Working with Holdings Records

Holdings records contain the following holdings information: location, items held, publication pattern (where applicable), and notes. Holdings records are dependent on and linked to associated bibliographic records. In Alma, holdings records can be created/edited using the MD Editor, an import profile job, or the Change Holding Information job (see Change Holding Information for more information).

MARC 21 Holdings Metadata Configuration

The MARC21 Holding metadata configuration profile determines how holdings fields/subfields are customized and validated in Alma. For example, you can customize the 852 field.

852 Field Configuration

In the First Indicator section of the 852 field configuration, you can specify the shelving scheme/call number type determined by the number stored in the first indicator.
This information appears, for example, in the Shelf Report options for call number type.
Creating Holdings Records

See Creating Holdings Records with the MD Editor on the Navigating the MD Editor Page for more information.

Updating Holdings Records

This section presents how to make changes to holdings records.

Performing Global Changes on Holdings Records

To perform global changes on physical items, you must have one of the following roles:

- Physical Inventory Operator
- Repository Manager
- Repository Administrator

You can update holdings information for physical items by running the Change Holding Information job. The changes you can make using the job include:

- Update the call numbers of the holdings using the values stored in the bibliographic records (see Mapping Call Numbers to Holdings).
- Correct the data using a pre-defined set of normalization rules (see Working with Normalization Rules).
- Publish/suppress the holdings to/from external discovery systems, including Primo (see Suppressing Alma Records from Primo).

After the job runs, the job report identifies how many records were updated and whether any records failed.

To perform global changes on holdings records:

Run the Change Holding Information job. For more information, see Running Manual Jobs on Defined Sets.

Moving Holdings Between Bibliographic Records (Relinking)

You can relink a holdings record to a different bibliographic record. This also updates the bibliographic record to which the associated PO line is linked.

Note

The relink holdings feature blocks the relinking of holdings that are related to requests. For these situations where the relinking of holdings is blocked, use the Merge Records and Combine Inventory option in the MD Editor to relink holdings. See Merging Bibliographic Records for more information.

To relink holdings record:
1. Complete a **Physical titles** search for the title and select **Holdings**.

   If the title has only one holdings record, the MARC Record Simple View page appears. See [Viewing Metadata Read-Only in the Simple Record View Page](#).

   If the title has multiple holdings records, the List of Holdings page appears.

2. From the MARC Record Simple View page, select **Relink**; or from the List of Holdings page, select the **Relink** row action for the holdings record that you want to relink. The MD Editor opens with a search panel enabling you to locate a bibliographic record in the Network Zone or Community Zone in addition to the Institution Zone to which you can relink. The Network Zone is available in a collaborative network; see [Network-Managed Records in a Collaborative Network](#).

3. Select Institution, Network, or Community, enter search criteria for a bibliographic record, and select **Search**. The search results appear with **View** and **Relink** options.

4. Select **Relink** for the new bibliographic record. The record appears in the MD Editor.

5. Select **Save**.

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### Moving Items Between Holdings and Deleting Holdings Records

To update physical inventory, you must have the following role:

- Repository Manager
- Physical Inventory Operator
- Purchasing Manager
- Purchasing Operator

To **move items to different holdings records and delete (the empty) holdings**:

1. Search the repository for something in the database with multiple holdings. See [Searching in Alma](#).

2. From the results list, select **Items** for the bibliographic record with multiple holdings.

   ![Record with Multiple Holdings](#)

   The List of Items page appears. See [Working with the List of Items](#).

3. Select the item(s) in the check box column to move and select **Change Holdings**. The List of Holdings page appears. See [Working with the List of Holdings](#).
4. Select the holdings location to which you want to move the items and select Select. The List of Items page displays an informational message to confirm what has been processed.

5. Select the View all holdings link.

The updated List of Holdings page appears.

6. To delete the holdings with zero items, select that holdings (row), select Delete Holdings, and select Confirm in the confirmation dialog box. The List of Holdings page refreshes with an informational message regarding the change and the holdings record removed from the list.

