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:

<table>
<thead>
<tr>
<th>Month</th>
<th>Season</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-12 - Month</td>
<td>21 - spring</td>
</tr>
<tr>
<td></td>
<td>22 - summer</td>
</tr>
<tr>
<td></td>
<td>23 - autumn</td>
</tr>
<tr>
<td></td>
<td>24 - winter</td>
</tr>
</tbody>
</table>
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
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 ‡j 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

<table>
<thead>
<tr>
<th>Punctuation</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>-</td>
<td>Hyphen</td>
<td>(eg, v1-1963-)</td>
</tr>
<tr>
<td>,</td>
<td>Comma</td>
<td>(eg, v1-v3,v5-) (1963-1965,1972-)</td>
</tr>
<tr>
<td>;</td>
<td>Semicolon</td>
<td>(eg, v1-v2; no15-)</td>
</tr>
<tr>
<td>:</td>
<td>Colon</td>
<td>(eg, ser1:v1-) (v1:n1-)</td>
</tr>
<tr>
<td>/</td>
<td>Slash</td>
<td>(eg, v1/2 or 1965/1966) (winter/spring)</td>
</tr>
<tr>
<td>?</td>
<td>Question Mark</td>
<td>(eg, 198? not 1981?)</td>
</tr>
</tbody>
</table>
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 your 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
ORGANIZE
Organize – What Works Best for You!

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

Command line searching shortcuts:

My Local Holdings
l4:L7I (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