

# Inventory: Holdings Records

Holdings records are where the call number and permanent location, along with other holdings-level information (such as holdings statements and notes) are stored.

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## Guide to local field usage in holdings records (pdf)

## Create a New Holdings Record

Preconditions: Instance Record exists in Inventory

### Steps

1. Navigate to the desired Instance record in Inventory; the selected record will be displayed in the right pane.
2. Select "Add holdings".
3. Fill in required and other relevant fields
  - a. Required by system: Permanent location (*Location* section).
  - b. Required by CUL: Holdings type (*Administrative data* section) and Holdings statement (*Holdings details* section) when applicable.
  - c. Boxes with arrows have drop-down menus; these can be navigated by scrolling or searched by typing.
4. Select "Save and close" in the lower right.

### Expected Result:

Summary of Holdings will appear along with the Instance data in the right pane.

The screenshot shows the 'Instance record New test record, title : FOLIO ve...' interface. The 'Add holdings' button is highlighted. Below it, the 'Administrative data' section is visible, showing 'Record last updated: 2/8/2021 9:03 PM'. The 'Location' dropdown menu is open, showing options like 'Interlibrary Loan (Olin)', 'OCLC Microforms (oclc, Olin)', 'OCLC Reference (oclc, Olin)', 'Olin (Annex)', and 'Olin A/V'. The 'Temporary' dropdown menu is also open, showing 'Location look-up'.

## Edit an Existing Holdings Record

Preconditions: a Holdings record has already been created

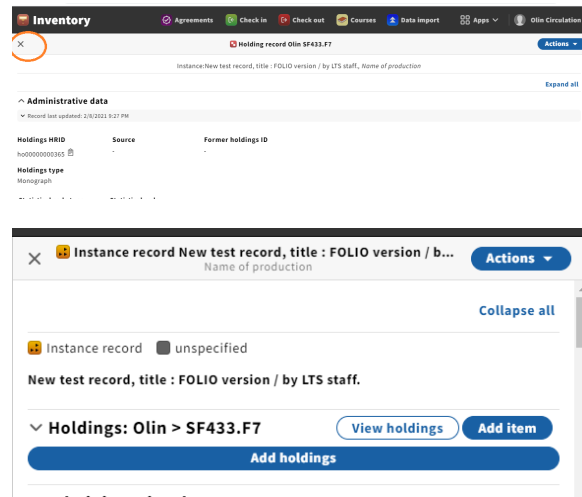
### Steps

1. Navigate to the Instance record and select "View holdings".
2. From the "Actions" menu in the upper right select "Edit".
3. Make desired edits.
4. Select "Save and close" in lower right.
5. Close the Holdings record by clicking the "X" in the upper left.

### Expected Results:

The screenshot shows the 'Instance record New test record, title : FOLIO version / by LTS staff, Name of production' interface. The 'Actions' menu is open, showing options like 'Edit', 'Duplicate', and 'Delete'. The 'Administrative data' section is visible, showing 'Record last updated: 2/8/2021 9:03 PM'. The 'Holdings' table is also visible, showing columns for 'Holdings HRID', 'Source', 'Former holdings ID', 'Holdings type', and 'Statistical code type'.

Instance displays in right pane. Updates to holdings display here only if they are part of the summary information (such as location, call number).



## Delete a Holdings Record

Preconditions: No items are associated with the Holdings record to be deleted and the Holdings record has been suppressed

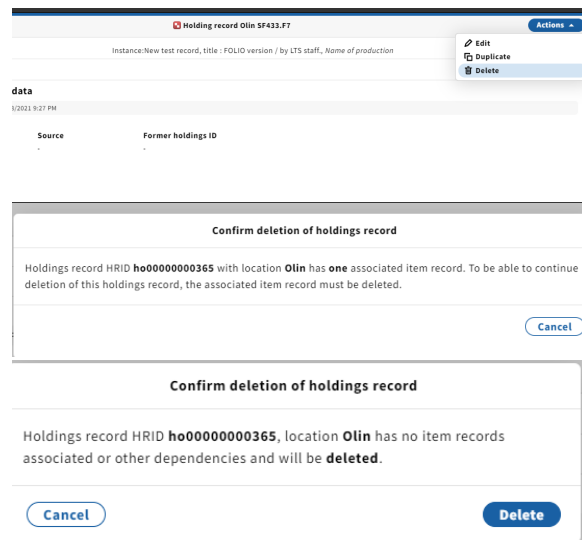
***Holdings records must first be suppressed before they are deleted. (This ensures the change occurs correctly in the public catalog.) Before following the steps below, suppress the holdings, and either wait a minute or two or open the record in the public catalog (you can use the instance hrid to pull it up easily) to verify that the holdings record suppression has occurred.***

### Steps

1. Navigate to the Instance record and select "View holdings".
2. In the "Actions" menu in the upper right, select "Delete".
3. A confirmation message will display; the record will not delete if there are associated items.

### Expected Results:

If no items were associated the Holdings record has been deleted.



# Move (Relink) a Holdings Record to a Different Instance

## Steps

1. Navigate to the Instance record for the Holdings record you wish to move.
2. In the "Actions" menu in the upper right, select "Move holdings / items to another instance"
3. You will be prompted to search for the Instance record you want to move the Holdings to. The search menu has the same options as the regular Inventory search. (For example, you can search by hrid or by barcode.)
4. Select the Instance.
5. Both records will display side-by-side.
6. Select the holdings record(s) by checking the box just below the Holdings location and call number display. Do not select the "Select holdings" box—this is for exporting holdings.
7. Click on "Move to" and select the title of the Instance you wish to move the Holdings to.
8. A confirmation will show for the action you are about to take. Select "Continue."
9. A green "toast" will appear briefly if the move has been successful.
10. Close either (or both) records to return to the regular display.

Note: You can initiate this process from either record, that is, the record you wish to move Holdings *from* or the record you wish to move Holdings *to*. Once the records are displayed side by side, you can move both Holdings and Items in either direction.

## Expected results:

The Holdings record and any associated item(s) will display on the record they have been moved to; they will no longer display with the record they were moved from.

If you need to mark an instance for deletion, follow the steps outlined in [Inventory: Deleting Instance Records](#)

