

## Chapter 3 -- Introduction to Holdings Maintenance

The Holdings Maintenance Screen allows you to view Item and Volume Information associated with a bibliographic record. From this screen you can add, delete and edit your holdings.

To access the Holdings Maintenance Screen, perform a catalog search and click on a title to view a record. The default view in the Staff Client for records is the OPAC view.

To switch from OPAC view to the **Holdings Maintenance** view, clicking on **Actions for this Record (Alt + R)** at the upper right. Select **Holdings Maintenance (Alt + H)** from the drop down list.

The screenshot displays the Evergreen Indiana cataloging system interface. At the top, the browser address bar shows '1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us'. The main content area is titled 'Record Summary ( Add Volumes ) ( View MARC )' and contains the following information:

- Title:** Cock-a-doodle-doo, creak, pop-pop, moo
- Author:** Aylesworth, Jim.
- Bib Call #:** P28.3.A95Cnl 2012
- Edition:** 1st ed.
- Pub Date:** 2012
- TCN:** 16538946
- Database ID:** 19508650
- Record Owner:**
- Created By:** jcp1-bduncan
- Last Edited By:** heleng
- Last Edited On:** 2012-06-14 1:51 PM

Below the record summary, there are navigation buttons: 'Record 1 of 2', 'Start', 'Previous', 'Next', 'End', and 'Search Results'. There are also 'Go Back', 'Reload', and 'Go Forward' buttons.

The main content area is titled 'Search the Catalog' and shows a search result for 'Cock-a-doodle-doo, creak, pop-pop, moo / by Jim Aylesworth ; illustrated by Brad Sneed.' The search criteria are 'All Formats' and 'Cock-a-doodle-doo, creak, p' in 'in' at 'Evergreen Indiana'. The search results show 'Showing Item 1 of 2'.

The record details include a book cover image and the following information:

- Available copies:** 10 copies at Evergreen Indiana.
- Current holds:** 1 current hold with 16 total copies.

At the bottom, there is a table with columns: LOCATION, CALL NUMBER, BARCODE, SHELVING LOCATION, AGE HOLD PROTECTION, CREATE DATE, and HOLDABLE.

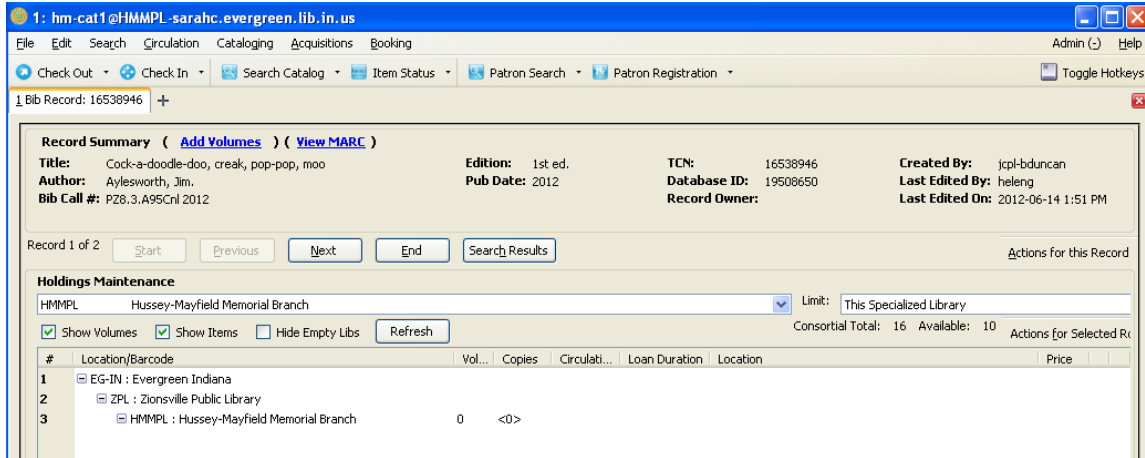
On the right side, there is a dropdown menu titled 'Actions for this Record' with the following options:

- OPAC View
- MARC View
- MARC Edit
- Holdings Maintenance**
- Manage Conjoined Items
- Manage Parts
- View Hold
- View/Place Orders
- Add to Bucket
- Mark for Overlay
- Delete Record
- Undelete Record
- Add Volumes
- Mark as Title Hold Transfer Destination
- Transfer All Title Holds
- Mark as Target for Conjoined Items
- Duplicate in New Tab
- Remove this Frame
- MFHD Holdings
- Serial Control View
- Alternate Serial Control
- Serials Batch Receive
- Set bottom interface as Default
- Reset Display

