

A photograph of three people in a library setting. On the left, a woman with long brown hair, wearing a purple cardigan over a black top, is smiling and looking down. In the center, a woman with long brown hair and glasses, wearing a light grey sweater, is also smiling and looking down. On the right, a man with short brown hair and glasses, wearing a white shirt, is leaning forward and looking down. They are all gathered around a table, possibly looking at a book or a laptop. In the background, there are blue bookshelves filled with books. A black coat rack is visible on the left side of the image.

# Serials automation tasks for summary holdings

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# Agenda



- **Introduction**
- The connection between the item and the holdings record
- The example here using a prediction pattern
- The 863/4/5 and the 866/7/8 tasks
- Recreating the 863/4/5 and the 866/7/8 fields
- The example here not using a prediction pattern
- Viewing the summary holding in Primo

# Introduction

- This presentation will focus primarily on two normalization tasks for holdings records as well as a related normalization rule.
- The normalization tasks are:
  1. MARC21 Expand Holding By 863/4/5 Task
  2. MARC21 Expand Holding By 866/7/8 Task
- In addition to this presentation it is highly recommended to also see accompanying PowerPoint presentation “Using Serial Prediction Patterns Opening Expected Issues and related subjects”

# Introduction


- By default Alma provides a set of rules which occur when a holdings record is saved.
- These may be viewed at Resource Management Configuration Menu > Cataloging > Metadata Configuration > Marc 21 Holding > Normalization > Marc21 Holding normalize on save

Profile MARC21 Holding		Family MARC
Type Holding		Usage HOLDING
Fields	Normalization	Validation Validation Exception Profile List
Add Process		
Active	Name	Description
✓	<a href="#">Marc21 Holding normalize from BIB</a>	Normalize Marc 21 Holding from BIB
✓	<a href="#">Marc21 Holding normalize on save</a>	Normalize Marc 21 Holding while saving
✓	<a href="#">Marc21 Holding Re-sequence And Clear empty fields</a>	Marc21 Holding Re-sequence And Clear empty fields

# Introduction

- In the “Task List” tab which we will show here we can see the following five tasks:
  1. 852 field normalization
  2. MarcDroolNormalization
  3. MARC21 Expand Holding By 863/4/5 Task
  4. MARC21 Expand Holding By 866/7/8 Task
  5. marc21HoldingClearEmptyFieldsTask

# Introduction

 Process Details

General Information

Task List

Task Parameters

Business Entity

Holding

Type

Marc 21 holding normalization

Name

Marc21 Holding normalize on save

Processes Selected

			Name	Description
1		▼	852 field normalization	Fill subfields according to first indicator
2	▲	▼	MarcDroolNormalization	Marc Drool Normalization
3	▲	▼	MARC21 Expand Holding By 863/4/5 Task	Create 863/864/865 Summary statement Holdings fields
4	▲	▼	MARC21 Expand Holding By 866/7/8 Task	Create 866/867/868 Textual Holdings fields
5	▲		marc21HoldingClearEmptyFieldsTask	Delete empty fields

# Introduction

- The order of the tasks in the task list, as shown in the previous slide, is very important and it is recommended that these three appear in the following order:
  1. MarcDroolNormalization
  2. MARC21 Expand Holding By 863/4/5 Task
  3. MARC21 Expand Holding By 866/7/8 Task

# Introduction

- The order is important because as we will see:
- “MarcDroolNormalization” will remove previous 863/4/5/6/7/8 fields before creating new “up-to-date” ones
- “MARC21 Expand Holding By 863/4/5 Task” will create the 863/4/5 fields that will subsequently be used by “MARC21 Expand Holding By 866/7/8 Task”
- Because “MARC21 Expand Holding By 866/7/8 Task” uses the results of “MARC21 Expand Holding By 863/4/5 Task” it should appear after “MARC21 Expand Holding By 863/4/5 Task”



# Introduction

- The order of the tasks

			Name	Description
1		▼	852 field normalization	Fill subfields according to first indicator
2	▲	▼	MarcDroolNormalization	Marc Drool Normalization
3	▲	▼	MARC21 Expand Holding By 863/4/5 Task	Create 863/864/865 Summary statement Holdings fields
4	▲	▼	MARC21 Expand Holding By 866/7/8 Task	Create 866/867/868 Textual Holdings fields
5	▲		marc21HoldingClearEmptyFields task	Delete empty fields

# Introduction

- The purpose of these tasks is ultimately to create an organized 866/7/8 summary holdings statement
- The summary holdings statement can then display in Primo and aid the end user in quickly and easily identifying what inventory the library holds.
- For example instead of scrolling through a big long list of items the end user can see a statement such as:

Library has: Vol. 1 (1993)– Vol. 7 (2000), Missing Vol. 3 No. 7.

