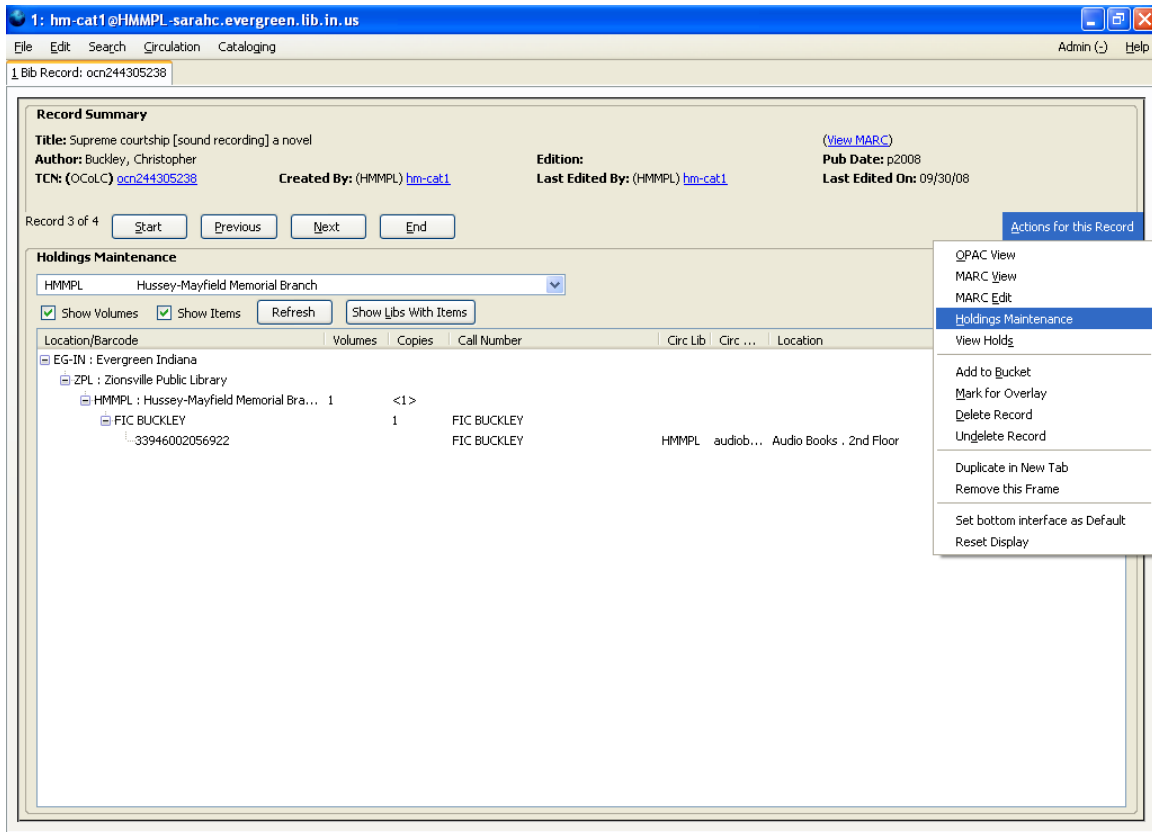


## Chapter 3 -- Introduction to Holdings Maintenance

Search for an item in Evergreen. When you find a match, click on the title to view the record. Switch from OPAC view to the **Holdings Maintenance** view by clicking on **Actions for this Record (Alt + R)** at the upper right. Select **Holdings Maintenance (Alt + H)** from the drop down list.

The record display will change from the OPAC view to Holdings Maintenance:



This is the view that is used when working with local holdings, so you are likely to use this view much of the time. This screen displays the holdings information for your library and allows you to add, delete and edit holdings as needed.

