Adding and maintaining Call Numbers and Items in the Web Client

Call numbers and items are added and maintained in several places in Evergreen. Catalogers generally add new call numbers and items in the Holdings editor access from the Holdings View of a bibliographic record. Holdings can be edited from the Holdings editor and deleted from Holdings view. Maintenance of copies can also be performed in item status (F5) and Item buckets.

Holdings View

This section covers adding and maintaining holdings through the Holdings View of a bibliographic record. In holdings view, you will use the Actions menu to access the Holdings editor as well as to take direct actions on holdings. From the Actions menu, you can

- Add items to Bucket
- Request items

- Show – Item Status (list)
- Show – Item Status (detail view)
- Show – Item Holds
- Show – Print Labels

- Mark – Item as Damaged
- Mark – Item as Discard/Weed
- Mark – Item as Missing
- Mark – Library/Call Number as Transfer Destination

- Add – Call Numbers
- Add – Items
- Add – Call Numbers and Items
- Add – Item Alerts

- Edit – Call numbers
- Edit – Items
- Edit – Call Numbers and Items
- Edit – Replace Barcodes
- Edit – Manage Item Alerts

- Delete – Empty Call Numbers
- Delete – Items
- Delete – Call Numbers and Items

- Transfer – Call Numbers to Previously Marked Destination
- Transfer – Items to Previously Marked Destination

Adding New Holdings to a Bibliographic Record

You add new volumes and copies to bibliographic records, both when no volume exists on a record in the database and when adding additional items to an existing volume via Holdings view. From the bibliographic record, select Holdings view and then the specific copies or volumes needing editing.

After you have identified a matching record in the PINES database by following PINES matching procedures and policies, you are ready to add your library system holdings to the bibliographic record. From a bibliographic record, select Holdings View.

Choose your library system from the dropdown menu at Show holdings at or below. Make sure the boxes to show empty call numbers, show empty libraries, show item detail, and show call number details are checked.

From the column picker, manage your columns by selecting the attributes you wish to display and the order you want then displayed. Be sure to select Save Columns when you are done. See Function Bar/Columns for further instructions.
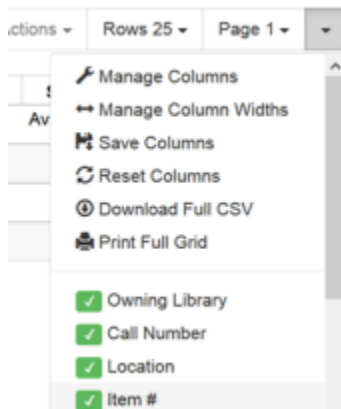
From the list of libraries, choose the library or libraries for holdings:

> 📝 Branches/Libraries are not always listed in Holdings View in alphabetical order. Pay attention to the order they are displayed I the Volume/Item editor to ensure you are associating the correct Item to each library.

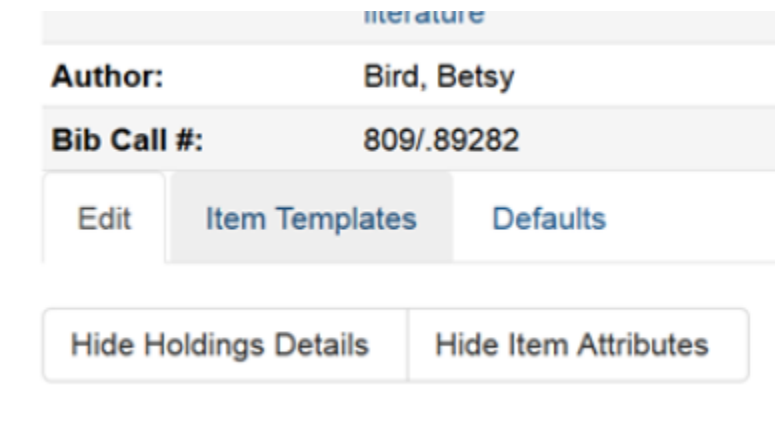From the Actions menu, either from the drop down menu or right clicking, choose Add – Call numbers and Items:
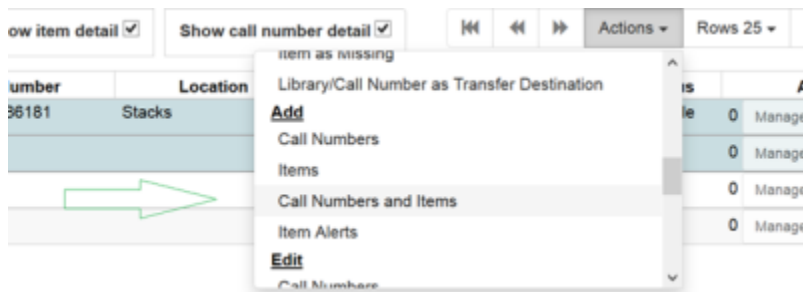
The Holdings editor will open.

