

A person with long braids, seen from behind, is walking through a library aisle. They are wearing a light-colored jacket and a backpack. The aisle is lined with tall bookshelves filled with books. The image has a blue overlay on the left side where the text is located.

17 June 2020

Shared Print Registration and Discovery: New Tools, Services and Support for Libraries

Panelists



Matt Barnes

Director of Sustainable
Collection Services
OCLC



Kristin Ewig

Senior Product
Manager
OCLC



Marie Waltz

Head of Access
Initiatives and Special
Projects Coordinator
CRL



Amy Wood

Head of Technical
Services
CRL



Building, Managing, and Curating the Collective Collection

370.78
Educational Research
to
371.102
Teaching

371.102
Teaching
to
371.19
School Relations

Andrew W. Mellon Foundation



Search OCLC websites



Searching for items in a library? Try WorldCat.org.

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OCLC awarded Mellon Foundation grant to register library retention commitments for print serials in WorldCat

Center for Research Libraries to partner with OCLC to develop project

DUBLIN, Ohio, 24 June 2018—OCLC, working closely with the [Center for Research Libraries](#) (CRL), has been awarded an [Andrew W. Mellon Foundation](#) grant to enhance the underlying infrastructure of the OCLC WorldCat database and CRL's Print Archives Preservation Registry (PAPR) to accommodate and make accessible actionable data for shared print serials management.

The two-year grant, for \$1,001,000, will support a joint OCLC and CRL Shared Print Data Infrastructure project. The initiative will modify [WorldCat](#), the world's most comprehensive database of information about library collections, to enable registration of print serial retention commitments and make archived holdings data available to inform library decision-making.

"We're grateful to the Andrew W. Mellon Foundation for this grant," said Skip Prichard, OCLC President and CEO. "Libraries have been enthusiastic about the ability to track shared print retention decisions for monographs in WorldCat. We're delighted to be able to expand our shared print program to include serials and multi-volume sets with this support from the Mellon Foundation."

Contact

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[Send an email](#)

See also

[WorldCat](#)

Deliverables



Registration

- Enabled registration for serials
- Expanded flexibility of existing registration process
- Enabled group/agent registration capabilities
- Option to register and edit commitments via MARC format (June 2020)



Discovery

- Improved discovery of shared print commitments in existing products
- Added views of shared print in additional products
- New API to make shared print details and holdings information discoverable

Getting Started with Registration

You will need a WorldShare login with access to LHR data sync collections in Collection Manager

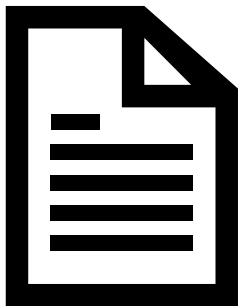
- If you are a cataloging member, you should have access already
- If you are not a cataloging member or do not have this access, contact sharedprint@oclc.org

OCLC staff can help guide you through the process once we understand your setup and support needs

- Submit the form at <https://oc.lc/spform>

Registration Workflow

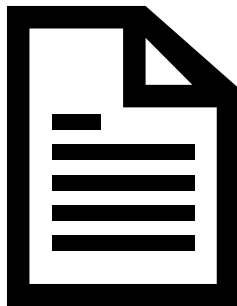
1



Create a collection profile in Collection Manager

- Contains data about institution commitments

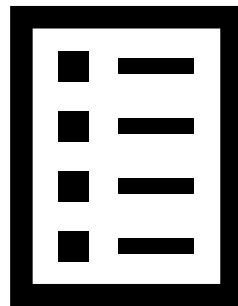
2



Upload CSV file of OCLC numbers

- Enhanced file contains multiple columns (including serials) where profile data can be overridden at a record level

