Create local holdings record

Who can create a local holdings record?

- You need a Full-level Connexion authorization to create an LHR.
- With at least a Full-level authorization, you can create a local holdings record for your institution.
- A holdings agent (when logged in using an Agent authorization) can create LHRs for a client institution.
  - When logged in as an agent, you cannot automatically create LHRs for your own institution, unless your institution is profiled as a client.
  - If your institution is not among your clients, you must log in with an individual authorization to create your own LHRs.

Two ways to create a local holdings record (LHR)

1. Derive a new record from an existing record and modify content as necessary (save keystrokes by reusing appropriate data).
2. Enter content in a workform.

Derive local holdings record from another LH record

- If you have existing local holdings records for an item, you can derive a new LHR for the same item from one already attached to the bibliographic record.
- If you are adding the first LHR for an item, you can derive the new record from another institution's LHR for the same item.
- In either case, deriving lets you reuse applicable content, save keystrokes, and reduce errors.
1. Retrieve the local holdings record from which you want to create a new LH record. You can derive a record from an LHR that belongs to your library (in edit mode) or from a record created by another institution (viewed in display mode).
2. On the Edit list click **Derive New Record** or press `<Alt><K>` and then `<D>` (or `<Alt><J>` and then `<D>`). The system displays the new local holdings record in edit mode.
3. Edit the record to enter or modify the holdings information.
   If appropriate, apply local holdings constant data to the new record.
   - On the Edit list click **Apply Default CD** (or press `<Alt><K>` and then `<C>`) to apply your default LH constant data.
   - Or
   - On the Edit list click **Apply CD By Name** (or press `<Alt><K>` and then `<5>`) or **Apply CD From List** (or press `<Alt><K>` and then `<6>`) to apply a specific constant data record.
4. Edit the Summary field of the new LHR.
If your institution has other LHRs linked to the bibliographic record, the most recent version of the Summary field appears when you derive a new LHR or use a workform. If your new record includes information that affects your institution's overall holdings for the item, edit the Summary to reflect the changes.

If you are creating the first LHR for the item, enter the appropriate information on overall holdings.

5. (Optional). Validate the edited record to identify any errors. Correct the record if necessary so that it passes validation.
   a. On the Edit list click Validate Record or press <Alt><K> and then <V> (or <Alt><J> and <V>).
      Note: Connexion validates the record automatically when you take the Add Record action.

6. On the Action list, click Add Record or press <Alt><K> and then <N> (or <Alt><J> and then <N>).

   Results
   ◦ Connexion validates the record. If the system reports validation errors, correct them and then try again to add the record.
   ◦ When the record is valid, Connexion links it to the bibliographic record in WorldCat.
   ◦ When you add your first LHR to a bibliographic record, Connexion sets your institution-level holdings, if not already set.
   ◦ The added record reappears in display mode.

Content transferred to derived local holdings record

• Content from the base record transfers to the new LHR, with the following exceptions:
• Summary. If you have other LHRs linked to the bibliographic record, the derived record contains the latest version of the Summary from the existing LHRs. If this is your first LHR for the item, the Summary field in the derived record contains the statement "Local holdings available."
• Record Status (Leader/05), Date Entered (008/00-05), and Date of Report (008/26-31). Record Status is set to n (New); Date Entered and Date of Report are set to the current date.
• Field 852. Connexion inserts an 852 that contains your institution symbol in $a and your default holding library code in $b.

Create a local holdings record using a workform

You can take the Create Local Holdings action from a local holdings record, from a bibliographic record, or from an institution summary or a group summary.

1. From a bibliographic record or an existing local holdings record, on the Action list click Create Local Holdings or press <Alt><K> and then <+>(plus sign) (or <Alt><J> and then <+>).
   Or
   From a group summary or institution summary, on the Action/Sort list click Create Local Holdings.

   Results
   Connexion displays a local holdings workform with the following default fields and values:
   ◦ Summary. If you have other LHRs linked to the bibliographic record, the workform contains the latest version of the Summary from the existing LHRs. If this is your first LHR for the item, the Summary field in the workform contains the statement "Local holdings available."
   ◦ Encoding Level. (Leader/17) Encoding Level is set to a fill character | (the vertical bar or pipe symbol), an invalid value. To validate the record, you must select a valid code for this element. Note that the Encoding Level value may require you to include other fields in the LHR.
- **Record Status** (Leader/05), **Date Entered** (008/00-05), and **Date of Report** (008/26-31). **Record Status** is set to n (New); **Date Entered** and **Date of Report** are set to the current date.

- **Lending policy and Reproduction policy** (008/20, 008/21). In all workforms, both elements contain the default setting u - Undefined.

- **Field 852.** Connexion inserts an 852 that contains your institution symbol and your default holding library code.

- **Other LHR fields.** The workform contains tags and default subfield codes for the 853, 863, and 866 fields.

2. Enter content to describe your holdings for the item. If appropriate, apply local holdings constant data to the new record.
   - On the Edit list click **Apply Default CD** (or press <Alt><K> and then <C>) to apply your default LH constant data.
     - Or
     - On the Edit list click **Apply CD By Name** (or press <Alt><K> and then <5>) or **Apply CD From List** (or press <Alt><K> and then <6>) to apply a specific constant data record.

3. Edit the Summary field of the new LHR.
   - If your institution has other LHRs linked to the bibliographic record, the most recent version of the Summary field appears when you derive a new LHR or use a workform. If your new record includes information that affects your institution's overall holdings for the item, edit the Summary to reflect the changes.
   - If you are creating the first LHR for the item, enter the appropriate information on overall holdings.

4. **(Optional).** Validate the edited record to identify any errors. Correct the record if necessary so that it passes validation. On the Edit list click **Validate Record** or press <Alt><K> and then <V> (or <Alt><J> and <V>).
   - Note: Connexion validates the record automatically when you take the Add Record action.

5. On the Action list, click **Add Record** or press <Alt><K> and then <N> (or <Alt><J> and then <N>).

**Results**

- Connexion validates the record. If the system reports validation errors, correct them and then try again to add the record.
- When the record is valid, Connexion links it to the bibliographic record.
- When you add your first LHR to a bibliographic record, Connexion sets your institution-level holdings, if not already set.
- The added record reappears in display mode.