The Holdings Editor

In the Holdings editors, you can add volumes and copies, add just copies, or edit copies and/or volumes. In this section, the terms item and Item are used synonymously.

Setting default view for the Item editor

You can set a personalized view for the holdings editor that defines the attributes available for edit and how the editor displays. Unchecking an attribute leaves it displayed in the holdings editor; but it is grayed out and cannot be edited. Most attributes should be checked so that they are available to edit.

At any point, you can change your defaults. You may need to re-display the browser page to see the changes in the Item editor.

Holdings Detail defaults

Always display Holdings Detail pane: Checking this will display the call number editor when you select Actions – Edit – Items.

Allow Call Number attributes in Item Templates: Checking this provides the ability to set some call number attributes in an item template. These include classification type (none, Generic, Dewey Decimal Classification (DDC), or Library of Congress Classification (LCC)) and any prefixes or subfixes you may use that would be compatible with the item template. Most PINES libraries have not implemented functionality for prefixes or subfixes separated from the basic call number.

Creation Defaults

Use Library Setting: defaults to the setting in Administration – Library settings. This first menu is to set your classification scheme. The default set for PINES under Administration – Library Settings – Cataloging – Default Classification Scheme is Dewey (Dewey Decimal Classification).

- Generic (no specified classification scheme)
- Dewey (DDC: (Dewey Decimal Classification))
- Library of Congress (LCC: Library of Congress Classification scheme)

Use Default Prefix: For libraries with call number prefixes defined. Can choose a specific prefix to apply to all call numbers.

Use Default Suffix: For libraries with call number suffixes defined. Can choose a specific suffix to apply to all call numbers

Auto-generate Barcodes: PINES has not implemented, leave unchecked.

Use checkdigit: Checking allows for verification of the item barcode and should not allow an improperly formatted barcode to be entered. If your library does not use Codabar formatting, you should leave the box unchecked.

Print Item Labels on Save & Exit: If you wish to print spine or spine/pocket labels one at a time to accommodate editing for format and spacing, check the box. If you batch print spine or spine/pocket labels, leave unchecked.

Display defaults for Working Item tab

Item display: Checking the elements under the Item display sets what appears under the Working Item tab:

Activated: the date the Item was set to activate. Activation date differs from the create date. An item is set to active when the status is set to Available, Checked out, ILL, On holds shelf, On Reservation shelf, Reserves, or Reshelving. In PINES, the date an item is activated starts the age protection count.

Created: the date the item was added to the PINES database.

Call Number: the call number associated with the item.

Circulation

This section sets up how the attributes controlling circulation of an item display. Items unchecked are not available for editing in the Item editor. PINES catalogers should leave the majority checked so that they are editable.

- *Circulate?* Yes/true or no/false. Should be checked
- *Circulation Library:* Should be checked
- *Circulation Modifier:* Should be checked
- *Circulate as Type:* Checking is a local decision. This attribute should only be set if a library does not use circulation modifiers to define basic circulation policy. However, some PINES libraries do assign this even with circulation modifiers. Be aware that checking a different Type than the circulation modifier covers can change the circulation rules that govern the item.

