

LOCAL HOLDINGS RECORDS (LHR) PUBLISHING PROFILES

SUNY Library Shared Services
Maggie McGee

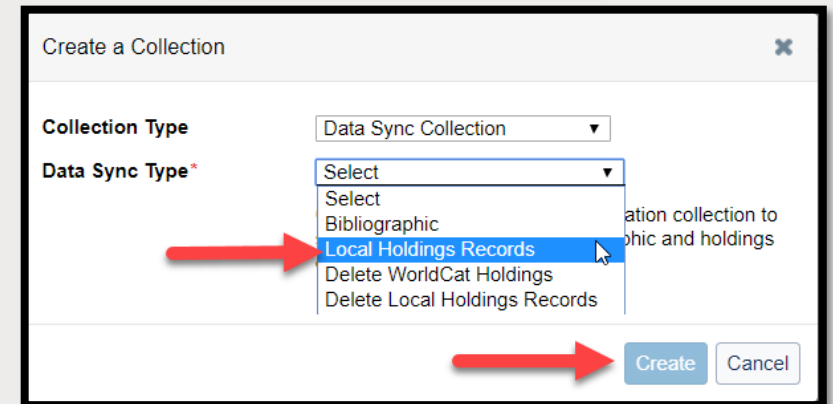
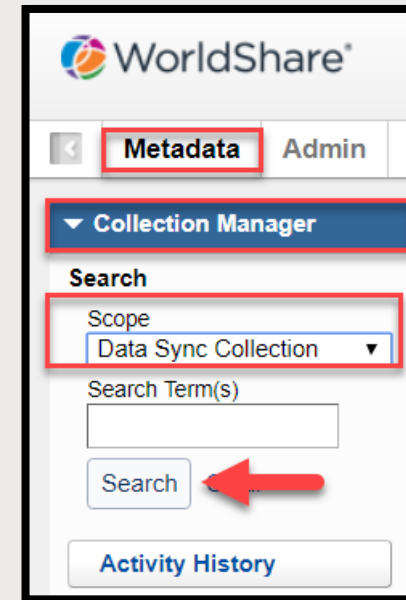


Create an LHR Data Sync Collection in OCLC Worldshare

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 ? <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 ? <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:

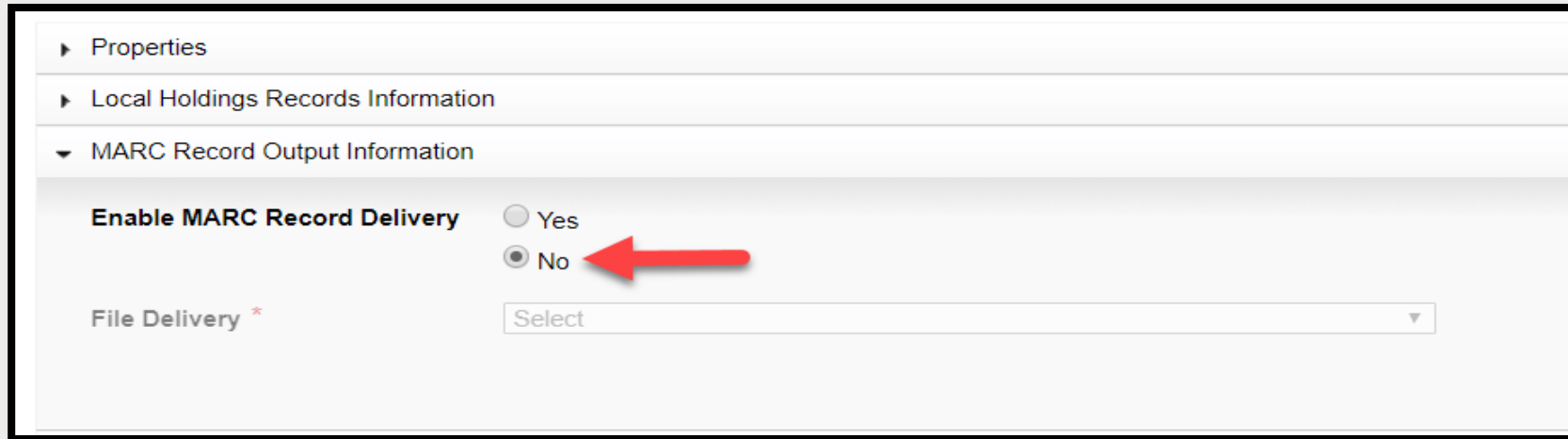
8. Provider: Ex Libris
9. System Name: Alma
10. Version: [leave blank]
11. OCLC Number Location(s): [default values]
12. Local System Number Location(s): [default values]
13. Local System Bibliographic Record Number Locations: [default values]