Note: Some issues are in the faculty offices

# Introduction

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- The end of this presentation will show some examples from Primo.
- Each library may customize both
  - A. The display in primo
  - B. How the 866/7/8 fields are created (for example enumeration prefixes)
- Therefore the display will not be uniform in all libraries



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- The example here using a prediction pattern
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## The connection between the item and the holdings record

- The MARC21 Expand Holding By 866/7/8 Task procedure will automatically create the 866/867/868 fields.
- The 866/867/868 are the 'Textual Holdings' fields
- The 866/867/868 fields are created from the 853/854/855 and 863/864/865 linked fields.
- The 863/864/865 fields will be created from the actual existence of the arrived items.
- This will be done for the arrived items **which have a link to the 853/4/5 field of the holdings record**

## The connection between the item and the holdings record

- If the item is created from a prediction pattern then the link to the 853/4/5 field of the holdings record is made automatically
- If the item is not made from a prediction pattern then item “pattern type” and “linking number” should be updated manually.

<b>— Pattern Information</b>	
Pattern Type	3 (853) ▼
Linking Number	1 ▼
Type of Unit	-

# The connection between the item and the holdings record

**Physical Item Editor**

Resource description [Foreign affairs. Foreign affairs \(Council on Foreign Relations\) Council on Foreign Relations \[New York, v. 1- Sept. 1922- \[0015-7120 0015-7120\]](#)

Holding [Ackerman Center: Ackerman Center: D410 .F6](#) [View all holdings](#)

Barcode 9927529314001421-1-1 [View all items](#)

Process type -

**Summary** General Information ENUM/CHRON information Notes History

**Item Information**

Item ID 23195761580001421 Barcode 9927529314001421-1-1

Created on 2015-05-22 Created by exl\_support

Updated on 2015-05-22 01:36:03 Updated by exl\_support

Status Item in place  
Holdings ID 22195761590001421

Item is linked to this holdings record

**Pattern Information**

Pattern Type 3 (853) Linking Number 1

Type of Unit -

Item is linked to this field in the holdings record

# The connection between the item and the holdings record

This shows how the item is connected to the holdings record

Physical Item Editor

Resource description [Foreign affairs. Foreign affairs \(Council on Foreign Relations\) Council on Foreign Relations \[New York, v. 1- Sept. 1922- \[0015-7120 0015-7120\]](#)

Holding: [Ackerman Center: Ackerman Center: D410 .F6](#) [View all holdings](#)

Working on -Foreign affairs.(992 (22195761590001421) Create

LDR 00587nx##a22001931i#4500

005 20150521220633.0

008 1011252p####8###1001aueng0000000

852 0 \$b ACKERMAN \$c AckCenter \$t 1 \$h D410 \$i .F6

853 \$8 1 \$a v. \$b no. \$u 4 \$v r \$i (year) \$j (month) \$w q

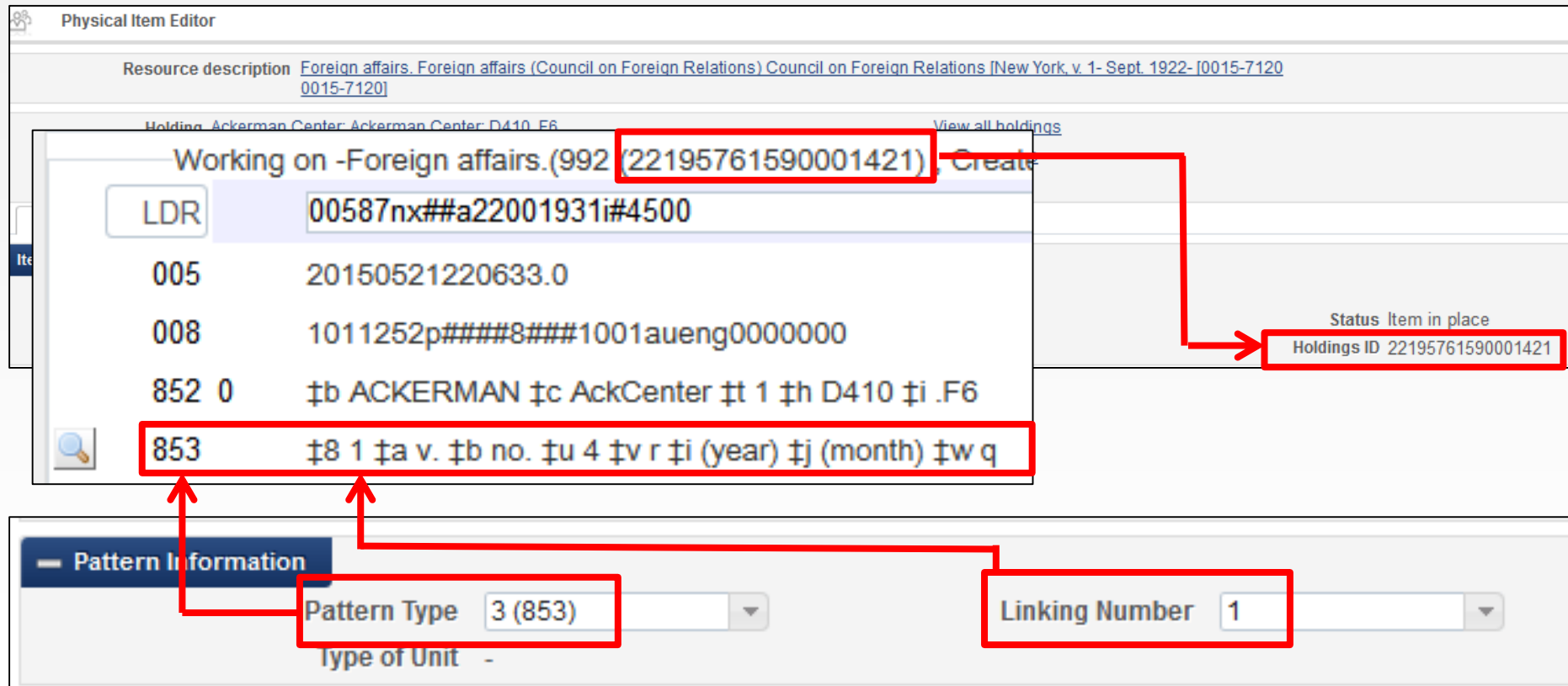
Status Item in place  
Holdings ID 22195761590001421

