

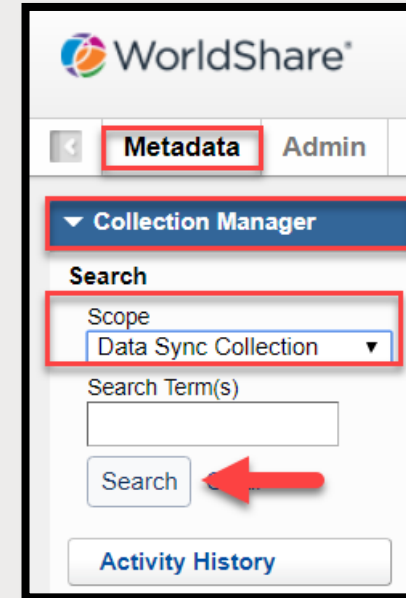
# LOCAL HOLDINGS RECORDS (LHR) PUBLISHING PROFILES

SUNY Library Shared Services  
Maggie McGee



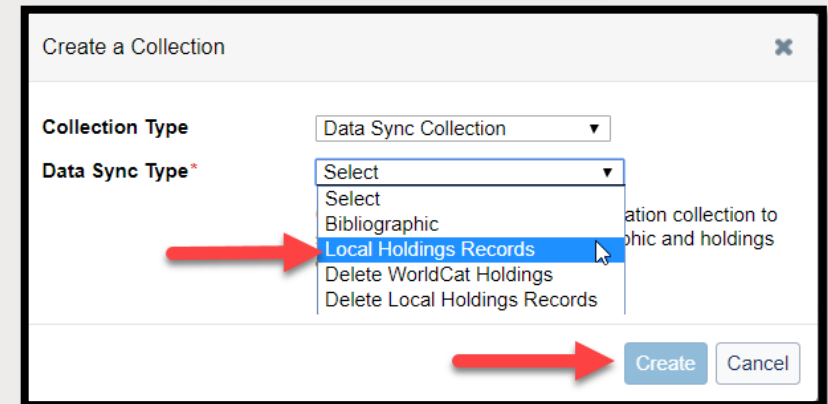
# Create an LHR Data Sync Collection in OCLC Worldshare

1. Login to WorldShare
2. Click on the Metadata Link
3. Click on Collection Manager and expand it
4. Change Scope to: Data Sync Collection
  - a) Check for existing Data Sync Collections by leaving the search term box empty and click search



If there are no existing collections that will be used:

5. Click Create a Collection
  - a) Collection Type: Data Sync Collection
  - b) Data Sync Type: Local Holdings Record
  - c) Click **Create**



# Create an LHR Data Sync Collection in OCLC Worldshare

6. Click on the Expand Properties Tab:
  - a) Type in a Collection Name
  - b) Collection ID will populate once you save the Data Sync Collection\*
  - c) Group: No
  - d) Original Data Format: MARC
  - e) **\*Use Record Status for Processing: Yes**
    - a) This means when "d" is in the LDR of the LHR record, it will delete the holdings in OCLC when the last holding record for the OCLC # has been deleted
  - f) **Remove Worldcat Holding When Final LHR Deleted: Yes**
  - g) Description: optional

# Create an LHR Data Sync Collection in OCLC Worldshare

## Properties Tab Example:

▼ Properties

\* Required field

Collection Name *	<input type="text" value="LHR Sync"/>
Collection ID	1032441
Institution	SUNY Oswego
Symbol	YOM
WorldCat Registry ID	2043
Group	<input type="radio"/> Yes <b>?</b> <input checked="" type="radio"/> No
WMS Library	No
Third Party/Consortia Name	<input type="text"/>
Collection Type	Local Holdings Records
Original Data Format	<input checked="" type="radio"/> MARC <input type="radio"/> Non-MARC
Use Record Status for Processing	<input checked="" type="radio"/> Yes <b>?</b> <input type="radio"/> No
Remove WorldCat Holding When Final LHR Deleted	<input checked="" type="radio"/> Yes <input type="radio"/> No

# Create an LHR Data Sync Collection in OCLC Worldshare


## Local Holdings Records Information Tab:

### 7. Initial Estimate for Record Count:

- a) Put in an estimate of the number of bibliographic records for the institution.

MFHD Processing

\* Required field

**Initial Estimate for Record Count \***   **Estimate Record Count**

**System Information**

Provider



System Name

Version



**OCLC Number Location \***

Location  Tag  Subfield

**Local System Holdings Record Number Location(s)**

Location  Tag  Subfield   





**Local System Bibliographic Record Number Location(s)**

Location  Tag  Subfield   

# Create an LHR Data Sync Collection in OCLC Worldshare

## Local Holdings Records Tab Continued:

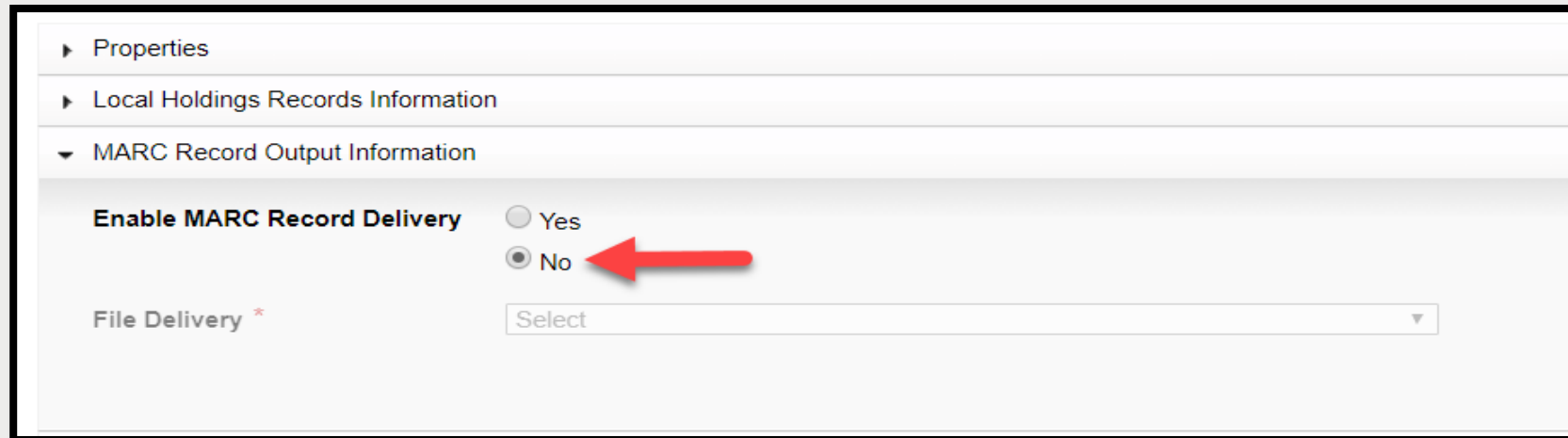
8. Provider: Ex Libris
9. System Name: Alma
10. Version: [leave blank]
11. OCLC Number Location(s): [default values]
12. Local System Number Location(s): [default values]
13. Local System Bibliographic Record Number Locations: [default values]

System Information			
Provider	<input type="text" value="ExLibris"/>		
System Name	<input type="text" value="Alma"/>		
Version	<input type="text"/>		
<b>OCLC Number Location *</b>	Location	Tag	Subfield
	<input type="text" value="004"/>	<input type="text" value="004"/>	<input type="text"/>
<b>Local System Holdings Record Number Location(s)</b>	Location	Tag	Subfield
	<input type="text" value="001"/>	<input type="text" value="001"/>	<input type="text"/>  
<b>Local System Bibliographic Record Number Location(s)</b>	Location	Tag	Subfield
	<input type="text" value="014 \$a"/>	<input type="text" value="014"/>	<input type="text" value="a"/>  

# Create an LHR Data Sync Collection in OCLC Worldshare

## Marc Record Output Information Tab:

### 11. Enable MARC Record Delivery: No



The screenshot displays a web interface for configuring MARC record output. It features a sidebar with three expandable sections: 'Properties', 'Local Holdings Records Information', and 'MARC Record Output Information'. The 'MARC Record Output Information' section is expanded, revealing two settings. The first is 'Enable MARC Record Delivery', which has two radio button options: 'Yes' and 'No'. The 'No' option is selected, and a red arrow points to it. The second setting is 'File Delivery \*', which is a dropdown menu currently showing 'Select'.