System Information			
Provider	<input type="text" value="ExLibris"/>		
System Name	<input type="text" value="Alma"/>		
Version	<input type="text"/>		
OCLC Number Location *	Location	Tag	Subfield
	<input type="text" value="004"/>	<input type="text" value="004"/>	<input type="text"/>
Local System Holdings Record Number Location(s)	Location	Tag	Subfield
	<input type="text" value="001"/>	<input type="text" value="001"/>	<input type="text"/>  
Local System Bibliographic Record Number Location(s)	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 a data sync collection. 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	+ -

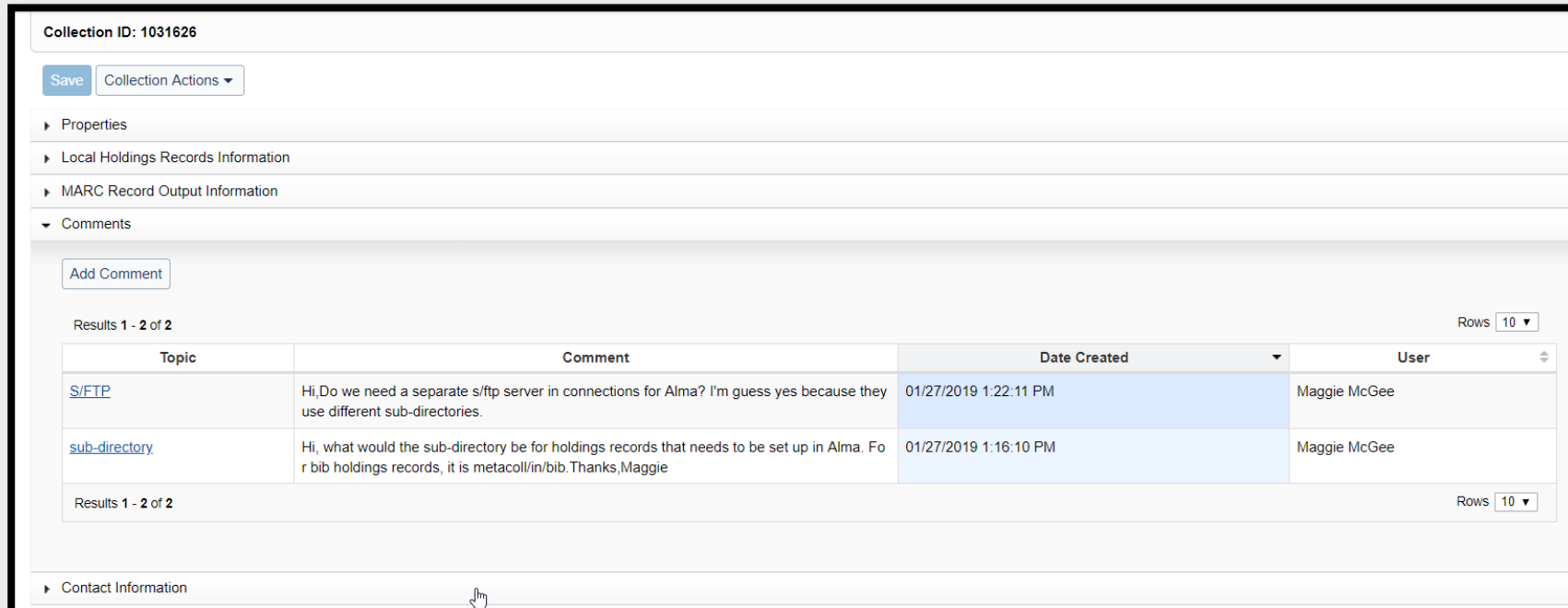
OCLC is a global library cooperative operating in more than 100 countries with the headquarters located in the United States. For information on how this contact information is used by OCLC, see the [Privacy Policy](#).