Pattern Information

Pattern Type 3 (853)

Linking Number 1

Type of Unit -





# Agenda



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## The example here using a prediction pattern

- In our case we have an acquisitions order for MMSID 9927529314001421 which is the “Foreign Affairs” journal.
- Inside the holdings record we create a prediction pattern 853 field

Working on -Foreign affairs.(992 (22195761590001421) ,

LDR	#####nx##a22#####1i#4500
008	1011252p#####8###1001aueng0000000
852 0	‡b ACKERMAN ‡c AckCenter ‡t 1 ‡h D410 ‡i .F6
853	‡8 1 ‡a v. ‡b no. ‡u 4 ‡v r ‡i (year) ‡j (month) ‡w q
590	‡a A quarterly publication that begins with v.1:no.1(2012:Jan.) and uses months in the second level of chronology.

For details on creating and using prediction patterns see separate presentation “Using Serial Prediction Patterns Opening Expected Issues and related subjects”

## The example here using a prediction pattern

- In our specific situation:
  - Vol. 1 2012 issues 1-4 have all arrived. It is a complete volume.
  - Vol. 2 2013 issues 1 and 4 have arrived. Issues 2 and 3 are missing. It is not a complete volume.
  - Vol. 3 2014 issues 1-4 have arrived. It is a complete volume.
- So we have 10 issues.
- All is complete for Vol. 1-3 except for issues 2 and 3 of Vol. 2 from 2013.

# The example here using a prediction pattern

	<input type="checkbox"/>	Barcode	Library	Location	Call Number	Description	Temporary Location	Status	Process type	Access Number	Receiving date
1	<input type="checkbox"/>	<a href="#">9927529314001...</a>	Ackerman Center	Ackerman Center	D410 .F6	v.1.no.1(2012:Jan.)	No	Item in place	-	-	05/21/2015
2	<input type="checkbox"/>	<a href="#">9927529314001...</a>	Ackerman Center	Ackerman Center	D410 .F6	v.1.no.2(2012:Apr.)	No	Item in place	-	-	05/21/2015
3	<input type="checkbox"/>	<a href="#">9927529314001...</a>	Ackerman Center	Ackerman Center	D410 .F6	v.1.no.3(2012:July)	No	Item in place	-	-	05/21/2015
4	<input type="checkbox"/>	<a href="#">9927529314001...</a>	Ackerman Center	Ackerman Center	D410 .F6	v.1.no.4(2012:Oct.)	No	Item in place	-	-	05/21/2015
5	<input type="checkbox"/>	<a href="#">9927529314001...</a>	Ackerman Center	Ackerman Center	D410 .F6	v.2.no.1(2013:Jan.)	No	Item in place	-	-	05/21/2015
6	<input type="checkbox"/>	-	Ackerman Center	Ackerman Center	D410 .F6	v.2.no.2(2013:Apr.)	No	Item not in place	Acquisition	-	-
7	<input type="checkbox"/>	-	Ackerman Center	Ackerman Center	D410 .F6	v.2.no.3(2013:July)	No	Item not in place	Acquisition	-	-
8	<input type="checkbox"/>	<a href="#">9927529314001...</a>	Ackerman Center	Ackerman Center	D410 .F6	v.2.no.4(2013:Oct.)	No	Item in place	-	-	05/21/2015
9	<input type="checkbox"/>	<a href="#">9927529314001...</a>	Ackerman Center	Ackerman Center	D410 .F6	v.3.no.1(2014:Jan.)	No	Item in place	-	-	05/21/2015
10	<input type="checkbox"/>	<a href="#">9927529314001...</a>	Ackerman Center	Ackerman Center	D410 .F6	v.3.no.2(2014:Apr.)	No	Item in place	-	-	05/21/2015
11	<input type="checkbox"/>	<a href="#">9927529314001...</a>	Ackerman Center	Ackerman Center	D410 .F6	v.3.no.3(2014:July)	No	Item in place	-	-	05/21/2015
12	<input type="checkbox"/>	<a href="#">9927529314001...</a>	Ackerman Center	Ackerman Center	D410 .F6	v.3.no.4(2014:Oct.)	No	Item in place	-	-	05/21/2015

