

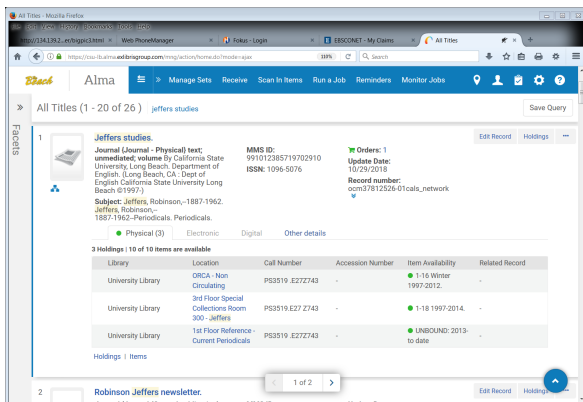
Create New or Standardize

Tuesday, February 11, 2025 4:08 PM

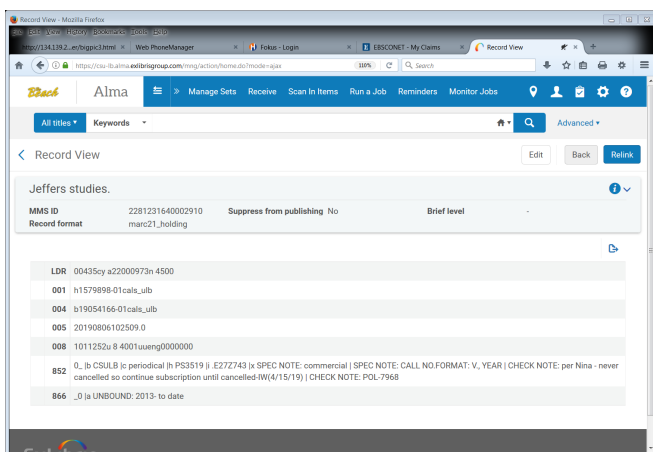
Fully updating and bringing the record up to standard

Search for the record you are updating > Click on the holding(s) you want to update.

☞ (In this case we are looking for/at a holding record that hasn't been updated to the national standard [ANSI/NISO Z39.71](#) for Holdings Records)



EDIT



What is being updated –

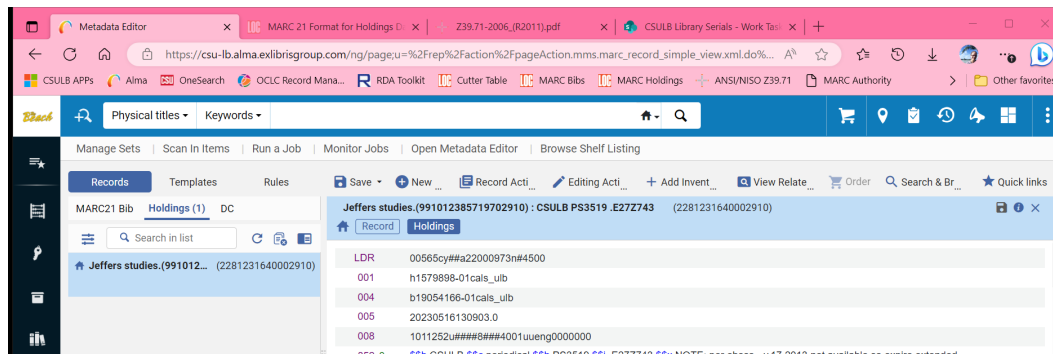
To fully update this record, we are going to get rid of the 001 and 004 fields, as they currently hold outdated information from Millennium (the old system). We are also going to update the LDR, 008 (if there is no 008 listed in record click on SAVE and a general 008 will be added), 852, and 866, as well as, add 007 (if you have item in hand), 853 and 863(s) fields.