# Create an LHR Data Sync Collection in OCLC Worldshare

## Contact Information Tab:

### 12. Input contact person's information

- a) This assigns a data sync specialist to this data sync collection for troubleshooting

Save Collection Actions

- Properties
- Bibliographic Record Information
- Local Bibliographic Data Information
- MARC Record Output Information
- Comments
- Contact Information

\* Required field

Fill out all of the contact information fields for at least one individual. We recommend that you provide the contact information for two to three individuals. List the contacts in order with the primary contact in the first row.

Last Name*	First Name*	Title*	Email Address*	Action
Maggie	McGee	Head of Bibliographic & Digital Services	mcgeemt@oneonta.edu	+ -

OCLC is a global library cooperative operating in more than 100 countries with the headquarters located in the United States. For information on how this contact information is used by OCLC, see the [Privacy Policy](#).

### 13. Click Save



# Create an LHR Data Sync Collection in OCLC Worldshare

## Comments Tab:

- Only appears after filling out the Contact Tab and Saving the Data Sync Collection
- This is where each institution can communicate with an OCLC Data Sync Specialist if there are any issues with creating a Data Sync Collection

The screenshot displays the 'Comments' tab for a Data Sync Collection with ID 1031626. At the top, there is a 'Save' button and a 'Collection Actions' dropdown menu. Below this, a list of tabs is shown: 'Properties', 'Local Holdings Records Information', 'MARC Record Output Information', and 'Comments' (which is currently selected). An 'Add Comment' button is located above the comment list. The comment list shows two entries, both created by Maggie McGee on 01/27/2019. The first comment discusses the need for a separate s/ftp server for Alma connections, and the second comment asks about the sub-directory for holdings records. The interface includes pagination controls showing 'Results 1 - 2 of 2' and a 'Rows 10' dropdown menu.

Collection ID: 1031626

Save Collection Actions ▾

▸ Properties

▸ Local Holdings Records Information

▸ MARC Record Output Information

▼ Comments

Add Comment

Results 1 - 2 of 2 Rows 10 ▾

Topic	Comment	Date Created ▾	User ⇅
<a href="#">S/FTP</a>	Hi, Do we need a separate s/ftp server in connections for Alma? I'm guess yes because they use different sub-directories.	01/27/2019 1:22:11 PM	Maggie McGee
<a href="#">sub-directory</a>	Hi, what would the sub-directory be for holdings records that needs to be set up in Alma. For bib holdings records, it is metacoll/in/bib. Thanks, Maggie	01/27/2019 1:16:10 PM	Maggie McGee

Results 1 - 2 of 2 Rows 10 ▾

▸ Contact Information

# Create an LHR Data Sync Collection in OCLC Worldshare

## 14. Submit the LHR data sync collection

- a) Click *Collection Actions*
- b) Click *Submit Collection to OCLC*
- c) Click *Submit*

The screenshot displays the WorldShare interface for a collection with ID 1032757. The 'Collection Actions' dropdown menu is open, and the 'Submit Collection to OCLC' option is highlighted with a red arrow. A second red arrow points to the 'Submit' button in the 'Submit Collection to OCLC' dialog box. The dialog box contains a warning message: 'You are about to submit the collection to OCLC. If you continue, the collection will be locked and only limited fields will be available. After the collection has been submitted, an OCLC staff member will review the collection and schedule it for processing. Check the Comments panel for status information from OCLC.'

WorldShare®

Metadata Interlibrary Loan Admin

Collection Manager

Search

Scope: Data Sync Collection

Search Term(s):

Search Clear

Close All Tabs

Search: Keyword =

Collection ID: 1032757

Save Collection Actions

- Clone Collection
- Make Default Collection
- Submit Collection to OCLC

UpdateData

Collection ID: 1032757

Submit Collection to OCLC

You are about to submit the collection to OCLC.  
If you continue, the collection will be locked and only limited fields will be available.  
After the collection has been submitted, an OCLC staff member will review the collection and schedule it for processing. Check the Comments panel for status information from OCLC.

Submit Cancel

# SETTING UP PUBLISHING PROFILES FOR LOCAL HOLDINGS RECORDS IN ALMA

# Setting Up Publishing Profiles for Local Holding Records In Alma

## STEP 2: Add S/FTP Definitions for Local Holdings Records

- *Configuration>General>External Systems>S/FTP definitions*
  - Click *Add S/FTP connection*
    - Name: OCLC LHR Data Sync
    - Server: ftp2.oclc.org
    - Port: 21
      - Use 22 if 21 fails to successful connect during testing
    - Sub-directory: metacoll/in/lhr
    - Max. Number of Files: [leave blank]
    - Min. Number of Files: 1
    - Max. file size: 100000
    - Size type: MB
    - Allow Navigation: True
    - Ftp Server Type: Default
    - Ftp Passive Mode: [keep unchecked]
    - Ftp Server Secured: [check the box]
    - Authentication method: username/password authentication
    - Username: [OCLC Symbol – must be in lower case]
    - Password: [supplied by OCLC]

# Setting Up Publishing Profiles for Local Holdings Records in Alma

## STEP 2: S/FTP Definitions for Local Holdings Records Example

Update S/FTP connection Test FTP Cancel Save

**OCLC LHR Data Sync** i ▼

Definition Type	FTP	ID	879429460004804
Context Type	Integration	Managed in Network	No

Name \*

Description

Server \*  Port \*

Sub-directory  Max. Number of Files

Min. Number of Files  Max. file size

Size type  Allow Navigation

Ftp Server Type  FTP Passive Mode

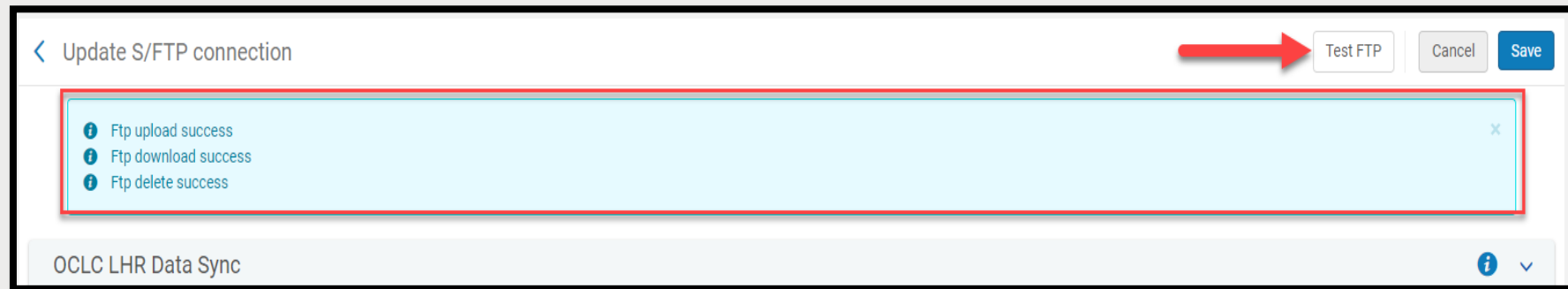
Ftp Server Secured

UserName \*  Password \*

# Setting Up Publishing Profiles for Local Holdings Records in Alma

## STEP 2 S/FTP Definitions for Local Holdings Records Continued

- Click **Test FTP**
  - A message will appear saying the Ftp upload, download, and delete were successful
  - If an error message appears, try changing the Port to 22