# Evergreen Indiana Cataloging Training Manual

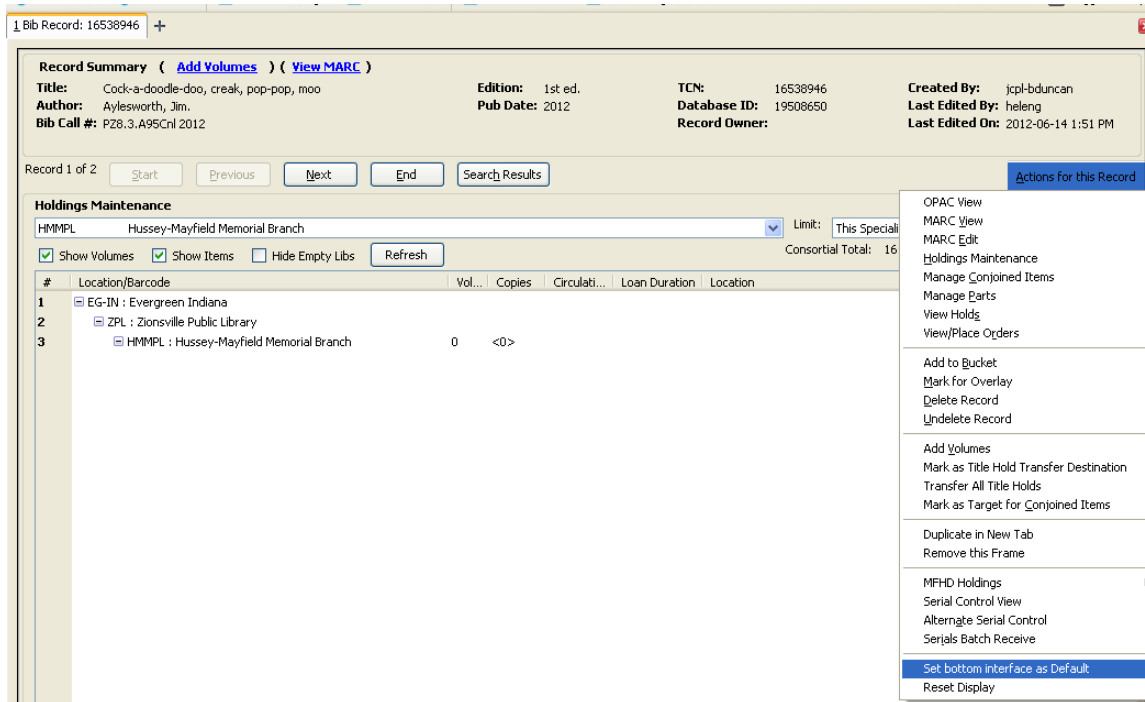
## Chapter 3 – Introduction to Holdings Maintenance

The record display will change from the OPAC view to Holdings Maintenance:



Since this is the view that is used when working with local holdings, you are likely to use this view much of the time.

To set the Holdings Maintenance screen as your default view, click on **Actions for this Record (Alt + R)** and choose **Set bottom interface as default**.



The next time you click on a record title it will take you directly to this screen instead of the OPAC view. You can also change your view to any of the various views listed in the first section of the Actions for this Record dropdown list at any time.

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**TIP:** Different views are needed for different tasks. Your default view is not set in stone, so feel free to change it as needed.

### The Record Summary Frame

In the staff client, when working with a bibliographic record, you will see a brief record summary at the top of the screen, regardless of the view you are using. It lists the title and author of the book.

**NOTE:** If there is no 1xx field on the MARC record, the information from the first 7xx field, if any, will be displayed as the author.

The Title Control Number (TCN), edition statement, if any, and publication date are also displayed in the record summary frame, as well as who created the record, who last edited it, and the date of the last edit.

Record Summary ( [Add Volumes](#) [View MARC](#) )

**Title:** Cock-a-doodle-doo, creak, pop-pop, moo /  
**Author:** Aylesworth, Jim.  
**Bib Call #:** PZ8.3.A95Cnl 2012

**Edition:** 1st ed.  
**Pub Date:** 2012

**TCN:** 16538946  
**Database ID:** 19508650  
**Record Owner:**

**Created By:** jcp1-bduncan  
**Last Edited By:** heleng  
**Last Edited On:** 2012-06-14 1:51 PM

Record 1 of 2   Start   Previous   Next   End   Search Results   Actions for this Record

**Holdings Maintenance**

HMMPL   Hussey-Mayfield Memorial Branch   Limit: This Specialized Library

Show Volumes    Show Items    Hide Empty Libs   Refresh   Consortial Total: 16   Available: 10   Actions for Selected Rows

