

## **INSTRUCTIONS FOR REPORTING HOLDINGS**

1. **Where to report** - for those members who do not have full OCLC access, or cannot do their own updating, please contact the following member institutions for holding updates:
  - i. Medical libraries: [Junie Janzen](#) at OUHSC - Tulsa
  - ii. Other libraries: [Dana Belcher](#) at East Central University
  - iii. All other institutions are responsible for their own local holdings maintenance. If you need training, please contact [Dana Belcher](#). Also, consult the [OKULS Manual](#), [OCLC links](#), and any member of the [Council](#) for help.
2. **Frequency of reporting** - New serial titles, additions, changes, and deletions should be reported as soon as possible.
3. **Format of reporting** - For those who are unable to do their own local holdings maintenance, check with your volunteer agent library as to the best way to report holdings. The following items will help the agent to update your holdings:

**Use the [forms](#) provided on the OKULS web** (see appendix).

- a. Title - give the title exactly as it appears on the title page, mast head, or cover of the serial. Include all punctuation marks as they appear in the title. Record the corporate entry when it is not included in the title and is helpful for identification.
- b. Other Identification Numbers - Complete the OCLC, ISSN, and LC card numbers if they are available. Remember, OKULS requires use of the hardcopy bibliographic record unless the serial was never published in hardcopy.
- c. Publisher - Be sure to include the publisher information.
- d. Physical Description [007] – provide the category of resource (text, microform, etc.) and the specific material description (unspecified, regular print, microfiche, etc. – you can code to whatever specificity you'd like).  
**Note:** each format requires a separate LHR due to OKULS practice.
- e. Data Elements [008] – provide the following:
  - i. Publication status [06] - is it currently received, ceased, etc.
  - ii. Method of acquisition [07] - coding is optional
  - iii. General/specific retention policies [12-15]
  - iv. Completeness code [16] – always 0 when reporting specific volume/year holdings. If not reporting specific holdings, this code is based on the amount of your holdings as compared to the entire published run of the serial.

- v. Lending/Reproduction policies [20-21] – usually b. will not lend and a. will reproduce. If you have material types defined in your auto-deflection ILL policies, you can leave [20-21] as unknown.
- vi. Language (if applicable)
- f. Location [852]
  - i. Shelving scheme and order [ind 1&2] are optional – provide call number information if applicable
  - ii. Provide your four digit OCLC symbol/holdings code (i.e., ECOB)
  - iii. Provide any public notes needed (see [Local Notes](#) for examples). Also, for records with multiple LHRs, indicate the format (i.e., Paper, Fiche, Electronic, etc.) (Example: \$z Paper. Current issues retained until microfiche received.)
- g. Captions and Patterns [853] (see [Captions to be Used in Enumeration.](#))
  - i. Compress/expand [Ind 1] – usually 3-unknown
  - ii. Caption evaluation [Ind 2] – usually 0-verified; all levels present
  - iii. Linking field \$8 – decides display order when multiple 853s are present
  - iv. Provide 1<sup>st</sup> level enumeration \$a (v., no., etc.) and 1<sup>st</sup> level chronology \$i (year, etc.)
- h. Enumeration and Chronology [863] (see [Holdings Statements.](#))
  - i. Field encoding level [Ind 1] – always 3 due to OKULS practice
  - ii. Form of holdings [Ind 2] – usually 0-no information provided
  - iii. Linking field \$8 – matches 853 and decimal point decides display order when multiple 863s are present (i.e., 1.1, 1.2, 1.3 match 853 \$8 1). You can have multiple 863s matched to one 853 – used when you have gaps.
  - iv. Provide 1<sup>st</sup> level enumeration \$a (1-, 12-15 – matches caption found in 853 \$a) and 1<sup>st</sup> level chronology \$i (1999-, 2000-2005 – matches caption found in 853 \$i)