3

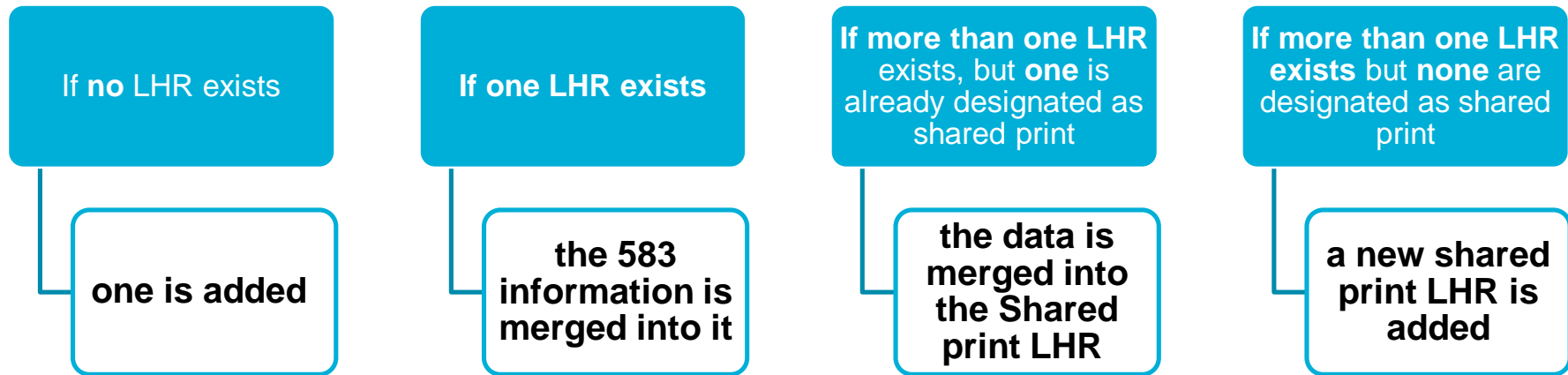


Shared Print LHR's created or matched/merged with profile and CSV data

Collection Profiles: What's New?

- **OCLC can create a collection profile for your library** or for institutions within your program with a completed Collection Profile Template (Word doc)
- **Agents/group coordinators will be able to create a collection profile** in order to submit commitment data on behalf of libraries (email sharedprint@oclc.org for help with a group coordinator login)
- **You only need to create one collection profile (institution or group coordinator)** however, you may choose to have multiple for organizational purposes

Merge/Match Logic



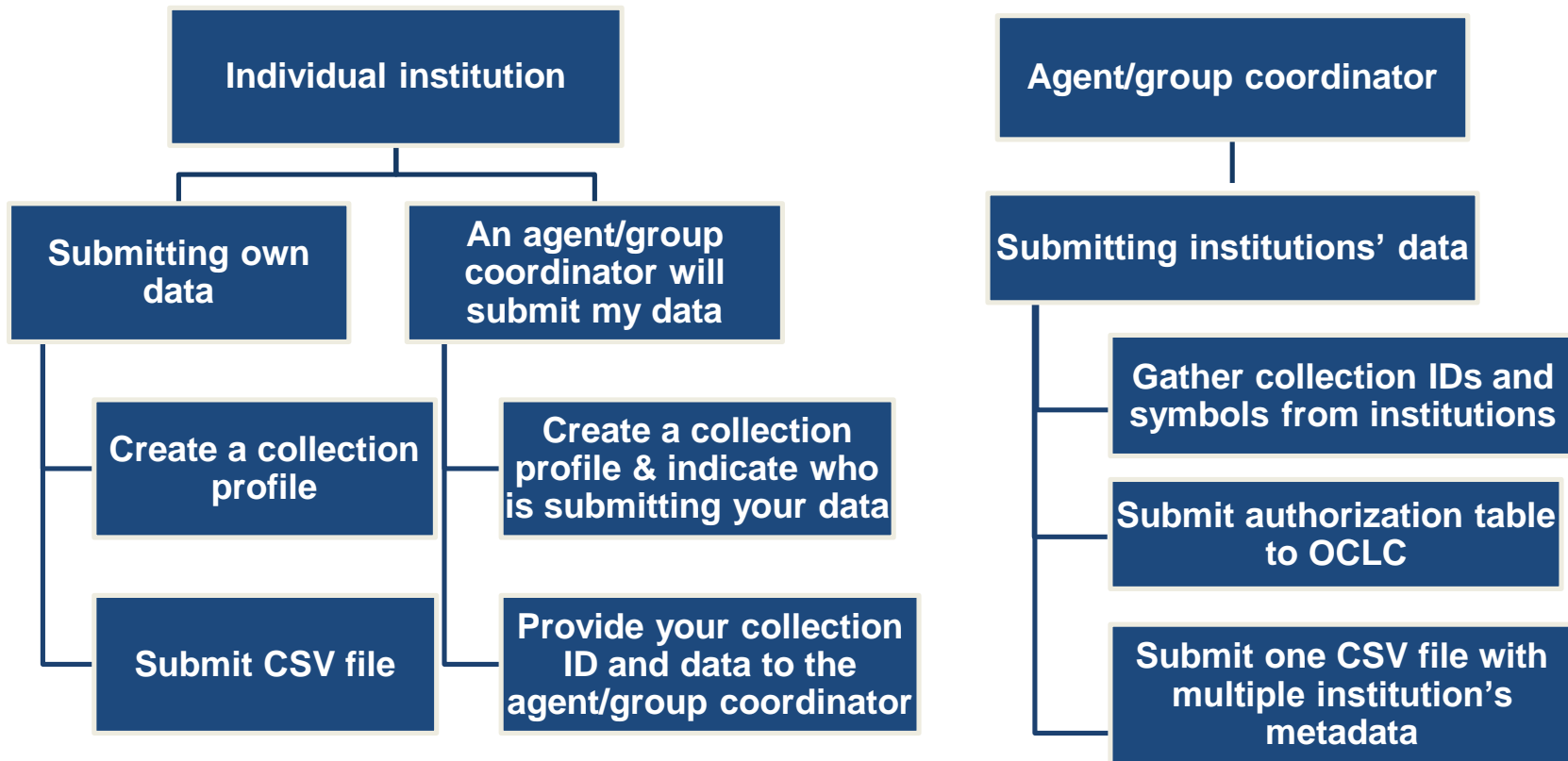
CSV Files: What's New?