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. The interface includes a 'Save' button and a 'Collection Actions' dropdown menu. Below these are expandable sections for 'Properties', 'Local Holdings Records Information', and 'MARC Record Output Information'. The 'Comments' section is expanded, showing an 'Add Comment' button and a table of comments. The table has columns for 'Topic', 'Comment', 'Date Created', and 'User'. Two comments are listed, both from Maggie McGee on 01/27/2019. The first comment discusses the need for a separate s/ftp server for Alma, and the second comment asks about the sub-directory for holdings records.

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 ⇅
S/FTP	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
sub-directory	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

Add S/FTP Definitions for Local Holdings Records

- Go to *Configuration>General>External Systems>S/FTP definitions*
 - Click *Add S/FTP connection*
 - Name: OCLC LHR Data Sync
 - Server: filex-m1.oclc.org
 - Port: 22
 - Sub-directory: /xfer/metacoll/in/lhr
 - Is full path: [click in the box]
 - 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: fx_oclcsymbol [OCLC Symbol – must be in lower case]
 - Password: [supplied by OCLC]

Setting Up Publishing Profiles for Local Holdings Records in Alma

Add S/FTP Definitions for Local Holdings Records Example

Update S/FTP connection Test FTP Cancel Save

OCLC LHR Data Sync i v

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

Name *

Description

Server * Port *

Sub-directory Is full path

Max. Number of Files Min. Number of Files

Max. file size Size type

Allow Navigation Ftp Server Type

FTP Passive Mode

Ftp Server Secured

Authentication method Username/password authentication Key authentication

UserName * Password *

Setting Up Publishing Profiles for Local Holdings Records in Alma

Add S/FTP Definitions for Local Holdings Records Continued

- Click *Test FTP*
 - A message will appear saying the Ftp upload, download, and delete were successful

The screenshot shows the 'Update S/FTP connection' interface in Alma. At the top right, there are buttons for 'Test FTP', 'Cancel', and 'Save'. The main content area displays the configuration for 'OCLC LHR Data Sync'. Below the configuration, there are two message boxes:

- A red message box with a white 'x' icon, containing the text: 'On delete subDirectory /xfer/metacoll/in/lhr Failed to remove file in FTP server.' and 'Ftp delete fail'.
- A blue message box with a white 'i' icon, containing the text: 'Ftp upload success' and 'Ftp download success'.

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

Name * OCLC LHR Data Sync

Description Data Sync for Local Holdings Records for serials

- Click *Save*

Setting up Publishing Profiles for Local Holdings Records in Alma

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 'Publishing Profiles' option is visible at the bottom of the menu, with a red arrow pointing to it. The main content area shows the 'Publishing Profiles' page. The page title 'Publishing Profiles' is highlighted with a red box. Below the title, there are tabs for 'Institution', 'Network', and 'Community'. A search bar and a '+ Add Profile' button are also visible. A table lists the publishing profiles, with the profile 'Publish your Local Holdings Records (LHRs) to OCLC' highlighted in blue. A red box highlights this profile, and a red arrow points to the 'Edit' button in the actions column.

	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	...

Setting Up Publishing Profiles for Local Holdings Records in Alma

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 * 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

Collection ID 1031626 

Setting Up Publishing Profiles for Local Holdings Records in Alma

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***]
 - First time you run the baseline and incremental can be Everyday at 6:00, but change it back to Every Saturday at 6:00 after the first incremental runs
 - 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

Configure Publishing Profiles for Local Holdings Records Continued

Publishing Parameters & Submission Format for LHR Record Example:

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

Collection ID 1031626

Publishing Parameters

Publishing mode * Incremental Baseline Full

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

Status Active Inactive

Scheduling Not scheduled

Email Notifications

Submission Format

FTP configuration OCLC LHR Data Sync

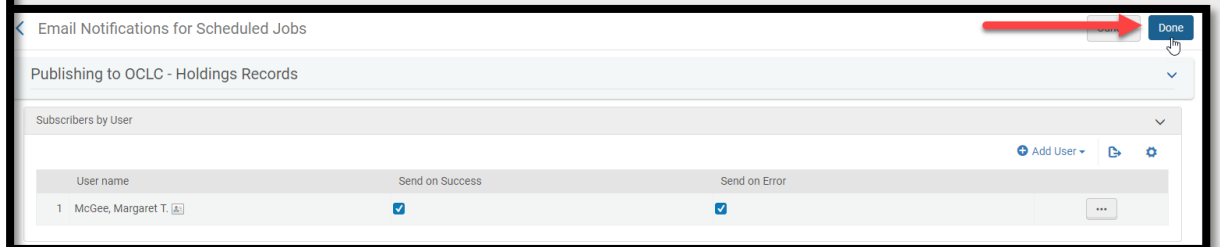
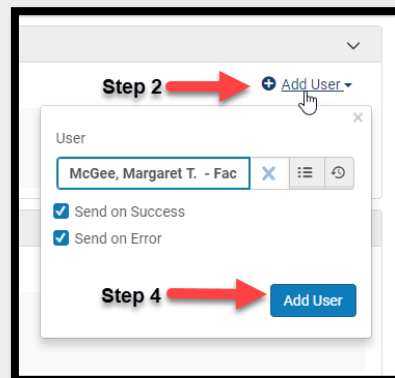
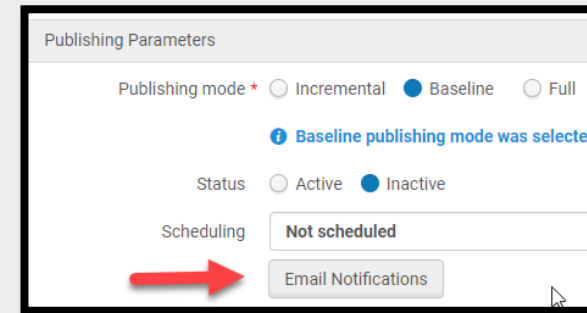
Sub-directory

Setting Up Publishing Profiles for Local Holdings Records in Alma

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 information for serial titles. 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
 - a) Alma's Enhancement removes any existing 004s when publishing LHRs to OCLC
 - 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 holdings location 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 included in the serials set that are not serials
2. 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
3. Change the flag for serials from “Publish Bib” to “Publish holdings only” after the baseline runs
 - a) Run the “Synchronize Bib records with external catalog” job on the set to change the set management tag to “Publish holdings only”
4. Work With OCLC
 - a) Communicate with OCLC via the LHR data sync communication tab
 - b) Create a Translation Table
 - c) Correct Errors
 - d) Publish

STEP 1: CREATE A SET FOR LHRS PUBLISHING PROFILES

Step 1: Create a Set for LHRs 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 search criteria: "Permanent physical location" and "Equals". The "Permanent physical location" dropdown is expanded to show a list of locations under the heading "Gladys Marcus Library :". The locations listed are: "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)", and "4th fl. -- Special Collections Periodicals (SPECP)". Below the search criteria, there are buttons for "AND" and "OR", and two more search criteria: "Other System Number" and "Contains Keywords". The "Contains Keywords" dropdown is expanded to show the text "(OCoLC)". At the bottom right, there are buttons for "Clear form" and "Search".

Step 1: Create a Set for LHRs 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 Collections Periodicals)))

