



UPDATING LOCAL HOLDINGS RECORDS (LHR) FOR SERIALS

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Agenda

- Introduction
- Background
- Prepare
- Organize
- Demonstration
- Resources



INTRODUCTION



Introduction – There is No Excuse!

- Excuses, excuses...





BACKGROUND



Background – Enumeration & Chronology

Enumeration: volume, issue, number, parts, sections, etc...

Chronology: year, season, month, day

Months and seasons may be expressed either in natural language or by the following codes:

Month

01-12 - Month

Season

21 - spring

22 - summer

23 - autumn

24 - winter

Background – Levels 1 & 2

Level of encoding – is there a standard you should be following? From: https://help.oclc.org/Metadata_Services/Local_Holdings_Maintenance/OCLC_MARC_local_holdings_format_and_standards/Leader#17____Encoding_level

Level 1 - When a library attaches their OCLC institution symbol to a WorldCat bibliographic record, the holdings are at Z39.71 level 1.

Level 2 - Holdings level 2
contain a leader, a 007 field, a 008 field, and an 852 field

Background – Level 3

Level 3 – Holding Level 3

Required fields and elements for LHRs

Newly created or edited LHRs must have the following fields:

- **Summary**

Summarizes institution holdings

- **Leader**

All LHRs should be Encoding Level 3 or above. Level 3 includes Location (852), General Holdings Information (007 and 008), and extent of holdings (853/863) *using only the highest level of enumeration and chronology (volumes and years).*

- **007** Physical description fixed field
- **008** Fixed length data elements
- **852** Location
- **853** Captions and Pattern–Basic Bibliographic Unit
- **863** Enumeration and Chronology–Basic Bibliographic Unit
(853 and 863 are paired fields) **AND/OR**
- **866** Textual Holdings Summary – optionally may be used in addition to, or instead of, the 853/863 pairs.

Background – Level 4

4 - Holdings level 4

Code 4 indicates that the holdings record is formulated according to level 4 of the applicable standard. Minimally, in addition to the leader, 007, 008, and 852 fields, it includes **detailed** holdings information, that is, the first and all subsequent levels of enumeration and chronology in either itemized or compressed form or a combination of the two, in one or more of the 853-855 Captions and Pattern, 863-865 Enumeration and Chronology, and 866-868 Textual Holdings fields.

853 0 0 ‡8 1 ‡a no. ‡i (year) ‡j (month)

863 4 0 ‡8 1.1. ‡a 180-226 ‡i 1976-1981

863 4 4 ‡8 1.2 ‡a 222

863 4 0 ‡8 1.3 ‡a 230 ‡i 1982 ‡j April

863 4 0 ‡8 1.4 ‡a 235 ‡i 1982 ‡Dec.

863 4 0 ‡8 1.5 ‡a 237 ‡i 1983 ‡j Mar.

863 4 0 ‡8 1.6 ‡a 239-242 ‡i 1983 ‡j June-Oct.

[Multiple 863 fields contain detailed holdings statements for an incomplete published run of the item.]

Background – Level 5

5 - Holdings level 4 with piece designation

Code 5 indicates that, in addition to the requirements for Level 4, the holdings record includes information that identifies a single physical part in subfield ‡p (Piece designation) in an 852 (Location) field, in subfield ‡p (Piece designation) in an 863-865 Enumeration and Chronology field or in subfield ‡p (Piece designation) in an 876-878 Item Information field, or in subfield ‡a (Textual holdings) in an 866-868 Textual Holdings field.

Background - Punctuation

Punctuation for Holdings Statements

-	Hyphen	(eg, v1- 1963-)
,	Comma	(eg, v1-v3,v5-) (1963-1965,1972-)
;	Semicolon	(eg, v1-v2; no15-)
:	Colon	(eg, ser1:v1-) (v1:n1-)
/	Slash	(eg, v1/2 or 1965/1966) (winter/spring)
?	Question Mark	(eg, 198? not 1981?)



PREPARE



Prepare – Inventory Your Stuff

What do you actually have?

- Check the catalog

- Go look yourself (or get a Padawan to do it for you)

- Check you last magazine renewal PO

If you didn't renew it, do you need to keep it? How long?

Do you need to weed anything?

Was the subscription a gift? Purchased with general funds?