#	Location/Barcode	Vol...	Copies	Circulati...	Loan Duration	Location	Price	
---	------------------	--------	--------	--------------	---------------	----------	-------	--

If you click View MARC link, the MARC record will pop up in another window:

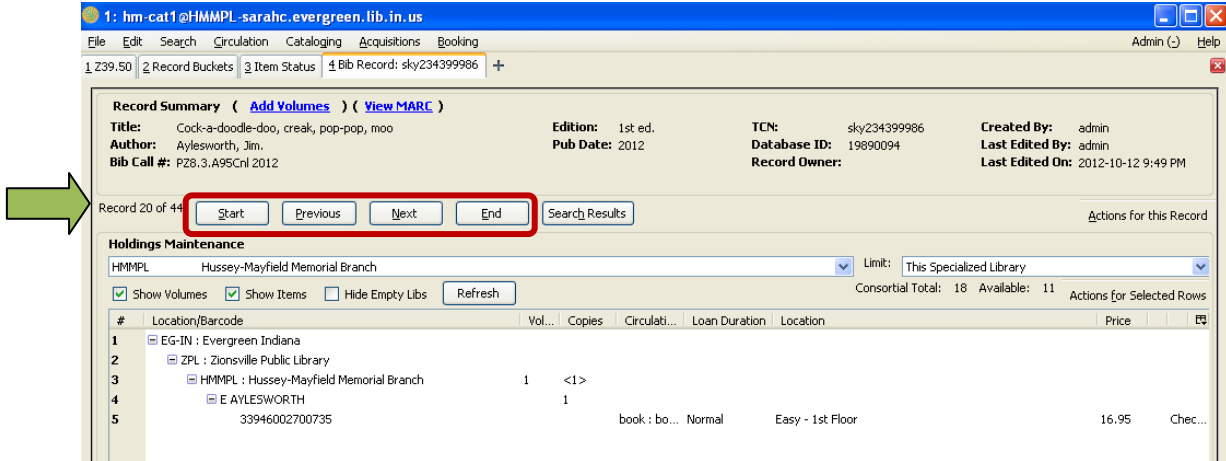
**MARC View**

```
LDR 01350cam a2200385 a 4500
001 19890094
003 EG-IN
005 20120516131406.1
008 101116s2012 nyua a 000 1 eng
010 |a 2010041438
020 |a 9780823423569
020 |a 0823423565
040 |a DLC |c DLC
050 0 0 |a PZ8.3.A95 |b Cnl 2012
082 0 0 |a [E] |2 22
100 1 |a Aylesworth, Jim.
245 1 0 |a Cock-a-doodle-doo, creak, pop-pop, moo /
|c by Tim Aylesworth : illustrated by Brad Speed
```

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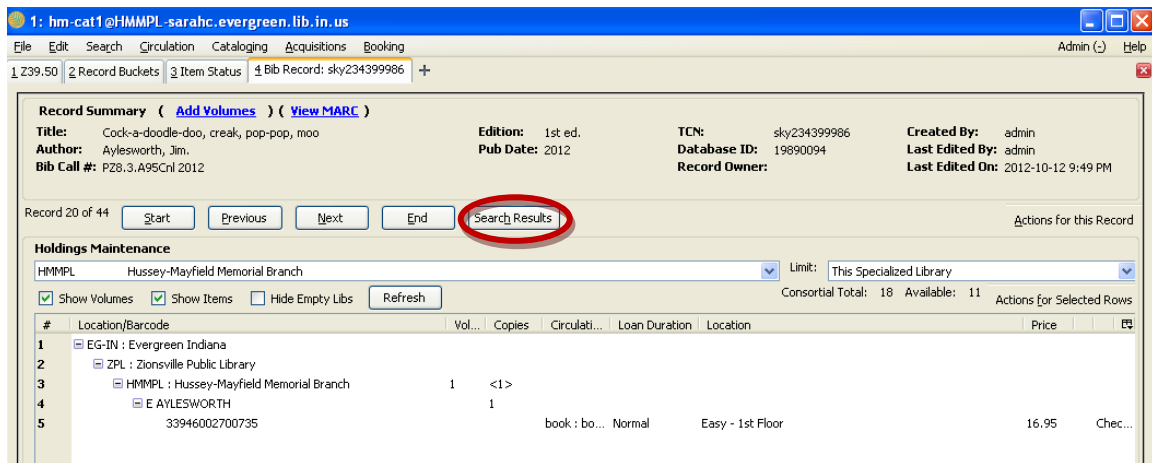
When you have accessed your record from a list of search results, the record summary also indicates which record in the list of results, and allows you to move from record to record in the list with the **Start (Alt + S)**, **Previous (Alt +P)**, **Next (Alt + N)**, and **End (Alt + E)** buttons.