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

Step 1: Create a Set for LHRs Publishing Profiles

3. Set Details

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

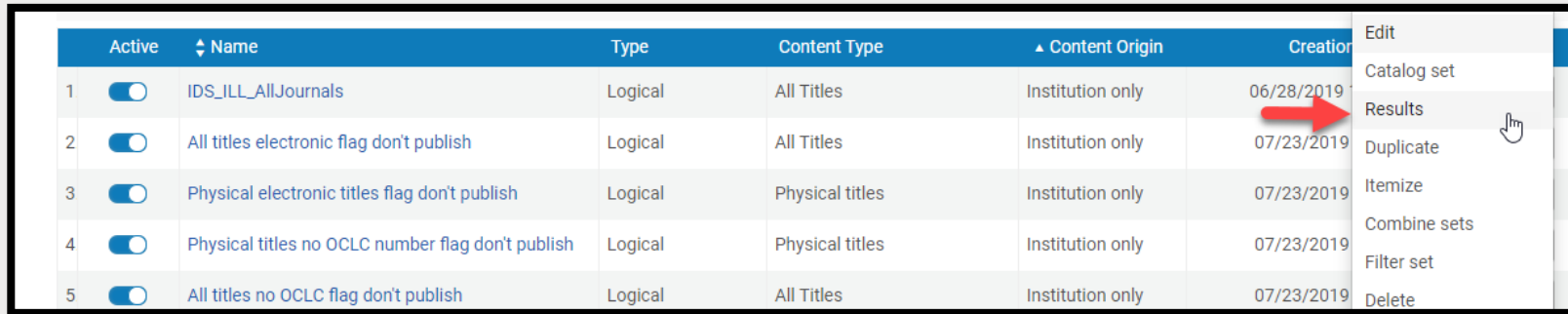
The screenshot shows the 'Set Details' form with the following fields and values:

- 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 LHRs Publishing Profiles

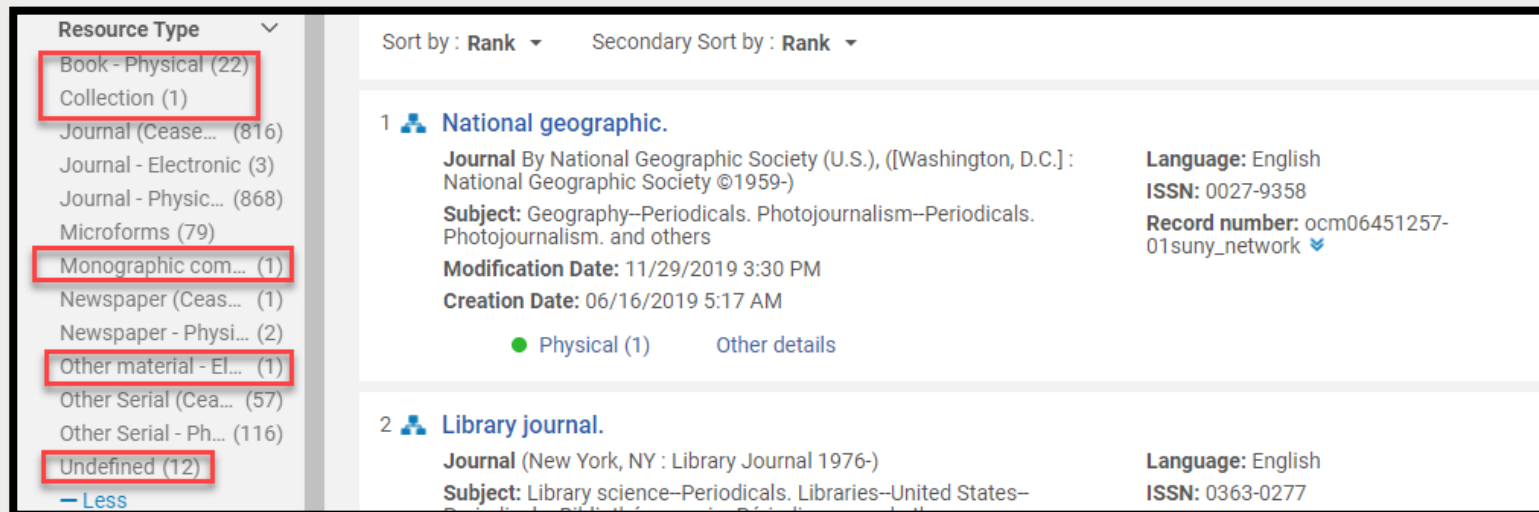
4. Click **Results** from the ellipses of the set to review the bib records that have been added to the set