Prepare – Get the Vitals

Gather vital information

Title

ISSN and OCLC #

Volumes held

Issues held

Dates

Item barcodes (if needed)

*if you catalog your serials, this info might already be in your system

Prepare – Answer Some Questions?

Currently receiving?

How long will you keep it?

Will you lend it or at least send a copy?

How is it shelved?

Decide on a retention policy

Look

EST. 1949
VOL. 72 NO. 6

4 MOTORTREND.COM JUNE 2020

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PROJECT

CREDITS

p. 8 launch: Getty Images; p. 9 rocket: SpaceX; car: Greg Bryan; pp. 14-15 boxes, Groucho

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Features

CE CONNECTION

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30 Caring for children with neurofibromatosis type 1

BY JANICE SAMPSON, DNP, RN, CNE; HEATHER L. THOMPSON, PhD, CCC-SLP; AND
DENISE M. WALL, PHD, RN

PM Family, The Tool Test, p. 80: 1. D; 2. B; 3. D; 4. B; 5. C.

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ORGANIZE



Organize – What Works Best for You!

TITLE	OCLC#	ISSN	ISSUES PER YEAR	RETENTION POLICY	1st Level Enumeration	2nd Level Enumeration	1st Level Chronology	2nd Level Chronology
Access	21389248	1050-0758	10	Current + 1 Year			2019	July
Accounting Today	18968151	1044-5714	12	Current + 1 Year			2018	June
American Journal of Nursing (AJN)	1743347	0002-936X	12	Current + 1 Year	v.119	no.1	2019	Jan
Architectural Record		0003-885X	12	Current + 1 Year	v.207	no.1	2019	Jan
Atlantic Monthly	1091140124	2151-9463	10	Current + 1 Year	v.323	no.1	2019	Jan
Automobile		0894-3583	12	Current + 1 Year	v.33	no.7	2019	Jan
BC Advantage	226340925		6	Current + 1 Year	Issue 14.2		2019	March/April
Bloomberg Businessweek	1537941	0007-7135	50	Current + 3 Months	Issue No. 4632		2019	7-Oct
Bodyshop Business		0730-7241	12	Current + 1 Year	v.38	No.6	2019	June
Bon Appetit	2483515	0006-6990	12	Current + 1 Year	v.64	no.4	2019	May
Car & Driver	1553328	0008-6002	12	Current + 1 Year	v.64	no.7	2019	Jan
Car craft	5937573	0008-6010	12	Current + 1 Year	v.67	no.1	2019	jan
Chronicle of Higher Education	1554535	0009-5982	42	Current + 3 Months	v.LXVI	no.6	2019	11-Oct
CMA Today	51523732	1543-2998	6	Current + 1 Year	v.52	Issue 4	2019	July/Aug
Consumer Reports	1564931	0010-7174	13	Current + 1 Year	v.84	No.1	2019	Jan
Cooks Illustrated	27552930	1068-2821	12	Current + 1 Year	no.158		2019	May/June
Discover	6560726	0274-7529	8	Current + 1 Year	v.40	No.1	2019	Jan/Feb
Economist	1081684	0013-0613	50	Current + 3 Months	v.433	no.9163	2019	5-Oct



DEMONSTRATION



Demonstration - Shortcuts

Command line searching shortcuts:

My Local Holdings

l4:L7l (lowercase "L"4:your OCLC symbol)

ISSN

in:0274-7529 or in:02747529

OCLC #

no:6560726



QUESTIONS??





RESOURCES



Resource Links

https://help.oclc.org/Metadata_Services/Local_Holdings_Maintenance

https://help.oclc.org/Metadata_Services/Local_Holdings_Maintenance/A_holdings_primer/40Examples_of_holdings_records

https://help.oclc.org/Metadata_Services/Local_Holdings_Maintenance/Training

https://help.oclc.org/Metadata_Services/Local_Holdings_Maintenance/OCLC_MARC_local_holdings_format_and_standards/Leader#17____Encoding_level

https://help.oclc.org/Metadata_Services/Connexion/Connexion_browser_documentation

https://help.oclc.org/Metadata_Services/Local_Holdings_Maintenance/Create_and_maintain_local_holdings_records

https://help.oclc.org/Metadata_Services/Local_Holdings_Maintenance/Create_and_apply_local_holdings_constant_data