

DYNIX Classic Holding Additions EUREKA

This document is a collection of screen images that will walk you through adding a holding (item) for your library's material.

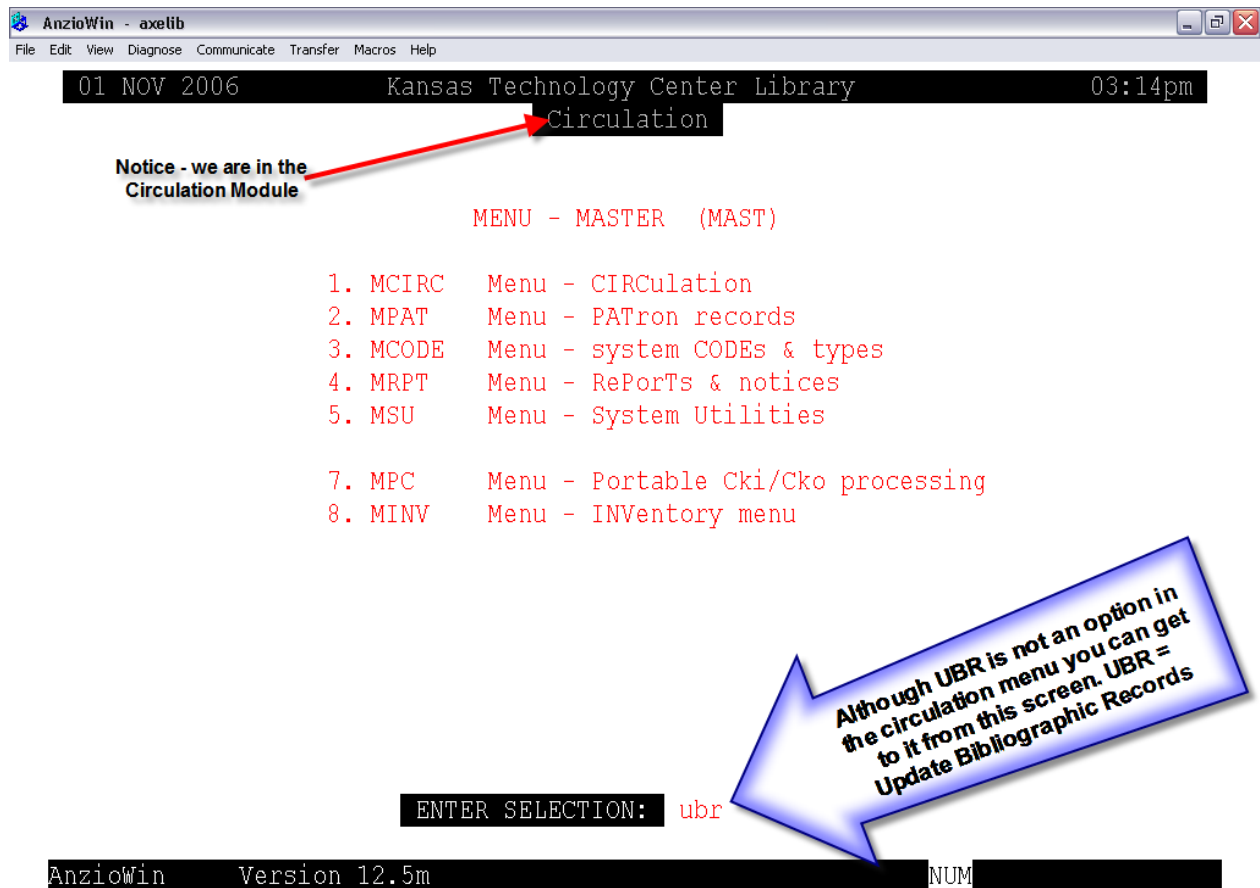


Figure 1: Accessing UBR via Circulation

The first step is to ascertain what you are linking: if you are working on, say, a cart of non-fiction material for the adult collection, the first step is to identify default codes which might be used for this cart of material. This allows you to set up session defaults that will match the majority of the material in hand.

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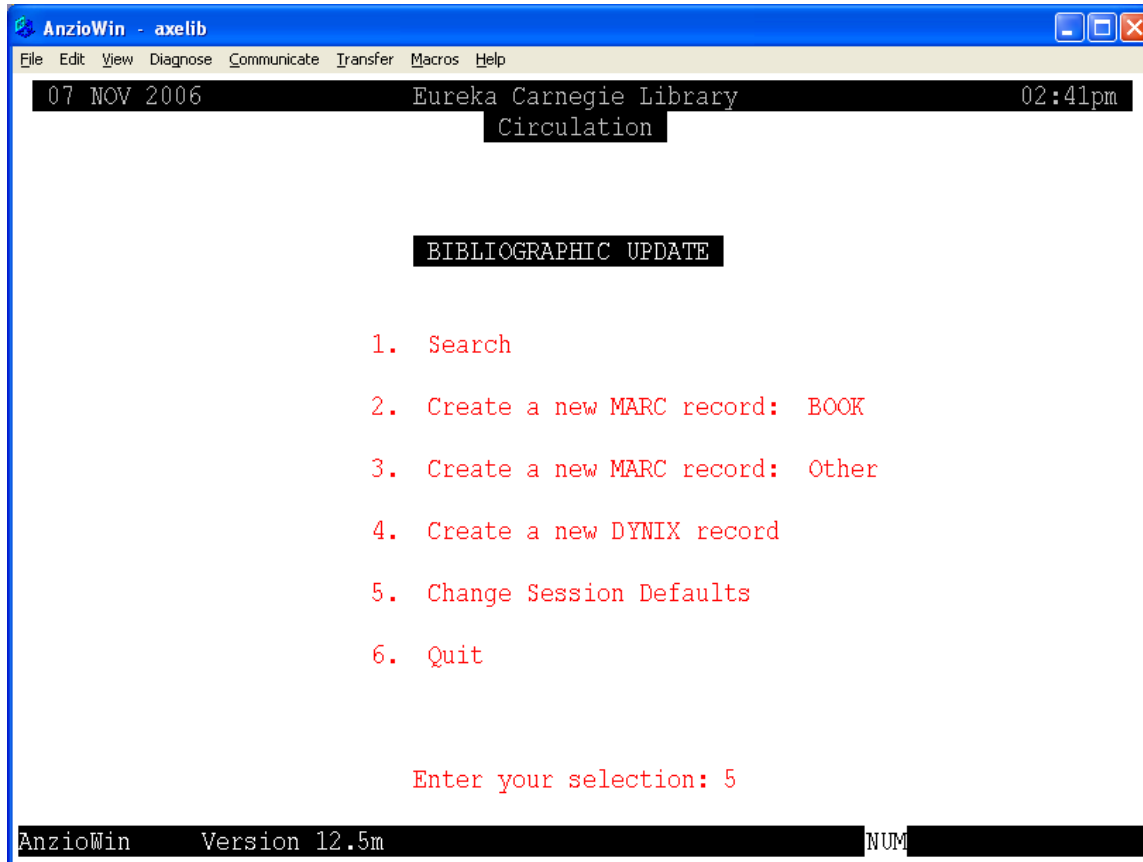


Figure 2. Setting Session Defaults

When starting a session in UBR, particularly if you have a quantity of items that belong to the same collection, you should start with identifying your session defaults, #5. Once those are set up, use Option #1, searching, to identify records on which to pin your item barcode/holding.

Notice that there are also several other options, which we will mention here only in passing. Options #2 and #3 are used when creating a MARC record from scratch. We rarely use these options since most of our records are downloaded from other resources. Option #4 is used to create a pseudo-MARC (or non-marc), again something we rarely do.

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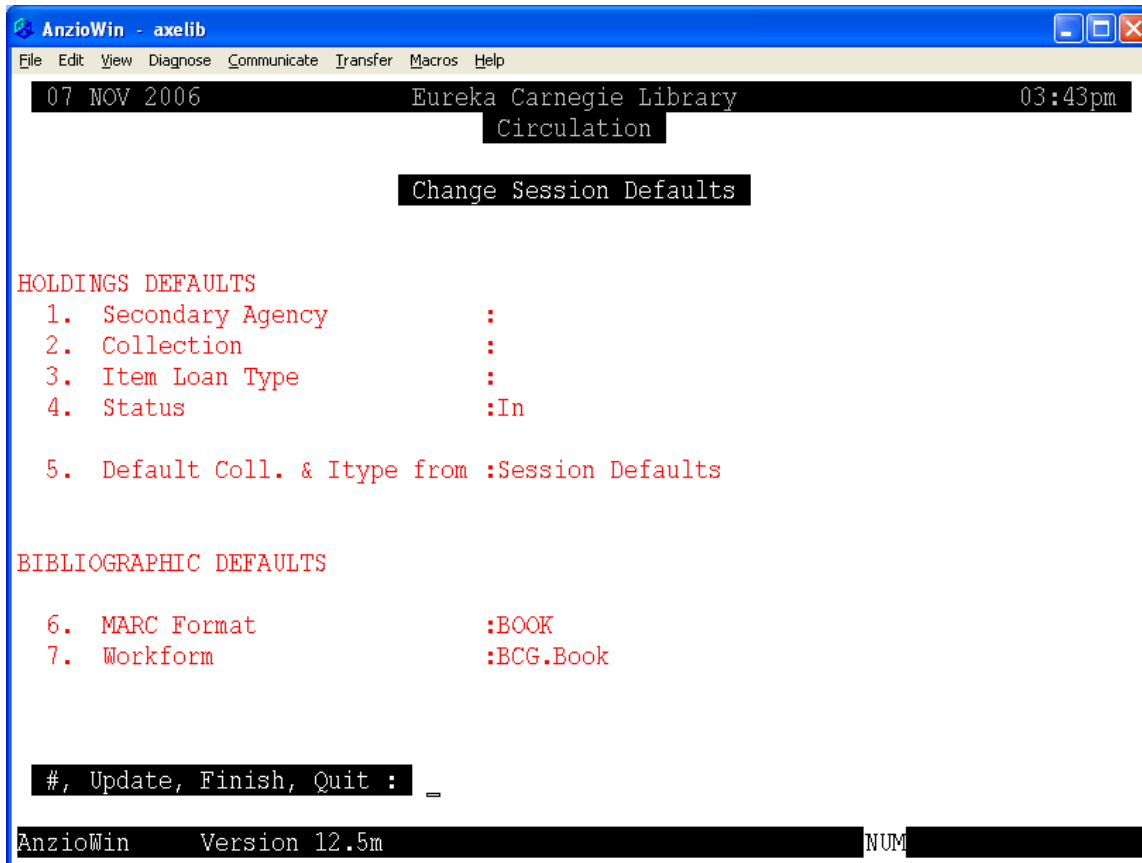


Figure 3. Changing Session Defaults.

Defaults will include the following:

1. Your agency code (EURE).
2. Collection code for this set of books. (Type “ee” if you’re not sure what they are to invoke the Codes Table.)
3. Item Loan Type code for this set of books. (Type “ee” if you’re not sure what they are to invoke the Codes Table.)
4. Status - we will change this to IN for now; in real time, when you are doing specific processing in a proper workflow, it should be left to processing or in cataloging until you are ready to shelve it in circ.
5. Default Coll/Itype Will Come From: Session Defaults. If the default comes up as First Holdings Displayed, change it by typing “S” for Session Defaults.

