

Introduction:

In FOLIO, bound-with relationships are established by linking the parent **Item** record with the child **Holdings** record. Creation or dissolution of this link is done by editing the parent Item record. Parent and child records have the following characteristics:

- Parent records will mostly look like other records, but with these distinctive features:
 - In the item list of the Holdings record, the parent Item barcode will be followed by a "bound-with" icon (looks like two books stacked on top of each other).
 - There will be information about linked child records in the "Bound-with and analytics" section of the Item record.
 - At the top of the Item record display, there will be a note next to the title indicating that other titles are bound with the item.
- Child records will have a Holdings record with Holdings type "bound-with" and a "Shelved Elsewhere" location. There is a separate "Shelved Elsewhere" location for each library, e.g., SAL3 Shelved Elsewhere, Green Shelved Elsewhere, etc. The library of the "Shelved Elsewhere" location should correspond to the library of the parent item.
- Child Holdings records do not have an Item record of their own, but because they are linked to the parent item, the parent item barcode will appear in the item list of the Holdings record. A "bound-with" icon will appear next to the barcode here (looks like two books stacked on top of each other).
- In the Holdings record, the HRID of the parent item will appear in the "Bound-with and analytics" section.

Note on bound-withs in Symphony: In Symphony (the system used at Stanford Libraries before FOLIO), it was not possible to directly link parent and child records. MARC 590 notes with information about the bound-with, in conjunction with other coding in the parent and child records, were used to generate a bound-with link in Searchworks. The 590 notes used for this purpose will still be found in bound-with records migrated from Symphony. If the records migrated and linked properly in FOLIO, the 590 will not affect the public display. But such notes will still generate a link in Searchworks if the records are not linked natively in FOLIO (e.g., the bound-with link did not migrate properly). Because 590 notes are not needed to link bound-withs in FOLIO, the procedure below for creating bound-withs does not require the entry of such a note.

Creating Bound-with Records in FOLIO:

Creating the parent record:

Create a record for the parent resource according to normal cataloging procedures. Note: For items that are classed with a series or serial, the enumeration and chronology of the parent Item should correspond to the actual contents of the item, as with any other Item record.

Creating the child record:

1. If necessary, create an Instance record for the child resource according to normal cataloging procedure. **Exception:** *copy can be used for copy-cataloging if it lacks a call number but is otherwise acceptable, because the child call number will be derived from the parent.*
2. Create a Holdings record:
 - a. Holdings type should be “Bound-with”.
 - b. The location should be a “Shelved Elsewhere” location corresponding to the library where the parent Item is shelved (e.g.: Green Shelved Elsewhere when the parent is shelved in Green, SAL3 Shelved Elsewhere when the parent is shelved in SAL3).
 - c. Enter Call number type (this should match the parent record).
 - d. Enter the call number of the parent appended by either the “position within container” descriptor or the enumeration of the resource:
 - i. If resource is **NOT** classed with a numbered series or serial, use a “position within container” descriptor. For books this will usually be “2ND IN VOL”, “3RD IN VOL”, etc. (e.g.: PQ2425 .P74 1829 2ND IN VOL). The “position within container” descriptor should be entered in ALL CAPS.
 - ii. For non-book resources, the description of the container will vary. For example, with microfilm we would use “2ND ON REEL”, etc.
 - iii. For resources classed with a numbered series or serial, append the numbering of the resource that would normally go in the Item record enumeration or chronology field to the end of the call number in the Holdings record (e.g., PQ2425 .P74 v.18)
3. Item record: **Do not create an Item record for bound-with children.**
4. Repeat this process for each child record.

Linking the Parent and Child:

1. Open the parent record and edit the Item record.
2. In the “Bound with and Analytics section” of the record, click on “Add Bound with and analytics”
3. In the dialog box, enter the Holdings HRID of the child record or records.
4. Click on Save to close the dialog box. You will return to the Item edit screen.
5. Before saving the Item, visually confirm that the “Instance title” appears in the list of bound-with children for each of the Holdings HRIDs you entered, and that the title is correct. If the Instance title does not appear, you have entered a non-existent Holdings HRID. If the title is incorrect, you have entered the wrong HRID.
6. Only seven bound-with relationships can be linked at one time. To link more than seven, save the first seven and the click on “Add bound with and analytics” again to enter the next seven.

Maintenance of Bound-withs

Bound-withs may need maintenance for a variety of reasons:

- The bound-with did not migrate correctly from Symphony. In this case there may be a 590 note about the bound-with relationship, but it may be incomplete, formatted incorrectly, contain wrong information, or have missing MARC coding. In other cases there may be no 590 note. In some cases, bound-withs did not migrate properly despite the 590 note being formatted correctly with valid data.
- The bound-with was created incorrectly in FOLIO.
- An item is found to contain bound-with titles that were not entered at the time of cataloging.
- The bound-with was altered or dissolved in error and needs to be fixed.

Parents and children that are not properly linked can be linked using the procedure above, but additional record updates will probably be needed. Confirm the following details:

- Confirm the records should be linked. This can be verified through a 590 note about the relationship, because you have the item in hand, or the person requesting the change has the item in hand.
- Any child Holdings record you link should have a “Shelved Elsewhere” location corresponding to the Library of the parent. If it does not, modify the location.
- Any child Holdings record should have the Holdings type “bound-with”. Verify and correct as necessary.
- The enumeration or “position within container” term (e.g., 1ST IN VOL) for the child should be at the end of the call number in the child Holdings record. Verify and correct as necessary.
- For numbered serials or series bound together, the parent Item record enumeration/chronology should describe the entire contents of the item (e.g., the parent and all the children).
- If there is a dummy record on the child Holdings record, it should be withdrawn and suppressed. These dummy items were sometimes used for bound-withs in Symphony, but are no longer needed.

Dissolving bound-with links

Dissolving bound-with links in FOLIO is done through the parent item record:

- Verify first that the child record has a complete stand-alone record. It should have a Holdings location that is not a “Shelved Elsewhere” location and an Item record with a barcode. Alternatively, it can be withdrawn and suppressed if not needed.
- Edit the parent Item record as follows:
 - In the “Bound-with and Analytics” section of the record, review the list of bound-with records. Find the child record you want to unlink.
 - Click on the trashcan icon to the right of the row.
 - Save the record.

Bound-withs for Serials

As of September 2024, bound-with procedures for serials are still being formulated. Before creating bound-with relationships for Serials, consult with a serials cataloger in Metadata Services or the Data Control Unit Operations Manager.

Bound-with links can be used for serial titles that are bound together. The procedure for linking the records is the same as above. The call number in the child "Shelved Elsewhere" Holdings record should include the holdings of the child title that are bound with the parent item. If there are multiple parent items that include issues of the child record, it will be necessary to create multiple "Shelved Elsewhere" Holdings on the child record.

A simple case of a bound-with serial occurs when the title of a serial changes mid-volume, and issues of both the preceding and succeeding titles are bound in a single item. However, more complicated bound-with relationships may occur, for example:

- A "main" serial title with multiple parts, where the parts are each cataloged separately, but have been bound together over a long period.
- A serial title with a separately cataloged supplement, and the supplement has been bound with the regular issues over a long period.

In some of these more complicated cases, bound-with coding may not be appropriate. As of September 2024, procedures in such cases are still being formulated.

Entering Holdings Statements for Bound-withs

As of September 2024, it has not been determined how Holdings statements should be entered on Instances that include child Holdings records.