Chapter 5 -- Adding Holdings

When cataloging in Evergreen Indiana, *always* do a thorough search for a matching title in the catalog before importing any new records. When a match is found in Evergreen, a new record should not be imported. Please attach your holdings to the existing record. If an existing record does not meet EI standards, please edit or overlay the record. See *Chapter 15 – Using the MARC Editor*, or *Chapter 14 – Overlaying Records*, if needed.

There are two settings options for adding holdings. With the default setting, adding and editing call numbers and item information occurs in two distinct steps. With the Unified Volume/Copy Creator, volume and copy information is added and edited on the same screen. Below are instructions for adding volumes with the default setting. See page 5.9 for instructions on adding volumes with the Unified Volume/Copy Creator.

Adding Volumes

Search for your item in Evergreen. When you find a record which matches your item, click on the title to view the record. If you are not in the Holdings Maintenance view, switch to it by clicking on Actions for this Record (Alt + R) at the upper right. Select Holdings Maintenance (Alt + H) from the drop down list. *Chapter 3—Introduction to Holdings Maintenance*, if needed

Click your Branch name to highlight the branch line. Click on Actions for Selected Rows (Alt + F), or right click on the Branch line. Select Add volumes (Alt + V) from the drop-down list:
# of volumes and # of copies will be automatically filled in. If you have multiple volumes or copies, see Chapter 9 – Adding Holdings for Multiple Volumes.

The Classification setting is preset to Generic. The Prefix and Suffix settings are optional. If you are using them, apply them now. See Chapter 26 – Cataloging Related Admin Functions for more information.

For information about the Part Designation dropdown, see Chapter 25 – Managing Monographic Parts.

Enter the call number into the Call Number box and your barcode in the Barcode box, then click Edit then Create (Alt + C)

NOTE: If you click Create with Defaults, you will not get a chance to apply your item information. It will be added with a copy location of Stacks and no circ modifier.
TIP: You can click the call number drop down to see any other call number options from the MARC record.

You can select an option from the list and click Apply to enter it in the Barcode box. Then you can edit it as needed.

TIP: If you put a check in the Use Checkdigit box, the system will delete any spaces entered in the barcode and will give you an error message if you enter an invalid barcode.

NOTE: If you don’t enter a barcode, your call number will be added as a volume with no copies attached. See Adding Items/Copies on page 5.7 if you create a call number with no copies attached.
When you click **Edit then Create**, the **Copy Editor** window will open:

![Copy Editor Window](image)

At this point you can apply your copy information.

Select the appropriate item template from the template drop down list, which appears above the volume entry fields.

**TIP:** The last template you applied will be displayed in the template box, so if you are cataloging the same type of item, you will not have to select the template from the list.

![Item Templates](image)
NOTE: If your template bar has no template drop down box, as shown below, you have not created any templates. See Chapter 6 – Item Templates.

Once the correct template name appears in the Template box, click the Apply (Alt + Y) button.

Your template will be applied. Make any other desired changes to the item information. See Chapter 7--Using the Copy Editor for more information if needed. Then click the Modify/Create Copies (Alt + M) button.
You will now return to the Holdings Maintenance screen, and your new item information will be displayed:

![Holdings Maintenance Screen]

**NOTE:** If you close the window instead of clicking Modify/Create Copies, then your item will be created with the default information. If you do this and you need to edit your item, highlight the barcode line and right-click or from **Actions for Selected Rows (Alt + F)** to select **Edit Items (Alt + E).** See Chapter 7 – **Using the Copy Editor**, if needed.
Adding Items/Copies

In some cases, such as when you add a second copy at a later date, or when you have created a call number without adding your volume, the call number you need will already be attached to the record. If that’s the case, you will need to Add Items rather than Add Volumes.

Highlight the call number where you wish to attach your copy, and either right-click or click Actions for Selected Rows (Alt + F). Then select Add Items (Alt + A)

The Volume and Copy Creator will open in a new tab. The call number you highlighted will appear in the call number box, and the # of Volumes box will be grayed out.

**TIP:** If you want to add more than one copy, you can change the number in the # of Copies box and more Barcode boxes will appear.
Enter your barcode and click **Edit then Create (Alt + C)**.

The Copy Editor will open:

At this point you can apply your templates and item attributes as needed and create your copy. Return to page 5.4 for further direction if necessary.
Adding Holdings with the Unified Volume/Copy Creator

The Unified Volume/Copy Creator/Editor is an optional setting that can be set for your branch or library system in the Local Admin settings. See Chapter 26—Cataloging Related Admin Functions for information on how to change to this setting.

Search for your item in Evergreen. When you find an existing record which matches your item, click on the title to view the record. If you are not in the Holdings Maintenance view, switch to it by clicking on Actions for this Record (Alt + R) at the upper right. Select Holdings Maintenance (Alt + H) from the drop down list. See Chapter 3—Introduction to Holdings Maintenance if needed.

Click your Branch name to highlight the branch line. If the call number you need is already attached to this record for your library, see Adding Items/Copies on page 5.7. Click on Actions for Selected Rows (Alt + F), or right click on the Branch line. Select Add volumes (Alt + V) from the drop-down list:
The Unified Volume/Copy Creator will open up:

Enter your volume information in the top half of the screen.

# of volumes and # of copies will be automatically filled in. For more information, see Chapter 9 – Adding Holdings for Multiple Volumes.
The **Classification** setting is preset to Generic. The **Prefix** and **Suffix** settings are optional. If you are using them, apply them now. *See Chapter 26—Cataloging Related Admin Functions* for more information.

Enter the call number into the **Call Number** box and your barcode in the **Barcode** box:

![Image of Volume/Copy Editor](image.png)

**NOTE:** When you open the Volume/Copy Editor, the Call Number box may be automatically filled in call number information from the MARC record. You can edit this information as desired, or clear the box to enter your own call number.
**TIP:** You can also click the call number drop down to see any other call number options from the MARC record.

You can select an option from the list and click **Apply** to enter it in the Barcode box. Then you can edit it as needed.

**NOTE:** Do not click Create Volumes Items (Alt + C) button at this point, or your item will be created with the default copy values. If you do this and you need to edit your item, highlight the barcode line and right-click or from Actions for Selected Rows (Alt + F) to select Edit Items (Alt + E). See Chapter 7 – Using the Copy Editor, if needed.
Adding Copy Information with the Unified Volume/Copy Creator

At this point you can apply your copy information.

**NOTE:** You can’t apply copy templates or edit copy information until you have entered a barcode.

Select the appropriate item template from the template drop down list, which appears above the volume entry fields.

**NOTE:** If no templates appear in the list, see Chapter 6--Copy Templates.
Once the correct template name appears in the Template box, click the **Apply (Alt + Y)** button.

Your template will be applied. Make any other desired changes to the item information. See *Chapter 7—Using the Copy Editor* for more information if needed. Then click the **Create/Volumes Items (Alt + C)** button.
The tab will close and your Volume and Copy will be created:

**NOTE:** When you close the Volume Editor, the right most tab will be displayed, so if you opened the Volume Editor from a Tab that is not the right-hand most (highest numbered) tab, you will need to click on the tab with the correct record to see your holdings.