- Click **Save**

# Setting up Publishing Profiles for Local Holdings Records in Alma

## STEP 3: Configure Publishing Profiles for Local Holding Records

### ■ *Resources*>*Publishing*>*Publishing Profiles*

- Click the ellipses for *Publish your Local Holdings Records (LHRs) to OCLC*
- Choose *Edit*

The screenshot displays the Alma system interface. On the left, the 'Resources' menu is highlighted with a red box. The main content area shows the 'Publishing Profiles' page. The page has tabs for 'Institution', 'Network', and 'Community'. Below the tabs, there is a search bar and a '+ Add Profile' button. A table lists the publishing profiles, with the following data:

	Active	Name	Description	Modification Date	
1	<input checked="" type="checkbox"/>	Publish bibliographic record (DataSync) to OCLC	Synchronize your local catalog with WorldCat	01/25/2019	...
2	<input type="checkbox"/>	Publish electronic records to Google Scholar	Publish electronic records to Google Scholar	-	...
3	<input checked="" type="checkbox"/>	Publish electronic records to Primo Central	Publish electronic records to Primo Central	11/05/2018	...
4	<input type="checkbox"/>	Publish electronic record to PubMed	Synchronize electronic records with PubMed	-	...
5	<input type="checkbox"/>	Publish holdings to Libraries Australia	Upload Holdings to Libraries Australia	-	...
6	<input type="checkbox"/>	Publish your Local Holdings Records (LHRs) to OCLC	Make your library's Local Holdings Records (LHRs) accessible through WorldCat	01/22/2019	...

The profile with ID 6 is highlighted with a red box. A red arrow points to the 'Edit' button in the context menu for this profile.

# Setting Up Publishing Profiles for Local Holdings Records in Alma

## STEP 3: Configure Publishing Profiles for Local Holdings Records Continued

### ■ Profile Details

- Name: [keep]
- Profile description: [keep]
- OCLC institution symbol: OCLC Symbol
- Project number: [keep blank]
- Collection ID: From OCLC Data Sync Collection

**Publishing Profile Details** Cancel Save

Profile Details

Profile name \*

Profile description

OCLC institution symbol \*  Project ID

Collection ID



# Setting Up Publishing Profiles for Local Holdings Records in Alma

## STEP 3: Configure Publishing Profiles for Local Holdings Records Continued:

- Publishing Parameters & Submission Format for Local Holdings Records:
  - *Publishing Mode:*
    - Baseline – **SELECT and RUN FIRST**
    - Incremental – Automatically runs after the Baseline runs
    - Full – **DO NOT USE**
  - Status:
    - Active or Inactive: [Keep status inactive until LHRs are ready to be published]
  - Scheduling: [Select *Every Saturday at 6:00*]
  - Email Notifications: [optional]
  - Submission Format:
    - FTP Configuration: [the name of the s/ftp definition]
  - Click **Save**

# Setting Up Publishing Profiles for Local Holdings Records in Alma

## STEP 3: Configure Publishing Profiles for Local Holdings Records Continued

Publishing Parameters & Submission Format for LHR Record Example:

The screenshot shows the 'Publishing Profile Details' form in Alma. The form is divided into three main sections: 'Profile Details', 'Publishing Parameters', and 'Submission Format'. The 'Publishing Parameters' and 'Submission Format' sections are highlighted with red boxes.

**Profile Details**

- Profile name \*: Publish your Local Holdings Records (LHRs) to OCLC
- Profile description: Make your library's Local Holdings Records (LHRs) accessible through WorldCat
- OCLC institution symbol \*: ZBM
- Project ID: [Empty]
- Collection ID: 1031626

**Publishing Parameters**

- Publishing mode \*:  Incremental  Baseline  Full
- Status:  Active  Inactive
- Scheduling: Not scheduled
- Email Notifications: [Button]

**Submission Format**

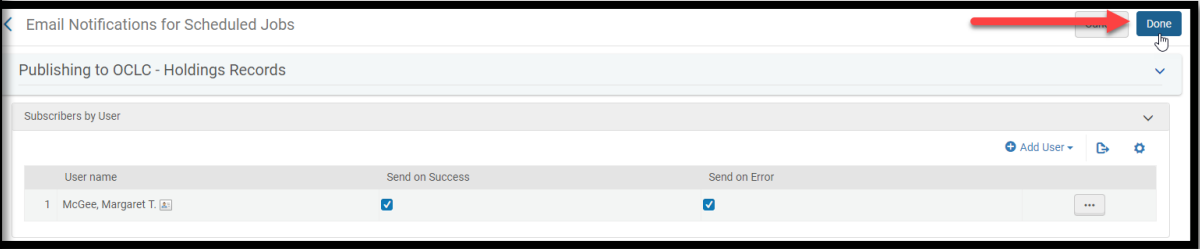
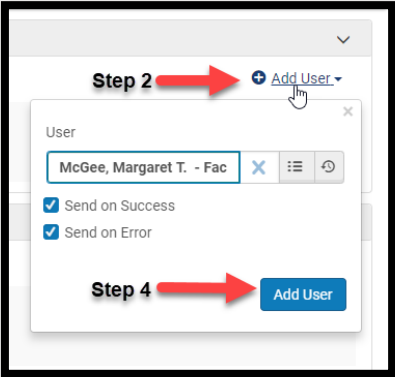
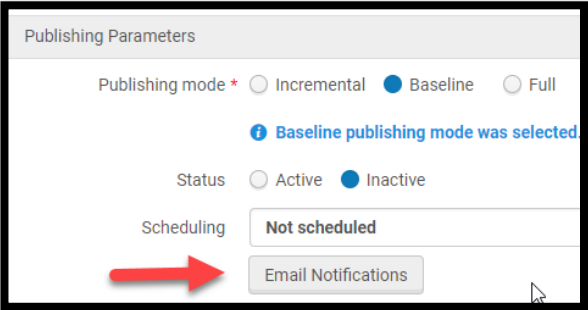
- FTP configuration: OCLC LHR Data Sync
- Sub-directory: [Empty]

# Setting Up Publishing Profiles for Local Holdings Records in Alma

## STEP 3: Configure Publishing Profiles Profile Details Local Holdings Records Continued

Setting up email notifications:

1. Click on **Email Notifications**
2. Click **Add User**
3. Enter username or search for user
  - Keep **Send on Success** and **Send on Error** checked unless you do not want to receive a notification the job is complete
4. Click **Add User**
5. Click **Done**



# LHR REQUIREMENTS

SUNY Library Share Services  
Maggie McGee



The State University  
of New York

# LHR Optional Fields

LHRs can be published without these fields, but these fields provide the library's holdings for the serial title. The following fields in the LHR will publish the library's holdings information to OCLC:

1. 853/863 (must be paired together)
2. 854/864 (must be paired together)
3. 855/865 (must be paired together)
4. 866

**Please Note:** if you have been manually adding your LHRs and using MARC Holdings fields that are different than in Alma it will either be:

1. Purge/fill – the LHR information is overwritten with whatever is sent from ALMA
2. Append – will add each submitted LHR to WorldCat and can very easily lead to duplication. It is used sparingly.

