**Individual Library: Collection Profile Template**

Please send the required information back to sharedprint@oclc.org and a data sync specialist will create your profile for you and provide you with your collection ID. If an agent/group coordinator is submitting data on your behalf, you will need to provide your collection ID to the agent/group coordinator along with your commitment metadata.

Note: Some information may need to be obtained from your group coordinator to comply with your program agreements

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| **Element** | **Notes** | **Library/Group Supplied Value** |
| Collection Name | Free text, e.g. “Siena College Shared Print Monographs”  |  |
| OCLC Symbol | System-supplied, read-only, and tied to login |  |
| Collection ID | Will be generated (system supplied) once profile is saved |  |
| WMS Library Y/N | System-supplied, based on OCLC symbol |  |
| Third Party/Consortia Name | Free text; does not affect the program name in the 583$f |  |
| Collection Type | Always = Local Holdings Records |  |
| Original Data Format | Always = NON-MARC |  |
| Shared Print Y/N | Always = Y |  |

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| \*Authorization | If an agent/group coordinator will submit data on your behalf, please note who will be submitting your data |  |

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| **Element** | **Description** | **Required/****Optional** | **Notes** | **Library/Group Supplied Value** |
| **LOCAL HOLDINGS RECORDS INFORMATION: RETENTION COMMITMENT and ILL POLICIES tabs** |
| 583$a | Action Note | R | By default, = committed to retain. Additional 583 $a values can be specified in the data file |  |
| 583 $c | Action Date (i.e. start date of retention commitment) | R | Typically, this is an agreement at the program level. Must be in YYYYMMDD format |  |
| 583 $d | Action Interval (date when retention commitment expires) | R | Typically, this is an agreement at the program level. Must be in YYYYMMDD format |  |
| 583 $f | Authorization (archiving program name) | R | Begin typing to find your archiving program name. This is a controlled list. If your program is not listed here or displaying as expected, please contact OCLC data sync or OCLC support. |  |
| 583 $u | URL for group retention policies or other documentation | O | (Most groups include this) |  |
| 008/20 | ILL Policy - Lending | R | Most groups specify "will lend" |  |
| 008/21 | ILL Policy - Reproduction | R |  |  |

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| **Element** | **Description** | **Required/****Optional** | **Notes** | **Library-Supplied Value** |
| **LOCAL HOLDINGS RECORDS INFORMATION: RETENTION COMMITMENT tab** |
| Initial Estimate for Record Count | Estimated number of records, i.e. rows in datafile for registration | R | Can be approximate! Useful for OCLC staff when evaluating the uploaded datafile, or to indicate whether a test file will be loaded first. |  |
| Treatment of Existing LHRs | Update existing LHRs or always create new? | R | Always choose merge information.Merge option appears on tabs for Retention Commitment, ILL Policies (twice), and Linkage Information. Choose the same value each time. |  |

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| **Element** | **Description** | **Required/****Optional** | **Notes** | **Library-Supplied Value** |
| **LOCAL HOLDINGS RECORDS INFORMATION: RETENTION COMMITMENT tab** |
| 583 $z | Public note | O | Can be overridden by record in the data file as well as $i and $l |  |
| 583 $5 | Archiving institution  | O | Specified as MARC Organization Code but libraries have used OCLC symbol |  |
| 583 $j | Site of action | O | Specified as Holdings Location Code but libraries have used institution name here |  |
| **LOCATION tab** |
| 852$b | OCLC 4 character Holding Library Code |  | Can be overridden by record in the data file.Holding Library Codes can be seen in the dropdown of the CollectionIf you have questions, contact OCLC about your Holding Library Codes. |  |
| **LINKAGE INFORMATION tab** |
| 014 $b | MARC Organization Code | R | MARC Organization Code is an international standard identifier assigned (for US libraries) by the Library of Congress. If not known, search at <https://www.loc.gov/marc/organizations/org-search.php> .If left blank, symbol will be used |  |
| **OWNERSHIP HISTORY tab** |
| Include Ownership and Custodial History Note?  | Original owner who contributed material to the archived location | O | Have the items in the datafile been transferred from a different location (with a different OCLC symbol) to the present, i.e. retention location? If the library wants to record information about prior ownership/location, say YES to this option. | YES or NO |
| 561 $a | OCLC symbol of previous owner | O |  |  |
| 561 $b | MARC Organization Code of previous owner | O | Can be looked up at <https://www.loc.gov/marc/organizations/org-search.php> . |  |

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| **MARC RECORD OUTPUT OPTION** |
| Enable MARC record delivery? |  | R | Only needed if a non-WMS library wants copies of records to update their local system. | YES or NO |
| Records returned? (choose one) | * Local holdings records (LHRs) only
* Separate file of bib records and LHRs
* Bib and LHRs interleaved
 | O | The 583 retention commitment note will only appear in the Local Holdings Record. |  |
| **LOCAL CONTACT INFORMATION** |
| The following is **required** for at least one person at the institution. List primary contact person first.Last Name First Name Title Telephone Email Address |
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