Find local holdings records

Learn how to search for local holdings records in Connexion, First Search, and WorldCat Discovery.

About searching for local holdings records (LHRs)

• Search for holdings records when you need to maintain your institution’s local holdings for items in your collection.
• Holdings maintenance usually begins with searching WorldCat, whether you are creating local holdings for new materials, adding local holdings records for new copies, updating existing local holdings records, or deleting local holdings records.
• This applies to searching in Connexion, First Search and WorldShare WorldCat Discovery.

Find local holdings records (LHRs)

You can retrieve the bibliographic record for the title you want and then edit existing local holdings records or create new LHRs.
Or, use holdings search limits to retrieve only bibliographic records linked to the holdings information you need. The holdings limits are:

• Institution Holdings (index label li:) - Retrieves bibliographic records for titles held by a specified institution. Does not require the presence of local holdings records.
• My Local Holdings (index label l4:) - Retrieves bibliographic records with local holdings records added by your institution.
• Group Holdings (index label zu:) - Retrieves bibliographic records for titles held by any institution that belongs to a specified group. Does not require the presence of local holdings records.
• Group Local Holdings (index label l5:) - Retrieves bibliographic records for titles with local holdings for any institution that belongs to a specified group.

Command line search

1. On the Search WorldCat screen, in the Command Line Search area, type a search in the Search for box.
   Tips:
   ◦ Use a number search (ISBN, ISSN, OCLC control number) to retrieve a single record.
   ◦ ISSN: Use index label in:.
   ◦ OCLC Control Number: Use index label (no:), asterisk (*), or number sign (#).
2. (Optional) To add a holdings limit, type and, the index label, and then a symbol for an institution or group.
   ◦ Institution Holdings - li:[institution symbol].
   Multiple institutions: To limit to holdings for 2 or more specific institutions, use parentheses and an OR operator in the search statement.
Example: AND (li:abc OR li:xyz)

- My Local Holdings - l4: [your institution symbol]
- Group Holdings - zu: [group symbol]
- Group Local Holdings - l5: [group symbol]
- Multiple groups: To limit to holdings for 2 or more specific groups, use parentheses and an OR operator in the search statement.
  Example: and (l5:abcd OR l5:wxyz)

Examples
in:0190-8286 AND l4:oclc
no:1775222 AND li:ser
no:1775222 AND (li:ser or li:zyz)
in:0190-8286 AND zu:nepu
085109130x AND l5:abcd
085109130x AND (l5:abcd or l5:wxyz)

3. (Optional) Below the search entry box, select (check) the Show Local Holdings if Single Record Found check box.

4. Click Search.

Guided search (Keyword/Numeric search area)

1. At the Search WorldCat screen, in the Keyword/Numeric Search area, type a search in any Search for box and select an index from the list next to that box.
   Tip: Use a number search (ISSN, ISBN, OCLC control number) to retrieve a single record.

2. (Optional) Select the holdings limit you want from the Holdings list.
   - Institution Holdings - In the Institutions box, enter an institution symbol.
     Multiple institutions: To limit to holdings for 2 or more specific institutions, separate the symbols with a space or a comma.
     Example: abc xyz or abc,xyz
   - My Local Holdings - Automatically searches for your institution symbol.
   - Group Holdings - In the Group box, enter a group symbol.
   - Group Local Holdings - In the Group box, enter a group symbol.
   - Multiple groups - To limit to holdings for 2 or more specific groups, separate the symbols with a space.
     Example: abcd wxyz or abcd,wxyz

3. (Optional) Below the search entry box, select (check) the Show Local Holdings if Single Record Found check box.