# LHR Requirements

Local holding Records need to have:

1. OCLC # (OCN) – only flag LHRs with OCLC #s to publish
  - a) Only holdings records related to a bibliographic record with an OCLC control number in the 035 field are published to OCLC when the bibliographic record is flagged/marked to be published to OCLC
2. LHRs cannot have existing 004s
  - a) OCLC cannot publish LHRs with more than one 004
  - b) Alma file places the OCN (OCLC#) in the LHR 004
3. **852 \$b – Collection (or sublocation)**
4. **852 \$c – Shelving location**
5. **Second 852 \$b - OCLC local holdings codes for periodicals - Optional**
  - a) Will use OCLC Symbol if a campus does not use OCLC local holdings codes
  - b) The local holdings code displays where the material is available in Worldshare

# STEPS TO PERFORM IN ALMA BEFORE PUBLISHING LHRS



The State University  
of New York

# Steps to Perform in Alma Before Publishing LHRs

1. Create a set(s) for serial collections for LHR Publishing Profiles
  - a) Physical Title Set
  - b) Save the Query
  - c) Review the set and remove any records that may have been caught in the serials set
2. Remove MARC holdings field 004 from migration
  - a) Copy SUNY LHR Remove 004 Normalization Rule
  - b) Create a MARC21 Holdings Normalization process
  - c) Run the "Change Holding Information" job on the set
3. Change the flag for serials from "Publish Bib" to "Publish LHR"
  - a) Run the "Synchronize Bib records with external catalog" job on the set
4. Activate the LHR Publishing Profile in Alma
  - a) Run the baseline first
  - b) LHR publishing profiles should be set to run every Saturday at 6:00
  - c) The LHR data sync collection in OCLC Worldshare needs to be submitted before activating the Alma LHR Publishing Profile
5. Work With OCLC
  - a) Communicate with OCLC via the LHR data sync communication tab
  - b) Create a Translation Table
  - c) Correct Errors



# STEP 1: CREATE A SET FOR LHR PUBLISHING PROFILES

# Step 1: Create a Set for LHR Publishing Profiles

1. Create a set using an advanced physical titles search using the “permanent physical locations” for serials in the collection

The screenshot shows an advanced search interface for physical titles. At the top, there is a dropdown menu for "Physical titles" and a "Zone" section with radio buttons for "Institution" (selected), "Network", and "Community". Below this, there are two main search criteria:

- Criterion 1:** "Permanent physical location" (dropdown) followed by "Equals" (dropdown). The selected value is "Gladys Marcus Library :". A list of sub-locations is displayed, each with a close button (x):
  - 4th fl. -- Periodicals Desk (PERDK)
  - 4th fl. -- Periodicals Desk, Forecasts Archive Library Use (PCIVE)
  - 4th fl. -- Periodicals Desk, Forecasts Current Library Use (PCAST)
  - 4th fl. -- Periodicals Desk Oversize (PEROS)
  - 4th fl. -- Periodicals Microform (PERM)
  - 4th fl. -- Periodicals Stacks (PERST)
  - 4th fl. -- Special Collections Periodicals (SPECP)
- Criterion 2:** "Other System Number" (dropdown) followed by "Contains Keywords" (dropdown). The selected value is "(OCoLC)".

At the bottom left, there are "AND" and "OR" buttons. At the bottom right, there are "Clear form" and "Search" buttons.

# Step 1: Create a Set for LHR Publishing Profiles

## 2. Click *Save Query*

The screenshot shows a search interface with the following elements:

- Physical titles** (selected) | Zone:  Institution  Network  Community
- Query 1: **Permanent physical location**  **Equals**  **Gladys Marcus Library :**
  - 4th fl. -- Periodicals Desk (PERDK) ✕
  - 4th fl. -- Periodicals Desk, Forecasts Archive Library Use (PCIVE) ✕
  - 4th fl. -- Periodicals Desk, Forecasts Current Library Use (PCAST) ✕
  - 4th fl. -- Periodicals Desk Oversize (PEROS) ✕
  - 4th fl. -- Periodicals Microform (PERM) ✕
  - 4th fl. -- Periodicals Stacks (PERST) ✕
  - 4th fl. -- Special Collections Periodicals (SPECP) ✕
- Query 2: **AND**  **OR**  **Other System Number**  **Contains Keywords**  **(OCoLC)**
- Buttons: **Clear form**, **Search**
- Results: **Physical Titles (1 - 20 of 1,979)** | **Back**
- Footer: **Set name** LHR for publishing profiles **Set type** logical where (Library (Holdings) contains phrase ((Gladys Marcus Library : 4th fl. -- Periodicals Desk/4th fl. -- Periodicals Desk, Forecasts Archive Library Use/4th fl. -- Periodicals Desk, Forecasts Current Library Use/4th fl. -- Periodicals Desk Oversize/4th fl. -- Periodicals Microform/4th fl. -- Periodicals Stacks/4th fl. -- Special

A red arrow points to the **Save Query** button in the bottom right corner.

# Step 1: Create a Set for LHR Publishing Profiles

## 3. Set Details

- Set name: [Mandatory]
- Description: [Optional]
- Private: [No, if want to share the set]
- Status: [Active]
- Click **Save**

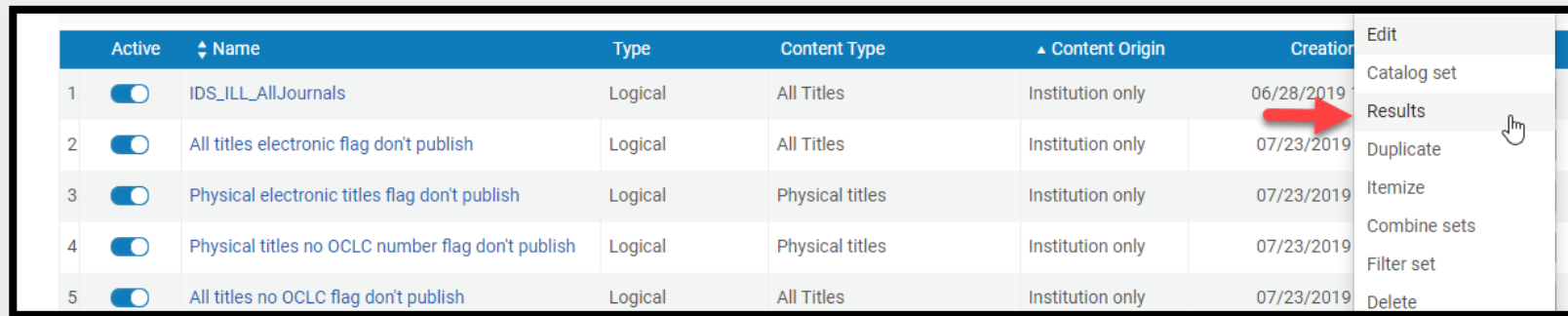
The screenshot shows the 'Set Details' form with the following fields and values:

- Set name \***: LHR for publishing profiles
- Description**: Periodical locations to be included in LHR publishing profiles
- Note**: (Empty text area)
- Set content type**: Physical titles
- Private**:  Yes  No
- Set type**: Logical
- Status**:  Active  Inactive
- Creation date**: 11/26/2019 5:38 PM
- Created by**: slc
- Updated by**: slc
- Content Origin**: Institution only
- Set ID**: 568311660004829

A red arrow points to the **Save** button in the top right corner.