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6. MARC Format: Records here will be BOOK format. If you have media, sound, manuscript, periodicals or other MARC formats, change 6 as follows:

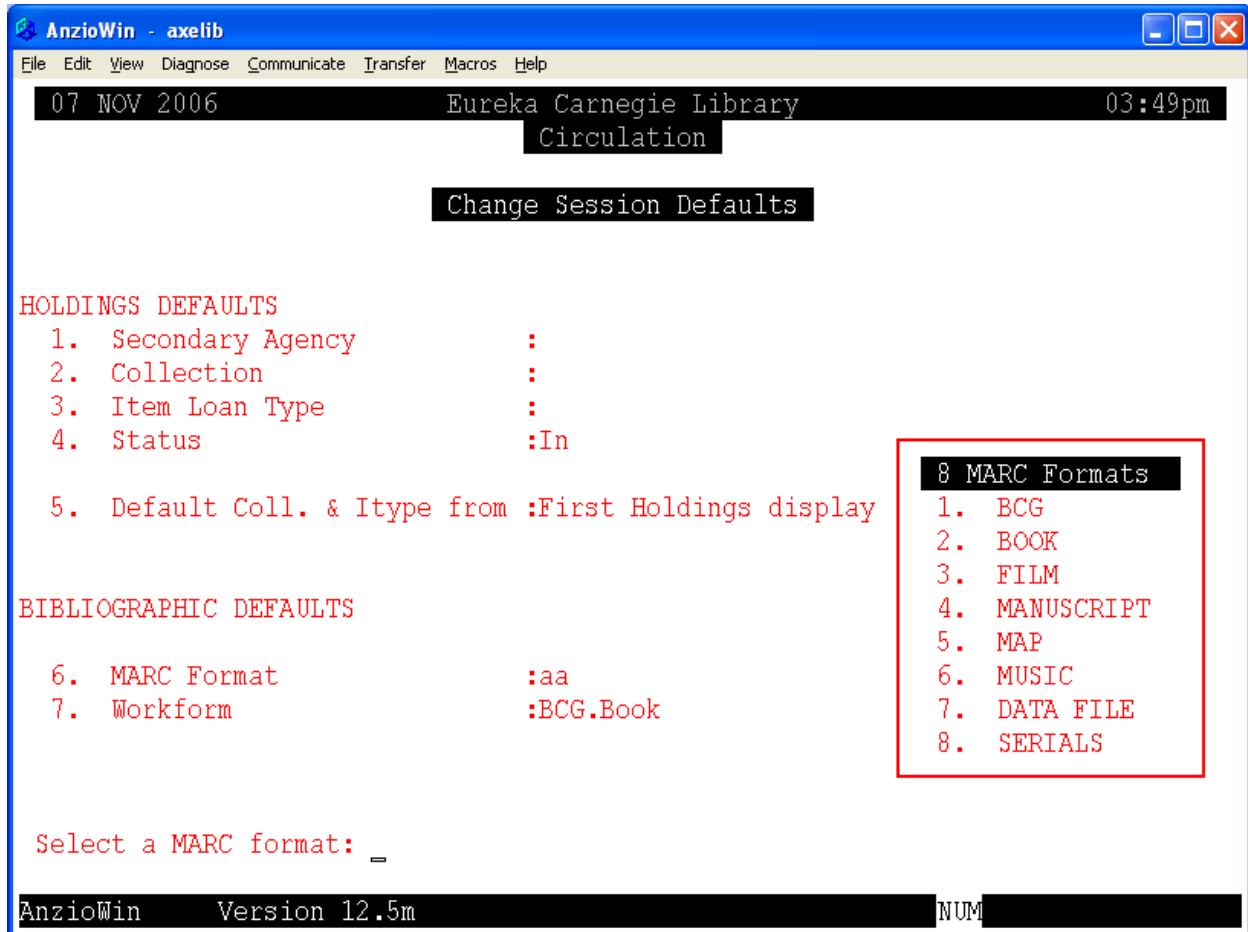


Figure 4. MARC Formats for Bibliographic Defaults.

Note: ignore for now the format BCG which is a local format type that we use as a template here at PSU. In order to display the choices, we have typed "aa" in the Option #6 for MARC format, to invoke the popup format codes window.

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Next, assign the correct Secondary Agency. Type 1, followed by the code:

EURE = Eureka
IOLA = Iola/SEK
COFF = Coffeyville

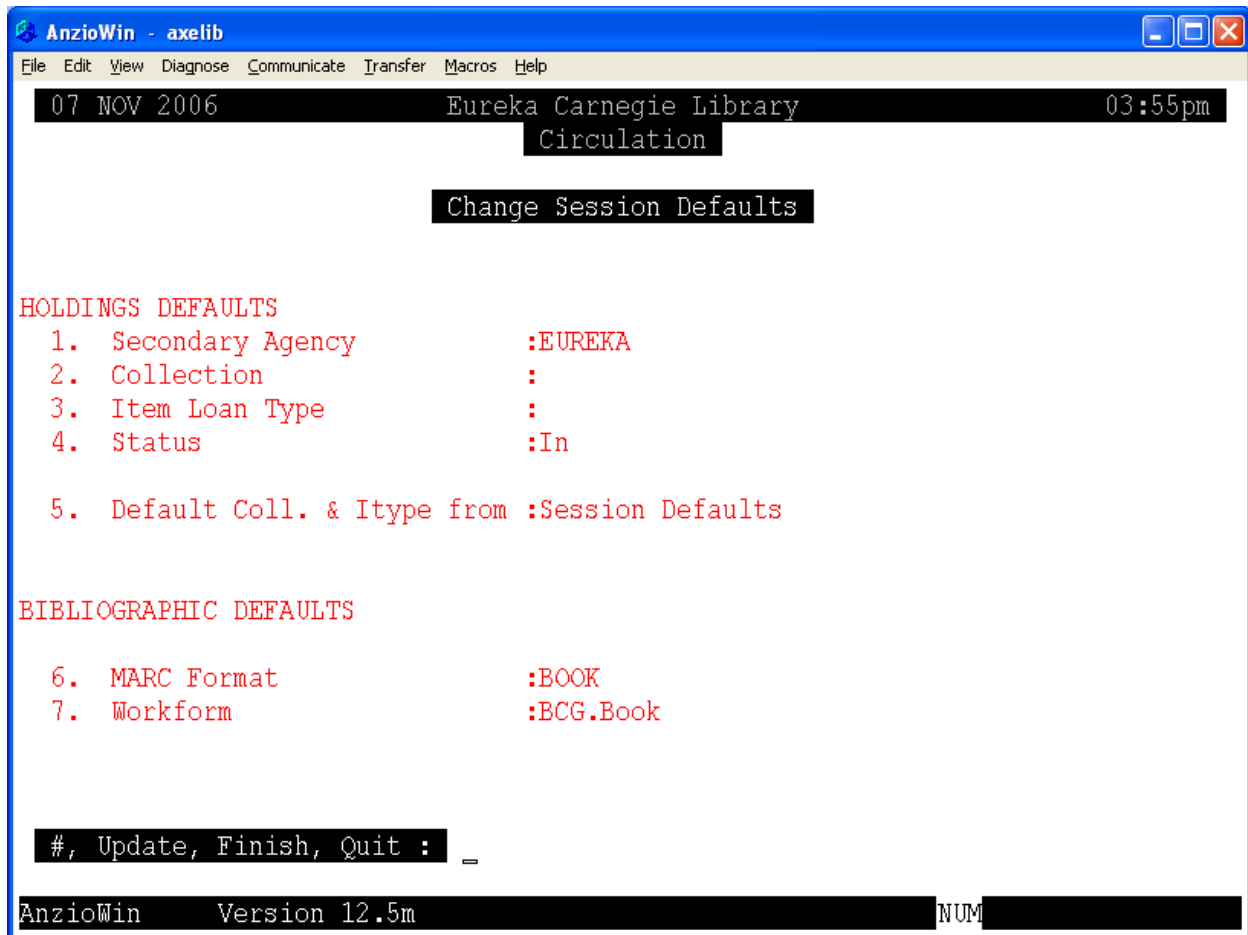


Figure 5. Assigning the Secondary Agency.

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Next, type 2 and “ee” to invoke the codes for the predominant collection code on your cart.

```
AnzioWin - axelib
File Edit View Diagnose Communicate Transfer Macros Help
07 NOV 2006 Eureka Carnegie Library 04:01pm
Circulation
Choose one of the following valid codes for this field Total = 483
Data entered = EE
CODES DESCRIPTIONS
-----
226. EAM Eureka Adult Mystery
227. EAMCD Eureka Adult Music CD
228. EANF Eureka Adult Non-Fiction
229. EANFLP Eureka Adult Non-Fic LP
230. EAP Eureka Adult Cur Periodicals
231. EAPO Eureka Adult Per Backissues
232. EAR Eureka Adult Reference
233. EAVE Eureka AV Equipment
234. EAW Eureka Adult Westerns
235. EC Eureka Computers
236. ED Eureka DVD Collecction
237. EDP Eureka Discovery Packs
238. EET Eureka Educational Toys
239. EILL Eureka ILL
240. EJACD Eureka Juvenile Audiobook CD
#, Accept data entered, Quit, Up, <enter> : _
AnzioWin Version 12.5m NUM
```

Figure 6. Invoking the Codes Table.

Select the number of the code that you want. If you know the code by heart, just type it in, confirming that the display is what you think you’ve selected. Note: Numbering changes frequently as new codes are added and old ones are removed. Don’t memorize numbers, memorize codes. Codes listed for this project on the classic Dynix system will be the same as on the new Horizon system installed later.

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```
AnzioWin - axelib
File Edit View Diagnose Communicate Transfer Macros Help
07 NOV 2006 Eureka Carnegie Library 04:04pm
Circulation
Change Session Defaults

HOLDINGS DEFAULTS
1. Secondary Agency :EUREKA
2. Collection :Eureka Adult Non-Fiction
3. Item Loan Type :
4. Status :In
5. Default Coll. & Itype from :Session Defaults