Vol. 2 issues 2-3 missing. They have no receiving date, they are "not in place" and have Process Type "Acquisition"

# The example here using a prediction pattern

- Because we used the prediction pattern to create the items each item is automatically linked to the relevant 85X field of the holdings record

Resource description <a href="#">Foreign affairs. Foreign affairs (Council on Foreign Relations) Council on Foreign Relations [New York, v. 1- Sept. 1922- [0015-7120 0015-7120]</a>	
Holding <a href="#">Ackerman Center: Ackerman Center: D410 .F6</a>	<a href="#">View all holdings</a>
Barcode 9927529314001421-3-1	<a href="#">View all items</a>
Process type -	
<div>SummaryGeneral InformationENUM/CHRON informationNotesHistory</div>	
Year of issue -	
Enumeration A	<input type="text" value="3"/>
Enumeration B	<input type="text" value="1"/>
Enumeration C	<input type="text"/>
Enumeration D	<input type="text"/>
Enumeration E	<input type="text"/>
Enumeration F	<input type="text"/>
Enumeration G	<input type="text"/>
Enumeration H	<input type="text"/>
Chronology I	<input type="text" value="2014"/>
Chronology J	<input type="text" value="01"/>
Chronology K	<input type="text"/>
Chronology L	<input type="text"/>
Chronology M	<input type="text"/>
Break Indicator	<input type="text"/>
<div>— Pattern Information</div>	
Pattern Type	<input type="text" value="3 (853)"/>
Linking Number	<input type="text" value="1"/>
Type of Unit	-

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# The 863/4/5 and the 866/7/8 tasks

- “MARC21 Expand Holding By 866/7/8 Task” uses the combination of the 853/4/5 and 863/4/5 to create a 866/7/8 summary holdings field
- “MARC21 Expand Holding By 863/4/5 Task” creates a 863/4/5 based on the existence and arrival of linked items.
- The 863/4/5 can be created either
  - Manually
  - Via the “MARC21 Expand Holding By 863/4/5 Task”
- In either case it can be used by “MARC21 Expand Holding By 866/7/8 Task” uses the combination of the 853/4/5 and 863/4/5 to create a 866/7/8 summary holdings field

# The 863/4/5 and the 866/7/8 tasks

- We already saw that we have items linked to the holdings record. The items are Vol. 1-3 issues 1-4 of each volume except for issues 2-3 of volume 2
- We also saw that the “Marc21 Holding normalize on save” process has “MARC21 Expand Holding By 866/7/8 Task” and “MARC21 Expand Holding By 866/7/8 Task”

			Name	Description
1		▼	852 field normalization	Fill subfields according to first indicator
2	▲	▼	MarcDroolNormalization	Marc Drool Normalization
3	▲	▼	MARC21 Expand Holding By 863/4/5 Task	Create 863/864/865 Summary statement Holdings fields
4	▲	▼	MARC21 Expand Holding By 866/7/8 Task	Create 866/867/868 Textual Holdings fields
5	▲		marc21HoldingClearEmptyFieldsTask	Delete empty fields



# The 863/4/5 and the 866/7/8 tasks

- Therefore when we save the holdings record we expect that
  - A. “MARC21 Expand Holding By 863/4/5 Task” will look at which items arrived and create an 863/4/5 field from the items
  - B. “MARC21 Expand Holding By 866/7/8 Task” create new 866/7/8 fields from a combination of the new 863/4/5 fields created above and the existing 853/4/5 fields.

# The 863/4/5 and the 866/7/8 tasks

- Here is the holdings record before saving
- There are no 863/4/5 or 866/7/8 fields


Working on -Foreign affairs.(992 (22195761590001421) ,

LDR 00587nx###a22001931i#4500

005 20150521220633.0

008 1011252p####8###1001aueng0000000

852 0 ‡b ACKERMAN ‡c AckCenter ‡t 1 ‡h D410 ‡i .F6

 853 ‡8 1 ‡a v. ‡b no. ‡u 4 ‡v r ‡i (year) ‡j (month) ‡w q

590   ‡a A quarterly publication that begins with v.1:no.1(2012:Jan.) and uses months in the second level of chronology.]