# Step 1: Create a Set for LHR Publishing Profiles

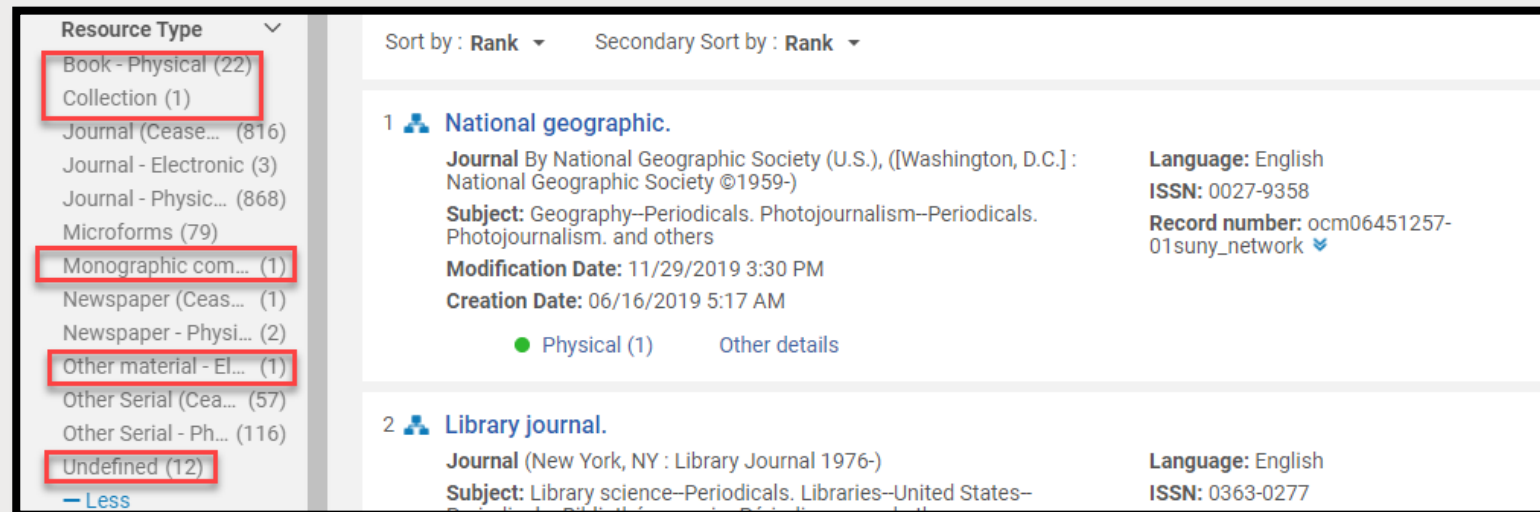
4. Click **Results** from the ellipses of the set to review the bib records that have been added to the set



Active	Name	Type	Content Type	Content Origin	Creation	
<input type="checkbox"/>	IDS_ILL_AllJournals	Logical	All Titles	Institution only	06/28/2019	⋮
<input type="checkbox"/>	All titles electronic flag don't publish	Logical	All Titles	Institution only	07/23/2019	⋮
<input type="checkbox"/>	Physical electronic titles flag don't publish	Logical	Physical titles	Institution only	07/23/2019	⋮
<input type="checkbox"/>	Physical titles no OCLC number flag don't publish	Logical	Physical titles	Institution only	07/23/2019	⋮
<input type="checkbox"/>	All titles no OCLC flag don't publish	Logical	All Titles	Institution only	07/23/2019	⋮

- Edit
- Catalog set
- Results
- Duplicate
- Itemize
- Combine sets
- Filter set
- Delete

5. Click on the **Resource Type** facet for non-periodicals to review if they are in the wrong location and/or should not be included in the LHR set



**Resource Type** ▾

- Book - Physical (22)
- Collection (1)
- Journal (Cease... (816)
- Journal - Electronic (3)
- Journal - Physic... (868)
- Microforms (79)
- Monographic com... (1)
- Newspaper (Ceas... (1)
- Newspaper - Physi... (2)
- Other material - El... (1)
- Other Serial (Cea... (57)
- Other Serial - Ph... (116)
- Undefined (12)
- Less

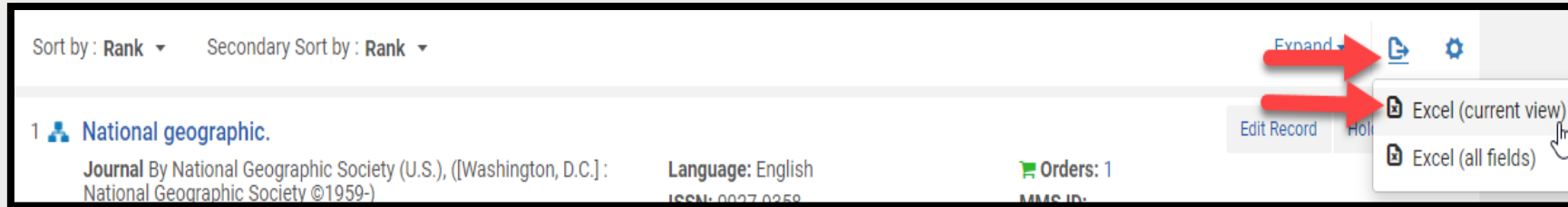
Sort by: Rank ▾ Secondary Sort by: Rank ▾

1 **National geographic.**  
**Journal** By National Geographic Society (U.S.), ([Washington, D.C.] : National Geographic Society ©1959-)  
**Subject:** Geography--Periodicals. Photojournalism--Periodicals. Photojournalism. and others  
**Modification Date:** 11/29/2019 3:30 PM  
**Creation Date:** 06/16/2019 5:17 AM  
**Language:** English  
**ISSN:** 0027-9358  
**Record number:** ocm06451257-01suny\_network

2 **Library journal.**  
**Journal** (New York, NY : Library Journal 1976-)  
**Subject:** Library science--Periodicals. Libraries--United States--

# Step 1: Create a Set for LHR Publishing Profiles

## 6. Export the set to Excel



## 7. Sort by Title/Creator/Imprint to make it easier to identify non-serial resources

1	Type / Creator / Imprint	Subject	title	Series	Modification Date	Creation Date	R
2	Book	Fashion designers--United States	American designers.			06/16/2019 5:17 AM	c
3	Book ([Basle, Switzerland] : So	Parasols. Umbrellas.	The Umbrella.	Ciba review ; no. 42.		06/16/2019 5:04 AM	c
4	Book ([New York, N.Y.] : Fairch	Academy Awards (Motion pict	The Oscars : the awards at 75 :			06/16/2019 5:13 AM	c
5	Book ([Place of publication not	Textile design--Forecasting. T	Once upon a better time. Part	Forecast collection	11/19/2019 10:07 AM	06/16/2019 5:02 AM	c
6	Book (1832-1877.)	Costume--History--Sources.--1	[Fashion plates].			06/16/2019 5:03 AM	c
7	Book (London : Coloro CLR Cod	Coloro (Firm) Color guides. C	Coloro.		11/19/2019 1:01 PM	06/16/2019 4:55 AM	c
8	Book (New York : Fairchild Pub	Fashion--History--20th century	WWD century : one hundred ye			06/16/2019 4:58 AM	c
9	Book (New York, N.Y. : America	American fabrics Indexes. Tex	American fabrics magazine ind			06/16/2019 5:12 AM	c
10	Book By B. Altman & Co. (New	B. Altman & Co--Catalogs. B. A	Book of styles, spring and sum	Its: Catalogue ; no. 116.	07/22/2019 12:42 AM	06/16/2019 5:10 AM	c