BIBLIOGRAPHIC DEFAULTS
6. MARC Format :BOOK
7. Workform :BCG.Book

#, Update, Finish, Quit :
AnzioWin Version 12.5m NUM
```

Figure 7. Session Defaults Populated with Collection Code.

If Adult Non-Fiction was what you wanted, success!

Continue on, Select 3 for the Item Loan Type, and again, type “ee” to invoke the codes table.

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Figure 8. Selecting the Item Type.

Again, choose the number from the table, or type the code directly at the session defaults menu.

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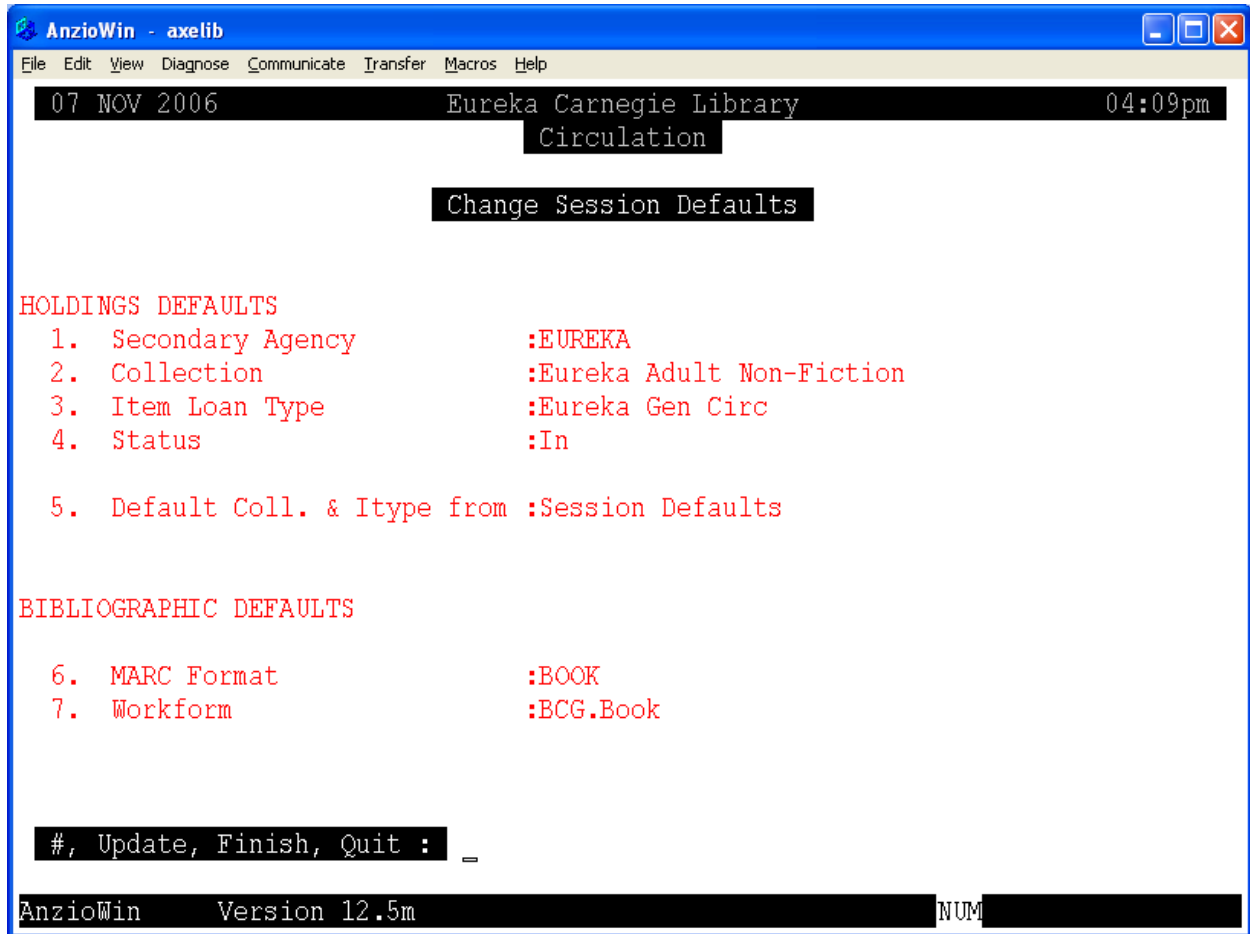


Figure 9. Setting the Default Item Loan Type.

If the fields are complete, type “F” to Finish.

Session defaults are sticky. They will stay with you, allegedly, on this screen, until you or another staff member change them.

If you’ve made an error or want to change a code, simply type the number to access the field, then type in the code you want to change it to.

After your session defaults are set up ONCE for the cart you are working on, now you are ready to search and link.

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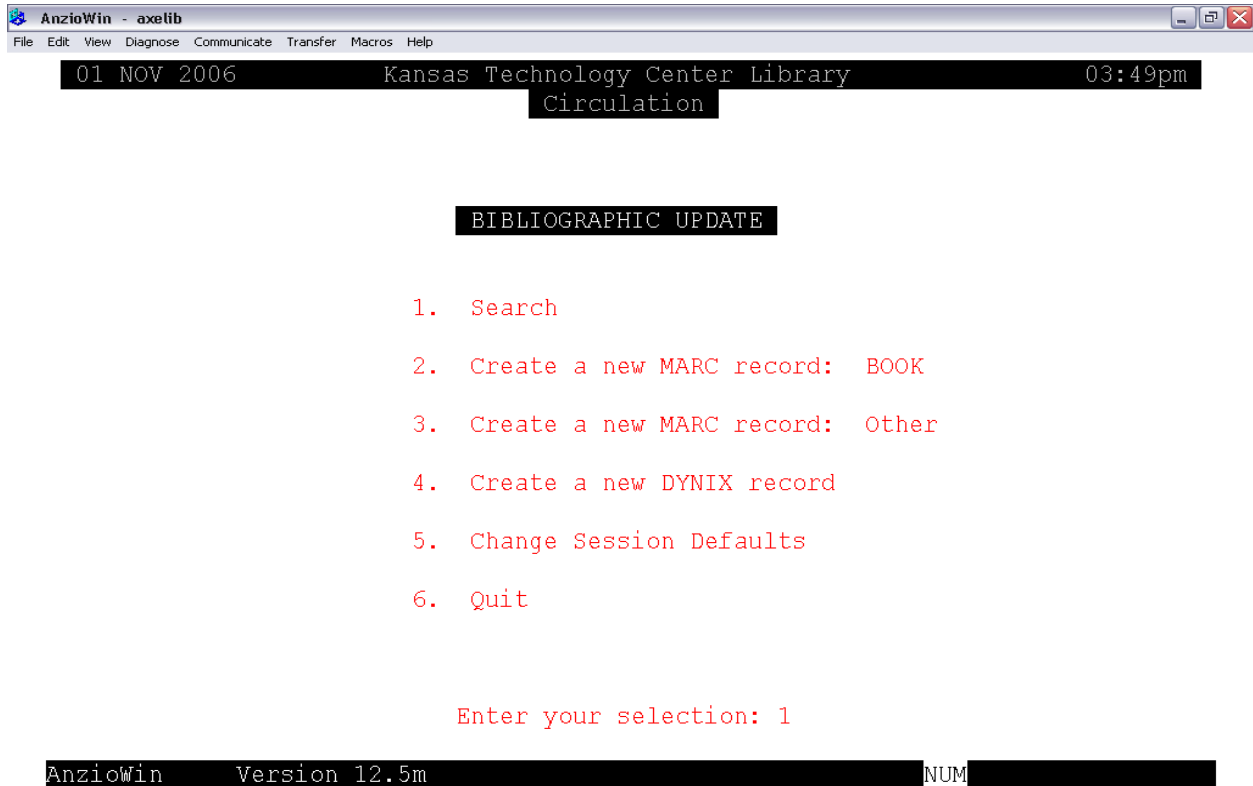


Figure 10: Bibliographic Update (UBR) via Circulation

Select option #1, Search.

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Figure 11: UBR – Highlighted Indexes.

The system will display many, many indexes. The ones highlighted in yellow will be the ones you will most frequently use for this project. You may use others. On your UBR menu, you will have an index called SEK Call Index. Use that one over other call number indexes as it will be unique to you. (Use someone else's if you want to steal a DDC number :_)

The next collection of screen images will guide you through the holding addition process.

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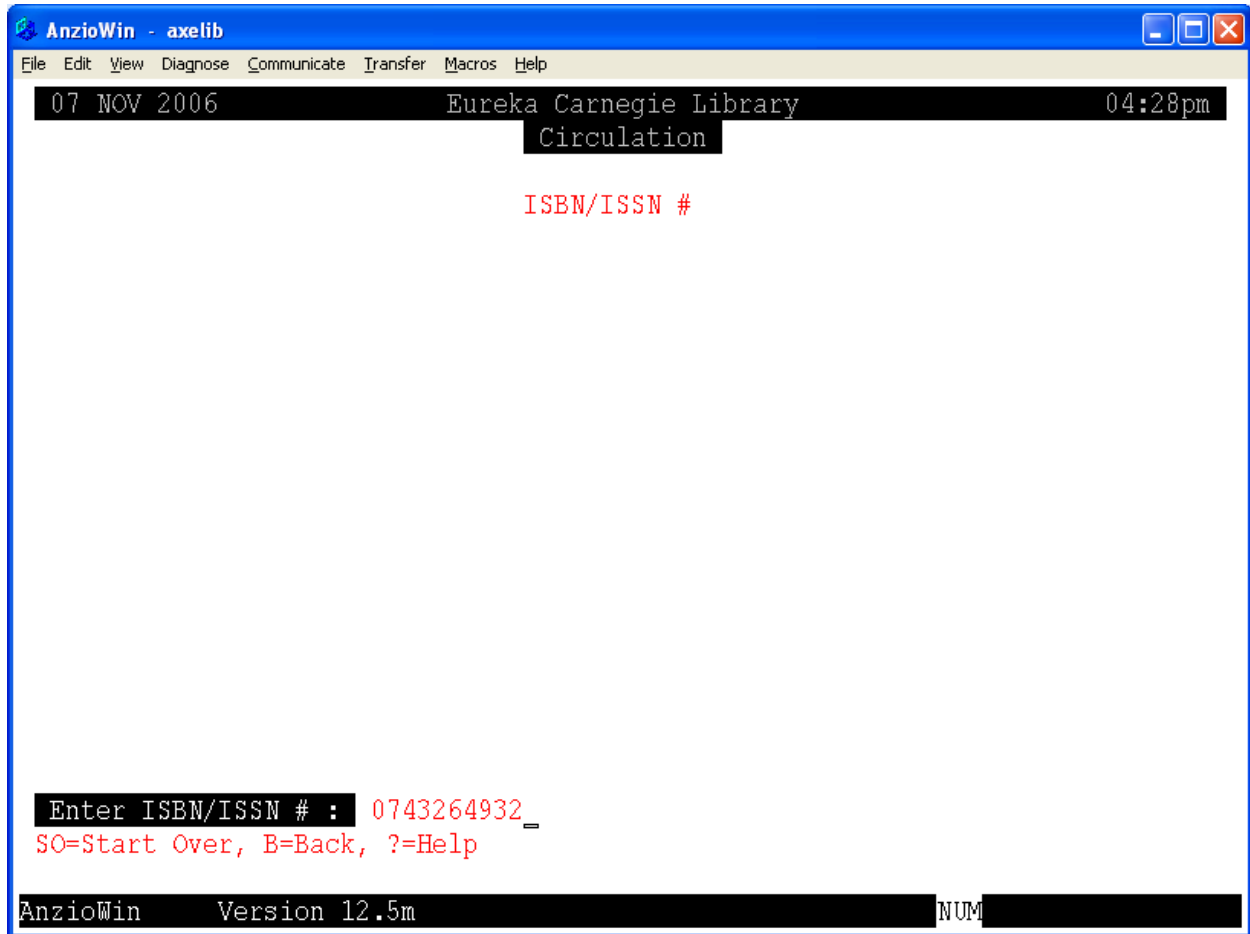


Figure 12: Searching by ISBN Number in UBR.

Note here: use your leading zeros, if they are part of the ISBN number. You may omit dashes. Add the X if an X is present.

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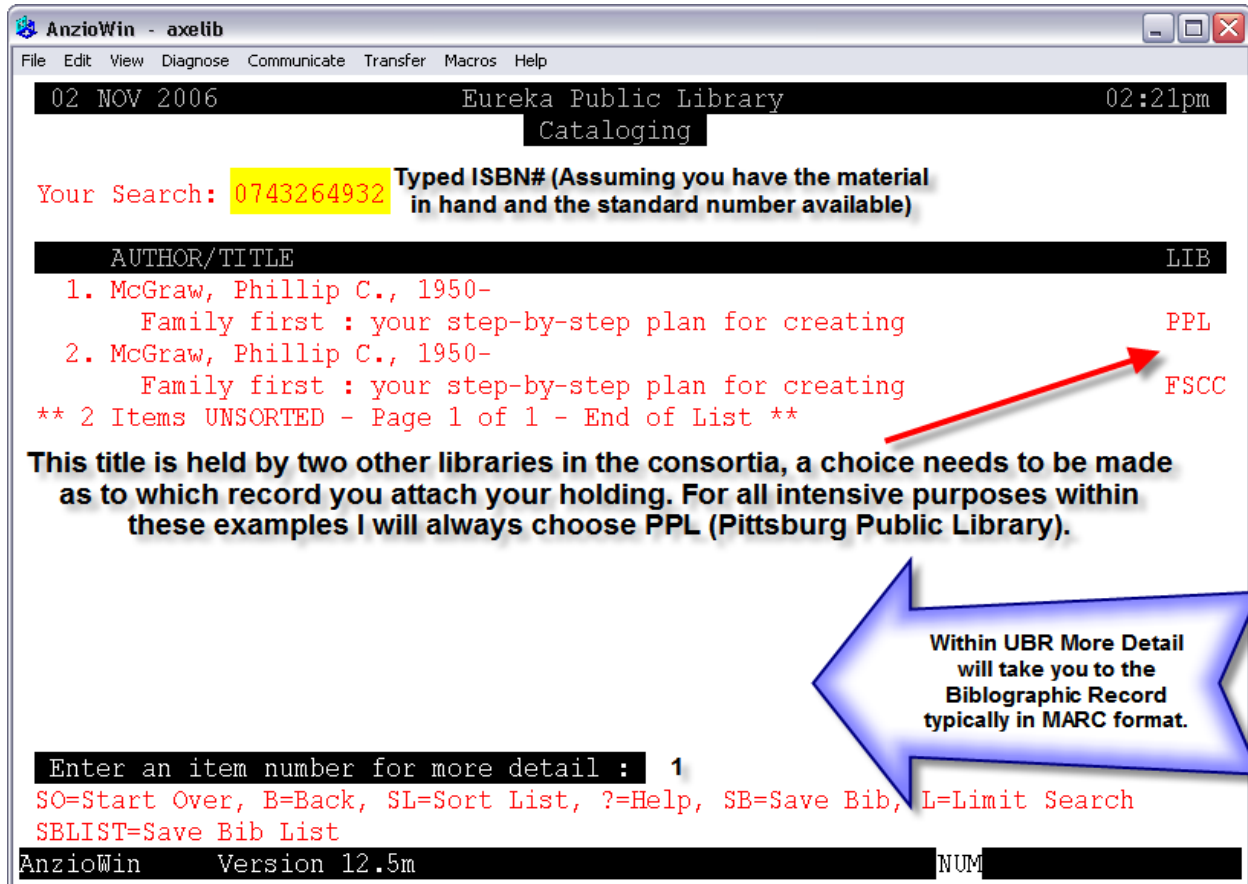


Figure 13: Eureka! ISBN is Found! (Sorry, Bad Pun!)

A brief discussion of what to do if it is NOT found:

- use LCCN index.
- search title, author or other indexes.
- always ensure that even if the title or author matches that the publication date, place, publisher, and size match. Check with Linda at SEK or Morgan at PSU for additional exacting details!
- If no hits, mark the book and go on. This is where SEK policy and procedure will kick in, in order to identify a MARC record for the book and, at a later time, load it.

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```
AnzioWin - axelib
File Edit View Diagnose Communicate Transfer Macros Help
02 NOV 2006 Eureka Public Library 03:25pm
Cataloging
DYNIX #: 966440
LEADER 00557cam 2200096 a 4500
005 20041001144738.0
008 040719s2004 nyu b 000 0 eng d
020 0743264932 Searched for ISBN and 020 Tag Match
049 00 LQ6
050 14 HQ536$b.M43 2004
082 04 306.85/0973$222
092 306.85$bMcG
100 1 McGraw, Phillip C.,$d1950-
245 10 Family first :$byour step-by-step plan for creating a phenomenal
family /$cPhil McGraw.
260 New York, N.Y. :$bFree Press,$cc2004.
300 xv, 286 p. ;$c24 cm.
504 Includes bibliographical references (p. 279-286).
650 0 Family$zUnited States.
650 0 Family psychotherapy.
- - - - More on Next Screen - - - -
Simply type S for Select
Press <enter> to see next screen : s_
SO=Start Over, B=Back, M=nonMarc, S=Select, C=Copy status, ?=Help
<enter>=Next Screen
AnzioWin Version 12.5m NUM
```

Figure 14: Select Appropriate Record.

If this is the record you want to attach holdings to, type “s” for select, or follow other options on the bottom two lines of suggested menu movements.