## Evergreen Indiana Cataloging Training Manual

### Chapter 3 – Introduction to Holdings Maintenance

In the staff client, when working with a bibliographic record, you will see a brief record summary at the top of the screen, regardless of the view you are using. It lists the title and author of the book. If there is no 1xx line on the MARC record, the first 7xx line will be displayed as the author. The Title Control Number (TCN), edition statement, if any, and publication date are also displayed. The record summary indicates who created the record, who last edited it, and the date of the last edit. The branches where the creators and editors work will be listed in parentheses, and then their user name or barcode, if they have no user name.

**Record Summary**

**Title:** Supreme courtship [sound recording] a novel [\(View MARC\)](#)  
**Author:** Buckley, Christopher **Pub Date:** p2008  
**TCN:** (OCoLC) [ocn244305238](#) **Created By:** (HMPL) [hm-cat1](#) **Last Edited By:** (HMPL) [hm-cat1](#) **Last Edited On:** 09/30/08

Record 3 of 3     [Actions for this Record](#)

Records added to the system when a library migrated to Evergreen will show they were created by EG-IN with the barcode 1010101010101.

**Record Summary**

**Title:** The pelican brief [\(View MARC\)](#)  
**Author:** Grisham, John. **Pub Date:** c1992  
**TCN:** (OCoLC) [ocn24628339](#) **Created By:** (EG-IN) [1010101010101](#) **Last Edited By:** (EG-IN) [1010101010101](#) **Last Edited On:** 08/24/08

If you click View MARC link, the MARC record will pop up in another window:

**MARC View**

```
LDR 00678cam a2200241 a 4500
001  ocm24628339
003  OCoLC
005  20030407140459.0
008  911001s1992 nyu 000 1 eng
010  |   †a 91033235
020  |   †a 0385421982 : †c $22.50
040  |   †a DLC †c DLC †d OCL †d MRQ
    |   †d CLE †d SVP †d OCL
050  0 0 †a PS3557.R5355 †b P4 1992
082  0 0 †a 813/.54 †2 20
100  1   †a Grisham, John.
245  1 4 †a The pelican brief / †c John Grisham.
250  |   †a 1st ed.
260  |   †a New York : †b Doubleday, †c c1992.
```

# Evergreen Indiana Cataloging Training Manual

## Chapter 3 – Introduction to Holdings Maintenance

When you have accessed your record from a list of search results, the record summary also indicates which record in the list of results, and allows you to move from record to record in the list with the **Start (Alt + S)**, **Previous (Alt + P)**, **Next (Alt + N)**, and **End (Alt + E)** buttons, at the bottom of the box, and finally on the right, the **Actions for this Record** link.

The screenshot displays a web browser window with the URL `1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us`. The browser's address bar shows the current page as "Bib Record: ocm24628339". The interface is divided into several sections:

- Record Summary:** Displays metadata for the record, including:
  - Title: The pelican brief
  - Author: Grisham, John.
  - TCN: (OCLC) [ocm24628339](#)
  - Created By: (EG-IN) [101010101010101](#)
  - Edition: 1st ed.
  - Last Edited By: (EG-IN) [101010101010101](#)
  - Pub Date: c1992
  - Last Edited On: 08/24/08
- Navigation:** A row of buttons labeled "Start", "Previous", "Next", and "End" is highlighted with a red box. To the right of these buttons is a link labeled "Actions for this Record", also highlighted with a red box.
- Holdings Maintenance:** This section shows the library location "HMMPL : Hussey-Mayfield Memorial Branch" and a table of holdings. The table includes columns for Location/Barcode, Volume, Copies, Call Number, Circulation, Loan, Location, Price, and Status. The table shows two holdings for "FIC GRISHAM":

Location/Barcode	Volu...	Copies	Call Number	Circ Modi...	Loan ...	Location	Price	Status
HMMPL : Hussey-Mayfield Memorial Branch	1	<2>	FIC GRISHAM					
FIC GRISHAM		2	FIC GRISHAM	book	Normal	Large Print . 2nd Floor	25.00	Available
33946000667928			FIC GRISHAM	book	Normal	Fiction . 2nd Floor	0.00	Available
33946001434864			FIC GRISHAM	book	Normal	Fiction . 2nd Floor	0.00	Available

# Evergreen Indiana Cataloging Training Manual

## Chapter 3 – Introduction to Holdings Maintenance

Below the Record Summary, is the Holdings Maintenance area. Note the various levels of information displayed. The top line in the display screen is the Consortium, the next line shows the library, then the branch. If your library system has multiple branches, you will have multiple branch lines (as illustrated on p. 3.6 with Jackson County). Then the Volume/Call Number line or lines display, and finally the item line(s).

