

Maintain Holding Codes

What are Holding Codes? All records that are stored within the library collections require Holdings / Copies information. More specifically Holding Codes are the source that identifies the circulation management of how any item can or cannot be circulated, what vendor did the item come from, how much did it cost, how was it funded, when was it added to the collection, what is its tracking circulating (barcode) number?

The program has a management section that allows the listing of these various descriptions; found within the Catalog Management Main/BackOffice menu there is a sub menu named “Maintain Holding Codes”.

Within this area you will find a list of code areas through a drop down menu for:

1. Circulation – code descriptions
2. Funding – code descriptions
3. Location – code descriptions
4. Owner – code descriptions
5. Vendor – code descriptions

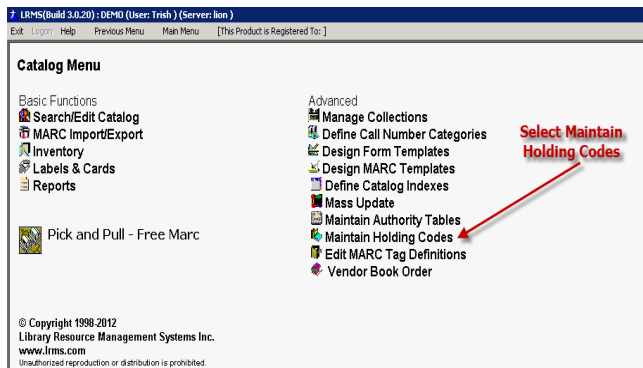
The amount of codes within each category is not limited to any certain count; however, the program has pre-assigned codes that would serve most library requirements. Holding Codes are extremely important and are what makes for fluid Circulation and Reporting of Statistics.



Management of Holding Codes begins within the Catalog Management section of the program. Catalog Management is the area that has options for anything that has to do with Cataloging.

✓ Select “Maintain Holding Codes” from the Right-hand “Advanced” column of options.

Use this method to Modify, Add or Delete any of the five listed Code Types.



LRMS does not recommend lengthy “Code” acronyms or descriptions.

When adding a code within Holdings avoid Typo’s by using the drop-down table of existing codes when adding or modifying a Holding code within a new or existing record.

✓ Modifying, Adding or Deleting any Holding Code is done by first selecting the appropriate Code Type to be worked with.



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Code Type:

Code: Description:

| | |
|-----|-----------------------------------------|
| 0 | Regular Circ |
| 01 | One-day Overnight Circulation |
| 02 | Two-day Circulation |
| 03 | Reference only - No regular Circulation |
| 05 | Periodicals |
| 06 | Audio Tape |
| 07 | Video-media Circulation |
| 08 | Books on Tape |
| 09 | Professional Material Circulation |
| 10 | EBook Circulation |
| 11 | Magazine Circulation |
| 19 | DVD Media |
| 200 | Visitor |
| 210 | Internet usage count |
| 220 | Table count |
| 230 | Ed Services count |
| 91 | TextBook Circulation |

To Change a Description or Code, Start by Highlighting the item that requires changing, this item will appear within the Code and Description fields

1. Modify any Holding code begins by selecting the code from the List of codes.
 - a. The program will display the selected item within the Code and Description fields from the above list. Changing the description requires you to overwrite the description or to edit the description. Click Modify to change the Code information to the new code data, the program will change all Holding records to the newly added information.
 - b. To be clear: Click on the Modify Button to execute the change. Note about Modify; once executed every Holding regardless of Collection location that contained the original Holding Code will be modified from the old code and to the new code.

