How to Create a Local Holdings Template

Storage and Use of Local Templates:

- Local templates may be created on the user’s hard drive. Once created, a local template will be listed in the template file alongside the system-provided templates. However, they will only be available on your workstation.

- Local holdings templates may be used to populate records with certain constant data such as sublibrary and collection subfields, OWN and H08 fields, etc.

Tips for Creating Local Holdings Templates:

- The templates for holdings records differ slightly from bibliographic and authority records in that you cannot use them to create new holdings records. Once you create a holdings template, you use the “expand” function to add information into existing holdings records.

- When creating a holdings template, the record is created first and then saved and named as a template.

- When entering blank fields, do not hit the Enter key before saving as a template because the fields will disappear.

- When entering blank fields you need at least one subfield code.

- If you want the fields to appear in order on your template, you should input them in order when creating the template.

- Names of templates can only be 8 characters long; the word (LOCAL) will appear automatically after each local template.

- Local templates can be created either by connecting directly to HVD60 (the holdings library) or by creating a holdings record from a bibliographic record, stripping out fields not wanted and then saving it as a local template.

Steps to Create a Local Holdings Template:

1. Connect to the HVD60 library by choosing the ALEPH..Connect to menu choice (or press the <Alt> + A, then C keys) or by right clicking on the library icon located at the bottom right hand corner of your screen and selecting HVD60 from there.
2. From the **Cataloging menu**, click on **New record** (or press the <Alt> + C keys, then the N key). The **Choose New Record Format** box will display on your screen; the only choice will be the HO format, because you are in the HVD60 Library.

![Choose Record Format Dialog Box](image)

**Figure 1: Choose Record Format Dialog Box**

3. Click **OK** or press the Enter Key. The **LDR form** will open in the **Upper Pane**.

![Leader (Holdings)](image)

4. Click the **OK** button or press the Enter key. The **008 form** will appear on your screen.

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5. Click the **OK** button. You will get a message that there are warnings, because you did not fill in the form (you will fill in the form when you use the template with a title). Click the **OK** button. A holdings record will open with the LDR and 008 fields in the Upper Pane. In the Lower Pane, the Messages Tab will display the warning messages.

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Figure 3: Holdings 008 Form

Figure 4: Warning Message

Figure 5: New Holdings Record

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6. Create an **852 field** with library location and collection information, e.g. $$b\text{ TOZ, }$$c\text{ GEN}. Add other MARC tags to the holdings record as you would like.

7. Add the **H08 field** with the appropriate values in subfields $$a$$ and $$b$$.

Your holdings record will look similar to this:

![Holdings Record with 852 and H08 fields](Figure 6: Holdings Record with 852 and H08 fields)

9. From the **Cataloging menu**, click on **Create template on local drive** (or, move your focus out of the Upper Pane and press the <Alt> + C keys, then the C key again to bring up the Create Template dialog box.)

![Create Template Dialog Box](Figure 7: Create Template Dialog Box)

10. **Name the template using a name that is less than 8 characters.** The **OK** button will darken; click the OK button or press the Enter Key. The system will display a message that your template has been created.

### Using a Local Holdings Template:

1. Connect back to the HVD01 library, and call up a bibliographic record.

2. Bring up the holdings list by clicking on **Tab 4** in the Lower Pane or pressing the <Ctrl> + O keys. Note that you can only load holdings from the server and not from the local drive.

3. Click on the **Create button** or press the <Alt> + C keys. A new holdings record will appear on the holdings list and will be highlighted.
4. Click the **Edit button** or press the <Alt> + E keys. The holdings record will open in the Upper Pane.

5. Edit the **LDR field** and the **008 fields** as appropriate.

6. From the **Edit menu**, click on **Expand from template** or press the <Ctrl>+ E keys. The List of Holdings Templates will display.

7. Highlight the template you just created and click on **OK**. The template fields will “expand” into the existing holdings record.
8. Add any additional fields you wish to add to this record. Save your record to the server by clicking on the **Save on Server and Local Drive** icon.

### Modifying a local holdings template

To modify an existing holdings template, you must create a new holdings record and expand your existing template into the holdings record.

1. Connect to **HVD60** using the method described above.
2. From the **Cataloging Menu**, choose **New Record**. The **Choose Record format box** will display; click the **OK** button or press the Enter key.
4. The form for the **LDR** will appear; click **OK**. The form for the 008 will appear; click **OK**. The holdings record will appear on your screen.
5. From the **Edit menu**, choose **Expand from Template** or press the <Ctrl> + E keys. The template information will expand into the holdings record.
6. Add or subtract fields and subfields as you would like.
7. From the **Cataloging Menu**, choose **Create template on local drive**. The **Create Template dialog box** will appear.
8. Give template the **same name**. You will be asked if you want to override the existing local template.

Figure 11: Template Override Box

9. Click **Yes** to Override
Deleting local templates

Local templates live in the local drive and therefore can only be deleted by going into Windows Explorer. If you do not have access to your local drive, you will need to consult with your local IT support staff.

To delete a local template:

1. Right click on Start button in the lower left hand corner of your screen
2. Click on Explorer
3. Go to C:\[AL500_171]\Catalog\Template
4. Right click on your template
5. Choose delete

Figure 12: List of Local Templates Found in Windows Explorer on Local PC