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# Creating Local Holdings Records in OCLC Connexion Using MARC Format

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# Creating Local Holdings Records in OCLC Connexion

Using MARC Format

GIL Users Group  
May 17, 2007



# GOLD Recommendations

- Flexible Rather than Prescriptive
- Comply with Standards
  - ANSI Z39.71 (Holdings Statements for Bibliographic Items)
  - MFHD (MARC Format for Holdings Data)
- Based on Local Practice



# Standards and Local Practice

- Multiple Formats - 3 options
  - Multiple bib & holdings records
  - Single bib & composite holdings
  - Single bib & multiple holdings
- Electronic Resources
  - Local Practice
  - Reflect your OPAC
  - OCLC Setting E-holdings



# Free Text or Coded Holdings

866 or 853/863

- 866 (Free Text)
  - Permitted but not recommended as substitute for coded holdings
  - Intended as text field to supplement coded information in 853/863 fields
  - System translates as "best guess"
- 853/863 (Coded)
  - Takes advantage of system capabilities
  - Standard coding will facilitate system translation of data



# Creating Local Holdings Records

- Derive LHR from another institution's holdings
- Derive LHR from your own library's holdings
  - Derive holdings record from print record for microform, online, etc.
- Create a new LHR from scratch



# Encoding Levels

- **Level 1** - Holdings symbol attached
- **Level 2** - Leader, 007, 008, 852
- **Level 3** - Summary holdings at first level of enumeration & chronology
- **Level 4** - Detailed holdings information at all levels of enumeration & chronology



## Typical Level 3 Periodical Pattern

- 853 01  $\neq$  8 1  $\neq$  a v.  $\neq$  i (year)
- 863 30  $\neq$  8 1.1  $\neq$  a 71-  $\neq$  i 1979-





# Derive New Record

OC LC Connexion Home | Help | Diacritics |

Cataloging Authorities General

Search Browse Create Show

\* WorldCat Browse Options Create Options Show Options

Search for \*01782226 Search Clear Search Search History

Show Local Holdings if Single Record Found

**Bib Record** Record 1 of 1

Edit Editing Local Holdings Record Action Action View MARC Template

Loc **accountancy.** MARC Help

Apply CD By Name  
Apply CD From List  
Apply Default CD  
Cancel Changes  
Derive New Constant Data Record  
**Derive New Record**  
Display Record  
Reformat Record  
Unedit Record  
Validate Record

Functions

Functions

Functions

Functions

Functions

008 9002065u 8 0001uu 0060723

852 GPM \$b GPMP \$h PER HF5601 \$i .J7 \$z [Total=v.1-v.193 1905-2002.  
Microfilm=v.1-v.91.1905-1951.0.5.1



# Create New Record

\*WorldCat Browse Options Create Options Show Options

Search for \*01782226

Show Local Holdings if Single Record Found

Search Clear Search Search History

Bib Record Record 1 of 1

Edit Editing Local Holdings Record Action Action View MARC Template

Local Holdings Record: Journal of accountancy MARC Help

OCLC 1782226 ISSN 0021-8448 Freq m Dates 1905

+ Publication Pattern Data

Summary v.1-v.193(1905-2002) Functions

+ + Leader cy a3n Functions

+ + 007 zu Functions

+ + 008 9002065u 8 0001uu 0080723 Functions

+ + 852 GPM \$b GPMP \$h PER HF5601 \$i .J7 \$z [Total=v.1-v.193 1905-2002. Microfilm=v.1-v.91 1905-1951 0 5 1 Functions

