

EAST Shared Print Serials Program

Local Holdings Records

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Introduction

A new process was created in 2021. The initial file sent to OCLC in Dec. 2021 had 9573 holdings records on 9554 bibliographic records. There was one bound-with and a number of titles split between 2 or more UMass locations, often UMDUB/UPER and UMSCI/UPER. Our shared print serials are all part of EAST and 35 titles are part of the Rosemont Shared Print Alliance. Serials other than print such as microfiche or not part of the UMDUB:UPER/UGEN/UEA and UMSCI:UPER/UGEN collections were not included.

Rosemont Guidelines:

https://rosemontsharedprintalliance.org/sites/rosemontsharedprintalliance.org/files/Rosemont_Last_Known_Copy_Initiative-Guidelines_for_Libraries.pdf

File Naming Convention for OCLC Data Sync Collection

The collection id is 1037683, UMass EAST Shared Print Serial Program. The file that is upload follows the following naming convention:

1. 7 digit data sync collection id
2. Period
3. OCLC UMass symbol
4. Period
5. lhrupdates[date of upload]
6. period
7. mrc

1037683.AUM.lhrupdates20211214.mrc

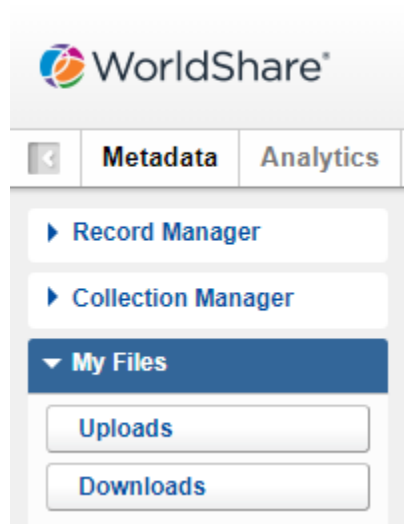
In Aleph, you can bring up the bib records by doing a ccl search of cno2=umelhr*

Preparing the file

To avoid validation errors, remove any 853, 867, 868 fields. The file should only have 866s which makes things much easier.

Once the file is ready and named appropriately, upload to Worldshare

1. Log into WorldShare
2. Navigate to Collection Manager/My Files



3. Click Uploads
4. Choose file
5. Select Data Sync LHR
6. Click upload

A screenshot of the 'Uploads' page in the WorldShare interface. At the top is a header 'Uploads'. Below it is a form with the following fields: 'Upload File' with a 'Choose File' button and the text '1023404.AU...181031.mrc'; 'File Type' with two radio buttons: 'Data sync bibliographic' (unselected) and 'Data sync LHR' (selected); and an 'Upload' button. Below the form is a section 'Results 1 - 3 of 3' with a refresh icon. Below this is a table with one row and one column header 'File Name'. The row contains the text '1013546.AUM.dramaon.mrc'.

Validation Reports

These can be downloaded via WorldShare. Typically there'll be only one report. Here there are 2 but one doesn't have any info.

Metadata

Analytics

Admin

Record Manager

My Labels

Collection Manager

My Files

Downloads

Records and Reports

KB Downloads

Records and Reports

Filter by

Select

Reset

Downloaded

Hide downloaded files

Results 1 - 10 of 21

File Name	File Type	Size	Post Date	Download Date	Action
metacoli_AUM_datasync.1037683-1037683.D20211216.T101536090.lhrrelpt.txt	Reports	479 KB	12/16/2021		Download
metacoli_AUM_datasync.1040919.D20211216.T000000000.lhrdetailrcpt.1.mrc.txt	Reports	8 KB	12/17/2021		Download
metacoli_AUM_updates.M20211126.T092716.uwspg.1.mrc.zip	Records - Updated	118,648 KB	11/26/2021		Download
metacoli_AUM_updates.M20211126.T092716.uwbf.1.mrc.zip	Records - Updated	785 KB	11/26/2021		Download

The report is a tab delimited file that can be opened in excel. The Local system number is the holdings record system number. Errors can be fixed in our local records in our LSP and in the .mrc file of LHRs that are to be sent up with the next upload. An email notification with a summary of the upload will also be received.

