

# Managing Maintain Holding Codes

This document will explain how to manage, Modify, Add and Delete Holding Codes.

## What are Holding Codes?

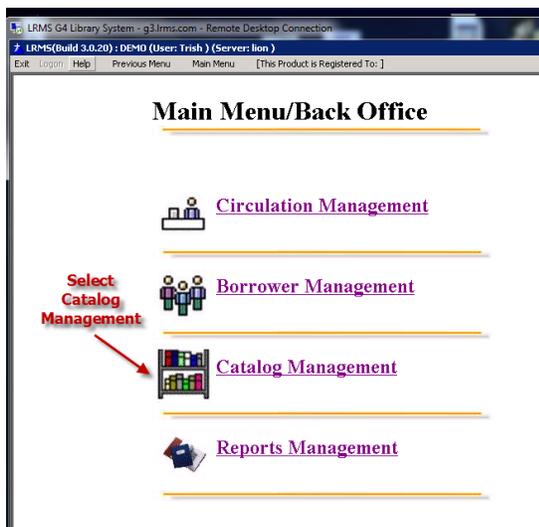
All records that are stored within the library collections require Holdings or also known as Copies information. More specifically Holding Codes are the source items that identify any records management, how any item can or cannot be circulated, where did the item come from, how much did it cost, how was it funded, when was it added to the collection, what is its tracking (bar code) 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

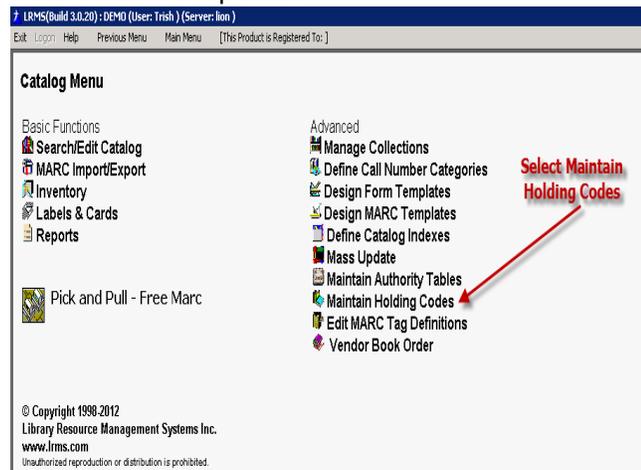
The amount of codes is not limited to any certain number; however the program had pre-assigned codes that would serve most library requirements. Holding Codes are extremely important and are what makes for fluid Circulation and Reporting of Statistics.



3. The method used to Modify, Add or Delete all codes is the same. **We do not recommend lengthy code acronyms or descriptions.** Avoid Typo's; we also strongly suggest using the table of codes when adding a Holding code for the first time to a new record.

1. The management of Holding Codes begins within the Catalog Management section of the program. Unlike other sections Catalog Management is the area that has options for anything that has to do with Cataloging.

2. Select Maintain Holding Codes from the Right hand column of options.



## Managing Maintain Holding Codes

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

LRMS(Build 3.0.20) : DEMO (User: Trish ) (Server: lion ) - [LAS Codes]

File Refresh Help Previous Menu Main Menu

Code Type: Circulation

Code: 10 Description: EBook Circulation

Modify Add Delete

|     |   |
|-----|---|
| 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**

5. Modify any Holding code starts by selecting the code from the List.
  - a. The program will display the selected item within the Code and Description fields above this list. Changing the description requires you to overwrite the description or to edit the description. Same is true if you wanted to modify the Code.
  - b. Click on the Modify Button to execute the change. Note about Modify; once executed every Holding regardless of Collection location that contain the original Holding Code will be modified by the program and will replace the old with the new.

LRMS(Build 3.0.20) : DEMO (User: Trish ) (Server: lion ) - [LAS Codes]

File Refresh Help Previous Menu Main Menu

Code Type: Circulation

Code: 10 Description: E - Book Circulation

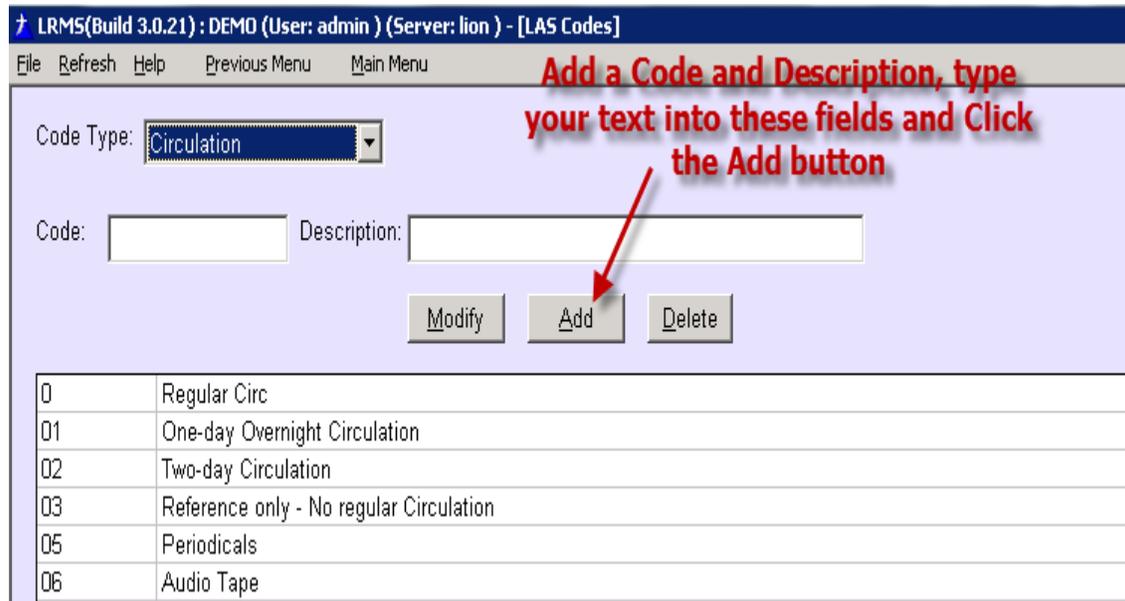
Modify Add Delete

|    |   |
|----|---|
| 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.**

## Managing Maintain Holding Codes

6. Add a New Code; is simple.
  - a. Begin with the Code and Description fields being empty 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.



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

| 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                              |

7. 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.