- *Loan Duration:* Should be checked
- *Fine Level:* Should be checked
- *Shelving Location:* Should be checked
- *Holdable?:* Should be checked
- *Age-based Hold Protection:* Should be checked

Miscellaneous

- *Deposit?* Should be checked
- *OPAC Visible?* Should be checked
- *Price:* Should be checked
- *Quality:* PINES has not implemented. How an items quality is defined effects holds. Can be unchecked.
- *Reference?* Should be checked
- *Acquisition Cost:* Can be unchecked. This field is populated with the invoiced cost of the originating acquisition and will be empty if the originating acquisition is not connected to an invoice. Only valid for libraries using the acquisitions interface.
- *Add/Edit Item Notes:* Should be checked, unless your library does not add Item notes.
- *Item Notes are Public:* Should be checked, unless your library only adds public notes.

Statistical Categories

- *Default Filter Library*: Should be checked, unless your library does not add statistical categories (statcats)
- *Edit Statistical Data*: Should be checked, unless your library does not add statistical categories (statcats)
- *Add/Edit Item Tags*: PINES has not yet implemented, but may after we have evaluated and tested the functionality. Can be checked or unchecked.

Display defaults for Completed Items tab

This section determines which attributes display in the Completed Items Tab:

Choose those attributes you need to see on a regular basis in Completed Items.

Item templates tab

You can make changes to your templates or add new ones here. See Item templates for more information.

Edit tab: Holdings Editor

Once your defaults are set, no need to set them again unless you want to change something. When ready, return to the Holdings Editor by clicking on the edit tab.

If you are adding multiple volumes, set the counter for call numbers. (If you add too many, you can remove them by click on the X. Be sure to reset the counter). If you are adding multiple volumes, either across multiple libraries, or for a multivolume set, you can Batch Apply the call number and any prefix or

suffix. Most PINES libraries do not use Prefixes or suffixes for call numbers. If you would like to implement them, please open a helpdesk ticket for more information. Click the Apply button when you are ready to add the call number to all volumes.

If you are adding multiple copies for call numbers, adjust the counter. If your library uses them, you can add Item numbers here as well. Scan in your barcodes. Assign parts to print titles as needed (See Monographic and Serial Parts for more detailed instructions).

> ⚠️ You must add call numbers and barcodes to all volumes to be able to save and add holdings.

The Item Editor

You will edit attributes in the item editor by applying templates and manually editing attributes such as price and deposit amounts (if needed). You can also add item notes and alert messages. See Item alert messages and notes for more detailed instructions.

Applying templates

When creating items, some values in the item editor are set to default visibly and not visibly. All default values apply (deposit is no longer set by default). Green highlighting in the Item Editor indicates some default values and that an attribute has been edited, either manually or by application of a template.

Default values in the Item editor are:

- Circulate?: Yes
- Status: In process
- Circulation library (if adding volumes to one library, the circulation library should be set from the owning library, otherwise a drop down menu will display with the circulation libraries and the number of call numbers (volumes) for each)
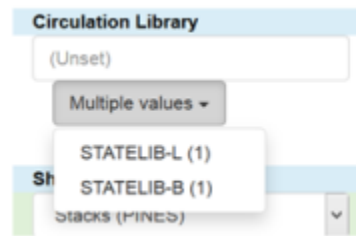
- Shelving location (default is Stacks (PINES), if your template does not set the location , you will need to pick it here)
- Status: In Process
- Reference?: No
- OPAC Visible?: Yes
- Holdable?: Yes
- Quality: Good (PINES has not implemented)
- Fine level: Normal
- Duration: Normal

Pick the appropriate template from the drop down menu and click Apply.

Make any other edits, such as price, as needed. You can either click on Save & Exit to save your work and close the holdings editor, redisplaying Holdings view with your new holdings, or click Store Selected, to verify your work and make additional edits as needed.

If the Item editor does not close when you click Save & Edit, a critical attribute such as a barcode or call number is missing. Check your work, make corrections, and try again.