Remove 001, 004

Update LDR, 008, 852, 866

Add 007, 035, 853, 863(s)

BEFORE:



subscription extended through v.19 2015 -IW(7/17/19) | NOTE: POL-7968

866 0 \$Sa UNBOUND: v.22 2021/22-to date

AFTER:

Physical titles Keywords

Manage Sets | Scan In Items | Manage In Process Items | Run a Job | Monitor Jobs | Open Metadata Editor | Browse Shelf Listing

Records Templates Rules

MARC21 Bib Holdings (1) DC

Search in list

Jefferies studies.(991012385719702910) : CSULB PS3519 .E27 Z743 (2281231640002910)

Record Holdings

LDR 00446cy##a22000973n#4500

005 20230803153056 0

008 1011254p####B###1001ueng0000000

852 0 \$Sb CSULB \$Sc periodical \$Sh PS3519 .E27 \$Si Z743 \$Sx NOTE: per ebSCO - v.17 2013 not available so expire extended, subscription extended through v.19 2015-IW(7/17/19) | NOTE: POL-7968 | NOTE: (8/1/23 LHR updated)-IW

853 3 3 \$S8 1 \$Sa v \$Si (year)

863 3 2 \$S8 1.1 \$Sa 22-\$Si 2021/2022-

866 3 1 \$S8 0 \$Sa v 22(2021/2022)-to current issue \$Sx Unbound.

LDR – Leader

Process - Click on the 3 dots along the right of the field to open the form editor. Edit positions 6, 17, and 18, all other field positions should be left as is. Click on any other field (008, 852, 866, etc.) to close form editor.

Character Position Meanings

- Type of Record (6) –**
 - v** - Multipart item holdings – multivolume monograph, more than 1 physical part but with a finite of items, not a serial
 - x** - Single-part item holdings – monographs, single physical part
 - y** - Serial item holdings – serials, periodicals, issues, etc.
- Encoding level (17) –**
 - 3** – Holdings level 3 - if only \$Sa and/or \$Si are in the 863 fields
 - 4** – Holdings level 4 – if \$Sb or \$Sj are in all of the 863 fields
 - m** - Mixed level holding - if some of the 863 have just \$Sa and or \$Si and some of the 863 fields have \$Sb and/or \$Sj
- Item information in record (18) –**
 - n** – no item information - we do not include barcodes and individual provenance information in the holdings record

Physical titles Keywords

Manage Sets | Scan In Items | Run a Job | Monitor Jobs | Open Metadata Editor | Browse Shelf Listing

Records Templates Rules

MARC21 Bib Holdings (1) DC

Search in list

Jefferies studies.(991012385719702910) : CSULB PS3519 .E27Z743 (2281231640002910)

Record Holdings

LDR Logical record length (0-4) 00565 Record status(5) c - Corrected Type of record(6) y - Serial item holding

Undefined character positions(7) # - Undefined Undefined character positions(8) # - Undefined Character coding scheme(9) a - UCS/Unicode

Indicator count(10) 2 Subfield code count(11) 2 Base address of data (12-16) 00097

Encoding level(17) 3 - Holdings level 3 Item information in record(18) n - No item information

Length of the length-of-field portion(20) 4 Length of the starting-character-position portion (21) 5

Undefined(23) 0 Length of the implementation-defined portion (22) 0

005 20230516130903.0

008 1011252u####B###4001ueng0000000

852 0 \$Sb CSULB \$Sc periodical \$Sh PS3519 \$Si .E27Z743 \$Sx NOTE: per ebSCO - v.17 2013 not available so expire extended,

LINK for more info LDR - <https://www.loc.gov/marc/holdings/hdleader.html>

001 – Control Number

Process - Click on field > EDITING ACTIONS > REMOVE FIELD

004 – Control Number for Related Bibliographic Record

Process - Click on field > EDITING ACTIONS > REMOVE FIELD

005 - Date and Time of Latest Transaction

Process – ALMA updates this date automatically, do nothing.

007 - Physical Description Fixed Field

Process – Shows the type of material the items linked to the holding are. Most holdings do not have 007 currently. If you have item in hand you can add. Click on EDITING ACTIONS > ADD FIELD type in 007 and select type of item, most are 't – TEXT' then click on 3 dots to add Specific Material Designation, most are 'a – regular printing.' If in binder select 'f – text in loose leaf binder.'

