Implementation of the MARC Holdings Format
Summary Notes from NUGM 1990 Workshop

The U.S. MARC Format for Holdings Data (MFHD) will be implemented by
NOTIS in Release 5.0. Holdings need to be converted from the
current volume holdings records to the new MFHD records by the
time Release 5.1 is implemented.

The check-in module (Project Checkmark) in 5.1 will be based on the
MFHD.

Michele Dalehite (FCLA) gave a history of the format (officially
approved 1/90), emphasizing the need to fight the "fear of format".
ALL fields do NOT need to be used. Holdings can continue to be
given in a summary fashion. The utilities are currently planning for
their implementation of the format. Modifications are currently being
worked on for non-serials, loseleafs, kits, multiple versions, etc.

Important objectives for the MFHD were to:
        .support (accept and store) NISO standards
        .work with libraries' local systems

The MFHD serves 4 functions:
        .editing
        .display
        .compression*
        .expansion*

  *Coding is used to determine how statements should be expanded
   or contracted.

It can also store preservation information, e.g. intent to preserve,
method of presevation.

The NISO standard has 4 levels of holdings:
        .level 1: item identifier/institution identifier (e.g. OCLC)
        .level 2: level 1 + information re: receipt, retention,
                  completeness, date of report, phsyical description
                  (i.e. hard or micro)
        .level 3: level 2 + summary holdings (e.g. OCLC LDRs)
        .level 4: level 3 + gaps, i.e. detailed holdings. Gaps
                  are reported in a positive fashion - show what
                  is owned

Predictive check-in with Release 5.1 will be based on encoding of
publication pattern -- not clear if that will be in MFHD or elsewhere.
May want to wait until more is known about 5.1 before building
complex holding pattern statements.

MFHD Fields:

853 (caption and publication pattern)
863 (detailed holdings)
    a 863 field for each piece with a barcode can be created using
    the MARC format; NOTIS libraries will continue to use the item
    records for this purpose.

    Coding of the 853 and 863 fields can be done with Phase I MFHD,
    but nothing will display to the public from these fields.

866/867/868 fields: used for recording holdings (main work/
    supplements/indexes)
899 fields: free text fields without subfielding

MFHD, Phase I (Release 5.0) does not allow for utilization of the
expansion capability. Release 5.1 may or may not allow it.
Compression is tied into predictive check-in and publication patterns.

Predictive check-in may necessitate coding 853's and 863's or
there may be user friendly prompting screen that staff could use.

Can convert volume holding records to 866's or 899's. Most sites will
probably need to convert to 899 fields.

Copy holdings information may eventually be incorporated into MFHD
record at which time the current copy holdings record will disappear.
No final plans or possible dates for this.

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