## The 863/4/5 and the 866/7/8 tasks

- Now we save the holdings record and watch what “magically” happens:

853      ‡8 1 ‡a v. ‡b no. ‡u 4 ‡v r ‡i (year) ‡j (month) ‡w q  
 590      ‡a A quarterly publication that begins with v.1:no.1(2012:Jan.) and uses months in the second level of chronology.

866 3 1 ‡a v.1 ‡8 1.1  
 866 4 1 ‡a v.2:no.1, ‡8 1.2  
 866 4 1 ‡a v.2:no.4 ‡8 1.3  
 866 3 1 ‡a v.3 ‡8 1.4

863 4 0 ‡8 1.1 ‡a 1  
 863 4 0 ‡8 1.2 ‡a 2 ‡b 1 ‡w g  
 863 4 0 ‡8 1.3 ‡a 2 ‡b 4  
 863 4 0 ‡8 1.4 ‡a 3

These 863 and 866 fields are created **automatically!**

These 863 and 866 fields are created **automatically!**

## The 863/4/5 and the 866/7/8 tasks

created from the 863 fields via the MARC21 Expand Holding By 866/7/8 Task **after** saving record

Working on Foreign Affairs (992 (22/10/2015 00:00:14Z) ; Created by ex\_support (00/21/2015 20:19:34 CDT)

853      ‡8 1 ‡a v. ‡b no. ‡u 4 ‡v r ‡i (year) ‡j (month) ‡w q

590      ‡a A quarterly publication that begins with v.1:no.1(2012:Jan.) and uses months in the second level of chronology.

866 3 1 ‡a v.1 ‡8 1.1

866 4 1 ‡a v.2:no.1, ‡8 1.2

866 4 1 ‡a v.2:no.4 ‡8 1.3

866 3 1 ‡a v.3 ‡8 1.4

863 4 0 ‡8 1.1 ‡a 1

863 4 0 ‡8 1.2 ‡a 2 ‡b 1 ‡w g

863 4 0 ‡8 1.3 ‡a 2 ‡b 4

863 4 0 ‡8 1.4 ‡a 3

created from MARC21 Expand Holding By 863/4/5  
Task **after** saving record

## The 863/4/5 and the 866/7/8 tasks

- What exactly happened?

Working on Foreign Affairs (992 (22-193761390001421) ; Created by ext\_support (03/21/2015 20:19:34 CDT)

853      ‡8 1 ‡a v. ‡b no. ‡u 4 ‡v r ‡i (year) ‡j (month) ‡w q

590      ‡a A quarterly publication that begins with v.1:no.1(2012:Jan.) and uses months in the second level of chronology.

866 3 1 ‡a v.1 ‡8 1.1

866 4 1 ‡a v.2:no.1, ‡8 1.2

866 4 1 ‡a v.2:no.4 ‡8 1.3

866 3 1 ‡a v.3 ‡8 1.4

863 4 0 ‡8 1.1 ‡a 1

863 4 0 ‡8 1.2 ‡a 2 ‡b 1 ‡w g

863 4 0 ‡8 1.3 ‡a 2 ‡b 4

863 4 0 ‡8 1.4 ‡a 3

Vol. 1 complete

First the 863 fields were created from the actual physical items. Alma saw which items existed and were linked to the holdings record and made relevant 863 fields

First the 863 fields were created from the actual physical items. Alma saw which items existed and were linked to the holdings record and made relevant 863 fields