Report Name: Local Holdings Record (LHR) Exception Detail - Data Synchronization				
Institution Symbol: AUM				
Collection ID: 1037683				
Data Sync File Name: AUM-AUM.1037683.IN.LHR.D20211214.T111901349.1037683.AUM.lhrupdates202112.mrc				
Date Completed: 20211220				
Incoming OCLC Num	Final OCLC Numbe	Local System Number	Data Sync Exception Description	LHR Validation Error
341597838	341597838	5486020	Invalid code in Language Code (008/22-24).	Severe
917536025	917536025	10703845	Invalid relationship - when 853 is present, then \$8 in 853 must be present.	Severe
917536025	917536025	10703845	Invalid relationship - when 853 is present, then \$8 in 853 must be present.	Severe
917536025	917536025	10703845	Invalid relationship - when 866 is present, then \$8 in 866 must be present.	Severe
1642717	1642717	2762176	Invalid relationship - when 867 is present, then \$8 in 867 must be present.	Severe
1642729	1642729	2762177	Invalid relationship - when 867 is present, then \$8 in 867 must be present.	Severe

Today

Usage_Statistics@ocl...

AUM -- The report (Local H...

AUM -- The report (Local

11:44 AM

Usage_Statistics@ocl...

AUM -- The report (Local H...

AUM -- The report (Local

11:44 AM

Breac Krash

CNI Project Briefings

Hi all,

10:50 AM

Usage_Statistics@oclc.org

AUM -- The report (Local Holdings Record Processing Exception Summary -- Data Synchronization) you requested for 20211220

To: Jennifer Eustis

20211220-CollectionManagerLhrProcessingExceptionsReport.xls

887 bytes

AUM -- The report (Local Holdings Record Processing Exception Summary -- Data Synchronization) you requested for 20211220

Record Structure

The MARC files have the following information - in the MARC tags explained below except for the Leader.

001

This has the current system number for the holdings record.

005

Date and time of last transaction

008

Fixed length field elements

014 1\

\$a

Current systems number for the bibliographic/instance record

\$b

Source of that record. This is to help us distinguish between Aleph and FOLIO in the future

014 0\

\$a

Current systems number for the holdings record

\$b

Source of that record. Again to help us distinguish between Aleph and FOLIO.

035

OCLC Number

562

Information to allow UMass to find and identify the record once in FOLIO. There can be two 562 MARC fields if the holdings is for both the Rosemont Shared Print Alliance and EAST.

583

EAST note. There can be two 583 MARC fields if the holdings is for both the Rosemont Shared Print Alliance and EAST. The 583 for Rosemont includes a \$z with Rosemont Last Known Copy

852

\$b

Aleph sublibrary. FOLIO Library. FOLIO Library codes are slightly different.

\$c

Aleph collection. FOLIO Location. FOLIO Location codes are slightly different.

\$h, i, m, k

Call number components

866

Holdings statement

Example 1: EAST ONLY:

=LDR 00718nx a22002294n 4500

=001 002162537

=005 20160520075300.0

=008 \\\0u\\\0\\\4001uueng0000000\\\0\\\

=014 1\ \$a002242301 \$bAleph

=014 0\ \$a002162537 \$bAleph

=035 \\\ \$a(OCOLC)15060412

=562 \\\ \$a(UMELHR)002162537, UMass Amherst is committed to retain copy as part of the Eastern Academic Scholars' Trust Shared Print Serials Program.\$5MU

=583 1\ \$acommitted to
retain \$c20160630 \$d20310630 \$fEAST \$u<https://eastlibraries.org/retained-materials> \$5MU

=852 0\ \$bUMDUB \$cUGEN \$hJ181 \$i.H54 \$mPer

=866 \0 \$ano.1-v.2 (1984)

Example: EAST and Rosemont:

=LDR 00458nx a22001694n 4500

=001 003046423

=005 20100511135400.0

=008 \\\0u\\\0\\\4001uueng0000000\\\0\\\

=014 1\\$\a003181606\$bAleph

=014 0\\$\a003046423\$bAleph

=035 \\\a(OCOLC)12708795

=562 \\\a(UMELHR)003046423, UMass Amherst is committed to retain copy as part of the Eastern Academic Scholars' Trust Shared Print Serials Program.\$5MU

=583 1\\$\acommitted to

retain\$c20160630\$d20310630\$fEAST\$u<https://eastlibraries.org/retained-materials>\$5MU

=562 \\\a(UMRLHR)003046423, UMass Amherst is committed to retain copy as part of the Rosemont Shared Print Alliance.\$5MU

=583 1\\$\acommitted to retain\$c20160630\$d20310630\$fEAST\$f

Rosemont\$u<https://rosemontsharedprintalliance.org/>\$5MU\$zRosemont Last Known Copy

=852 0\\$\bUMDUB\$cUGEN\$hZ6121\$i.l46 1977 1st Suppl

=866 41\$av.1-v.2