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**Working with the List of Holdings**

The List of Holdings page displays the holdings (with the MMS ID link) for the selected resource. It is available when you select Holdings for a physical item that has multiple holdings records after searching in the repository (see Searching in Alma) or when selecting View all holdings on the List of Items page (see Working with the List of Items) or the Physical Item Editor page (see Updating Item-Level Information).
Note

If there is only one holdings record, selecting Holdings after a repository search opens the MARC simple Record View page. See Viewing Metadata Read-Only in the Simple Record View Page. If you, instead, need to access the actions for a single holdings record (such as the Associate a PO Line action), you may want to use an All titles search (instead of a Physical titles search) where you can select Holdings from the search results list for the bibliographic record of interest to open the List of Holdings page where the single holdings record of interest appears and the button to access actions for the holdings record.

You can filter the list of holdings to only view holdings with available items.

The following actions are available for each holdings:

- View – Open the MARC simple Record View page. See Viewing Metadata Read-Only in the Simple Record View Page.
- Edit – Edit the holdings on the MD Editor page. For more information, see Navigating the MD Editor Page.
- Relink – Relink the holdings record to a bibliographic record in the MD Editor in split view. For more information, see Moving Holdings Between Bibliographic Records (Relinking).
- View items – View the items that are associated with the holdings record on the List of Items page (see Working with the List of Items).
- Associate a PO line – Associate a PO line with the holdings. Select a PO line and select Update. Only PO lines for physical continuous orders can be selected. The associated PO line appears in the PO Line column. To remove the associated PO line, select Associate PO line again and remove the selected PO line from the PO line box.

If you want to delete empty holdings records, select the holdings records in the list of holdings and select Delete Holdings. You cannot remove holdings records that contain items.

To add new holdings, select Add New Holdings. The MD Editor opens and you can add a new holdings record related to the bibliographic record identified on the List of Holdings page. The attached bibliographic record does not open, so there is no additional step to release the bibliographic record when you finish creating the new holdings record.

When you finish adding the new holdings record in the MD Editor, select File > Save and Release and select Back to return to the List of Holdings page.

Additional Holdings Record Information

See the following sections for more information regarding holdings records:

- Navigating the MD Editor
- Managing Physical Item Inventory Using Shelf Reporting
- Importing Records Using an Import Profile
- Managing Import Profiles
- Mapping Call Numbers to Holdings
- Configuring Other Settings (Resource Management)
  - use_marc_record_holdings_template
  - call_number_type
Use Case: Holdings Record Call Number Type

This use case describes how to set the call number type (852 first indicator) to 3 so that the call number information is properly mapped from the bibliographic record 086 to the holdings record using an import profile.

With the import process, the following methods are available for managing call number type in the 852 first indicator in the following priority order:

1. Define the call number type in the holdings default template.

   Open your default holdings template in the MD Editor (Resources > Cataloging > Open the Metadata Editor) and set the 852 first indicator to 3.

   Set the `use_marc_record_holdings_template` customer parameter (Configuration Menu > Resources > General > Other Settings) to true. When you do this, the holdings records that are automatically created with your import profile use the default holdings template.

   Note that other workflows that use the default holdings template will also have the 852 first indicator set to 3.

2. Define the call number type for a specific library location that is used in the import profile.

   For the library identified in your import profile, configure the library's call number type to the one that matches the 852 first indicator 3. This is done in the Holdings Configurations section of the Edit Physical Location page (Configuration Menu > select the library location > General > Locations > Physical Locations).

   ![Edit Physical Location](image.png)

   Library Holdings Configurations Call Number Type

   In this example, the **Superintendent of Documents classifications** call number type is selected.

   When the holdings records are automatically generated with your import profile for this specific library location, the 852 first indicator will be set to 3 (the corresponding number to the **Superintendent of Documents classifications** call number type).

   Note that this will not impact other locations.

3. Define the default call number type for the institution.
Set the call_number_type customer parameter (Configuration Menu > Resources > General > Other Settings) to 3.

This configuration applies to the automatic creation of all holdings. They will all be created with 3 as the 852 first indicator unless the 852 first indicator is specified by one of the previous methods.

After implementing one or more of these methods to set the 852 first indicator to 3, the automatic creation of holdings records using an import profile will use the call number mapping and properly map the bibliographic call number information to the holdings record.

Note that the Update holdings call number parameter in the import profile specifically refers to updating the the call number of existing holdings of a bibliographic record with an empty call number.