



Local Holdings Record Batchload for Branch Level Scoping

Making branch level holdings visible

This document contains information for WorldCat Local subscribers who want to add functionality to limit searches to a specific branch location (called “branch level scoping”).

Please note: The ability to limit searches by branch location is included in subscriptions to the WorldCat Local service but is not included in WorldCat Local “quick start.”

WorldCat Local subscribers may choose to limit search results to resources located at a specific branch.

- If the branch libraries in your library system are represented separately by three- or five-character OCLC institution symbols and share the same catalog, you can add the OCLC institution symbols for your branch locations in the “Search Results and Relevancy Ranking” module of [OCLC Service Configuration](#). Doing so allows WorldCat Local to identify the records held by your branch locations. In this situation, branch scoping is done at the OCLC institution symbol level and does not require local holdings records.
- If the branches in your catalog are not represented by a unique OCLC institution symbol and you would like your WorldCat Local users to be able to limit a search to a specific branch location, you must have local holdings records (LHRs) attached to bibliographic records in WorldCat to facilitate branch level scoping.

Implementing branch level scoping

You will need to work with the OCLC Implementation and Consultative Services teams who can help you set up and complete branch level scoping.

- If you are currently working with the Implementation team for WorldCat Local, please contact them by email at WorldCatLocalIM@oclc.org.
- Otherwise, please contact OCLC Customer Support at support@oclc.org to get the process started. Either group can help you.

Local holdings records (LHRs)

The remainder of this document gives information about LHRs and about two types of batchload projects for adding LHRs to WorldCat to support branch level scoping.

OCLC LHRs are separate holdings records attached to a related WorldCat bibliographic record that provide holdings details for your library beyond the presence of your OCLC institution symbol in the bibliographic record to indicate a holding. Individual LHRs report holdings information for a single copy of an item. An institution may have one or many LHRs for any given bibliographic record in WorldCat.

OCLC LHRs are based on the [MARC21 Format for Holdings Data](#) (MFHD). OCLC LHRs can be represented at Levels of Specificity 2 or above as defined by the [Holdings Statements for Bibliographic Items \(ANSI/NISO Z39-71\)](#).

The specific data element in LHRs that enables branch level scoping is the unique four-character holding library code located in field 852 ‡b. A holding library code identifies a holding library or collection associated with your OCLC institution symbol.

If you need a list of your current holding library codes, or you need to add new holding library codes or change existing codes, send an email request to profiling@oclc.org. Holding library codes must be four alphanumeric characters in the ranges A-Z and 2-9 only.

Branch level scoping using LHRs

To support branch level scoping, you will need to add or update local holdings records with the most current local holding codes for your library.

This document covers two ways you can add LHRs in WorldCat using OCLC Batch Processing:

- Order a batchload project for local holdings records using the OCLC Local Holdings Record Updating service (LHRUS).
- Order a bibliographic batchload project enhanced for creating LHRs.

Note: You can also work with LHRs directly online using the local holdings maintenance feature of the Connexion browser interface to OCLC cataloging. See [Connexion browser documentation](#) for more information.

Local Holdings Record Updating Service (LHRUS) batchload projects

LHRUS is the preferred method for adding local holdings records to WorldCat because the LHRs can contain more detail and can be added at Levels of Specificity 2 and higher, as defined by the [Holdings Statements for Bibliographic Items \(ANSI/NISO Z39-71\)](#).

Requirements for using LHRUS:

- Holdings records are compliant with [MARC21 Format for Holdings Data](#) (MFHD).
- Each holdings record has a single, valid, and properly formatted OCLC control number for the associated WorldCat bibliographic record
- Each holdings record contains an 852 field with subfield ‡a Location and ‡b Sublocation
- Each holdings record represents the holdings data for only one copy of an item.

Please note that although LHRUS accepts non-MARC patterned data, sending this type of data is not recommended for supporting ongoing branch scoping. Files for non-MARC LHRUS projects can be submitted only as frequently as quarterly, which has proven to be too infrequent for WorldCat Local users.

For definitive information about using the LHRUS batchload option, see the [Local Holdings Record Updating Service User Guide](#).

Bibliographic batchload projects enhanced for creating LHRs

If your library cannot provide MFHD records, or if the OCLC control number cannot be included in the LHRs, you can use a bibliographic batchload project that is enhanced to create LHRs. You send bibliographic records with branch location data embedded in the records. OCLC uses the data to create local holdings records and attaches them to the bibliographic records matched in WorldCat. This type of batchload creates *only* Level 2 LHRs.

General requirements for using a bibliographic batchload project to create LHRs:

- MARC21 bibliographic records must contain branch location identifiers in a consistent location and format—for example, in a 9xx field.
- Additional data to be included in the LHRs must be in the same field as the location information so that it can be associated correctly—if multiple locations are represented in a record. Examples of types of data that can be included are:
 - Call number
 - Copy number
 - URLs

Please note that detailed holdings cannot be included as part of this type of batch processing. Bibliographic batchload projects that are enhanced to create LHRs do not overwrite any existing LHRs that you entered via

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Connexion or LHRUS. These records are skipped, and the library is notified about any records that are not loaded because of these existing LHRs.

Support

If you have questions or need more information about batch processing for adding local holdings records to WorldCat, please contact OCLC Customer Support at support@oclc.org.