## 8. Delete titles from the excel spreadsheet that will not be included with LHR publishing profiles

# Step 1: Create a Set for LHR Publishing Profiles

## 9. Create an Itemized set

- a) Go to ***Admin>Manage Jobs and Set>Manage Sets***
- b) Click ***Add Set***
- c) Click ***Itemize***
  - i. Set name: [Name the set – mandatory]
  - ii. Set content type: [Select Physical titles]
  - iii. Private: [Select 'No' if you want to share the set with others]
  - iv. Status: [Active]
  - v. Add Contents from File to Set: From File: [upload the excel file]
  - vi. Click ***Save***

# Step 1: Create a Set for LHR Publishing Profiles

[Set Details](#) Add Members to Set Cancel Save

**General Information**

**Set name \*** LHR set for publishing profiles

**Description** Set for LHRs publishing profiles

Note

**Set content type \*** Physical titles

**Private**  Yes  No

Creation date 12/23/2019 5:47 PM

Updated by Ex Libris

Set ID -

Set type Itemized

**Status**  Active  Inactive

Created by Ex Libris

Content Origin  Institution only  Discovery

**Add Contents from File to Set**

From File  From Analytics

File

The maximum file size is 10 MB.

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FIT serials list \_ edited to remove some no 🗑️ 📁



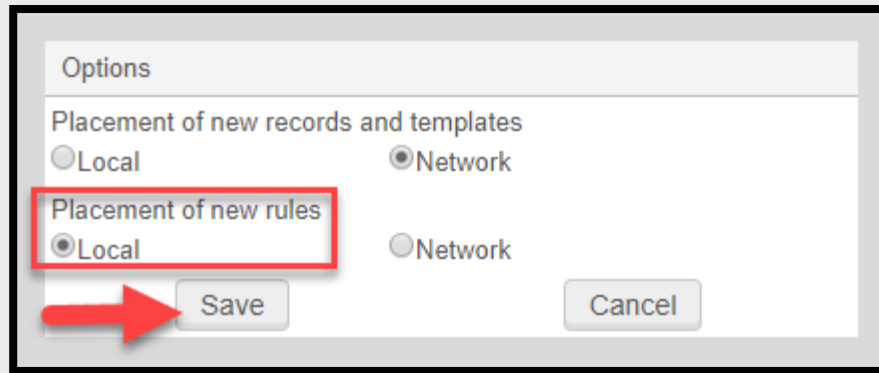
# STEP 2: REMOVE MARC HOLDINGS FIELD 004 FROM MIGRATION



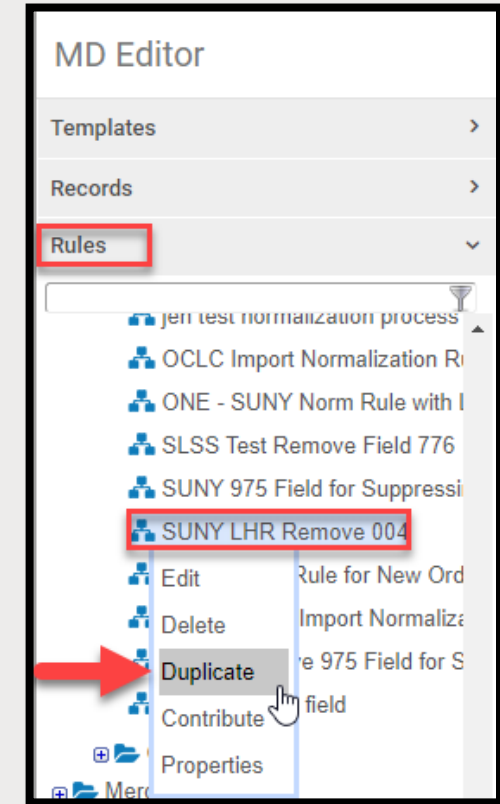
The State University  
of New York

# Copy SUNY LHR Remove 004 Normalization Rule

1. Open the MD Editor
2. Go to **Files>Options**
  - a) Placement of new rules and templates: Local
  - b) Click **Save**



3. Click on Rules in the left-pane of the MD Editor
4. Expand the Normalization Rule folder
5. Expand the Shared folder
6. Click **Duplicate** from SUNY LHR Remove 004 normalization rule



# Copy SUNY LHR Remove 004 Normalization Rule

7. Normalization rule properties screen opens
  - a) Name: Add the campus three letter identifier
  - b) Make sure **Share** and **Enabled** are selected
  - c) Click **Save**
8. The rule opens in the MD Editor
9. Go to **File>Exit**
10. Click **Yes** when the confirmation box pops-up asking if you want to save the rule before closing

Normalization rules properties

Name\* GEN - Copy Of SUNY LHR Remove 004

Description:\* Remove 004 from LHR for them to publish to OCLC

Private  Shared

Enabled

Created by slc (September 14, 2019)

Last updated by maggie-nz (September 14, 2019)

Save Cancel

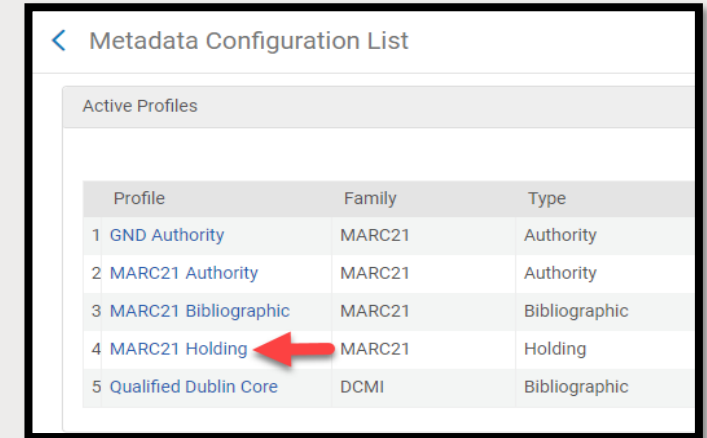
Confirmation required

Do you want to save normalization rules before closing ?