4. Click Search.

Holdings search limits: Details

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## TO RETRIEVE

### SPECIFY THIS LIMIT

| Institution or multiple institutions | Select **Institution Holdings** and type an institution symbol in the box. Separate multiple symbols with spaces or commas.  
**Command line**  
Type `AND li:[institution symbol]`. To specify multiple institutions, use parentheses and the **OR** operator. |
|--------------------------------------|---------------------------------|
| Local holdings for your institution | **Keyword/Numeric search**  
Select **My Local Holdings**  
**Command line**  
Type `AND l4:[your institution symbol]`. |
| Institution holdings for institutions in a specified group or multiple groups | **Keyword/Numeric search**  
Select **Group Holdings** and type group symbol in the box. Separate multiple symbols with spaces or commas.  
**Command line**  
Type `AND zu:[group symbol]`. To specify multiple groups, use parentheses and the **OR** operator. |
| Local holdings for institutions in a specified group or multiple groups | **Keyword/Numeric search**  
Select **Group Local Holdings** and type group symbol in the box. Separate multiple symbols with spaces or commas.  
**Command line**  
Type `AND i5:[group symbol]`. To specify multiple groups, use parentheses and the **OR** operator. |
| Notes | One institution  
no:4567321 AND li:ser  
Multiple institutions  
no:4567321 AND (li:ser or li:zyz) |
| Notes | Command line example  
085109130x AND l4:abc |
| Notes | Command line examples  
One group  
in:1234-4321 AND zu:nepu  
Multiple groups  
in:1234-4321 AND (zu:bcdf OR zu:nepu) |
| Notes | Command line examples  
One group  
085109130x AND i5:nepu  
Multiple groups  
085109130x AND (i5:abcd OR i5:wxyz) |

### Option: Show local holdings for a single bibliographic record

- To go directly to local holdings when you retrieve a single record (rather than to the bibliographic record), select **Show Local Holdings if Single Record Found** on the Search WorldCat screen.
- Whether or not you limit to My Local Holdings, Connexion displays your local holdings record or institution summary.
- **Multiple bibliographic records.** For multiple records, the truncated list or brief list shows *LH* links to your LHRs. If you limited the search to a single group's local holdings, results show *GR* links to the group's local holdings.

1. Enter your search in either the command line or the guided search area. Include a holdings limit if you wish.
2. Select the **Show Local Holdings if Single Record Found** check box.
3. Click **Search**.

   ◦ **Result - Single bibliographic record**
     - **No holdings limit** - Either a local holdings record or an institution summary list (for multiple LHRs) for your institution.
     - **Holdings limit to your local holdings** - Either a local holdings record or an institution summary list (for multiple LHRs) for your institution.
     - **Holdings limit to a specified institution** - Either a local holdings record or an institution summary list (for specified institution).
     - **Holdings limit to a group's holdings** - Bibliographic record.
     - **Holdings limit to a group's local holdings** - Group holdings summary listing institutions in the group that have LHRs linked to the record.

   ◦ **Result - Multiple bibliographic records**
     Depending on which holdings limit you specified, the WorldCat truncated list or brief list may show links to local holdings:
     - No limit or limit to your local holdings. Records with attached local holdings for your institution have an **LH** link next to the record number. Click **LH** to view local holdings.
     - **Holdings limit to a specified institution** - ??? for specified institution. If you specified multiple institutions, no **LH** links to local holdings appear.
     - **Holdings limit to a group's holdings** - Bibliographic record.
     - **Holdings limit to a group's local holdings** - Records with attached local holdings for at least one institution in the group have a **GR** link next to the record number. Click **GR** to view local holdings (LHR or group summary). If you specified multiple groups, no **GR** links to group local holdings appear.

**Display local holdings by institution, group, state, or region**

Use **Display Local Holdings** to view LHRs created by another library or by libraries in a group, a state, or a region.

1. Open the bibliographic record for which you want to view local holdings records.
2. **From the bibliographic record**
   - On the View list, click **Display Local Holdings**, press `<Alt><K><\>` (backslash), or press `<Alt><J>` and then `<\>`.
3. In the Local holdings type list, select the display to view:
   a. For Institution Holdings or Group Holdings, enter an **institution or group symbol** in the text box.
   b. Select **State Holdings, Region Holdings, Default Holdings, or All Holdings**.
4. Click **Display Local Holdings**.
   **Results**
   Connexion opens a Holdings Display window that lists summary local holdings for an institution or group, or for institutions in the category you selected (state, region, default, all). Or if no institutions with local holdings were found, the window indicates that there are no holdings to display.
5. In the Holdings Display window, under Local Holdings Information, click the **link to the holdings summary** for the institution you want. Connexion closes the Holdings Display window and displays local holdings for the institution you selected, either an LHR or an institution summary.
About holdings agents

- An agent can maintain holdings for specific client institutions. Typically, client libraries do not have direct access to Connexion.
- Profiling for an Agent authorization identifies the institution symbols of clients. When logged on using an Agent authorization, a user can edit, add, and delete holdings for client institutions linked to that authorization.
- Agents use the same procedures as users maintaining holdings for their own institution.
- Agent activity is usually done by staff at a processing center or other networking agency.