How do I locate all print records that have a WorldCat holding (held by) on them, but have no LHR records

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Applies to

- WorldShare Reports
- WorldShare Report Designer

Answer

You need to run a report that will capture all the print titles you have a WorldCat Holdings on, that do NOT have a LHR attached. Sometimes a holding gets added accidentally (human error) to a record or for some reason the holding was not removed, when the LHR was deleted as expected. Meaning that your system will say you hold an item, when in actual fact you do not.

This report is to locate any print resources you have a holding on, that does not have a LHR attached.

To locate the OCLC numbers of items that have a WorldCat Holding on it, but no LHR do the following:

1. Select > Analytics > Reports > Report Launch pad.
2. Select > Application > Web Intelligence at top of screen.
3. Select > New icon from the tool bar.
4. Select > Universe > Ok > Institution Title Holdings > OK.
5. Select > Title folder > OCLC number > drag into Result Objects box.
6. Select > Title folder > Title > drag into Result Objects box.
7. Select > Title folder > Material Format > drag into Result Objects box.

Now to set the Query filter to exclude any e-resources from this report.

As many e-resources would not have an LHR but are held by your library & you do would not want these items returned in this report.

1. Select > Title folder > Material Subformat > drag into Query filter box  (Note: list of values may take a while to load).
2. Select > Not in list > Select any e-Resource formats listed.
3. Add optional filter > Select Institution folder > Institution Symbol > In List > select your OCLC Symbol.
Run the query > You will need to add Material Subformat to a column by selecting the Available Objects icon of left-side margin > Select Material Subformat and drag across to the last column on your report.

Now you will need to go back and use the Edit Data Provider to add Query 2 to this report.

1. Select > Add Query > From the universe > Select the LHR Item Detail Universe.
2. Select > LHR item Details > OCLC Number > Drag across to the Result Objects box.
3. Now you need to run just Query 2 by selecting > Run Queries Drop-down menu > Selecting Query 2.
4. But ensure you select > Include the result objects in the document without generating a table [essential for this report to work].
5. Now go back to the Edit Data Provider icon and update the Query 1: (to add the new filter).
6. Set in the New filter from Query 2 > OCLC Number > Not in List > OCLC number (Query 2) [ by selecting Result from another query > Query 2 OCLC number.]
7. Select Run queries again.
8. You will now get your report showing your items that are not e-resources, but with holdings that have no LHRs attached.
9. Save as xxxx to your local reports folder.
10. You can then export this report as a PDF or excel if required.

Additional information

Once you have the OCLC numbers of all these items, you will be able to do a bulk removal of WorldCat Holdings in Record Manager > Record Work Lists > Bibliographic tab > Add in the OCLC numbers found in this report, separated with a space > Record Actions > Delete WorldCat holdings > Delete Holdings (s) Only.

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