If your record was the only search result, these navigational boxes will be inactive:



**NOTE:** You may find that the records are slow to load when using these buttons to navigate search results.



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You can also use the Search Results buttons to return to your list of search results.

Record Summary ( [Add Volumes](#) ) ( [View MARC](#) )

Title: Cock-a-doodle-doo, creak, pop-pop, moo      Edition: 1st ed.      TCN: sky234399986      Created By: admin  
Author: Aylesworth, Jim.      Pub Date: 2012      Database ID: 19890094      Last Edited By: admin  
Bib Call #: PZ8.3.A95Cnl 2012      Record Owner:      Last Edited On: 2012-10-12 9:49 PM

Record 20 of 44    Start    Previous    Next    End    Search Results    Actions for this Record  
Go Back    Reload    Go Forward    Debug    Print Page

INSPIRE    Indiana State Library    Find a Library Near Me    Help    About Evergreen

### Search the Catalog

All Formats    title:title:Cock-a-doodle-    Title    in    Evergreen Indiana

[Search](#)    [Advanced Search](#)

[ [Click to Refine Your Original Search](#) ]

[Another Search](#)    [Advanced Search](#)    Sort by: Sort by Relevance     Limit to available items

Search Results Results 1 - 25 of 44 (page 1 of 2)    1 2    Next ▶

Recent searches			
<b>Personal Author</b> <a href="#">More</a>	1.	<a href="#">Cock-a-doodle-doo, cock-a-doodle-dandy!</a> <i>Kapp, Paul</i> . 1966. Call number: J 784.6 KAP 1 of 1 copy available at Evergreen Indiana.	<a href="#">Place Hold</a> <a href="#">Add to my list</a>
<a href="#">Andreae, Giles 1966-</a> (5) <a href="#">McPhail, David M.</a> (5) <a href="#">McPhail, David</a> (3) <a href="#">Rostoker-Gruber, Karen</a> (3) <a href="#">Andreae, Giles</a> (2)	2.	<a href="#">Cock-a-doodle-doo</a> <i>Read, Loma</i> . 1998. Call number: E REA 1 of 1 copy available at Evergreen Indiana.	<a href="#">Place Hold</a> <a href="#">Add to my list</a>
<b>Topic Subject</b> <a href="#">More</a>	3.	<a href="#">Cock-a-doodle-doo!</a> <i>Moroney, Tracey</i> . c1994. Call number: E TOD FIC Mor 1 of 1 copy available at Evergreen Indiana.	<a href="#">Place Hold</a> <a href="#">Add to my list</a>
<a href="#">Domestic animals</a> (13) <a href="#">Animal sounds</a> (12) <a href="#">Fiction</a> (11) <a href="#">Farm life</a> (6) <a href="#">Winds</a> (6)	4.	<a href="#">Cock-a-doodle-doo!</a> <i>Harding, Emma</i> . 1994. Call number: E HAR 2 of 2 copies available at Evergreen Indiana.	<a href="#">Place Hold</a> <a href="#">Add to my list</a>
<b>Series Title</b> <a href="#">More</a>	5.	<a href="#">Cock-a-doodle-doo!</a> <i>Runcie, Jill</i> . 1991. Call number: RUN 4 of 4 copies available at Evergreen Indiana.	<a href="#">Place Hold</a> <a href="#">Add to my list</a>
<a href="#">Hellin reardier l evel 2</a> (3)			

From here you can navigate to other records as desired, or you can click the Go Back button to return to the bibliographic record you had opened, which will open in OPAC view. To return to holdings maintenance view click **Actions for this Record (Alt + A)**, and select **Holdings Maintenance (Alt +H)**.

Record Summary ( [Add Volumes](#) ) ( [View MARC](#) )

Title: Cock-a-doodle-doo, creak, pop-pop, moo      Edition: 1st ed.      TCN: sky234399986      Created By: admin  
Author: Aylesworth, Jim.      Pub Date: 2012      Database ID: 19890094      Last Edited By: admin  
Bib Call #: PZ8.3.A95Cnl 2012      Record Owner:      Last Edited On: 2012-10-12 9:49 PM

Record 20 of 44    Start    Previous    Next    End    Search Results    Actions for this Record  
Go Back    Reload    Go Forward    Debug    Print Page

INSPIRE    Indiana State Library    Find a Library Near Me    Help    About Evergreen

### Search the Catalog

All Formats    title:title:Cock-a-doodle-    Title    in    Evergreen Indiana

[Search](#)    [Advanced Search](#)

[ [Click to Refine Your Original Search](#) ]

