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.
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.

Records added to the system when a library migrated to Evergreen will show they were created by EG-IN with the barcode 101010101010101.

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

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When your 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.
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).

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.
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.

Libraries with holdings are highlighted in green. To display the holdings of another library, click on the library name.
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.
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.
To set the Holdings Maintenance screen as your default view, go to Actions for this Record and choose Set bottom interface as default.

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.