LINK for more info 007 - <https://www.loc.gov/marc/holdings/hd007.html>

008 - Fixed-Length Data Elements

Process - If there is no 008 listed in record click on SAVE and a general 008 will be added, then click on the 3 dots along the right of the field to open the form editor. Edit positions 6, 7, and 16, also edit positions 12 and 22-25 as needed. Click on any other field to close form editor.

Character Position Meanings

- **Date Entered on File (0-5)**
 - Today's date in YYMMDD format. *(Ensures accuracy of record creation.)*
- **Receipt, acquisition, or access status (06)**
 - 2 - Received and complete or ceased *(use if the title has ceased publishing for any reason)*
 - 4 - Currently received *(use if we are currently receiving items for the title, switch to 2 or 5 if we cancel our subscription)*
 - 5 - **Not currently received** *(use if we are not getting it currently and we have no indication that publishing has ceased)*
- **Method of acquisition (07)**
 - f - Free *(use if complementary use free)*
 - g - Gift *(use if gifted by person or company or trust, etc)*
 - p - Purchase *(use if we have record of purchasing it)*
 - u - **Unknown** *(use if we have no record of purchasing and there is no note stating that it was a gift)*
 - d - Deposit *(use if holding has "CSULB...depository library" or item has/gets a depository stamp)*
- Expected acquisition end date (08-11) - ##### - *(use # as we generally have no intent to cancel, do not know when we are going to cancel or it is not applicable.)*
- General retention policy (12)
 - 2 - Retained except as replaced by updates
 - 5 - Retained until replaced by cumulations, replacement volume, or revision
 - 6 - Retained for limited period
 - 8 - **Permanently retained** *(Use for all titles that are retained w/o regular replacement, i.e. everything that doesn't have a note for library retains latest BLANK or use for any items that will stay on our shelves until a librarian deselects them)*
- Policy type (13)- # - **No specific retention policy** *(used if the General retention policy (12) is not 8-permanently retained, only used in the case of serials or sets that get replaced or superseded regularly, then use usually 1-latest, but whatever best fits situation)*
- Number of units (14) - # - **No information provided** *(use only if General retention policy (12) is not 8, then use which ever number fits best ex: 1 for retain only 1 year or issue, ex: 2 for retain 2 yrs or issues, ex: 6 for retain 6 months)*
- Unit type (15) - # - **No specific retention type** *(use only if General retention policy (12) is not 8, then use which ever unit type fits best. Ex: months for 6 months retained, ex: editions for 1 vol or ed. kept before being replaced by next vol.)*
- **Completeness (16)**
 - 1 - Complete - have 95-100% of items published *(1-50 published and we have all but 1 item)*
 - 2 - **Incomplete** - have 50-94% of items published *(1-50 published and we have 11-50)*
 - 3 - Scattered - have less than 50% of items published *(1-50 published and we have 20-25, and 48-50)*
 - 4 - Not Applicable *(use for monographs)*
- **Lending policy (20) -**
 - 'a' - Will lend' *(For circulating locations.)*
 - 'b' - Will not lend' *(For non-circulating locations like 3stacks-nc or orca-nc.)*
 - See [008 Lending and Reproduction Policies](#) for more detail on which to choose
- **Reproduction policy (21) - a - Will Reproduce** *(Indicates items can be copied under library policy for ILL.)*
 - See [008 Lending and Reproduction Policies](#) for more detail on which to choose
- Language (22-24)- language of coded data contained in the 863-865
 - 'eng' - English' *(Default for most catalog records. Including call numbers or captions that have op., no., v., etc.)*
 - 'ger' - German, fre - French, ita - Italian, etc.' *(If captions are in another language. Eg. Use ger for call numbers that have Bd., Heft, etc.)*
- Separate or composite copy report (25) - 0 - Separate copy report *(historically CSULB has used 0 for this field, despite multiple copies on the same record which should necessitate '1 - composite copy report')*
- **Date of Report (26-31):** Today's date in YYMMDD format