Recent searches    [Search Results](#)    Showing Item 20 of 44    [Previous](#)    [Next](#)

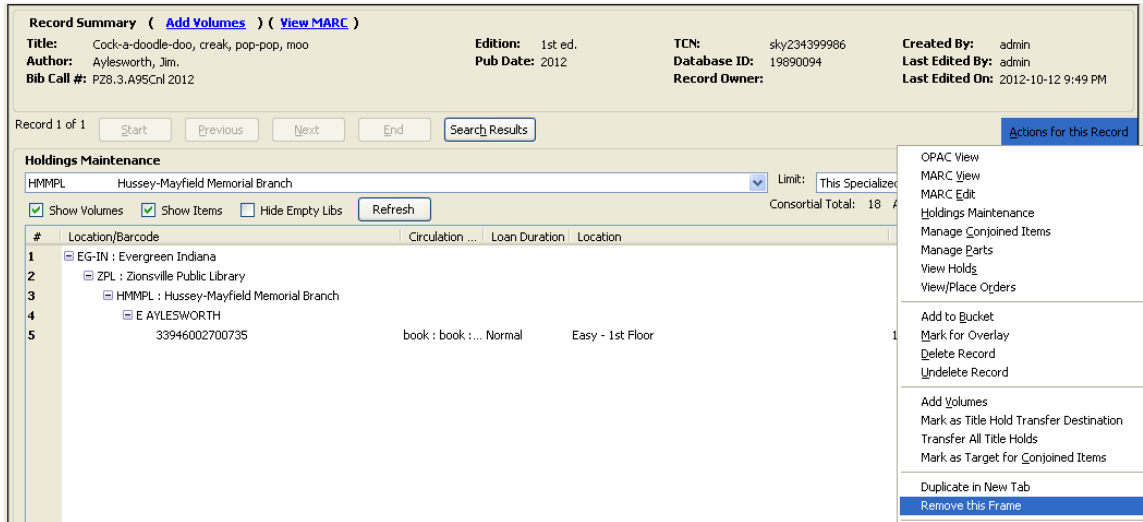
	Cock-a-doodle-doo, creak, pop-pop, moo / by Jim Aylesworth ; illustrated by Brad Sneed. Aylesworth, Jim. (Author). Sneed, Brad, Ill. (Added Author). Aylesworth, Jim. (Credited).	<a href="#">Place Hold</a> <a href="#">Add to my list</a>
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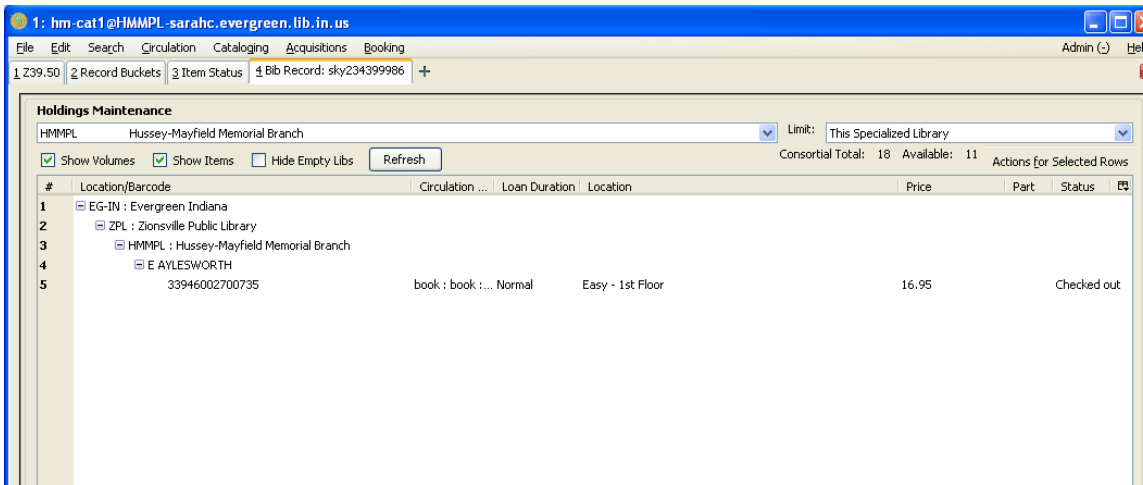
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To turn off the record summary frame, click on **Actions for this Record (Alt + A)** and select **Remove this Frame**.



The Record Summary frame will disappear, as seen below, and you will no longer be able to access the **Actions for this Record** menu for that record. When you close the record and open another, the Record Summary frame will be turned back on.