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The screenshot shows the AnzioWin application window with the following content:

MARC PROCESSING

BIB KEY: 966440 FORMAT: BK

1. +LD 00506cam 2200088 a 4500
2. 005 20041001144738.0
3. 008 040719s2004 nyu b 000 0 eng d
4. 020 a0743264932 ✓
5. 049 00 aLQ6
6. 050 14 aHQ536\$b.M43 2004
7. 082 04 a306.85/0973\$222
8. 092 a306.85\$bMcG
9. 100 1 aMcGraw, Phillip C.,\$d1950-
10. 245 10 aFamily first :\$byour step-by-step plan for creating a phenomenal family /\$cPhil McGraw.
11. 260 aNew York, N.Y. :\$bFree Press,\$cc2004.
12. 300 axv, 286 p. :\$c24 cm.
13. 504 aIncludes bibliographical references (p. 279-286).
14. 650 0 aFamily\$zUnited States.
15. 650 0 aFamily psychotherapy.
16. 935 a92904

After Selected Two Options appear

Type H for Holdings record

Bib record, Holdings record, <enter> _

AnzioWin Version 12.5m NUM

Figure 15: The “Record” Now Splits into Two Parts.

The Bibliographic Record (the MARC record) is the “Bib”; the “Holdings” are where the items and unique call numbers live.

There are two pieces critical to “claiming” the “territory” known as your record. One, is appending your holdings code to the 049 tag.

To do this: Select the “B”ib option.

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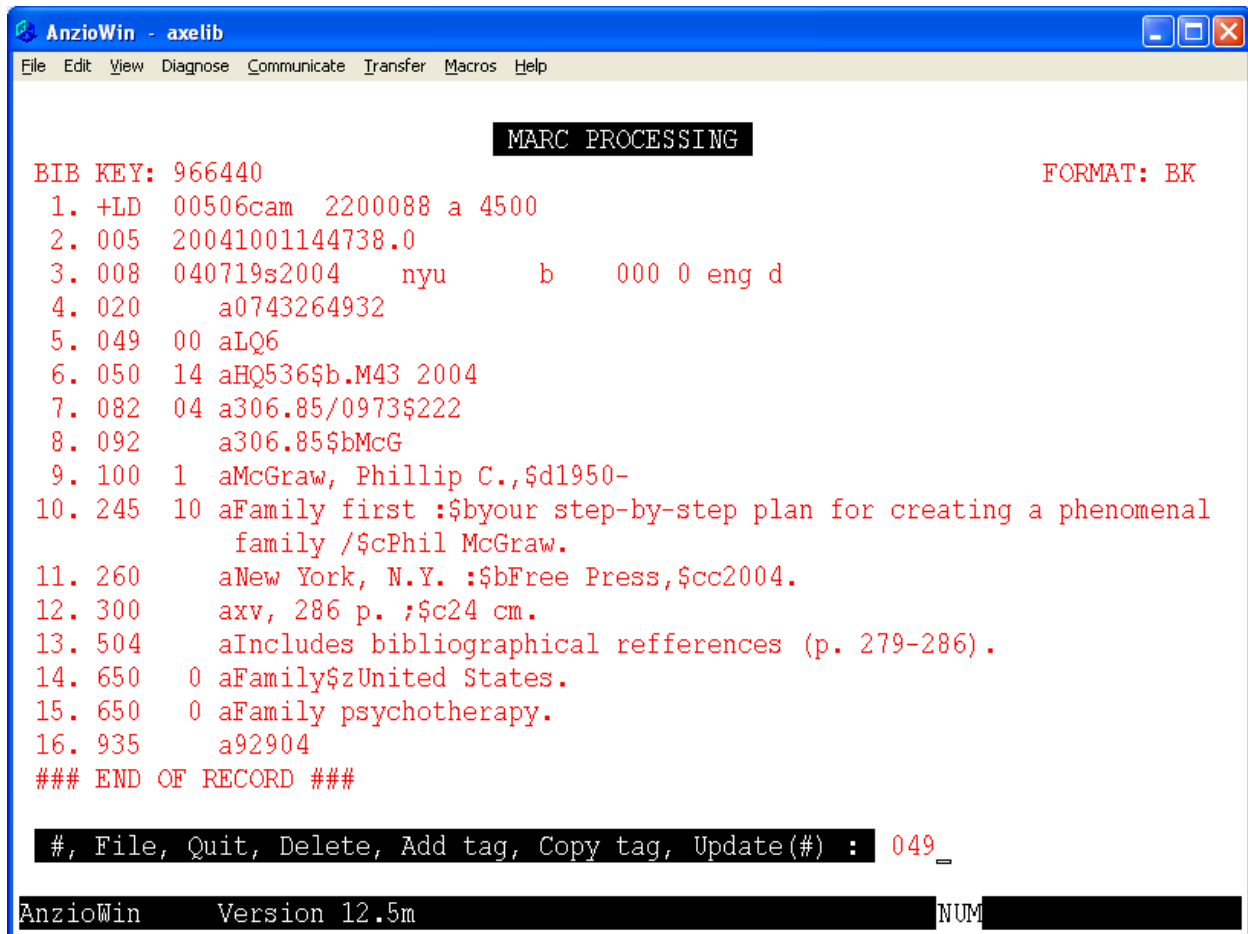
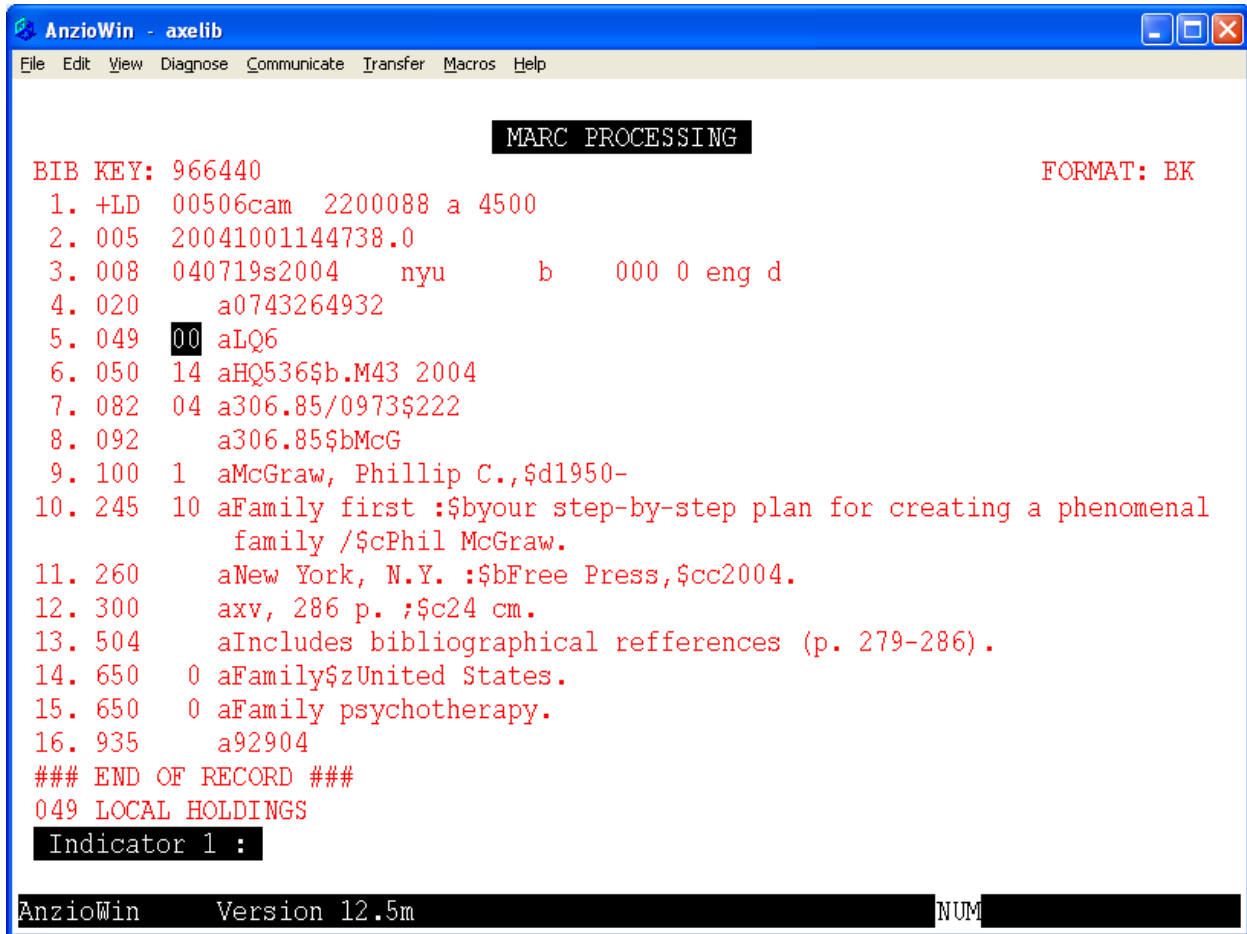


Figure 16. Selecting the Bib and 049 Tag for Editing.

Now type "049" and press <enter>.

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```

AnzioWin - axelib
File Edit View Diagnose Communicate Transfer Macros Help

MARC PROCESSING

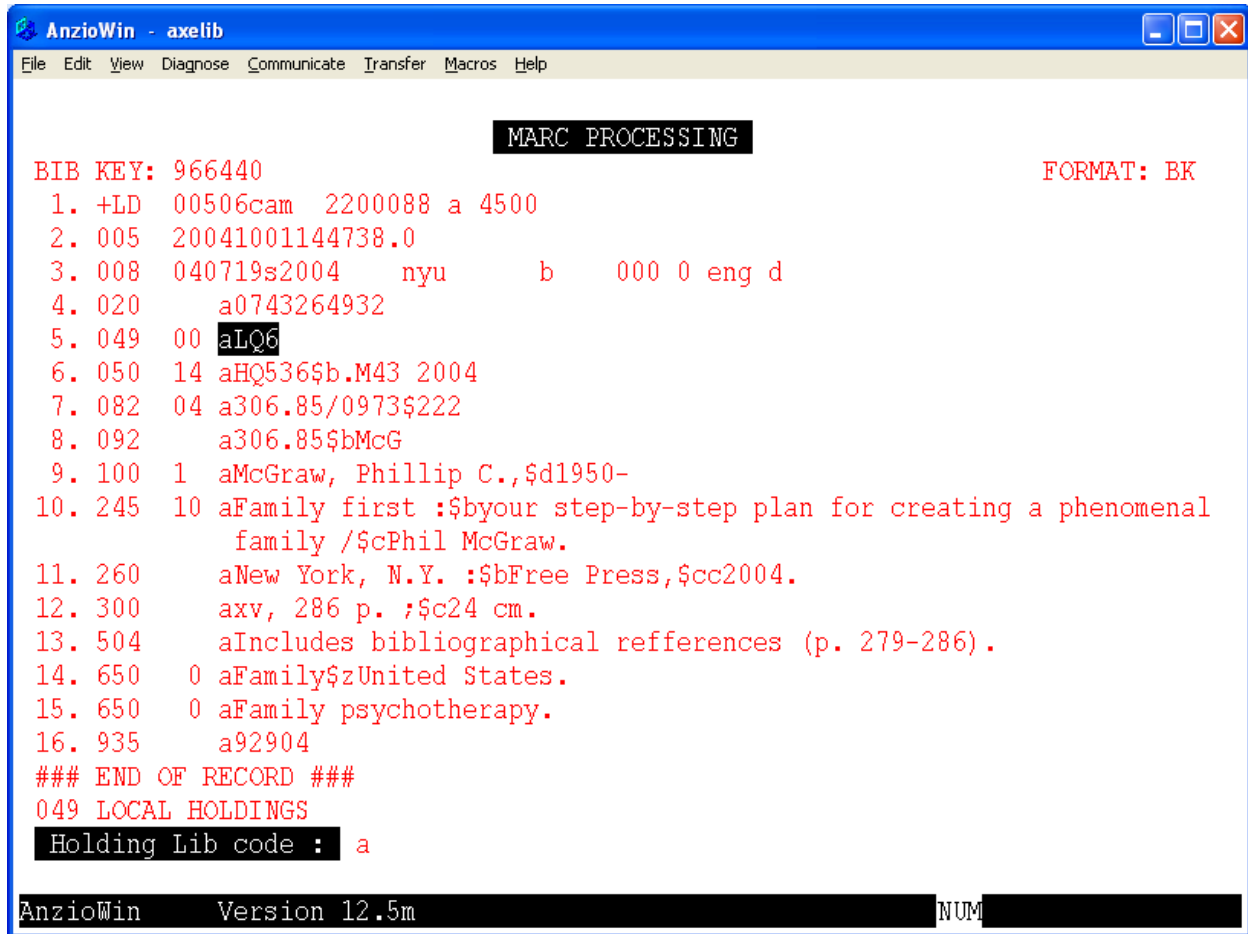
BIB KEY: 966440                                FORMAT: BK
1. +LD 00506cam 2200088 a 4500
2. 005 20041001144738.0
3. 008 040719s2004 nyu b 000 0 eng d
4. 020 a0743264932
5. 049 00 aLQ6
6. 050 14 aHQ536$b.M43 2004
7. 082 04 a306.85/0973$222
8. 092 a306.85$bMcG
9. 100 1 aMcGraw, Phillip C.,$d1950-
10. 245 10 aFamily first :$byour step-by-step plan for creating a phenomenal
    family /$cPhil McGraw.
11. 260 aNew York, N.Y. :$bFree Press,$cc2004.
12. 300 axv, 286 p. :$c24 cm.
13. 504 aIncludes bibliographical references (p. 279-286).
14. 650 0 aFamily$zUnited States.
15. 650 0 aFamily psychotherapy.
16. 935 a92904
### END OF RECORD ###
049 LOCAL HOLDINGS
Indicator 1 :

AnzioWin Version 12.5m NUM
```

Figure 17. Appending to the 049 Tag.

Notice that the record immediately takes you to the indicators, which are not used for the 049 tag. Press <enter> twice, and the focus will move to the subfield “a”.

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```

AnzioWin - axelib
File Edit View Diagnose Communicate Transfer Macros Help

MARC PROCESSING

BIB KEY: 966440                                FORMAT: BK
1. +LD 00506cam 2200088 a 4500
2. 005 20041001144738.0
3. 008 040719s2004 nyu b 000 0 eng d
4. 020 a0743264932
5. 049 00 aLQ6
6. 050 14 aHQ536$b.M43 2004
7. 082 04 a306.85/0973$222
8. 092 a306.85$bMcG
9. 100 1 aMcGraw, Phillip C.,$d1950-
10. 245 10 aFamily first :$byour step-by-step plan for creating a phenomenal
    family /$cPhil McGraw.
11. 260 aNew York, N.Y. :$bFree Press,$cc2004.
12. 300 axv, 286 p. ;$c24 cm.
13. 504 aIncludes bibliographical references (p. 279-286).
14. 650 0 aFamily$zUnited States.
15. 650 0 aFamily psychotherapy.
16. 935 a92904
### END OF RECORD ###
049 LOCAL HOLDINGS
Holding Lib code : a

AnzioWin Version 12.5m NUM
```

Figure 18. 049, Subfield a.