# Vol. 1 complete

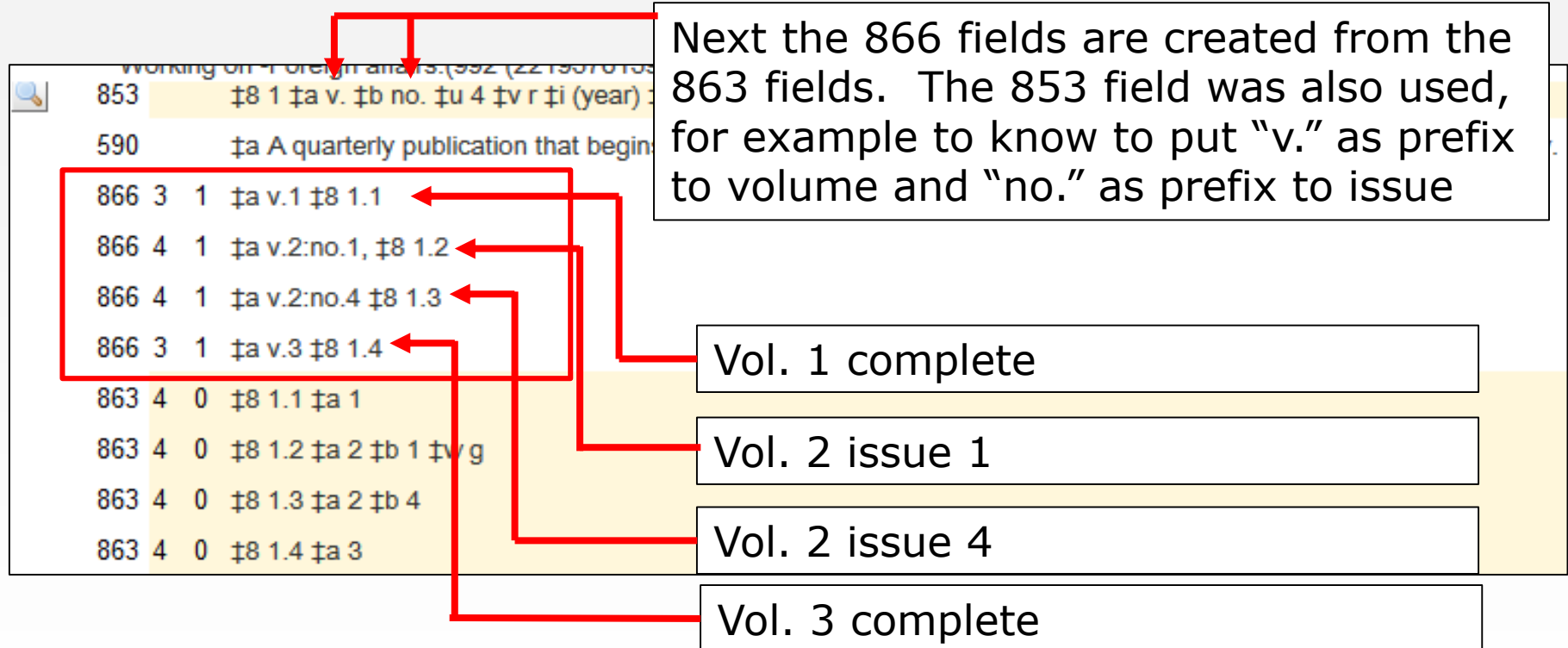
Vol. 2 issue 1 with gap after it  
subfield w with "g"

Vol. 2 issue 4

Vol. 3 complete

# The 863/4/5 and the 866/7/8 tasks

- What exactly happened?





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# Recreating the 863/4/5 and the 866/7/8 fields

- Every time a record is saved a new 863/4/5 will be created (if “Marc21 Holding normalize on save” process has “MARC21 Expand Holding By 866/7/8 Task” )
- But, we really do not want multiple 863/4/5 fields. We want just one per set of issues which have no gap.
- We also want the existing 866/7/8 fields to be removed when we save a record so that new ones can be built according to the up-to-date new 863/4/5 fields.
- Therefore we make a normalization rule which will first delete the existing 863/4/5/6/7/8 fields.

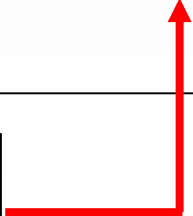


# Recreating the 863/4/5 and the 866/7/8 fields

- Here is a sample rule. We do not however delete all 863/4/5/6/7/8/9. We delete only those without a 9 in subfield 8 because we may have "local" 86X fields

```
rule "delete 863 4 5 6 7 8 if it does not have subfield 8 9"  
when  
  (TRUE)  
then  
  removeField "863" if (not exists "866.8.9")  
  removeField "864" if (not exists "867.8.9")  
  removeField "865" if (not exists "868.8.9")  
  removeField "866" if (not exists "866.8.9")  
  removeField "867" if (not exists "867.8.9")  
  removeField "868" if (not exists "868.8.9")  
end
```

This will prevent local fields  
from getting deleted



# Recreating the 863/4/5 and the 866/7/8 fields

- The rule (which we called "delete 863 4 5 6 7 8 if it does not have subfield 8 9") is then added to the "Marc21 Holding normalize on save"

General Information		Task List	Task Parameters
Business Entity	Holding	Name	Marc21 Holding normalize on save
Type	Marc 21 holding normalization		
Processes Selected			
		Name	Description
1		852 field normalization	Fill subfields according to first indicator
2		MarcDroolNormalization	Marc Drool Normalization
3		MARC21 Expand Holding By 863/4/5 Task	Create 863/864/865 Summary statement Holdings fields
4		MARC21 Expand Holding By 866/7/8 Task	Create 866/867/868 Textual Holdings fields
5		marc21HoldingClearEmptyFieldsTask	Delete empty fields