1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us

File Edit Search Circulation Cataloging

1 Bib Record: ocn244305238

**Record Summary**

**Title:** Supreme courtship [sound recording] a novel  
**Author:** Buckley, Christopher  
**TCN:** (OCoLC) [ocn244305238](#)      **Created By:** (HMMPL) [hm-cat1](#)      **Edition:**  
**Last Edited By:** (HMMPL) [hm-cat1](#)

Record 3 of 4               

**Holdings Maintenance**

HMMPL    Hussey-Mayfield Memorial Branch

Show Volumes     Show Items       

Location/Barcode	Volumes	Copies	Call Number	Circ Lib	Circ ...	Location
EG-IN : Evergreen Indiana						Consortium
ZPL : Zionsville Public Library						Library
HMMPL : Hussey-Mayfield Memorial Bra... 1	<1>					Branch
FIC BUCKLEY	1		FIC BUCKLEY			Volume/Call number
33946002056922			FIC BUCKLEY			Copy/Item    HMMPL    audiob...    Audio Bo

In order to display all the lines, you may have to click the small boxes with plus signs next to the various lines to display hidden information. If you click the box and nothing displays, there are no holdings on this record at your library. To prevent having to open the boxes each time you view the Holdings Maintenance screen, make sure you have green check marks in the boxes next to **Show Volumes** and **Show Items**, circled above. These will remain checked or unchecked until you change them.

# Evergreen Indiana Cataloging Training Manual

## Chapter 3 – Introduction to Holdings Maintenance

At the very top of the Holdings Maintenance box, note the drop down box that lists your library's name. To the right of this box, are displayed the total number of items in the consortium that are attached to this record. If you click on the down arrow, a drop down list will open showing the other EI libraries.

The screenshot shows a web browser window with the URL `1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us`. The browser has a menu bar with 'File', 'Edit', 'Search', 'Circulation', 'Cataloging', 'Admin (-)', and 'Help'. The address bar shows '1 Bib Record: ocn213854514'. The main content area is titled 'Record Summary' and contains the following information:

- Title:** The hour I first believed : a novel
- Author:** Lamb, Wally.
- TCN:** (OCoLC) [ocn213854514](#)
- Created By:** (HMMPL) [hm-cat1](#)
- Edition:** 1st ed.
- Pub Date:** c2008
- Last Edited By:** (HMMPL) [hm-cat1](#)
- Last Edited On:** 11/10/08

Below the record summary are navigation buttons: 'Record 2 of 21', 'Start', 'Previous', 'Next', 'End', and 'Actions for this Record'. The 'Holdings Maintenance' section features a green banner that reads: 'Green in the list below means the library has volumes for this record.' Below this is a table of holdings:

JCPLS	Seymour Main Library
JNPL	Jennings County Public Library
JNPLJ	Jennings County Branch
LBPL	Lebanon Public Library
<b>LBPLL</b>	<b>Lebanon Public Library</b>
MLPL	Melton Public Library
MLPLM	Melton Branch
MVPL	Mooresville Public Library
MVPLM	Mooresville Public Library
NWCL	North Webster Community Public Library
NWCLN	North Webster Community Branch
OWPL	Odon Winkelpleck Public Library
OWPLO	Odon Winkelpleck Branch
PLFD	Plainfield Public Library
<b>PLEDP</b>	<b>Plainfield-Guilford Township Public Library</b>
UCPL	Union County Public Library
UCPLB	Union County Public Library - Liberty
2N1	2N1

To the right of the table is a summary box: 'Consortial Total: 9 Available: 3' and 'Actions for Selected Rows'. Below this is a table with columns 'Owning Lib' and 'Status'.

Libraries with holdings are highlighted in green. To display the holdings of another library, click on the library name.

# Evergreen Indiana Cataloging Training Manual

## Chapter 3 – Introduction to Holdings Maintenance

The screenshot displays the Evergreen cataloging interface. At the top, the browser address bar shows "1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us". The menu bar includes "File", "Edit", "Search", "Circulation", "Cataloging", "Admin", and "Help". The address bar below the menu shows "1 Bib Record: ocn213854514".

The main content area is divided into two sections:

- Record Summary:** Displays metadata for the record. Title: "The hour I first believed : a novel". Author: "Lamb, Wally.". Edition: "1st ed.". Pub Date: "c2008". TCN: "(OCoLC) ocn213854514". Created By: "(HMMPL) hm-cat1". Last Edited By: "(HMMPL) hm-cat1". Last Edited On: "11/10/08". A "(View MARC)" link is also present.
- Holdings Maintenance:** Shows a tree view of holdings. The selected library is "JCPLC : Crothersville Branch". The table below lists holdings with columns for Location/Barcode, Call Number, Circ Lib, Due Date, Location, Owning Lib, and Status.

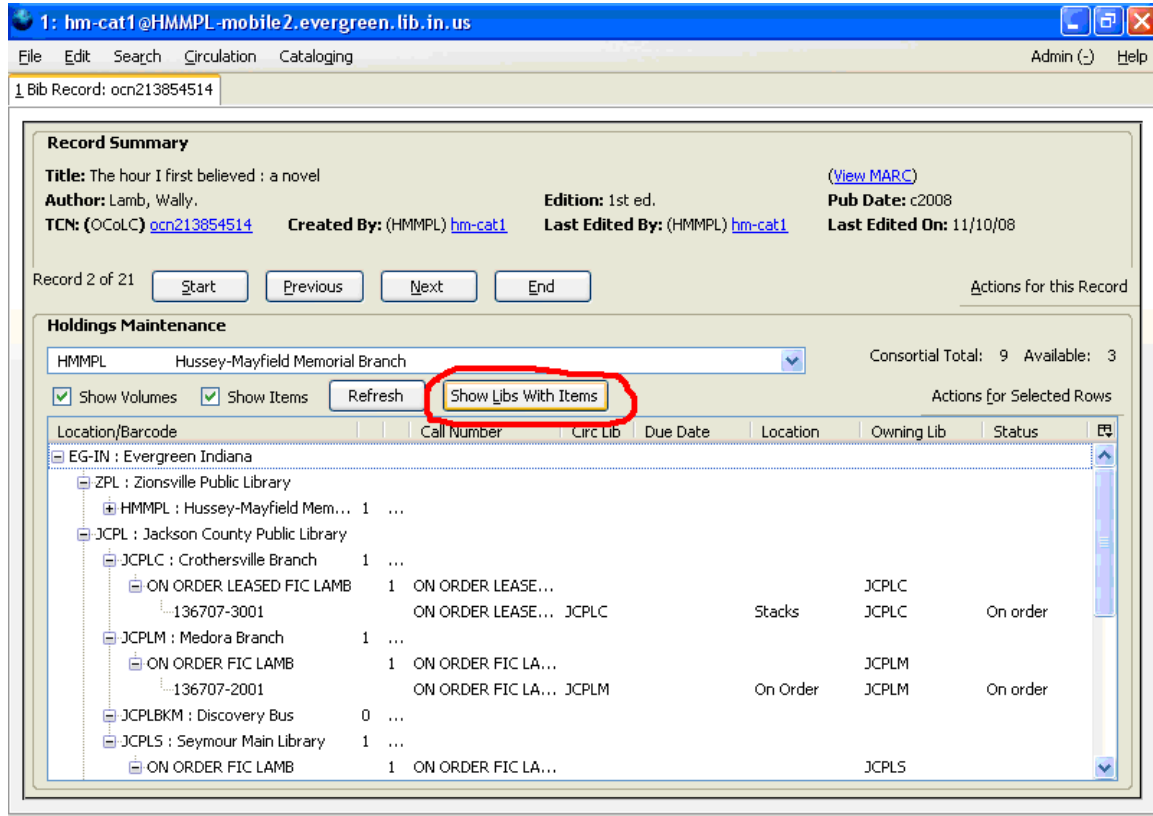
Location/Barcode	Call Number	Circ Lib	Due Date	Location	Owning Lib	Status
EG-IN : Evergreen Indiana						
JCPL : Jackson County Public Library						
JCPLC : Crothersville Branch	1	...				
+ ON ORDER LEASED FIC LAMB	1	ON ORDER LEASE...			JCPLC	
+ JCPLBKM : Discovery Bus	0	...				
+ JCPLM : Medora Branch	1	...				
+ ON ORDER FIC LAMB	1	ON ORDER FIC LA...			JCPLM	
+ JCPLS : Seymour Main Library	1	...				
+ ON ORDER FIC LAMB	1	ON ORDER FIC LA...			JCPLS	