## Understanding and Customizing the Holdings Maintenance Display

Below the Record Summary, is the Holdings Maintenance area. The Holdings Maintenance Screen is a Column Picker screen, so you can customize the columns that are displayed. Just click on the column picker icon to make your selections. See **Chapter 4 – Using the Column Picker** for more information.

The screenshot shows the 'Record Summary' for a book titled 'Cock-a-doodle-doo, creak, pop-pop, moo' by Aylesworth, Jim. Below the summary is the 'Holdings Maintenance' section for the 'Hussey-Mayfield Memorial Branch'. A table lists holdings with columns for #, Location/Barcode, Vol., Copies, Circulation, Loan Duration, and Location. A column picker menu is open on the right, with the 'Call Number' option highlighted. The menu includes options like #, Location/Barcode, Volumes, Copies, Alert Message, Barcode, CN Prefix, Call Number, CN Suffix, Circulate As Type, Circulation Library, Circulation Modifier, Circulate?, Copy ID, and Copy Number.

**TIP:** Select the columns that display information that you typically edit using the Copy Editor, so you can see at a glance if the information is correct.

**TIP:** The Holdings Maintenance display is clearer and easier to read if you turn off the Call Number in the Column Picker, as seen below. The Call Number displays in the first column by default. Turning on Call Number just displays the call number in an additional column.

This screenshot shows the Holdings Maintenance screen with the 'Call Number' option selected in the column picker menu. The table below shows a single holding with the call number 'J 954 NARDO' displayed in the first column. The column picker menu is open, and 'Call Number' is highlighted.

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The **Actions for Selected Rows (Alt + F)** menu allows you to perform various functions associated with volumes and items. In order to perform the desired function, it is necessary to highlight the correct row in the Holdings Maintenance display. If the wrong line is selected, certain functions will not be active.

**Record Summary ( Add Volumes ) ( View MARC )**

**Title:** Cock-a-doodle-doo, creak, pop-pop, moo  
**Author:** Aylesworth, Jim.  
**Bib Call #:** PZ8.3.A95Cnl 2012

**Edition:** 1st ed.  
**Pub Date:** 2012

**TCN:** sky234399986  
**Database ID:** 19890094  
**Record Owner:**

**Created By:** admin  
**Last Edited By:** admin  
**Last Edited On:** 2012-10-12 9:49 PM

Start Previous Next End Search Results Actions for this Record

**Holdings Maintenance**

HMMPL Hussey-Mayfield Memorial Branch Limit: This Specialized Library

Consortial Total: 18 Available: 11 Actions for Selected Rows

Show Volumes  Show Items  Hide Empty Libs Refresh

#	Location/Barcode	Circulation ...	Loan Duration	Location
1	EG-IN : Evergreen Indiana			
2	ZPL : Zionsville Public Library			
3	HMMPL : Hussey-Mayfield Memorial Branch			
4	E AYLESWORTH			
5	33946002700735	book : book : ...	Normal	Easy - 1st Floor

- Copy to Clipboard
- Add Items to Buckets
- Show Item Details
- Make This Item Bookable (Y)
- Show Last Few Circulations
- Edit Items
- Transfer Items to Previously Marked Volume
- Link as Conjoined Items to Previously Marked Bib Record
- Add Volumes
- Mark Library as Volume Transfer Destination
- Add Items
- Edit Volumes
- Mark Volume as Item Transfer Destination
- Transfer Volumes to Previously Marked Library
- Delete Items
- Delete Volumes
- Request Item
- Mark Item Damaged
- Mark Item Missing
- Print Item Spine Labels
- Replace Barcode
- Save Columns
- Refresh Listing

The Holdings Maintenance screen displays holdings information in a hierarchical fashion. Line number 1 is the Consortium line, line number 2 is the library system, line number 3 is the library branch. Next are displayed the Volume/Call Number line and finally the item line.

**Record Summary ( Add Volumes ) ( View MARC )**

**Title:** Cock-a-doodle-doo, creak, pop-pop, moo  
**Author:** Aylesworth, Jim.  
**Bib Call #:** PZ8.3.A95Cnl 2012

**Edition:** 1st ed.  
**Pub Date:** 2012

**TCN:**  
**Databa**  
**Record**

Start Previous Next End Search Results

**Holdings Maintenance**

HMMPL Hussey-Mayfield Memorial Branch

Show Volumes  Show Items  Hide Empty Libs Refresh

#	Location/Barcode	Vol...	C...	Circulation Modifier
1	EG-IN : Evergreen Indiana			
2	ZPL : Zionsville Public Library			
3	HMMPL : Hussey-Mayfield Memorial Branch			
4	E AYLESWORTH			
5	33946002700735			

**Consortium  
Library System  
Branch  
Call Number/Volume  
Barcode/Copy/Item**

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To display all the lines at once, make sure the boxes next to **Show Volumes** and **Show Items** are checked. If they are not, you can check them and then click the **Refresh** button. These will remain checked or unchecked for your workstation until you change them.