Session Timer 35:48 Interr



# Apply Constant Data

Cataloging → Authorities → General

Search | Browse | Create | Show

\* WorldCat | Browse Options | Create Options | Show Options

## Bib Record

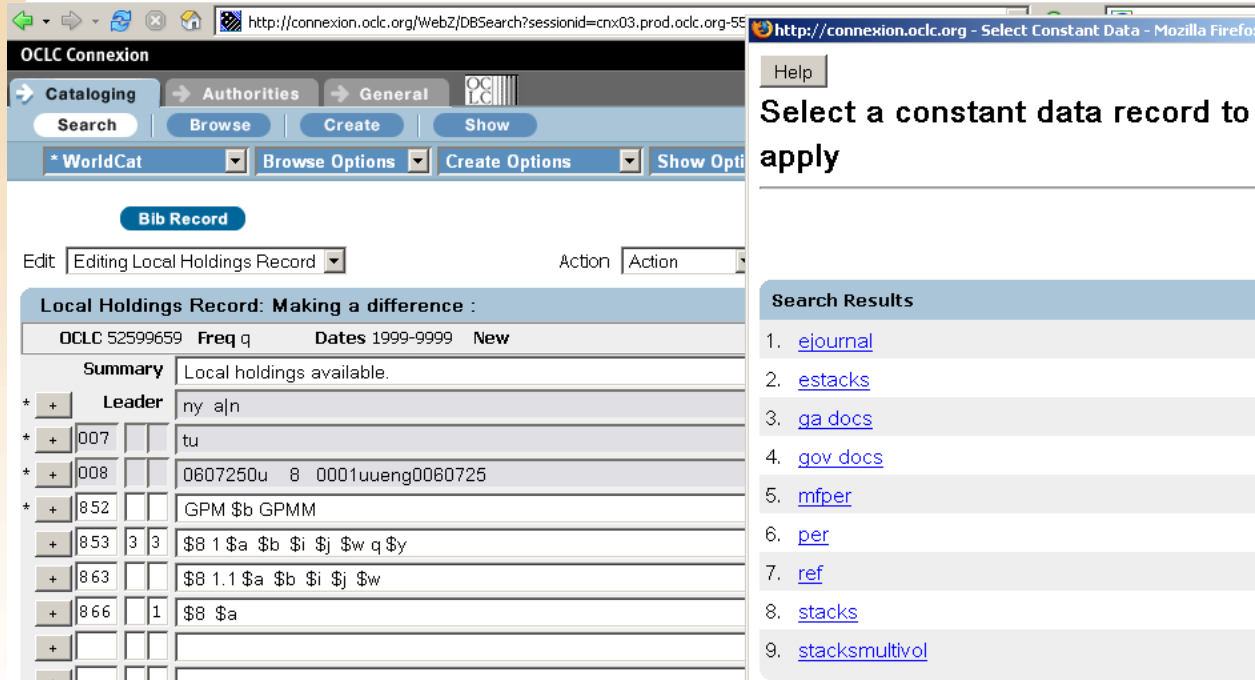
Edit: Editing Local Holdings Record | Action: Action

Lo				...a difference :
				...es 1999-9999 New
				...able.
+ +	008			0607250u 8 0001uueng0060725
+ +	852			GPM \$b GPMM
+ +	853	3	3	\$8 1 \$a \$b \$i \$j \$w q \$y
+ +	863			\$8 1.1 \$a \$b \$i \$j \$w
+ +	866		1	\$8 \$a



# Constant Data List

## Select and Apply



The screenshot displays the OCLC Connexion web interface. The top navigation bar includes 'Cataloging', 'Authorities', and 'General' tabs, with 'Cataloging' selected. Below this are buttons for 'Search', 'Browse', 'Create', and 'Show'. A secondary bar contains dropdown menus for 'WorldCat', 'Browse Options', 'Create Options', and 'Show Opti'. The main content area is titled 'Bib Record' and shows a 'Local Holdings Record: Making a difference :'. The record details include OCLC 52599659, Freq q, Dates 1999-9999, and New. A summary table lists various holdings with columns for status (+), barcode, call number, and price.

Local Holdings Record: Making a difference :			
OCLC	Freq	Dates	New
52599659	q	1999-9999	
<b>Summary</b> Local holdings available.			
<b>Leader</b> ny a n			
+ 007		tu	
+ 008		0607250u 8 0001uueng0060725	
+ 852		GPM \$b GPMM	
+ 853	3 3	\$8 1 \$a \$b \$i \$j \$w q \$y	
+ 863		\$8 1.1 \$a \$b \$i \$j \$w	
+ 866	1	\$8 \$a	
+			
+			

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# Resources

OCLC Local Holdings Maintenance Tutorials

<http://www.oclc.org/support/training/localholdings/tutorial/>

Local Holdings Maintenance Quick Reference

[http://www.oclc.org/support/documentation/localholdings/quickref/hm\\_quickref.pdf](http://www.oclc.org/support/documentation/localholdings/quickref/hm_quickref.pdf)

OCLC-MARC Local Holdings Format Tag Chart

<http://www.oclc.org/support/documentation/localholdings/tagchart/holdingstagchart.pdf>

MARC 21 Format for Holdings Data Primer

<http://www.oclc.org/support/documentation/localholdings/primer/holdingsprimer.pdf>

MARC 21 Concise Format for Holdings Data

<http://www.loc.gov/marc/holdings/echdhome.html>

Holdings Statements for Bibliographic Items

<http://www.niso.org/standards/resources/Z39-71.pdf>

GOLD Serials Union Listing Manual

<http://www.georgialibraries.org/lib/gold/goldmanual.pdf>

University System of Georgia Guidelines for Holdings Statements

<http://www.valdosta.edu/library/about/policy/gil/gilcat.shtml>



# Presenter

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*Please feel free to contact me for more information.*

