Branch-level scoping

Find out how to implement branch-level scoping for data sync collections in WorldShare Collection Manager.

Implement branch-level scoping

To implement branch-level scoping, contact the appropriate group at OCLC to set up and complete branch-level scoping:

- For libraries going through WorldCat Discovery implementation, contact the Implementation team.
- For all other collections, contact OCLC Customer Support.

Limit searches by branch location

The ability to limit searches by branch location is included in subscriptions to the WorldCat Discovery service but is not included in WorldCat Discovery "quick start."

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

- You can add the OCLC institution symbols for your branch locations in the Search Results and Relevancy Ranking module of OCLC Service Configuration if the branch libraries in your library system meet both of these criteria:
  - They are represented separately by three- or five-character OCLC institution symbols.
  - They share the same catalog.

  If you add the symbols for your branch locations, WorldCat Discovery can 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 Discovery 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.

Local holdings records (LHRs) and branch-level scoping

To support branch-level scoping, there are two types of data sync collection for adding LHRs to WorldCat.

- Order a local holdings records collection for local holdings records.

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.

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

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.

Local holdings records collections

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

Here are some requirements for creating a local holdings records collection:

- All holdings records must be compliant with MARC21 Format for Holdings Data (MFHD).
- Each holdings record must have a single, valid, and properly formatted OCLC control number for the associated WorldCat bibliographic record.
- Each holdings record must contain an 852 field with subfield $a Location and $b Sublocation.
- Each holdings record must represent the holdings data for only one copy of an item.

Although a local holdings records collection accepts non-MARC patterned data, sending this type of data is not recommended for supporting ongoing branch scoping. Files for non-MARC collections can be submitted only as frequently as quarterly, which has proven to be too infrequent for WorldCat Discovery users.

For information about creating a local holdings records collection, see Create a local holdings records collection.