Number of copies reported: (17-19)	001	Lending policy(20)	a - Will lend	Reproduction policy(21)	a - Will reproduce
Language (22-24)	eng - English	Separate or composite copy report(25)	0 - Separate copy report	Date of report (26-31)	000000

852	0	\$S0 CSULB \$Sc 3stacks \$Sh PN14 L58
866	0	\$Sa 5 1964 7-8 1966-67.
853	3	\$S1 1 \$Sa v. \$Si (year)
863	3	\$S1 1.1 \$Sa 0
866	3	\$S1 0 \$Sa 0

Record was successfully expanded

You have 1 warning(s) in your record - 11:54:05 AM.

LINK for more info 008 - <https://www.loc.gov/marc/holdings/hd008.html>

852 – Location

Process - Click on field to edit, add subfield I (\$\$i) if not already there. Add new note to end of notes or add \$\$x after call # if no previous notes. Can also use 3 dots to open form editor.

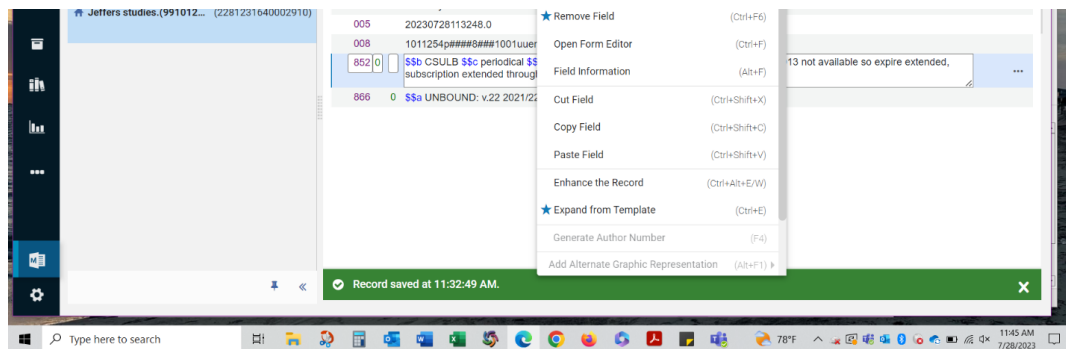
Indicators

- Indicator 1 (Shelving scheme)
 - 0 - **Library of Congress classification** - usually
 - 3 - Superintendent of Documents classification
 - 8 - Other scheme – PZ, mysteries, newspapers, etc,
- Indicator 2 (Shelving order)
 - # - **No information provided**

Subfields

- \$\$c – location code
 - See [ALMA Location Codes](#)
- \$\$h & \$\$i - Call # formatting -
Single Cutter: \$\$h JK1 \$\$i .U65
Double Cutter: \$\$h JA88.U6 \$\$i T352
- \$\$x - Non-Public Note –
Formatting - | NOTE: per Nina, cancel for 2020-IW(7/22/22)
See SharePoint Documents > StandardNotes_ItemsHoldingsPortfolios for standardized notes, if not listed then add note as NOTE: per name, note-initials(date) or NOTE: note-initials(date)
- \$\$z – Public Note (place after \$\$x) – Some issues missing.

Do not click out of the field, instead click on EDITING ACTIONS>, ADD FIELD to add a field for the 853 right below the 852 field.



853 – Captions and Pattern - Basic Bibliographic Unit

Process - Click on small blank field and type 853 pause and when the cursor automatically moves type in 3 pause 3. Backspace over the \$\$a space that automatically gets added and type in \$\$8 1 \$\$a then add either v. or no. depending on what is in the item records enumeration a field, after you have added v. add \$\$i (year), then go to editing actions, add field.

Indicators

Indicator 1 (Compressibility and expandability) - 3 - Unknown

Indicator 2 (Caption evaluation) - 3 - Captions unverified; all levels may not be present.