Notice now the focus has taken you to the subfield a of the 049. However, you want to leave the existing code in the record and append past it.

BIG NOTE:
Don't use arrow keys, and
keep your hand off your mouse!
You are now entering the
text-field-only
no-mouse
no-arrow-keys
zone!

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```
AnzioWin - axelib
File Edit View Diagnose Communicate Transfer Macros Help

MARC PROCESSING

BIB KEY: 966440                                FORMAT: BK
1. +LD 00510cam 2200088 a 4500
2. 005 20061107164548.0
3. 008 040719s2004 nyu b 000 0 eng d
4. 020 a0743264932
5. 049 00 aLQ6
6. 050 14 aHQ536$b.M43 2004
7. 082 04 a306.85/0973$222
8. 092 a306.85$bMcG
9. 100 1 aMcGraw, Phillip C.,$d1950-
10. 245 10 aFamily first :$byour step-by-step plan for creating a phenomenal
    family /$cPhil McGraw.
11. 260 aNew York, N.Y. :$bFree Press,$cc2004.
12. 300 axv, 286 p. ;$c24 cm.
13. 504 aIncludes bibliographical references (p. 279-286).
14. 650 0 aFamily$zUnited States.
15. 650 0 aFamily psychotherapy.
16. 935 a92904
### END OF RECORD ###
049 LOCAL HOLDINGS
Holding Lib code : a.a BZ9_

AnzioWin Version 12.5m NUM
```

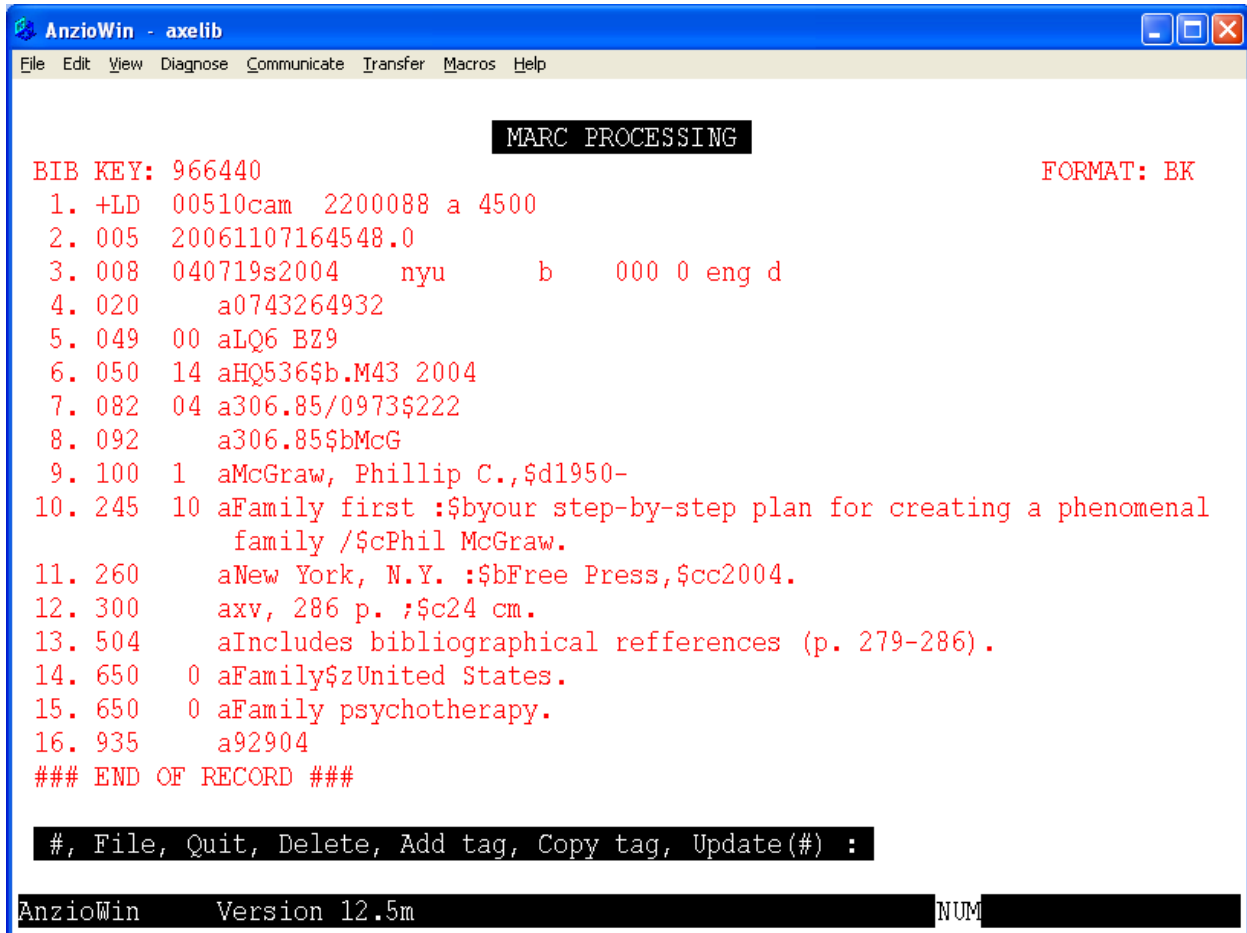
Figure 19. Adding the Local 049 Code.

Type “.a BZ9”, then press <enter>. (Note: don’t type BZ9 if you’re not at Eureka! Use your own 049 code, such as CD7, KC#, KSI, etc.

Press another <enter> to finish the 049 tag.

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Presto, magicfico, there are now two codes on the 049 tag!



```
AnzioWin - axelib
File Edit View Diagnose Communicate Transfer Macros Help

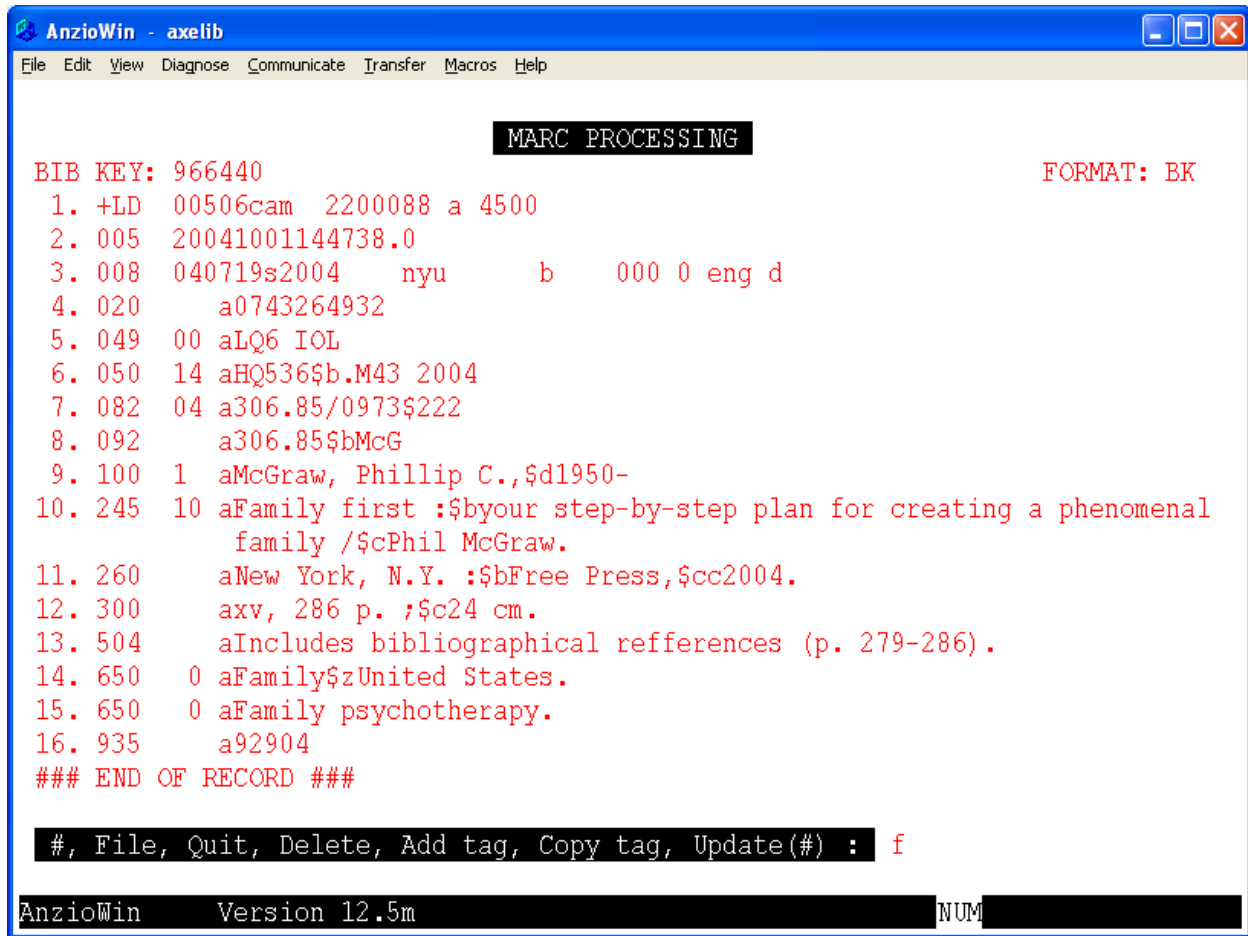
MARC PROCESSING

BIB KEY: 966440                                FORMAT: BK
1. +LD 00510cam 2200088 a 4500
2. 005 20061107164548.0
3. 008 040719s2004 nyu b 000 0 eng d
4. 020 a0743264932
5. 049 00 aLQ6 BZ9
6. 050 14 aHQ536$b.M43 2004
7. 082 04 a306.85/0973$222
8. 092 a306.85$bMcG
9. 100 1 aMcGraw, Phillip C.,$d1950-
10. 245 10 aFamily first :$byour step-by-step plan for creating a phenomenal
    family /$cPhil McGraw.
11. 260 aNew York, N.Y. :$bFree Press,$cc2004.
12. 300 axv, 286 p. ;$c24 cm.
13. 504 aIncludes bibliographical refferences (p. 279-286).
14. 650 0 aFamily$zUnited States.
15. 650 0 aFamily psychotherapy.
16. 935 a92904
### END OF RECORD ###

#, File, Quit, Delete, Add tag, Copy tag, Update(#) :
AnzioWin Version 12.5m NUM
```

Figure 20. Your 049 Code Successfully Appended.

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```
AnzioWin - axelib
File Edit View Diagnose Communicate Transfer Macros Help

MARC PROCESSING

BIB KEY: 966440                                FORMAT: BK
1. +LD 00506cam 2200088 a 4500
2. 005 20041001144738.0
3. 008 040719s2004 nyu b 000 0 eng d
4. 020 a0743264932
5. 049 00 aLQ6 IOL
6. 050 14 aHQ536$b.M43 2004
7. 082 04 a306.85/0973$222
8. 092 a306.85$bMcG
9. 100 1 aMcGraw, Phillip C.,$d1950-
10. 245 10 aFamily first :$byour step-by-step plan for creating a phenomenal
    family /$cPhil McGraw.
11. 260 aNew York, N.Y. :$bFree Press,$cc2004.
12. 300 axv, 286 p. ;$c24 cm.
13. 504 aIncludes bibliographical references (p. 279-286).
14. 650 0 aFamily$zUnited States.
15. 650 0 aFamily psychotherapy.
16. 935 a92904
### END OF RECORD ###

#, File, Quit, Delete, Add tag, Copy tag, Update(#) : f

AnzioWin Version 12.5m NUM
```

Figure 21. Both 049 Codes Appended Successfully and Filed.