Yes Cancel

# Create a MARC21 Holdings Normalization process

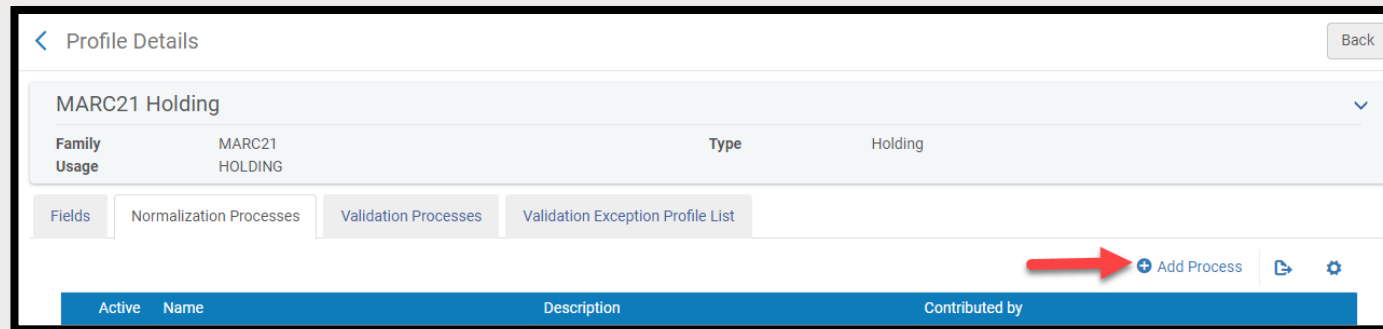
1. Go to *Configuration>Resources>Cataloging>Metadata Configuration*
2. Click *MARC21 Holdings*
3. Click on the *Normalization Processes* tab
4. Click *Add Process*



Metadata Configuration List

Active Profiles

Profile	Family	Type
1 GND Authority	MARC21	Authority
2 MARC21 Authority	MARC21	Authority
3 MARC21 Bibliographic	MARC21	Bibliographic
4 MARC21 Holding	MARC21	Holding
5 Qualified Dublin Core	DCMI	Bibliographic



Profile Details

MARC21 Holding

Family	MARC21	Type	Holding
Usage	HOLDING		

Fields | Normalization Processes | Validation Processes | Validation Exception Profile List

+ Add Process

Active	Name	Description	Contributed by
--------	------	-------------	----------------

# Create a MARC21 Holdings Normalization process

5. Process Details – General Information screen opens
  - a) Name: [name the process]
  - b) Description: [add description]
  - c) Status: [make sure it is Active]
  - d) Click **Next**

Process Details - General Information

1 2 3 **Next**

Business Entity ID	Holding	Type	Marc 21 holding normalization
	-		

Name \* Remove 004 from MARC Holdings

Description \* Remove 004 from Marc Holdings from migration

Status Active

Status Date -

# Create a MARC21 Holdings Normalization process

## 6. Process Details – Add Task screen opens

a) Click **Add Tasks**

Process Details - Add Tasks

HOLDING	
Business Entity Name	Holding Remove 004 from MARC Holdings
Type	Marc 21 holding normalization

+ Add Tasks

b) Click the **MARCDroolsNormalization** check box

c) Click **Add and Close**

d) Click **Next**

Add Tasks

Name	Description
<input type="checkbox"/> 852 field normalization	Fill subfields according to first indicator
<input checked="" type="checkbox"/> MarcDroolNormaliz...	Marc Drool Normalization
<input type="checkbox"/> marc21HoldingClea...	Delete empty fields
<input type="checkbox"/> marc21HoldingRese...	Re-sequence fields
<input type="checkbox"/> MARC21 Expand Holding By 866/7/8 Task	Create 866/867/868 Textual Holdings fields
<input type="checkbox"/> MARC21 Expand Holding By 863/4/5 Task	Create 863/864/865 Summary statement Holdings fields
<input type="checkbox"/> MARC21 Holding Fix 001 Field	Rewrite 001 field

Add Close Add and Close

# Create a MARC21 Holdings Normalization process

7. Process Details – Task Parameters screen opens
  - a) Drool File Key: [select the copy of the SUNY LHR Remove 0044 normalization rule]
  - b) Click **Save**

Process Details - Task Parameters

1 2 3

Cancel Save Save

**HOLDING**

Business Entity Name	Holding	Type	
Remove 004 from MARC Holdings		Marc 21 holding normalization	

MARC DROOL NORMALIZATION

Drools File Key \* **GEN - Copy Of SUNY LHR Remove 004**

# Run the "Change Holding Information" Job on the Set

1. Go to *Admin>Manage Jobs and Sets>Run a Job*
2. Search by name for “**Change Holding Information**”
3. Click on the radio button next to the “**Change Holding Information**” job
4. Click *Next*

Run a Job - Select Job to Run

1 - 1 of 1

Name change holding informati

Type: All Source type: All

Name	Description	Content Type	Type
1 <input checked="" type="radio"/> Change Holding Information	Update holding information for a set of physical items	Physical item	Information Update

Next



# Run the "Change Holding Information" Job on the Set

5. Click on the radio button for the LHR set
6. Click *Next*

Run a Job - Select Set

1 2 3 4 Cancel **Next**

	▲ Name	Type	↕ Content Type	↕ Content Origin	Create Date
9	<input type="radio"/> feature films barcodes	Itemized	Physical items	Institution only	06/28/2019 16:33:18 EDT
1...	<input type="radio"/> FF to EF 07092019	Itemized	Physical items	Institution only	07/09/2019 16:15:05 EDT
1...	<input type="radio"/> Flash Card Material Type Barcodes	Itemized	Physical items	Institution only	07/10/2019 16:20:01 EDT
1...	<input type="radio"/> Game Material Type Barcodes	Itemized	Physical items	Institution only	07/10/2019 16:22:09 EDT
1...	<input type="radio"/> Gen Microfilm with Inaccurate Call Numbers	Itemized	Physical items	Institution only	07/10/2019 11:12:52 EDT
1...	<input type="radio"/> Gen Microfilm with Inaccurate Material Type	Itemized	Physical items	Institution only	07/10/2019 11:07:18 EDT
1...	<input type="radio"/> Kit Material Type Barcodes	Itemized	Physical items	Institution only	07/10/2019 16:28:00 EDT
1...	<input type="radio"/> MCDB barcodes	Itemized	Physical items	Institution only	06/28/2019 16:40:06 EDT
1...	<input type="radio"/> Oversize Material Type Barcodes	Itemized	Physical items	Institution only	07/10/2019 16:24:52 EDT
1...	<input type="radio"/> Pam - Regular Loan item policy	Itemized	Physical items	Institution only	09/20/2019 14:27:35 EDT
1...	<input checked="" type="radio"/> Periodicals for LHR - mm	Logical	Physical titles	Institution only	11/14/2019 07:55:25 EST
2...	<input type="radio"/> Realia Material Type Barcodes	Itemized	Physical items	Institution only	07/10/2019 16:30:23 EDT

# Run the "Change Holding Information" Job on the Set

7. Click in the box "Correct the data using normalization rules"
8. Select the Normalization Process to remove MARC holdings 004
9. Click *Next*

Run a Job - Enter Task Parameters

1 2 3 4

Cancel Back Next

Task Parameters: Change Holding Information

Apply only for Library  location

Update call number from Bibliographic record

Correct the data using normalization rules

Tag records for publishing

# Run the "Change Holding Information" Job on the Set

10. Review the job

11. Click **Submit**

Run a Job - Review and Confirm

1 2 3 4 Cancel **Submit**

General Information

Job Name Change Holding Information - Periodicals for LHR - mm - 11/26/2019 19:36:33 EST

Set Information

Set ID 685499910004833

Name Periodicals for LHR - mm

Set Size 60

Task Parameters: Change Holding Information

12. Click **Confirm** when the confirmation job pops-up

Confirmation Message

You are about to run a job which will affect 60 members of the set. This cannot be reversed. Do you want to continue?

