

# **Recording textual holdings of multipart and serial titles**

Presented by Resource Management Group  
April 3, 2025

# Format for today's session

- The session is being recorded
- The first ~40-45 minutes will include a review of the documentation with some interactive Zoom polls and demonstration
- Add your questions anytime to the Zoom Q&A
- All questions will be answered after the presentation
- Recording will be shared later today

# **ANSI/NISO Z39.71-2006 (R2011)**

## **Holdings Statements for Bibliographic Items**

- A change in UC Berkeley practice for recording holdings statements in fields 866-868 in Alma holdings records
- Peer-reviewed national standard
- First approved in 1999, revision approved in 2006 and reaffirmed in 2011
- Promotes consistency in the communication and exchange of holdings information

# Recording textual holdings of multipart and serial titles

- <https://www.lib.berkeley.edu/Staff/staff-docs/sils/resource-management/recording-textual-holdings-of-multipart-and-serial-titles>
- UC Berkeley local documentation of ANSI/NISO Z39.71-2006 (R2011) Holdings Statements for Bibliographic Items
- Focuses on how to code common situations in fields 866-868 in Alma holdings records
- Considerations: principle of representation, fewer exceptions

# Today's training

- Will review the UC Berkeley local documentation to help you understand our new policies
- Does not replace the documentation
  - You should review and consult the documentation when creating holdings statements using the new standard
- Will answer your questions
  - Enter questions in the Zoom Q&A to be answered at the end of the presentation

# Trainers for today's session

**Tim Converse**, Operations Manager, Northern Regional Library Facility

**Dori Hsiao**, Technical Processing Lead, Environmental Design Library

# Poll 1: Which holdings statement represents the new standard?

A serial is published monthly, 12 numbers to a volume each year, beginning in January 1981. The library holds nearly all of volumes 1 to 10, but lacks number 9 of volume 8.

- A) 866 41 \$\$8 0 \$\$a  
v.1(1981)-8:8(Aug 1988), 8:10(Oct 1988)-v.10(1990)
- B) 866 41 \$\$8 0 \$\$a  
v.1:no.1(1981:Jan.)-v.8:no.8(1988:Aug.),v.8:no.10(1988:Oct.)-v.10:no.  
12(1990:Dec.)

## Poll 2: Which holdings statement represents the new standard?

A serial is published monthly, 12 numbers to a volume each year, beginning in January 1981. The library holds nearly all of volumes 1 to 20, but lacks number 12 of volume 8.

- A) 866 41 \$\$8 0 \$\$a  
v.1:no.1(1981:Jan.)-v.8:no.11(1988:Nov.),v.9(1989)-v.10(1990)
- B) 866 41 \$\$8 0 \$\$a  
v.1(1981)-8:11(Nov 1988), v.9(1989)-10(1990)



## Poll 3: Which holdings statement represents the new standard?

A report is published triennially, with the first report covering the years 1950 to 1952. Beginning with the second report, the reports are assigned ordinal numbering (2nd, 3rd, etc.).

A) 866 41 \$\$8 0 \$\$a 1951/53(1)-1957/59(3)

B) 866 41 \$\$8 0 \$\$a [1](1951/1953)-3(1957/1959)

## Poll 4: Which holdings statement represents the new standard?

A newspaper is published daily, and is not assigned enumeration. The library holds all issues from 1961-1970 except for July 1, 1962.

- A) 866 41 \$\$8 0 \$\$a 1961:Jan.1-1962:June 30,1962:July 2-1970:Dec.31
- B) 866 41 \$\$8 0 \$\$a 1961; 1962:Jan-June 30, July-Dec; 1963-1970

## Poll 5: Which holdings statement represents the new standard?

A monograph was published in four volumes from 1979 to 1982, each volume containing three parts. The library holds all parts except for the third part of the second volume.

- A) 866 41 \$\$8 0 \$\$a v.1:pt.1-v.2:pt.2,v.3-v.4
- B) 866 41 \$\$8 0 \$\$a v.1:1-3; 2:1-2; 3:1-3; 4:1-3 (1979-1982)

# Moving forward

- Effective April 4:
  - When **creating a new** holdings statement, use the NISO standard
  - When **updating an existing** holdings statement, either:
    - Update the holdings statement to use the NISO standard
    - Update the holdings statement according to the existing pattern
  - If no edits are required, accept legacy holdings statements; do not update existing holding statements just to follow the NISO standard
  - Do not mix legacy practices with the NISO standard

# Q&A