Press <enter> to finish editing the tag, and “F”ile the record away.

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The computer now returns you to your original split screen, giving you a choice of “B”ib or “H”oldings.

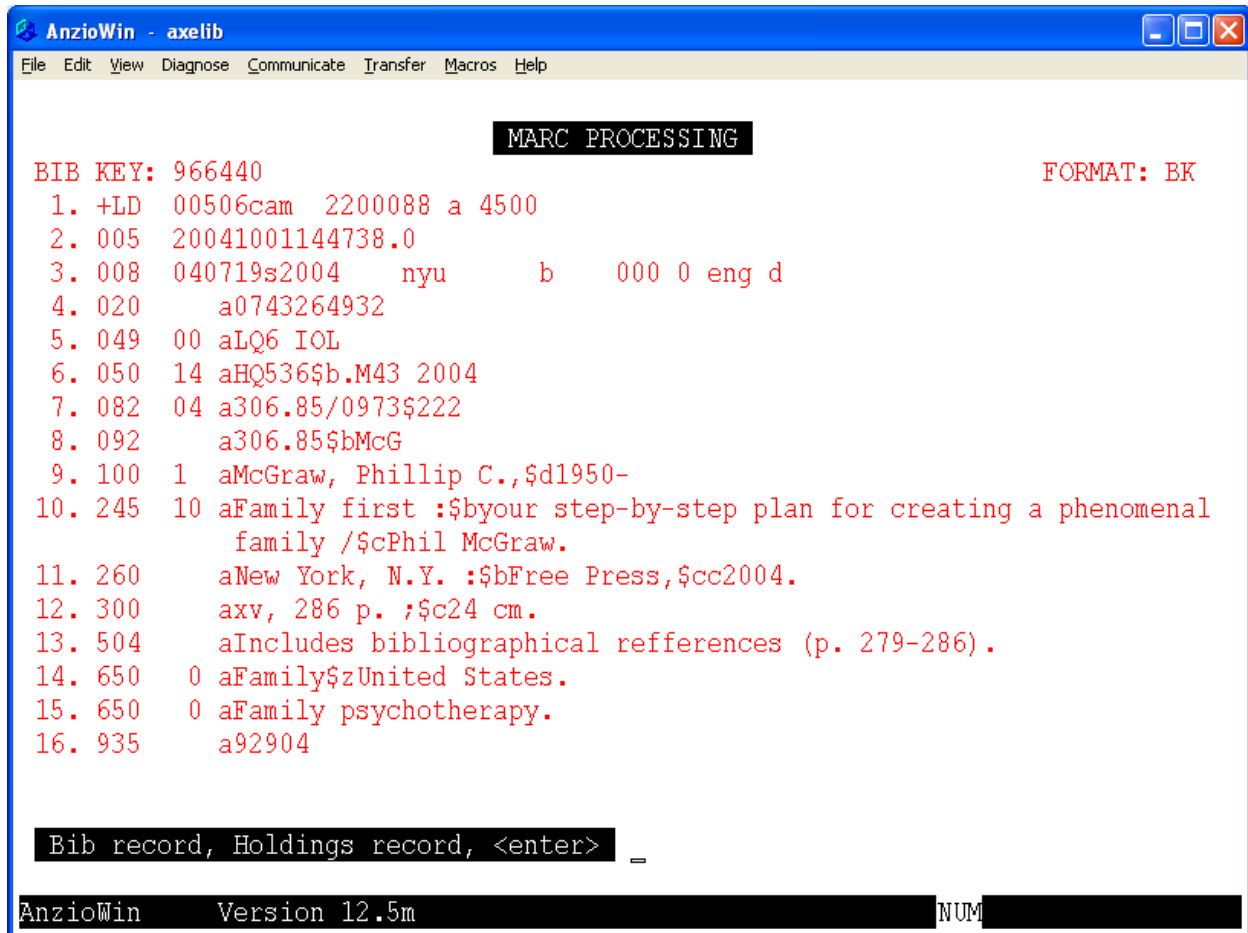


Figure 22. Returning to the Option of Bib vs. Holdings.

This time, choose “H” for Holdings.

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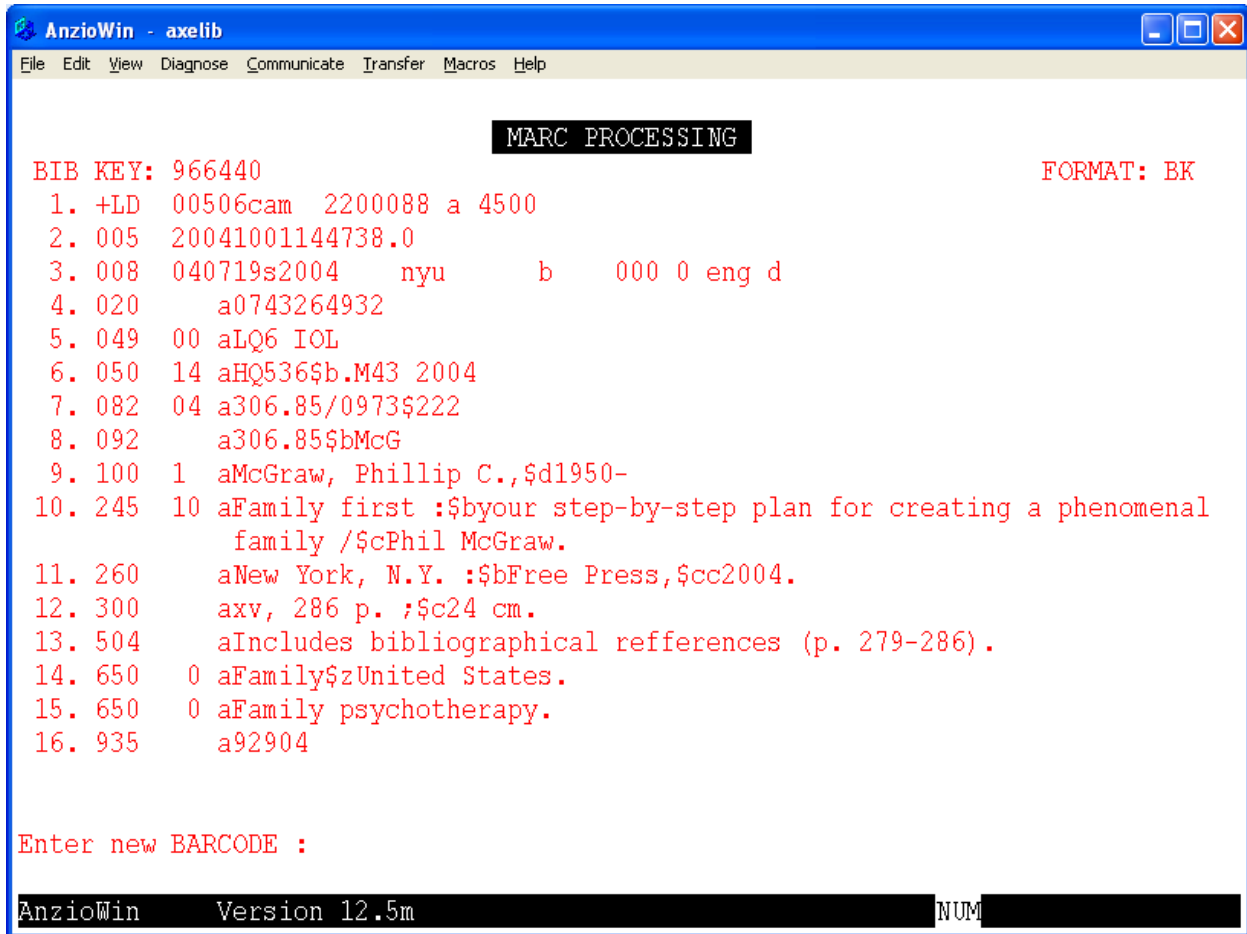


Figure 23. Prompting for the Barcode.

The system will automatically prompt you for the barcode of the first book. Always a good idea to have it ON the book at this precise moment in time! Here's where you take the book's barcode and scan it in.

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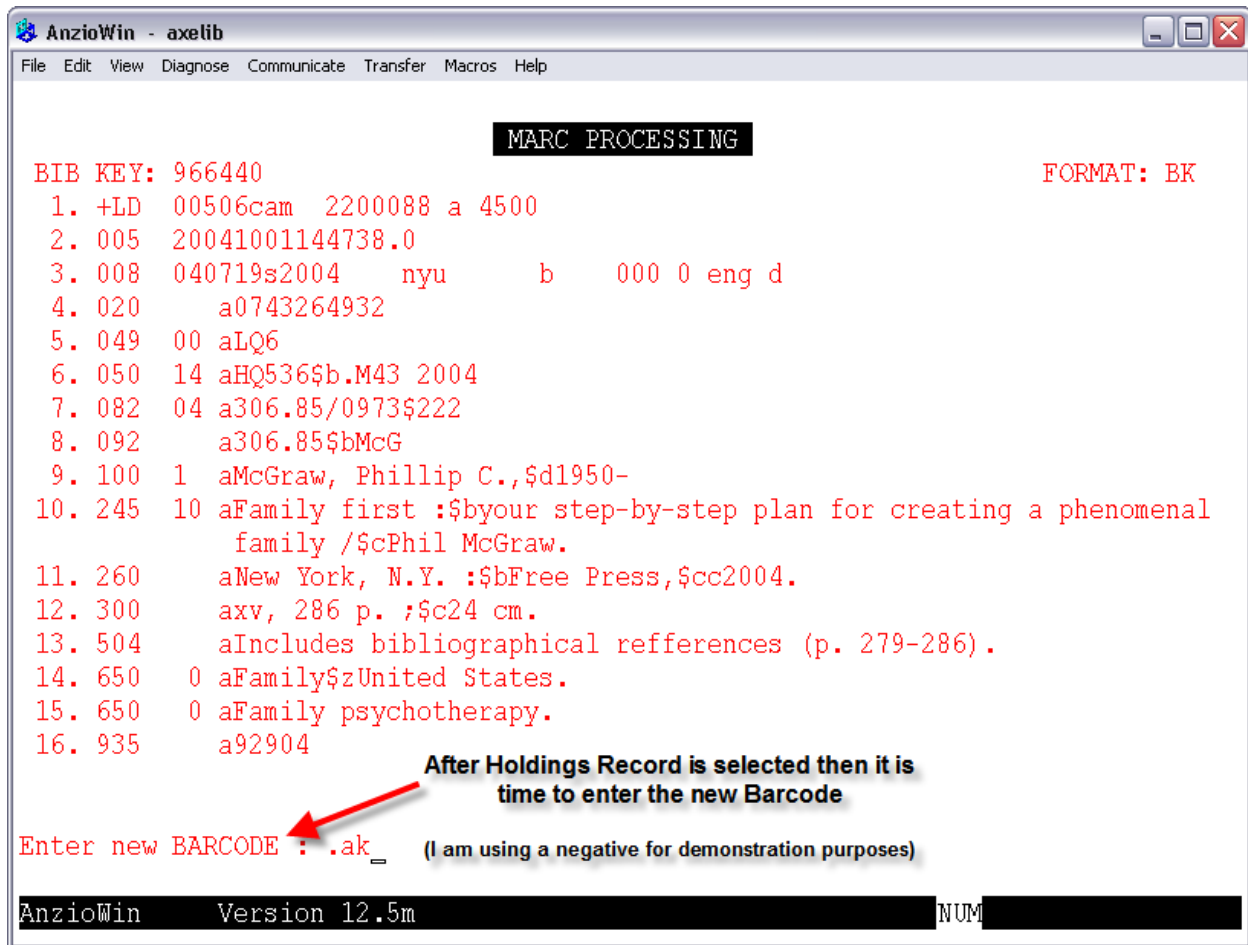


Figure 24: Adding a New Barcode

A note here: if you do not have a barcode, you can use a “.ak” to generate a negative barcode. However, that negative barcode, while a good placeholder, will need to be replaced later with a “real” barcode in order to successfully be used for checkout at a later time. “.ak” is a good way, however, if you’re checking in a large set of encyclopedias, say, and you’re doing them in order by volume after volume and suddenly the letter “N” is missing. Go ahead and create a holding for “n”, then go find that missing volume and you can replace the negative later with the true barcode on the real “N” volume.