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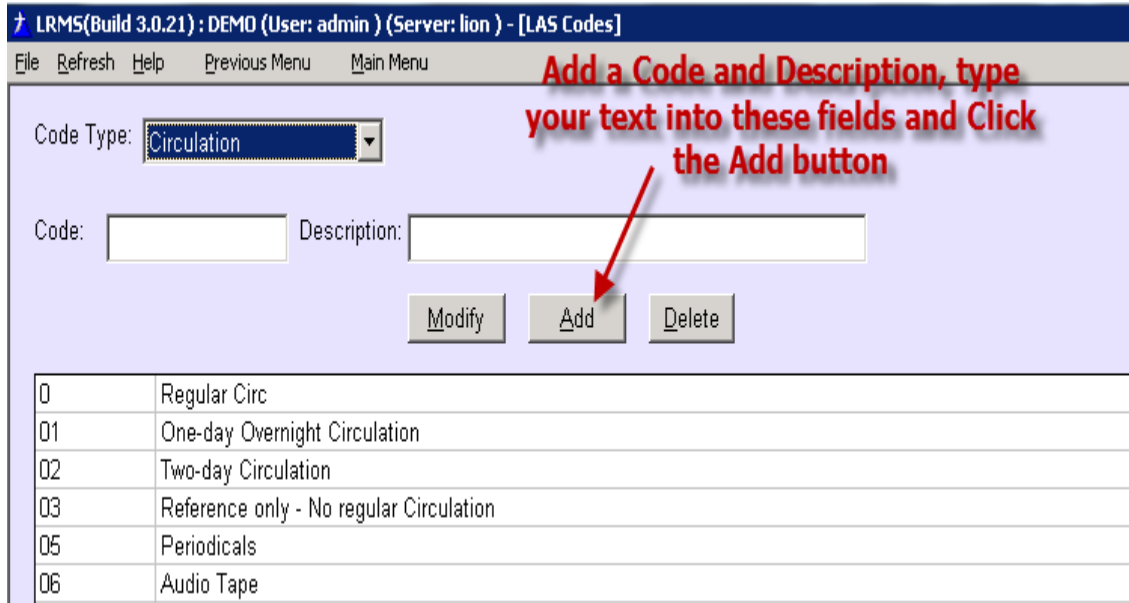
Code Type:

Code: Description:

| | |
|----|-----------------------------------------|
| 0 | Regular Circ |
| 01 | One-day Overnight Circulation |
| 02 | Two-day Circulation |
| 03 | Reference only - No regular Circulation |
| 05 | Periodicals |
| 06 | Audio Tape |
| 07 | Video-media Circulation |
| 08 | Books on Tape |
| 09 | Professional Material Circulation |
| 10 | EBook Circulation |
| 11 | Magazine Circulation |

Make any change to the selected items Code or Description Fields and then Click the Modify Button. Making a change to any Code this way will change and all items that had used this Code or Description prior to modification.

2. Add a New Code; is simple.
 - a. Begin with the Code and Description fields being void of any text.
 - b. Add text to the Code and Description fields
 - c. Click the Add button and the new code will be added to the table of codes.



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Add a Code and Description, type your text into these fields and Click the Add button

Code Type:

Code: Description:

| | |
|----|-----------------------------------------|
| 0 | Regular Circ |
| 01 | One-day Overnight Circulation |
| 02 | Two-day Circulation |
| 03 | Reference only - No regular Circulation |
| 05 | Periodicals |
| 06 | Audio Tape |

3. Delete a Code; is simple.
 - a. Begin by highlighting the code within the table display, the program will display this information within the Code and Description fields.
 - b. Click the Delete Button to permanently remove this information from the Table Display only. This action does not remove this Code from any collection item where it may have been used.
 - i. If you do not know whether a Code has been used – review this code through the Catalog Menu Search/Edit Catalog searching by the “Find For” group of menu selections and the “All” Collection for this code.
 - ii. Should this code be found to be used and it should be changed to another code, use the Modify procedure to make the change to correct the code. This will automatically remove the bad code.
4. Refresh codes:
 - a. Use this option to display all codes even those that might not be within the code listings. This is a good way to find codes that may have been added in error or were never set-up within the codes table highlight this code and correct or add its description; use the Modify option to make a change. There are instances where a rogue code can not be managed using this interface, should this happen contact LRMS support for assistance.