Take the time to familiarize yourself with the hierarchies and how they display.

Record 3 of 7    Start    Previous    Next    End    Search Results

**Holdings Maintenance**

HMMPL    Hussey-Mayfield Memorial Branch    Limit:

Show Volumes     Show Items     Hide Empty Libs    Refresh    Consorti

#	Location/Barcode	Vol...	Copies	Circulati...	Loan Duration	Location
1	EG-IN : Evergreen Indiana					
2	ZPL : Zionsville Public Library					
3	HMMPL : Hussey-Mayfield Memorial Branch					
4	FIC ZUSAK					
5	33946001795165				normal	Fiction . 2nd Floor
6	33946001799241				normal	Fiction . 2nd Floor
7	TEEN FIC ZUSAK					
8	33946001760532				normal	Teen . 2nd Floor

Consortium  
 Library System  
 Branch  
 Call Number/Volume  
 Barcode/Copy/Item  
 Barcode/Copy/Item  
 Call Number/Volume  
 Barcode/Copy/Item

If you prefer not to show all items and volumes by default, you can also click the plus signs to view volume and item information.

#	Location/Barcode	Vol...	Copies
1	EG-IN : Evergreen Indiana		
2	ZPL : Zionsville Public Library		
3	+ HMMPL : Hussey-Mayfield Memorial Branch	1	<1>

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At the top of the Holdings Maintenance box, note the drop down box that lists your library's name. On the right side of the screen are displayed the total number of items in the consortium that are attached to this record. If you click on the down arrow, a drop down list will open showing the other EI libraries.

Record Summary ( [Add Volumes](#) ) ( [View MARC](#) )

Title: Cock-a-doodle-doo, creak, pop-pop, moo  
 Author: Aylesworth, Jim.  
 Bib Call #: PZ8.3.A95Cnl 2012

Edition: 1st ed.  
 Pub Date: 2012

TCN: sky234399986  
 Database ID: 19890094  
 Record Owner:

Created By: adm1  
 Last Edited By: adm1  
 Last Edited On: 2012

Start Previous Next End Search Results

**Holdings Maintenance**

Green and bold in the list below means the library has volumes for this record.

HMMPL Hussey-Mayfield Memorial Branch Limit: This Specialized Lib...

EG-IN Evergreen Indiana **Consortial Total: 18 Available: 11**

Library	Loan Duration	Location	Price	Part
ACPL Akron Carnegie Public Library				
ACPLA Akron Carnegie Public Library - Akron				
ADPL Andrews-Dallas Public Library				
ADPLA Andrews-Dallas Public Library - Andrews				
AMPL Alexandria-Monroe Public Library				
<b>AMPLA Alexandria-Monroe Public Library - Alexandria</b>	Normal	Easy - 1st Floor	16.95	
APL Attica Public Library				
AFLA Attica Public Library - Attica				
APLS Adams Public Library				
APLSD APLS-Decatur				
APLSC APLS-Geneva				
BCPL Benton County Public Library				
BCPLF Benton County Public Library - Fowler				
BECPLE Bloomfield Eastern Greene County Public Library				

Libraries with holdings are indicated with bold text and a green bar on the left side of the dropdown box. To display the holdings of another library, click on the library name.

You can also set your display to show multiple branches at once. Simply select your system name from the list instead of your branch name:

Record Summary ( [Add Volumes](#) ) ( [View MARC](#) )

Title: Cock-a-doodle-doo, creak, pop-pop, moo  
 Author: Aylesworth, Jim.  
 Bib Call #: PZ8.3.A95Cnl 2012

Edition: 1st ed.  
 Pub Date: 2012

TCN: sky  
 Database ID: 19890094  
 Record Owner:

Record 1 of 1 Start Previous Next End Search Results

**Holdings Maintenance**

GDCPL Greensburg-Decatur County Contractual Public Library Limit: Cor

Show Volumes  Show Items  Hide Empty Libs Refresh

#	Location/Barcode	Vol...	Copies	Circulati...	Loan Duration	Location
1	EG-IN : Evergreen Indiana					
2	GDCPL : Greensburg-Decatur County Contractual Public Library					
3	GDCPLB : Greensburg-Decatur County Public Library - Boo...	0	<0>			
4	GDCPLD : Greensburg-Decatur County Public Library - Car...	1	<1>			
5	CAR E AYLESWORTH		1			
6	32826011905908					
7	GDCPLG : Greensburg-Decatur County Public Library - Gre...	1	<1>			
8	E AYLESWORTH		1			
9	32826011894698					
10	GDCPLW : Greensburg-Decatur County Public Library - We...	0	<0>			

**Consortium Library System**

**Branch**

**Branch**

**Branch**

**Call Number/Volume**

**Barcode/Copy/Item**

**Branch**

**Call Number/Volume**

**Barcode/Copy/Item**

**Branch**

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You can also display holdings for all the libraries by selecting Evergreen Indiana.