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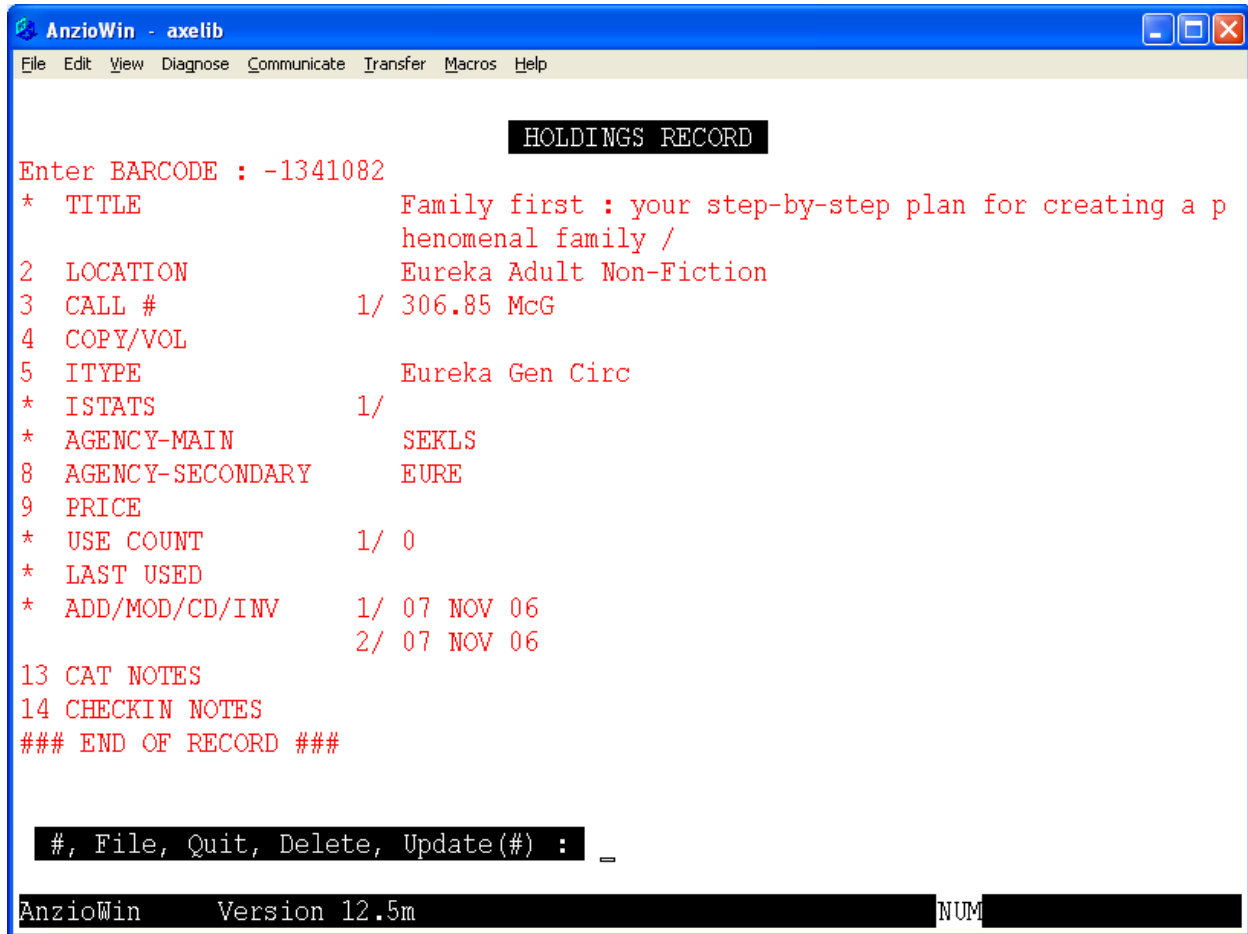


Figure 25. What Your Screen Should Look like!

- 2: Location is filled in from defaults.
- 3: Call number is coming from either the 092 of the bib record, or the previous library's item. CHECK THIS FIELD to be sure that the call number that is displaying MATCHES what is on the spine.
- 4: Copy/Vol: if this is something other than a copy 1, put "c.2" or "copy 2" or "v.16" or whatever it is. Extra copy markings and volume markings do not go in the Call# field but instead live in the copy/vol field.
- 5: Itype is filled in from defaults.
- 8: Agency-secondary is filled in from defaults.
- 9: Price is blank. You can fill in a price here, but it is not necessary, particularly if you are using item defaults (all paperbacks will be billed at a default of \$5 a piece, etc.)

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A few other tags to note:

ISTATS will remain blank until the record is filed. These will be very generic for the duration of this product, only a single ISTAT since it is hoped you will not be circulating under text-based.

AGENCY-MAIL, SEKLS is your primary domain mother-ship account. No need to modify that :_)

USECOUNT is currently zero. This is the field that will increment with checkout usage.

LASTUSED will show the date of the previous checkout, if any. This particular display does not record the previous patron (that lives in another secret space).

CATNOTES are a field that can be annotated for catalogers to see, such as “security strip lives on page 24”.

CIRCNOTES are a field that everyone in circulation will see on checkout or checkin, such as “coffee stain on page 24” or “three disks in pocket in back” or “49 blocks of wood in this kit”.

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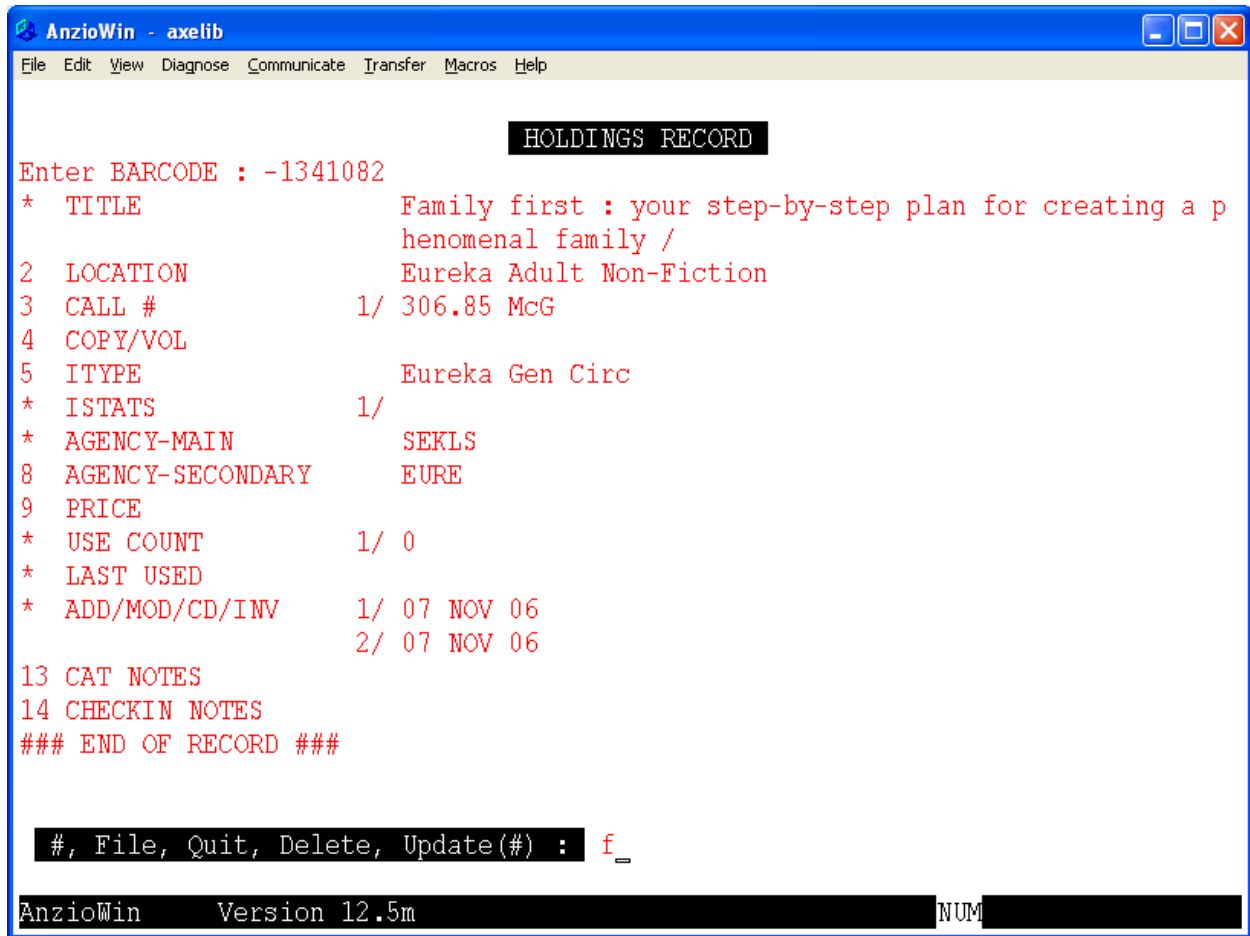


Figure 26. Making Changes to the Holdings (Item) Record.

Now “F”ile the record away to save your changes.

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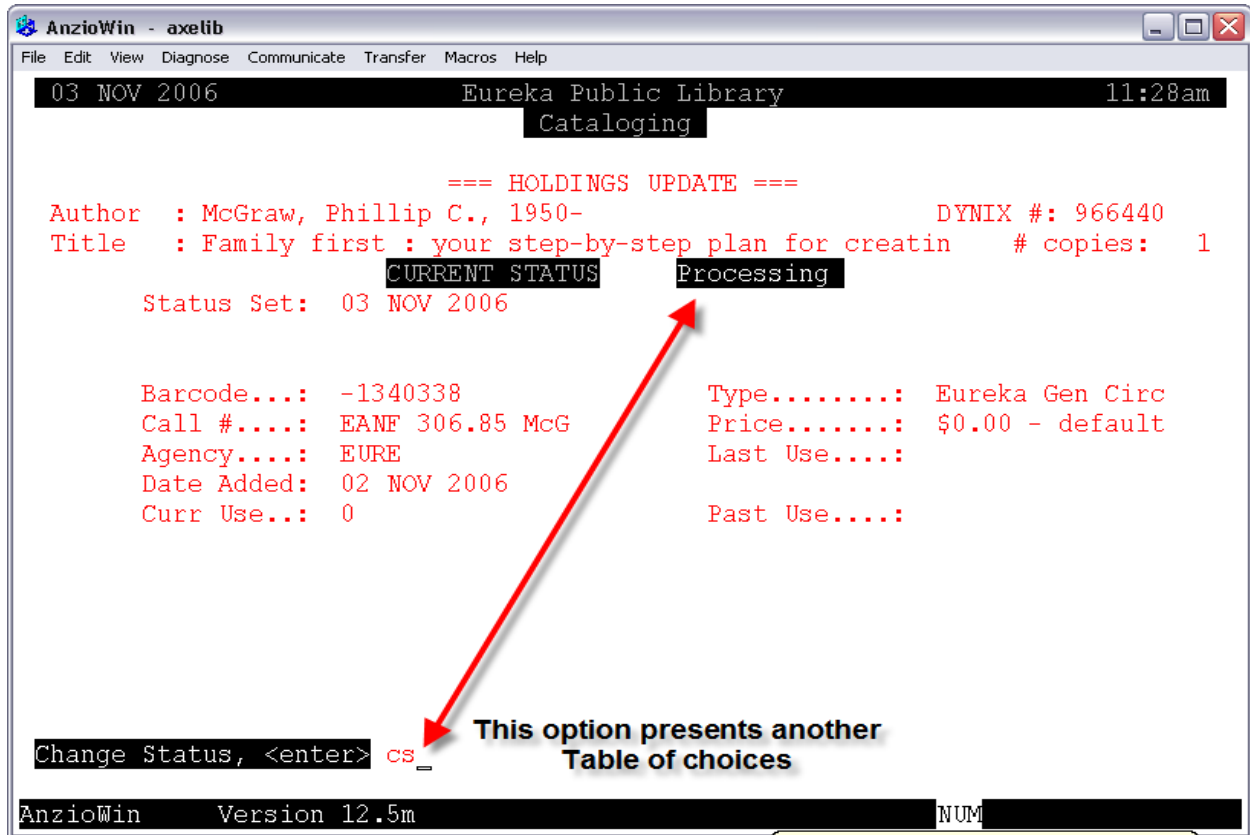


Figure 27: Status Change

Currently there are 51 item status codes, your library will need to determine how to handle statuses. Some locations send their material to the circulation desk to be 'checked in' where depending upon the embedded rules the status could go from 'processing' to 'on cart' to 'in; aka item should be on shelf'. Again this process needs to be determined at your local agency.

The following collection of screen shots are Holding Record Customizations for Fields with Eureka Codes of specific material.