Cancel **Confirm**

STEP 3: CHANGE THE FLAG  
FOR SERIALS FROM  
“PUBLISH BIB” TO  
“PUBLISH LHR”

# Change the Flag to Publish LHR

1. Go to *Admin>Manage Jobs and Sets>Run a Job*
2. Search by name for the term “synchronize”
3. Click on the radio button for “Synchronize Bib records with external catalog”
4. Click *Next*

Run a Job - Select Job to Run

1 - 2 of 2

Name

Type: All Source type: All

	Name	Description	Content Type	Type
1	Synchronize MMS with national catalog	Mark MMS as synchronized or non-synchronized with national catalog	Bibliographic title	Marc 21 Bib normalization
2	Synchronize Bib records with external catalog	Marks MMS records for synchronization or no-synchronization with external catalog (OCLC)	Bibliographic title	Marc 21 Bib normalization

Next

# Change the Flag to Publish LHR

5. Click on the radio button for the LHR set
6. Click *Next*

Run a Job - Select Set

1 - 5 of 5

Content Type: All

Name	Type	Content Type	Content Origin	Create Date
<input type="radio"/> LHR set to filter	Itemized	All Titles	Institution only	11/19/2019 15:53:46 EST
<input checked="" type="radio"/> Periodicals for LHR - mm	Logical	Physical titles	Institution only	11/14/2019 07:55:25 EST
<input type="radio"/> WOM	Itemized	All Titles	Institution only	08/09/2019 11:58:57 EDT

7. Click on the “Publish Holdings” radio button for the Synchronize with External Catalog task parameter
8. Click *Next*

Run a Job - Enter Task Parameters

Task Parameters: MmsTagSyncExternal

Synchronize with External Catalog?  Don't publish  Publish holdings only  Publish Bibliographic records

# Change the Flag to Publish LHR

9. Review the job

10. Click **Submit**

Run a Job - Review and Confirm

1 2 3 4 Cancel Submit

General Information

Job Name Synchronize Bib records with external catalog - Periodicals for LHR - mm - 11/20/2019 07:40:22 EST

Set Information

Set ID 685499910004833

Name Periodicals for LHR - mm

Set Size 60

Task Parameters: MmsTagSyncExternal

Synchronize with External Catalog? Publish holdings only

11. Click **Confirm** when the pop-up confirmation message appears

Confirmation Message

You are about to run a job which will affect 60 members of the set. This cannot be reversed. Do you want to continue?

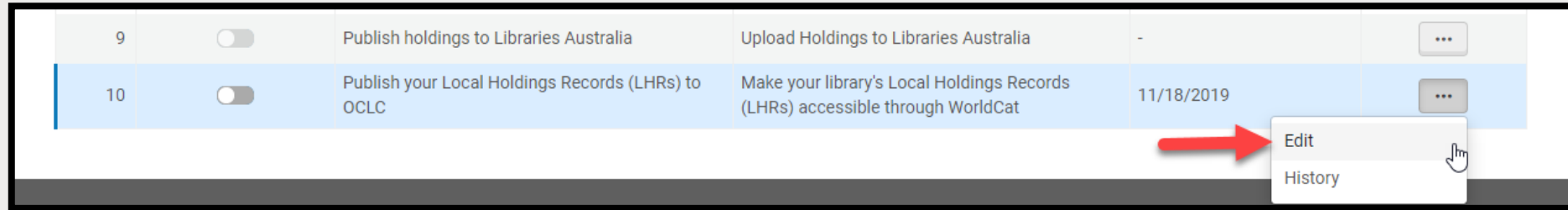
Confirm

# STEP 4: ACTIVATE THE LHR PUBLISHING PROFILE



# Activate the LHR Publishing Profile in Alma

1. Go to *Resources>Publishing>Publishing Profiles*
2. Click **Edit** from the ellipses of the LHR publishing profile



3. Set the Publishing Mode for the first time to **Baseline**
  - a) After the baseline runs it will automatically switch to incremental
4. Set the Status to **Active**
5. Set scheduling to **Everyday at 6:00** for the Baseline and the first time the incremental job runs
6. Click **Save**

# Activate the LHR Publishing Profile in Alma

[←](#) Publishing Profile Details [Cancel](#) [Save](#)

Profile Details

Profile name \*

Profile description

OCLC institution symbol \*  Project ID

Collection ID

Publishing Parameters

Publishing mode \*  Incremental  Baseline  Full

**i** Baseline publishing mode was selected. Please note this option will not create any files on the FTP server.

Status  Active  Inactive

Scheduling

# Activate the LHR Publishing Profile in Alma

- Change the LHR Publishing Profile to Publish every Saturday at 6:00 after working with OCLC to create the mapping table and handling errors

**< Publishing Profile Details** Save

**Profile Details**

Profile name \* **Publish your Local Holdings Records (LHRs) to OCLC**

Profile description **Make your library's Local Holdings Records (LHRs) accessible through WorldCat**

OCLC institution symbol \* **YGM** Project ID

Collection ID **1032377**

**Publishing Parameters**

Publishing mode \*  Incremental  Baseline  Full

Status  Active  Inactive

Scheduling **Every Saturday at 06:00**

Email Notifications

# STEP 5: WORK WITH OCLC TO CORRECT ERRORS AND CREATE A TRANSLATION MAPPING TABLE

# Provide OCLC with the following Information

From your LHR data sync collection communication's tab provide OCLC with the following information:

1. Alma location codes for the translation mapping table
2. OCLC Holdings codes that are associated with the Alma location codes if you are currently using OCLC holdings codes
3. Existing 004s in the LHRs MARC holdings records have been removed
4. Date the baseline is being run
5. Date the first incremental file is being run

I am setting up (redacted) LHR publishing profiles baseline to tomorrow am. The first incremental will run on Wed., 12/25/2019. I will then set it to publish once a week.

I removed the 004s in the the holdings records from migration

UVV only has the one OCLC symbol, they do not use holding codes.

In the table please only include the following location codes:

1. PERDK
2. PERST
3. SPECP
4. PEROS
5. PERM
6. PCAST
7. PCIVE

# LHR Worldshare Datasync Collection

OCLC will work with each campus once files begin to run to:

1. Review the files
  - a) Will identify holdings with potentially incorrect Alma locations
  - b) Will identify records with issues and run a job to resolve conflicts
2. Create a translation mapping table
  - a) The Table contains:
    - I. 852 \$a – OCLC Symbol
    - II. 852 \$b – Collection (or sublocation)
    - III. 852 \$c – Shelving Location
    - IV. Second 852 \$b – OCLC Holdings location code
  - b) The table can also include the following information if it has been or will be maintained in the LHR:
    - I. 008/20 (Lending Code)
    - II. 008/21 (Reproduction Code)
3. Will publish the LHRs to OCLC

852 \$a	852 \$b	852 \$c	852 \$a	852 \$b
ZBM	ONEMN	BOOKO	ZBM	
ZBM	ONEMN	BOOKM	ZBM	
ZBM	ONEMN	ORDER	ZBM	
ZBM	ONEMN	CHILD	ZBM	
ZBM	ONEMN	SCCN	ZBM	
ZBM	ONEMN	SCC	ZBM	
ZBM	ONEMN	PERRR	ZBM	
ZBM	ONEMN	PERM	ZBM	
ZBM	ONEMN	PERC	ZBM	
ZBM	ONEMN	PERMF	ZBM	
ZBM	ONEMN	PER	ZBM	

852 \$a	852 \$b	852 \$c	852 \$a	852 \$b
ZBM	ONEMN	PER	ZBM	ZBMM
ZBM	ONEMN	PERRR	ZBM	
ZBM	ONEMN	PERMF	ZBM	
ZBM	ONEMN	PERM	ZBM	

# SUPPORTING DOCUMENTATION



The State University  
of New York

# Supporting Documentation

- OCLC Publishing Profiles presentation:  
<https://public.3.basecamp.com/p/xmaGzrJCuPcG4uYun8dtEj2L>
- Ex Libris Documentation: [Publishing to OCLC](#)