Record Summary ( [Add Volumes](#) ) ( [View MARC](#) )

Title: Cock-a-doodle-doo, creak, pop-pop, moo  
Author: Aylesworth, Jim.  
Bib Call #: PZ8.3.A95Cnl 2012

Edition: 1st ed.  
Pub Date: 2012

TCN: sky234399986  
Database ID: 19890094  
Record Owner:

Created By: admin  
Last Edited By: admin  
Last Edited On: 2012-10-12 9:49 PM

Record 1 of 1   Start   Previous   Next   End   Search Results   Actions for this Record

**Holdings Maintenance**

EG-IN   Evergreen Indiana   Limit: This Specialized Library

Show Volumes    Show Items    Hide Empty Libs   Refresh

Consortial Total: 18   Available: 11   Actions for Selected Rows

#	Location/Barcode	Vol...	Copies	Circulati...	Loan Duration	Location	Price	Actions
1	EG-IN : Evergreen Indiana							
2	ACPL : Akron Carnegie Public Library							
3	ACPLA : Akron Carnegie Public Library - Akron	0	<0>					
4	ADPL : Andrews-Dallas Public Library							
5	ADPLA : Andrews-Dallas Public Library - Andrews	0	<0>					
6	AMPL : Alexandria-Monroe Public Library							
7	AMPLA : Alexandria-Monroe Public Library - Alexandria	1	<1>					
8	JP AYL		1					
9	37521530333352			book : bo...	Normal	AMPL Juvenile Preschool Picture Book	16.95	R...
10	APL : Attica Public Library							
11	APLA : Attica Public Library - Attica	0	<0>					
12	APLS : Adams Public Library							
13	APLSD : APLS-Decatur	0	<0>					
14	APLSG : APLS-Geneva	0	<0>					
15	BCPL : Benton County Public Library							
16	BCPLF : Benton County Public Library - Fowler	0	<0>					
17	BEGPL : Bloomfield Eastern Greene County Public Library							

**NOTE:** The more holdings there on the record, the longer it will take to load.

**NOTE:** Make sure the **Limit** drop down box is set to **This Branch Your Bookmobile** or **This Specialized Library**.

**TIP:** You can shorten the display to system names by clicking the **Hide Empty Box**. Then branch names without holdings will not display, however you cannot leave this toggled for cataloging because your own branch will also hidden on records where you have no holdings.

Record Summary ( [Add Volumes](#) ) ( [View MARC](#) )

Title: Cock-a-doodle-doo, creak, pop-pop, moo  
Author: Aylesworth, Jim.  
Bib Call #: PZ8.3.A95Cnl 2012

Edition: 1st ed.  
Pub Date: 2012

TCN: sky234399986  
Database ID: 19890094  
Record Owner:

Created By: admin  
Last Edited By: admin  
Last Edited On: 2012-10-12 9:49 PM

Record 1 of 1   Start   Previous   Next   End   Search Results   Actions for this Record

**Holdings Maintenance**

EG-IN   Evergreen Indiana   Limit: This Specialized Library

Show Volumes    Show Items    Hide Empty Libs   Refresh

Consortial Total: 18   Available: 11   Actions for Selected Rows

#	Location/Barcode	Vol...	Copies	Circulati...	Loan Duration	Location	Price	Actions
1	EG-IN : Evergreen Indiana							
2	ACPL : Akron Carnegie Public Library							
3	ADPL : Andrews-Dallas Public Library							
4	AMPL : Alexandria-Monroe Public Library							
5	AMPLA : Alexandria-Monroe Public Library - Alexandria	1	<1>					
6	JP AYL		1					
7	37521530333352			book : bo...	Normal	AMPL Juvenile Preschool Picture Book	16.95	R...
8	APL : Attica Public Library							
9	APLS : Adams Public Library							
10	BCPL : Benton County Public Library							
11	BEGPL : Bloomfield Eastern Greene County Public Library							
12	BGPL : Boswell Grant Township Public Library							

More information on the following page.

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**NOTE:** *If you change the library displayed in the Holdings Maintenance screen, it will remain the default until you change it back, even if you log out or open another bibliographic record.*

To change the screen back to displaying your holdings only, you must select it from the drop-down list.