

WorldCat Local Operations : SCP Procedures for Creating and Deleting LHRs

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LHRs for Serials: Appendix C: SCP Procedures for Creating and Deleting LHRs

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Step 1---Gathering new, updated and deleted SCP records in Create Lists

At the start of each week, the SCP file processor searches for bibliographic records that have been newly added, updated, or set for deletion for SCP during the previous week. These records are given a 599 note at the time of cataloging/updating.

- Select an empty file in Create Lists and hit the Search Records button
- Name the file "SCP serials output <date>" and leave the Store Records Type as BIBLIOGRAPHIC. Leave the range as the entire database. The date should be in the yymmdd format and be the current Monday of the week, or Tuesday if Monday is a holiday.
- Hit "Retrieve Saved Query" and use the saved search "SCP Serials Output 040611kdp". Criteria is:

BIBLIOGRAPHIC BRANCH equal to "cdl " AND BIBLIOGRAPHIC MARC Tag 599 greater than "" AND BIBLIOGRAPHIC MAT TYPE equal to "s" AND BIBLIOGRAPHIC BIB LEVL equal to "s" AND BIBLIOGRAPHIC CAT DATE greater than " - - "

OR BIBLIOGRAPHIC BRANCH equal to "cdl " AND BIBLIOGRAPHIC MARC Tag 599 greater than "" AND BIBLIOGRAPHIC MAT TYPE equal to "s" AND BIBLIOGRAPHIC BIB LEVL equal to "i" AND BIBLIOGRAPHIC CAT DATE greater than " - - "

OR BIBLIOGRAPHIC BRANCH equal to "cdl " AND BIBLIOGRAPHIC MARC Tag 599 greater than "" AND BIBLIOGRAPHIC MAT TYPE equal to "s" AND BIBLIOGRAPHIC BIB LEVL equal to "b" AND BIBLIOGRAPHIC CAT DATE greater than " - - "

- Quality control checks are then performed on this bib file, which are not detailed here. Once they are finished:

Step 2---Make sure SCP serials have a checkin record attached

- Select an empty file in Create Lists and hit the Search Records button.
- Name the file "Scp checkin fixes" or something like it and keep the Store Records Type as BIBLIOGRAPHIC. Change the Range to Review, and select the file you created in Step 1 above.
- Enter the following search criteria and then hit Search:

BIBLIOGRAPHIC LINKED REC not exist to CHECKIN

- Review any SCP bib records that are lacking a checkin record, and add if necessary. However, do not add a checkin record for a serial title that is part of the "Early English Books online" package or is a shared print title (branch will be multi with cdl and ucl). None of these titles will receive LHR's at this time. You can then empty this file after you are finished.

Step 3---Creating an SCP checkin file in Create Lists:

- Select an empty file in Create Lists and hit the Search Records button.
- Name the file "SCP LHR file <date>" (date should be same as above) and change the Store Records Type to CHECKIN. Change the Range to Review, and select the file you created in Step 1 above.
- Enter the following search criteria and then hit Search:

BIBLIOGRAPHIC R CTRL CD not equal to "d"

- Confirm that checkin records have 007 and 008 fields: Sort the file by Type "c" for checkin, and by Marc tag 007. Records that lack an 007 will appear at the top of the list. Add the field as necessary. Repeat the sort/correction with Marc tag 008.
- Confirm that checkin records have the proper location code of cdl: Sort the file by Type "c" for checkin and by checkin location. Records with improper coding will appear at the top of the list and/or the bottom.

Step 4---Creating the MARC Holdings File

- Select Output MARC HOLDINGS Records in Data Exchange and hit the Create button
- Name the file "cls.lhr.trans.d<same date as above>"
- Under the range, select the checkin file created in Step 3 [SCP LHR file <date>] and then hit Start
- Once it is done creating the file, hit Close, select the file you just created from the list, and then hit Put PC
- Navigate to the P:\MSD-SCP_CD_L folder and hit save
- FTP the file to the CDL server (contact SCP for access instructions)

Note: The SCP MARC Holdings output table copies all 856 and 920 fields from the bibliographic record and puts them into the holdings record. The 856 fields contain the links to online access and the 920 fields indicate which campuses have access to a resource (one 920 field for each campus that has access).

Step 5 - Creating the Separate LHRs for Each Campus

Once the file has been received at CDL, it will be run through the LHR Creation Program which looks at each record in the file and spins off a separate LHR based on the 920 fields in the source record. In addition, it also does the following:

- Changes the code in the 003 field from 'CUS' to the campus xxxER symbol
- Changes the code in the 852\$a from 'CUS' to the campus xxxER symbol
- Changes the code in the 852\$b from 'cdl' to the 4-character OCLC holdings code that corresponds the 5-character xxxER symbol
- Removes any 856 fields that do not pertain to a particular campus (some LHRs have multiple 856 fields, where one campus might have access via one 856 field but not the other)
- Removes the 920 fields

Once the process is done, all the separate LHRs for the individual campuses will be in one master LHR file. OCLC requires that this master data file have an accompanying label file. The LHR Creation Program will also make the label file with the following data in ascii text:

DAT 20091109000000.0 (date compiled, including zeros)
 RBF 9505 (exact number of records in the data file)
 DSN LHR.DATA.D091109 (exact name of the data file)
 ORS SCPER (SCP's batch processing symbol)
 FDI P012667 (the batch project ID---this remains constant)

NOTE: There must be two spaces between the field name and the field description, e.g. DAT(space)(space)20091109000000.0 (use the "enter" key after each completed line). Do not include any of the above information in parentheses in the label.

Step 6 - Sending the Files to OCLC

Once the LHR Creation Program has finished, it will place the master LHR file and the label file in the 'outdata' folder on the SCP server.

- Retrieve the 2 files from the CDL server and place them on the P drive. We plan to keep the files indefinitely for archiving/troubleshooting purposes.
- FTP the 2 files to OCLC's EDX server using the CUS EDX account (OCLC confirms that this is okay).

Deleting LHR's for SCP serials

If we are dropping one or more campuses from a title and that title has no other access for that campus or campuses (i.e., UCB drops out of a tier 1 resource which is the only UCB access for that resource):

- Catalogers will make changes to the bib record, including changing the 856|z and removing the 920 for UCB.
- A 599 UPD note will be added to the bib and the record will be resent to the remaining 9 campuses.
- The cataloger will then need to manually delete UCB's CUYER holdings symbol and the LHR from the OCLC record for that title (note: removing the holdings symbol will automatically delete the LHR).
- New LHR's will be resubmitted for the other 9 campuses still having access to the title in the weekly LHR process. New LHRs will reflect update info, i.e., that this title is now a tier 2 with the nine remaining campuses listed as having access.

Note that usually when a campus drops out of an entire package, an e-mail is sent to the campus to delete all titles contained within that package. Holdings and LHR deletions of a campus for large packages can be done in a batch process in OCLC.

If we are deleting a title from SCP (i.e., access no longer available)

- Catalogers will make changes to the bib record, including deleting the 793 field and coding the record as "d" in the R-CTRL code in Millennium.
- A 599 DEL note will be added to the bib and the record will be sent out to the relevant campuses.
- The SCP file processor will gather these records weekly and delete holdings and LHR's from OCLC in a batch process.