Process Details

General Information Task List Task Parameters

Business Entity Holding Type Marc 21 holding normalization

Name Marc21 Holding normalize on save

Marc Drool Normalization

Drools File Key \* delete 863 4 5 6 7 8 if it does not have subfield 8 9

# Recreating the 863/4/5 and the 866/7/8 fields

- Now, for example, Vol. 2 issue 2 arrives

5	<input type="checkbox"/>	Ackerman Center	Ackerman Center	No	05/21/2015	05/22/2015	D410 .F6	992752931400	v.2:no.1(2013:Jan.)	-	<a href="#">Edit</a>
6	<input type="checkbox"/>	Ackerman Center	Ackerman Center	No	-	05/22/2015	D410 .F6	992752931400	v.2:no.2(2013:Apr.)	-	<a href="#">Action</a>
7	<input type="checkbox"/>	Ackerman Center	Ackerman Center	No	-	05/22/2015	D410 .F6		v.2:no.3(2013:July)	-	<a href="#">Edit Inventory item</a> <a href="#">Receive</a>
8	<input type="checkbox"/>	Ackerman Center	Ackerman Center	No	05/21/2015	05/22/2015	D410 .F6	992752931400	v.2:no.4(2013:Oct.)	-	<a href="#">Edit</a>

# Recreating the 863/4/5 and the 866/7/8 fields

- The Holdings record is saved and the local 866 field is not deleted (because it has subfield 9) and the 863 and 866 is updated with the item

005	20150522055329.0
008	1011252p####8###1001aueng0000000
852 0	‡b ACKERMAN ‡c AckCenter ‡t 1 ‡h D410 ‡i .F6
853	‡8 1 ‡a v. ‡b no. ‡u 4 ‡v r ‡i (year) ‡j (month) ‡w q
590	‡a A quarterly publication that begins with v.1:no.1(2012:Jan.) and us
866	‡a Some issues in Dr. Smith's office ‡8 9
863 4 0	‡8 1.1 ‡a 1
863 4 0	‡8 1.2 ‡a 2 ‡b 1-2 ‡w g
863 4 0	‡8 1.3 ‡a 2 ‡b 4
863 4 0	‡8 1.4 ‡a 3
866 3 1	‡a v.1 ‡8 1.1
866 4 1	‡a v.2:no.1-v.2:no.2, ‡8 1.2
866 4 1	‡a v.2:no.4 ‡8 1.3
866 3 1	‡a v.3 ‡8 1.4

Still have the local field

Vol. 2 issue 1 arrived

# Agenda



- Introduction
- The connection between the item and the holdings record
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- Viewing the summary holding in Primo

# The example here not using a prediction pattern

- Now we have serial “Thoreau journal quarterly”.
- It has a holding record with an 853 as follows:  
853 #8 1 #a Vol. #b Iss. #u 4 #v r #i (year)  
#j (month) #w q
- It has no acquisitions order or prediction pattern

050 0 0 #a PS3053 #b .T5	008 1011252p#####8###1001aueng00000000
082 0 4 #a 818/.309 #2 19	005 20150522060713.0
222 0 #a Thoreau journal quarterly	852 0 #b MCDERMOTT #c stax #h PS3053 #i .T5
245 0 0 #a Thoreau journal quarterly.	853 #8 1 #a Vol. #b Iss. #u 4 #v r #i (year) #j (month) #w q
260 #a [Old Town, Me., #b Thoreau Fellowship]	
300 #a 13 v. #c 23 cm.	

# The example here not using a prediction pattern

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- The functionality shown here can still be used even without a prediction pattern as long as the items have
  1. A receiving date
  2. Pattern type
  3. Linking number

# The example here not using a prediction pattern

- The library has
  - Volume 2 from 2014, issues 1-4
  - Volume 3 from 2015, issue 1
- All have a receiving date

<input type="checkbox"/>	Barcode	Library	Location	Call Number	Description	Temporary Location	Status	Process type	Access Number	Receiving date
<input type="checkbox"/>	<a href="#">9927529313901...</a>	Eugene McDermott Library	Stacks	PS3053 .T5	vol.2 no.1 (2014)	No	Item in place	-	-	05/22/2015
<input type="checkbox"/>	<a href="#">9927529313901...</a>	Eugene McDermott Library	Stacks	PS3053 .T5	vol.2 no.2 (2014)	No	Item in place	-	-	05/22/2015
<input type="checkbox"/>	<a href="#">9927529313901...</a>	Eugene McDermott Library	Stacks	PS3053 .T5	vol.2 no.3 (2014)	No	Item in place	-	-	05/22/2015
<input type="checkbox"/>	<a href="#">9927529313901...</a>	Eugene McDermott Library	Stacks	PS3053 .T5	vol.2 no.4 (2014)	No	Item in place	-	-	05/22/2015
<input type="checkbox"/>	<a href="#">9927529313901...</a>	Eugene McDermott Library	Stacks	PS3053 .T5	vol.3 no.1 (2015)	No	Item in place	-	-	05/22/2015



# The example here not using a prediction pattern

- All issues are linked to the 853 field of the holding record

Summary	General Information	ENUM/CHRON information	Notes	History
<b>Year of issue</b> -				
Enumeration A	3	Chronology I	2015	
Enumeration B	1	Chronology J		
Enumeration C		Chronology K		
Enumeration D		Chronology L		
Enumeration E		Chronology M		
Enumeration F		Break Indicator		
Enumeration G				
Enumeration H				
<b>Pattern Information</b>				
Pattern Type	3 (853)	Linking Number	1	
Type of Unit	-			

