Salesforce case #00021233: Creating Separate Holding Records for Multiple Items on the Same Bib in the Same Location but Different Call Numbers

*[Note: In the information below, data such as ‘bc’ and ‘bch’ refer to subfields in the 852 field.]*

During the data migration phase for the Alliance cohort 1 libraries, we were told that Alma could only have one call number for all items in a given location (unless we used alternate call numbers). Based on this, we wrote extensive documentation for later cohorts on how to approach modifying call numbers to support the Alma data structure. After going live, we found that Alma had no problems when we manually created multiple holding records with the same location but different call numbers. Additionally, in the current “Millennium\_(III)\_Migration\_Form-1.xlsx” (completed by Alliance cohort 2 libraries in July), there was a new question on the “Questionnaire tab”, Line 18 which said “Indicate which 852 subfields to use to determine unique holding records (Instruction: To group all items on a single bib by location only, use ‘bc’ here. If you have many items on the same bib in the same location but different call numbers WITHIN that location, then choose from additional subfields hiijkmp. Default = bc (library and location only, not call number).”

Question 1: Could you please formally confirm that Alliance libraries no longer need to modify their existing Millennium call numbers so that all items in a given location, attached to the same bib record, have the same call number, i.e., data migration will create separate holding records for each combination of location+call number.

Question 2: In the instructions for this question, it states “If you have many items on the same bib in the same location but different call numbers WITHIN that location, then choose from additional subfields hiijkmp.” For those Alliance libraries (migrating from Millennium) who will export all call numbers as part of the item record csv file (i.e., call numbers will not be extracted from the bib records), the entire call number was placed in the Alma 852 $h field and was not split between multiple fields. Therefore, can you confirm that the correct response for this question is “bch” if the library has many items on the same bib in the same location but different call numbers WITHIN that location? When might a library want to include subfields other than "bch" in their response?

***Ex Libris’ answer:***

Since Question 1 and Question 2 are really basically the same question, we will answer both in one go.

Essentially, yes is the answer to #1, but can only be achieved by choosing bch as you describe in #2. However, we don't think that can be said as a blanket statement for all institutions and all data and all scenarios safely. We have encountered many variations; here are a few examples:

1. Item with call number and Marc holdings with call number - both in the same Bib, Library and Location and an answer of bch in the migration form:
a. If the item call number is equal to the Marc holding call number (852 |h) - it will associate with it.
b. If the item call number is not equal to the Marc holding call number (852 |h) - a new holding will be generated with the item's call number as the new holding's call number.
2. Item with call number and no Marc holdings and an answer of bch in the migration form:
a. a new holding will be generated with the item's call number as the new holding's call number. Any subsequent item in the same Bib-Lib-Loc-Call number get applied to the same generated holding. Any difference in Call number string will result in different holdings generated for each.

So, if in all cases it is correct to say at the Alliance that bch is the right way to go and that any difference in call number either between item and Marc holding or between items and other items should have their own generated holdings, then, yes. We have seen many exceptions to that at some sites, which is why we are wary of simply answering your question with a "yes" it is no longer needed to cleanup your call numbers.

As for why one might want to include more call number fields in the match criteria - we have sites like that, too - where even subfield h call number info is not enough, and want differentiated holdings if any of the other 852 subfields are different among items - or between items and a real marc holding.

So, this is why the parameter now exists. It is not plug and play across all sites to say that one or the other is best. It depends on how the data is managed today - and whether a looser match based on bc alone is best (quite often it is) or whether a more specific match is better (which can result in lots of extraneous holdings if the data is not clean).

***Additional Alliance note:***

I think, in a nutshell, we still have to clean up errors in our call numbers. If we do everything correctly, the items in the same location on the same bib should have the same call numbers. Thus, we should still clean up our call number errors. I think it is critical for each library to understand the following explanation from Ex Libris and make its own decisions on what to do according to its data.

But, there are legitimate cases where it is correct to have different call numbers in the same location on the same bib (e.b., U.S. federal documents where the Sudoc stem has changed over time) and this “bch” method will solve the following issue that we had discussed before. For example: