**Group Profile Template**

In order to successfully generate a Collection ID for your agent/group coordinator profile, you will need to fill in all required fields, some of which may not be relevant to a program. Institution specific fields are only used to successfully save your profile. Institution specific fields will not be inherited or used for any type of reference, so values do not have to be valid. Placeholder values are provided below if you wish to use them. Please send the required information back to support@oclc.org and a data sync specialist will create your profile for you.

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| **Element** | **Notes** | **Library/Group Supplied Value** |
| Collection Name | Free text, e.g. “EAST shared print admin profile”  |  |
| OCLC Symbol | System-supplied, read-only, and tied to login; a special symbol will be established for your program profile |  |
| 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 | Local Holdings Records |
| Original Data Format | Always = NON-MARC | NON-MARC |
| Shared Print Y/N | Always = Y | Y |

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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; Format YYYYMMDD |  |
| 583 $d | Action Interval (date when retention commitment expires) | R | Typically, this is an agreement at the program level: Format YYYYMMDD |  |
| 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 support@oclc.org  |  |
| 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. | 9999 for group placeholder |
| Treatment of Existing LHRs | Update existing LHRs or always create new? | R | WMS libraries should always choose "Merge".  If Non-WMS libraries have any LHRs in WorldCat (e.g. serial holdings), choose "merge" for best results. "Merge" option does not require barcode numbers in the datafile.Merge option appears on tabs for Retention Commitment, ILL Policies (twice), and Linkage Information. Choose the same value each time. | Use “merge field information” for placeholder value |

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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 | Holding Library Code of Current Location | R | Can use placeholder value here | Use MAIN as placeholder value |
| **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. | Use 9999 for placeholder value |
| **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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