# The example here not using a prediction pattern

- When the holding record is saved the 863 and 866 is automatically created

Working on -Thoreau journal quar (22195761450001421) , Created t			
LDR			00259nx##a22000971i#4500
008			1011252p####8###1001aueng0000000
005			20150522061940.0
852	0		‡b MCDERMOTT ‡c stax ‡h PS3053 ‡i .T5
853			‡8 1 ‡a Vol. ‡b lss. ‡u 4 ‡v r ‡i (year) ‡j (month) ‡w q
863	4	0	‡8 1.1 ‡a 2-3
866	3	1	‡a Vol.2-Vol.3 ‡8 1.1

# Agenda



- Introduction
- The connection between the item and the holdings record
- The example here using a prediction pattern
- The 863/4/5 and the 866/7/8 tasks
- Recreating the 863/4/5 and the 866/7/8 fields
- The example here not using a prediction pattern
- **Viewing the summary holding in Primo**

# Viewing the summary holding in Primo

- When the end user views the record in Primo he now does not need to scroll through what can often be a long list of items to see if the item(s) he needs are present.
- He can instead view the summary holdings record in the GetIt tab
- The actual display of the 866/7/8 field in Primo depends on local customizations and thus differs from library to library

# Viewing the summary holding in Primo

- For example this appears above the list of items in Primo for the first example here “Foreign Affairs” journal

Location:	Ackerman Center Erik Jonsson Building, 4th Floor, JO 4.800, Non-Circulating D410 .F6
Library Has:	Some issues in Dr. Smith's office v.1 v.2:no.1-v.2:no.2, v.2:no.4 v.3
Copy:	1

Year  Volume  Description

# Viewing the summary holding in Primo

- Here is the second example done here “Thoreau Journal” as it appears in Primo.

Location: .Eugene McDermott Library Main Stacks (Call numbers A to G, 3rd Floor; H to Z, 4th Floor) PS3053 .T5 <a href="#">Where is it?</a>				
Library Has: Vol.2-Vol.3				
Year	All	Volume	All	Description All
1 - 5 of 5 Records				
Barcode	Type	Check-out Policy	Description	Status
9927529313901421-2-1		For use in the library	vol.2 no.1 (2014)	Item in place
9927529313901421-2-2		For use in the library	vol.2 no.2 (2014)	Item in place
9927529313901421-2-3		For use in the library	vol.2 no.3 (2014)	Item in place
9927529313901421-2-4		For use in the library	vol.2 no.4 (2014)	Item in place
9927529313901421-3-1		For use in the library	vol.3 no.1 (2015)	Item in place

# Viewing the summary holding in Primo

- In this example from another library the end user immediately sees that all issues exist since Vol. 1 from June 1967.

## Journal of economic issues.

Association for Evolutionary Economics. 1967

● Available at Foster Business Library Stacks Call number:(HB1 .J66 )

Availability & Request Options Item Details

Libraries users log in for all request options

### Request Options:

Location: Foster Business Library Stacks HB1 .J66 (find this location)

Holdings: v.1(1967:June)-

Year All Volume All Description

853 33 |8 1 |a v. |i (year) |j (month)

863 3\_ |8 1.1 |a 1- |i 1967- |j 06-

866 31 |a v.1(1967:June)- |8 1.1

# Viewing the summary holding in Primo

- In this example from another library the end user immediately sees that all issues exist since Vol. 18 (1975) to Vol. 33 (1990) from June 1967.

The screenshot shows a Primo record for the "Indian journal of pathology & microbiology : an official organ of Indian Association of Pathologists & Microbiologists." The record is available at Tompkins-McCaw Library Bound Journals. The "Find or Request" tab is active, showing a "Request" button and a "Details" link. The "Request Options" section displays the location as "Tompkins-McCaw Library Bound Journals" and the holdings as "v.18 (1975)-v.33 (1990)". A red arrow points from the holdings text to a callout box below. The callout box contains the text "866 31 |8 0 |a v.18 (1975)-v.33 (1990)".

Journal

☆ Indian journal of pathology & microbiology : an official organ of Indian Association of Pathologists & Microbiologists.  
Chandigarh : Indian Association of Pathologists & Microbiologists, 1975

● Available at Tompkins-McCaw Library Bound Journals

Find or Request Details

Request Virginia Commonwealth University Actions

Request Options:

Location: Tompkins-McCaw Library Bound Journals Hide Details

Holdings: v.18 (1975)-v.33 (1990)

Year All Volume All Description All

1 - 7 of 7 Records

866 31 |8 0 |a v.18 (1975)-v.33 (1990)





**THANK YOU**

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