Subfields

- **\$\$8** - this subfield tells the computer what order to put the fields and information, it needs to go in every 853, 863, and 866 field– see <https://www.loc.gov/marc/holdings/echdcntf.html> for more info.
- **\$\$a** – caption for 1st level of enumeration - usually volume (v.)
- **\$\$b** – caption for 2nd level of enumeration - usually number (no.)
- **\$\$i** – caption for 1st level of chronology - usually (year)
 - place caption in () to indicate that the caption does not need to be displayed.
- **\$\$j** – caption for 2nd level of chronology - usually (month)
- **\$\$k** – caption for 3rd level of chronology – usually (day)
- **\$\$w** - frequency – see <https://www.loc.gov/marc/holdings/hd853855.html> for codes
- **\$\$g** – alternative numbering scheme
- **\$\$m** - alternative chronology
- **\$\$o** – caption/title of item (ex: Buyers Guide, Subject Index, etc.)

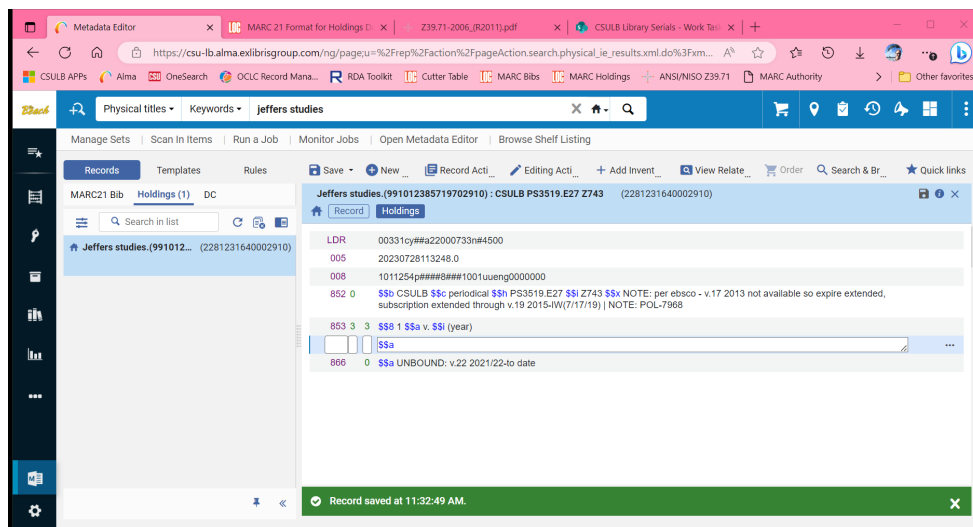
Examples

LDR holding level 3 -

853 33 \$\$8 1 \$\$a v. \$\$i (year)
 853 33 \$\$8 1 \$\$a no. \$\$i (year)
 853 33 \$\$8 1 \$\$i (year)

LDR holding level 4 –

853 33 \$\$8 1 \$\$a v. \$\$b no. \$\$i (year)
 853 33 \$\$8 1 \$\$a v. \$\$i (year) \$\$j (month)
 853 33 \$\$8 1 \$\$a v. \$\$b no. \$\$i (year) \$\$j (month)



LINK for more info 853 - <https://www.loc.gov/marc/holdings/hd853855.html>

863 – Enumeration and Chronology - Basic Bibliographic Unit

Process - Click on small blank field and type 863 pause and when the cursor automatically moves type in 3 or 4 depending on the holding level and then 2 (unless there is only 1 item then use 3), and then backspace over the \$\$a space that automatically gets added and type in \$\$8 1.1 \$\$a , and in the case of Jeffers studies, 22-

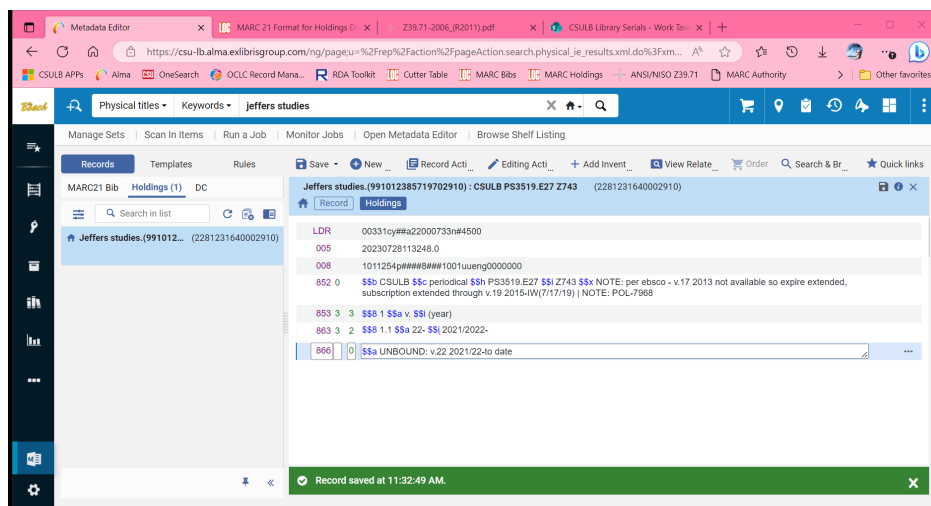
\$\$i 2021/2022-. Otherwise fill in the beginning volume dash the last volume before a gap (add \$\$w g, to show a gap in what we have), or the beginning volume dash to indicate that an item is still being received. Use format 863 32 \$\$8 1.1 \$\$a 1-5 \$\$i 2000-2005 or 853 32 \$\$8 1.1 \$\$a 22- \$\$i 2021/2022-

Indicators

- Indicator 1 (Field Encoding level) –
 - 3 - Holdings level 3
 - 4 - Holdings level 4
- Indicator 2 (Form of holding) –
 - # - No information provided
 - 0 - Compressed
 - 1 - Uncompressed
 - 2 - Compressed, use textual display – if more than 1 item in a row use this
 - 3 - Uncompressed, use textual display – 1 item then gap use this
 - 4 - Item(s) not published

Subfields

- Fill in subfields \$\$a, \$\$b, \$\$i, \$\$j, & \$\$k as needed per subfields in 853 and add \$\$w to show gaps in what we physically have.
- Always include \$\$8 following the 853 and add a decimal 1 to first 863 and increment by 1 for each 863 added (\$\$8 1.1 ... \$\$8 1.2...)



LINK for more info 863 - <https://www.loc.gov/marc/holdings/hd863865.html>

866 – Textual Holdings - Basic Bibliographic Unit

Process - Add 3 or 4 for the holdings level in the first indicator for the 866 and change the 0 in the 2nd indicator to 1. Then add \$\$8 0 to the beginning on the 866 before the \$\$a, finally change the formatting of the information already in the 866 to follow the NISO/ANSI Z39.71 document (also see examples below). In the case of our current example Jeffers studies, it would be 866 31 \$\$8 0 \$\$a v.22(2021/2022)-to current issue \$\$z Unbound.

Indicators

- Indicator 1 (Field encoding level)
 - 0 - Non-standard
- 3 - Holdings level 3
- 4 - Holdings level 4
- Indicator 2 (Type of notation)
 - 1 - ANSI/NISO Z39.71

Subfields

- \$\$8 – Field link and sequence number
 - 0 - always use 0 to indicate that “No display is generated from any of the 853/863 fields. Field 866 replaces all of the 853/863 fields for display purposes.”
- \$\$a – Textual holdings - Follow [ANSI/NISO Z39.71 standard](#) for formatting and punctuation (see below for punctuation chart).
 - List all items the library currently has, with commas showing gaps.
- \$\$z – Public note – Used to record numbering irregularities, binding irregularities, etc.
 - In binder. Unbound. Latest 2 years only. etc.
 - IMPORTANT: Despite ANSI/NISO standard to record specific extent notes in <angle brackets> DO NOT USE <> as PRIMO ignores them and any information recorded within does not show up on OneSearch Record.