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

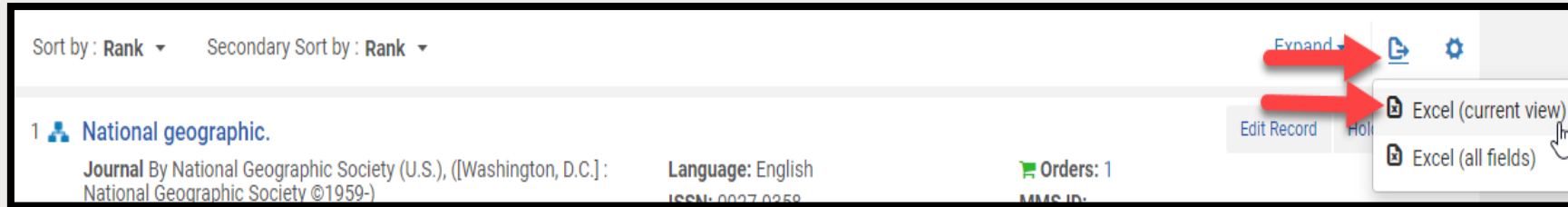
Sort by: Rank ▾ Secondary Sort by: Rank ▾

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 LHRs 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 LHRs 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 LHRs 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

Status Active Inactive

Creation date 12/23/2019 5:47 PM

Created by Ex Libris

Updated by Ex Libris

Content Origin Institution only Discovery

Set ID -



Add Contents from File to Set

From File From Analytics

The maximum file size is 10 MB.

File

FIT serials list _ edited to remo... (109.91 KB)

FIT serials list _ edited to remove some no  

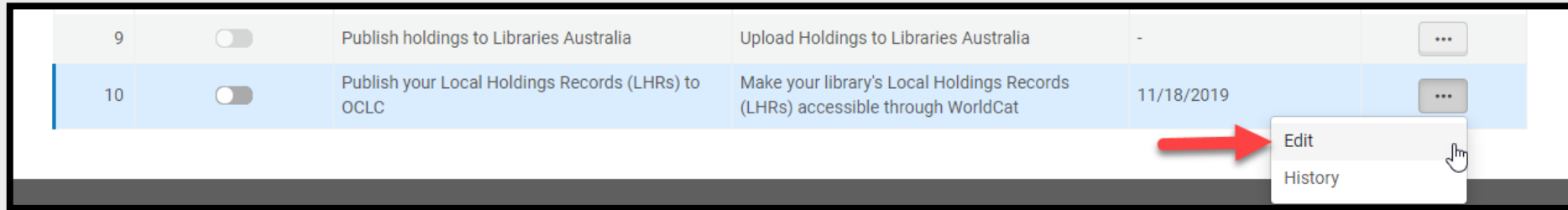
STEP 2: ACTIVATE THE LHR PUBLISHING PROFILE



The State University
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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
 - After the first incremental job has run change the job to publish Every Saturday at 6:00
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 3: CHANGE THE FLAG
FOR SERIALS FROM
“PUBLISH BIB” TO
“PUBLISH LHR”



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Change the Flag to Publish LHR After the Baseline Runs

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 ▾ synchronize 🔍

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: 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. Date the baseline is being run
4. Date the first incremental file is being run

I am setting up (████████████████████) 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
 - I. OCLC Symbol is an OCLC holdings location code does not exist
 - 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)

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	

Troubleshooting – Republishing LHRs to OCLC

3. Ask OCLC for the LHR file to review
 - The file contains the LHR information
 - 004 contains the OCLC # (ocn)
4. Extract the 004 ocn from the OCLC file using MARCedit
5. Create and itemized set in Alma to compare from the extracted ocn's and compare the original set to the set published to OCLC
6. OCLC will publish the LHRs once the campus has approved the table and file

TROUBLESHOOTING



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Troubleshooting – Republishing LHRs to OCLC

To Republish LHRs to OCLC run the "Holding OCLC Republish Set of Titles" job

1. Go to ***Admin>Manage Jobs and Sets>Run a Job***
2. Search for the "Holding OCLC Republish Set of Titles" job
3. Click on the radio button next to the job
4. Click ***Next***
5. Click on the radio button of the LHR set created in step 1
6. Click ***Submit***

SUPPORTING DOCUMENTATION



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Supporting Documentation

- OCLC Publishing Profiles presentation:
<https://public.3.basecamp.com/p/xmaGzrJCuPcG4uYun8dtEj2L>
- Ex Libris Documentation: [Publishing to OCLC](#)
- [How to publish a set of records from Alma to OCLC/WorldCat, regardless of management tags?](#)