Note that if you change the library displayed in the Holdings Maintenance screen, it will remain the default until you change it, even if you open another bibliographic record.

# Evergreen Indiana Cataloging Training Manual

## Chapter 3 – Introduction to Holdings Maintenance

Another way to view the holdings of other libraries is to click the **Show Libs with Items (Alt + L)** button, circled below.



All of the libraries with holdings on this record will show in the display screen below your library. Note that on magazine records with many holdings it will take a very long time to load all of the holdings.

To change the screen back to displaying your holdings only, simply click the **Refresh** button, next to the **Show Libs with Items** button.

# Evergreen Indiana Cataloging Training Manual

## Chapter 3 – Introduction to Holdings Maintenance

To set the Holdings Maintenance screen as your default view, go to **Actions for this Record** and choose **Set bottom interface as default**.

The screenshot shows a web browser window with the URL `1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us`. The browser's address bar shows the record ID `1 Bib Record: ocn213854514`. The main content area is divided into two sections: **Record Summary** and **Holdings Maintenance**.

**Record Summary** displays the following information:

- Title:** The hour I first believed : a novel
- Author:** Lamb, Wally.
- TCN:** (OCoLC) [ocn213854514](#)
- Created By:** (HMMPL) [hm-cat1](#)
- Edition:** 1st ed.
- Last Edited By:** (HMMPL) [hm-cat1](#)
- Pub Date:** c2008
- Last Edited On:** 11/10/08

Navigation buttons include **Start**, **Previous**, **Next**, and **End**. A **Actions for this Record** button is located in the top right corner of the record summary section.

**Holdings Maintenance** shows a dropdown menu for the library branch, currently set to **HMMPL Hussey-Mayfield Memorial Branch**. Below this are checkboxes for **Show Volumes** and **Show Items**, along with **Refresh** and **Show Libs With Items** buttons. A table below lists holdings with columns for **Location/Barcode**, **Call Number**, **Circ Lib**, **Due Date**, and **Location**. The table shows a holding for **EG-IN : Evergreen Indiana** at **ZPL : Zionsville Public Library**, with a sub-entry for **HMMPL : Hussey-Mayfield Mem...**.

The **Actions for this Record** menu is open, showing the following options:

- OPAC View
- MARC View
- MARC Edit
- Holdings Maintenance
- View Holdings
- Add to Bucket
- Mark for Overlay
- Delete Record
- Undelete Record
- Duplicate in New Tab
- Remove this Frame
- Set bottom interface as Default** (highlighted)
- Reset Display

The next time you click on a record title it will take you directly to this screen instead of the OPAC view. You can also change your view to MARC view, MARC edit, or back to OPAC view as needed, and you can reset your default view any time.