**Individual Library: Collection Profile Template**

Please send the required information back to [support@oclc.org](mailto:support@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 Collection  If 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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