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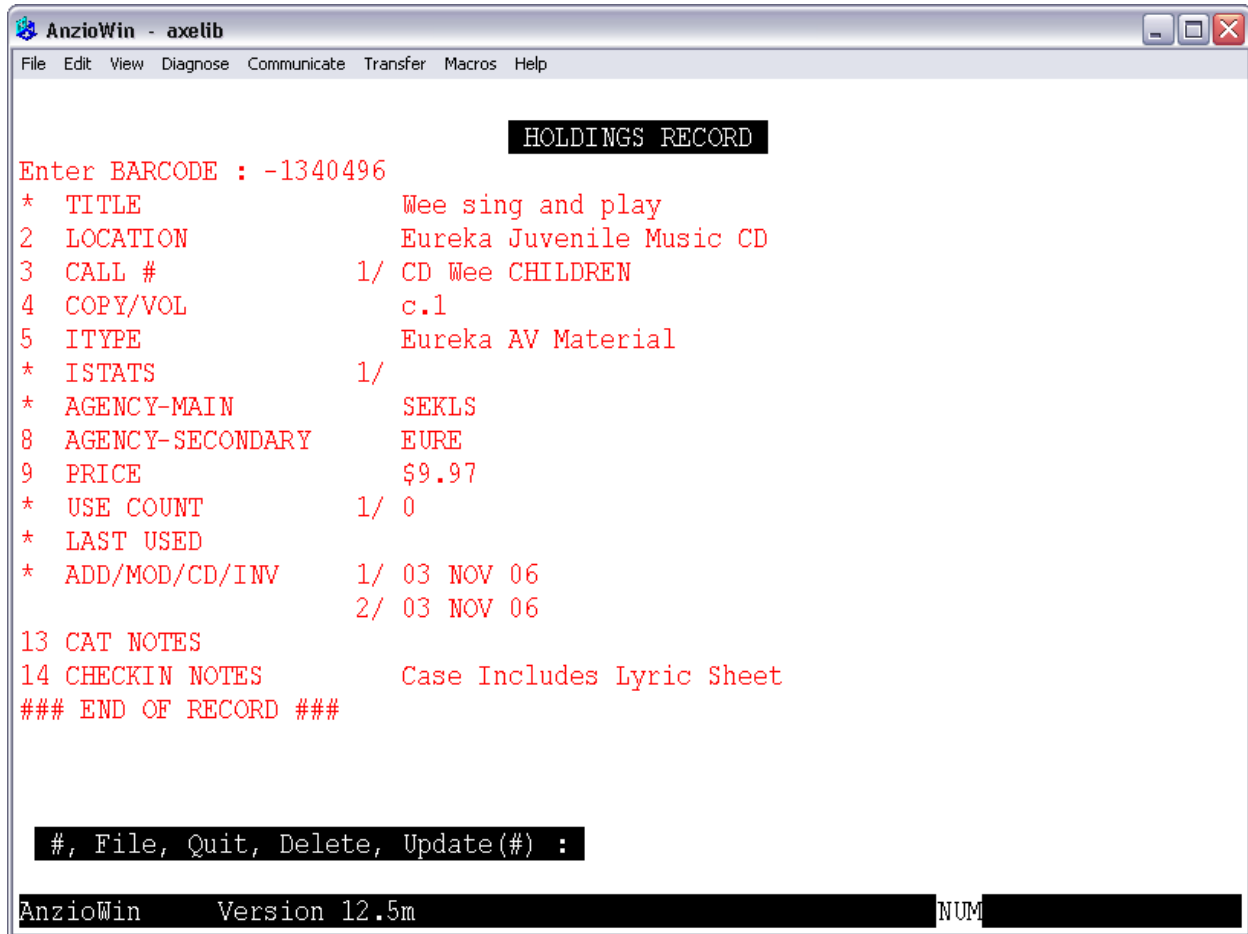


Figure 28: Fields Updated with Eureka Customizations (Juvenile Music CD)

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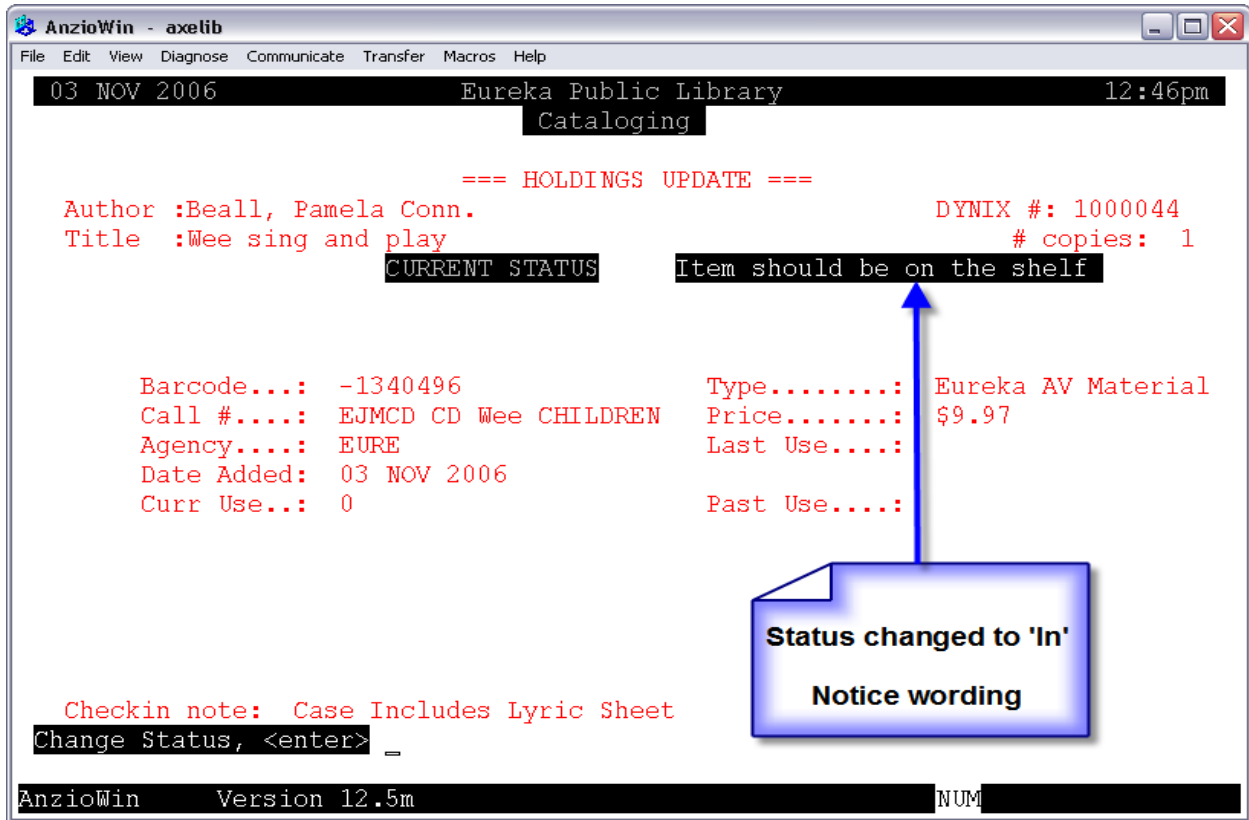


Figure 29 : Eureka Library Holdings Update
(Status of IN)

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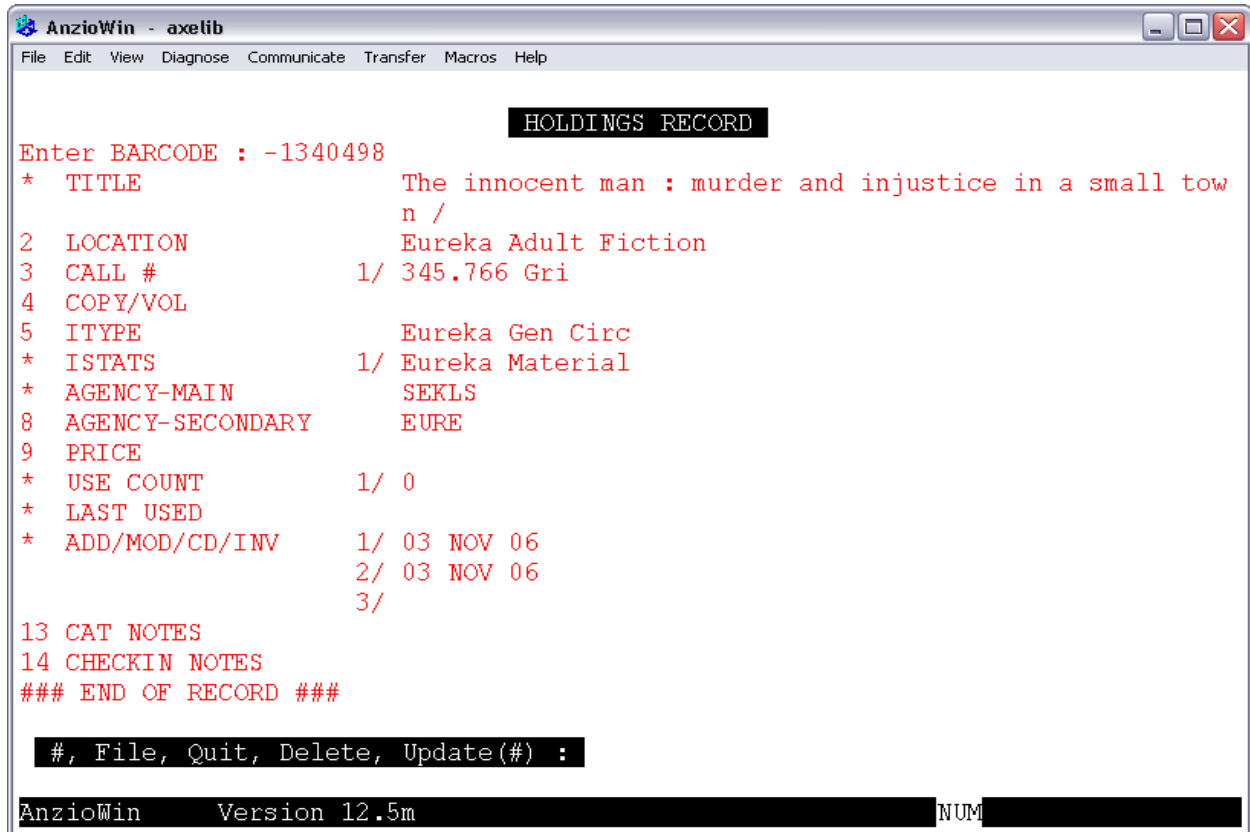
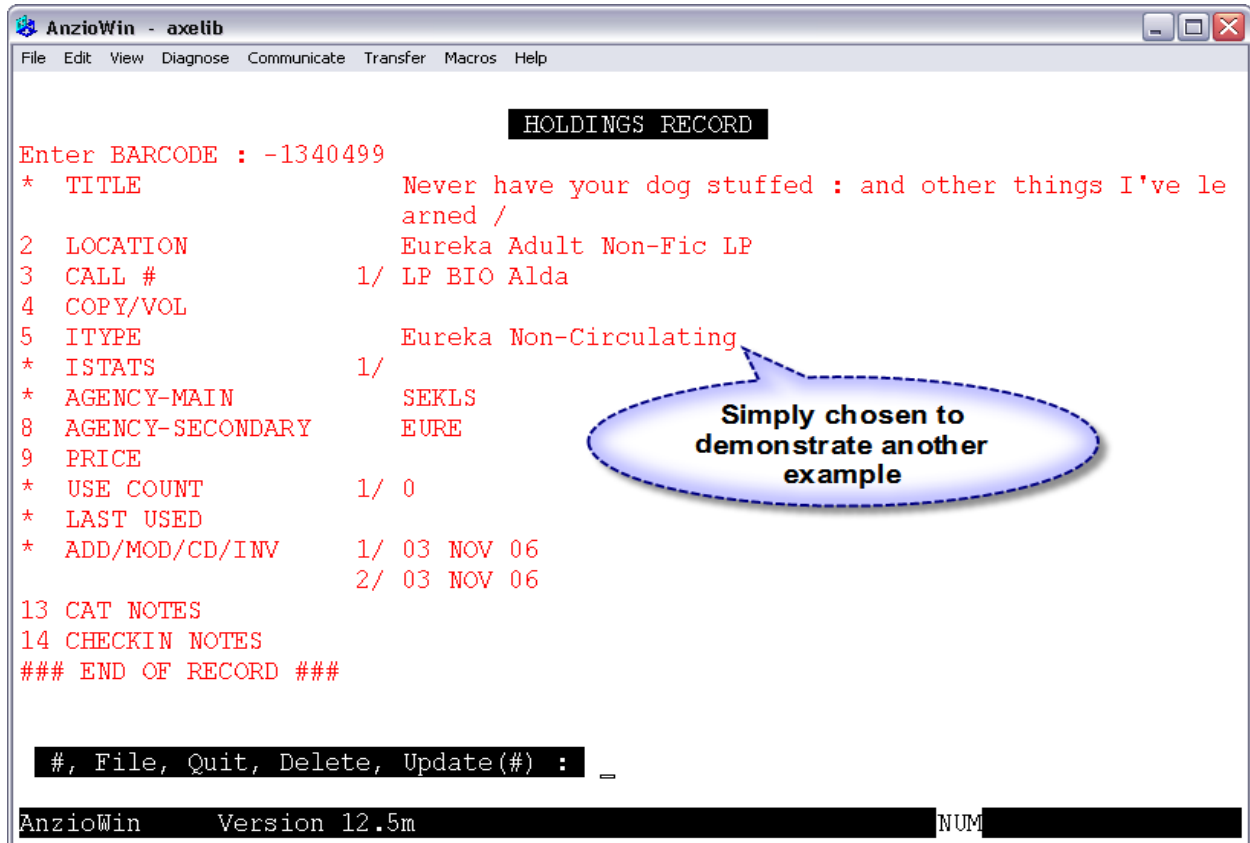


Figure 30: Fields Updated with Eureka Customizations (Adult Fiction)

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**Figure 31. Eureka Customizations
(Choosing a non-circulating item-type)**