- A **14-column template** is now available which can be used to add or **override data from the profile** and **register serials**
- Columns have been added to support **group processing** and allow multiple institutions to be processed in one file

Key
Required
Required for agents/ group coordinators
Multiple subfields accepted
Override eligible
Defined in CSV

Data	Action
OCLC_Number	Required
LSN	Required
Barcode	For matching (WMS libraries)
InstitutionSymbol_852\$a	Required for agents/group coordinators
HoldingLibrary_852\$b	Can be used to override/replace profile values
CollectionID	Required for agents/group coordinators Default=committed to retain; other values accepted in additional rows
ActionNote_583\$a	Required for agents/group coordinators
ActionDate_583\$c	Can be used to override/replace profile values
ExpirationDate_583\$d	Can be used to override/replace profile values
MethodofAction_583\$i	Accepts multiple values using \$i delimiter
Status_583\$l	Accepts multiple values using \$l delimiter
PublicNote_583\$z	Accepts multiple values using \$z delimiter
ProgramName_583\$f	Accepts multiple values using \$f delimiter
MaterialsSpecified_583\$3	Only defined in CSV, not in profile

Selecting the Appropriate Workflow



Workflow Output

- You will receive summary and exception reports in the MyFiles section of Collection Manager within 2-3 business days of data submission
- Re-submit any corrected records
- Successful records will be available in WorldCat



Exception & Summary Reports

Collection Manager

My Files

Uploads

Downloads

Records and Reports

KB Downloads

Records and Reports

Filter by: Select

Reset

Downloaded: ☒ Hide downloaded files

No results

Rows: 10

File Name	File Type	Size	Post Date	Download Date	Action
-----------	-----------	------	-----------	---------------	--------

Report Name: Local Holdings Record Processing Summary - Shared Print Registration

Reporting Date: 20190306

Collection ID: 1031567

Institution Symbol: MAC

Data Sync File Name

Date Completed

Shared Print Records Input

LHRs Added

LHRs Updated

Shared Print

Shared Print Records Skipped

MAC-MAC.1031567.IN.LHR.D20190306

20190306

21189

0

0

317

3743

Report Name: Local Holdings Record (LHR) Exception Detail - Shared Print Registration

Institution Symbol: MAC

Collection ID: 1031567

Data Sync File Name: MAC-MAC.1031567.IN.LHR.D20190305.T114117731.1031567.mac.sharedprint_20190305.csv

Date Completed: 20190306

Incoming OCLC Number

Final OCLC Number

Local System Number

Data Sync Exception Description

609340450

609340450

No matching barcode in WorldCat.

33241066

33241066

Failed due to processing error, please resubmit record

CRL Partnership



CRL will submit data to WorldCat on behalf of multiple institutions/programs



CRL will sync back any serials data to PAPR

Synchronizing PAPR & WorldCat

PAPR to WorldCat

- Participate in PAPR
- Library and CRL sign agreement listing terms of the synchronization service
- Program Manager will remain the main contact
- Updates immediately following PAPR updates

WorldCat to PAPR

- CRL will create Collection Manager Query Collections to push alerts for new and updated shared print holdings in WorldCat
- Alerts will trigger process to pull records for loading into PAPR
- All records will be checked against current PAPR holdings to prevent data loss or data problems

PAPR Enhancements

- Exposed publication history
- Added format to improve aggregation of microfilm and electronic holdings with print holdings
- Extended ability to add electronic holdings beyond Portico and CLOCKSS
- Created ability to export data in format needed for batch loading
- Extended ability to custom export data from PAPR to sync data with other databases
- Improved statistical visualization
- Identified key data issues to resolve to better support future data analysis

Dashboard

Directory

Archived Titles

Statistics

Title Keyword ▼ 19th century music. Search

Search Results

 Download Archived Holdings  Download Gaps and Condition Report

1 results for titlekeyword: 19th century music.

 Print  Digital

Title	Publisher	ISSN	Program (Institution)
19th century music.	University of California Press	0148-2076	<div> View all holdings  BTAA SPR (UIUSP)  COPPUL SPAN (UBC)  CRLJSTOR (CRLAA)  EAST (MAFCI)  FLARE (FLARE)  HARV@JSTOR (HJSTOR)  JSTOR (ZASSP)  Scholars Trust (CAO)  Scholars Trust (FLARE)  UCL Shared Print (ZASSP)  WEST (CSNSP)  WRLC (CAO)  EJS TOR  PORTICO </div>

Format ICONs & EJSTOR Holdings

Dashboard

Directory

Archived Titles

Statistics

AAUW journal.

- Publisher: American Association of University Women
- Print ISSN: 0001-0278
- Electronic ISSN:
- OCLC Number: 1847370
- Subject: Women Education (Higher) United States Periodicals.
- Subject code: L
- Publication history: v. 55, no. 2-[v. 71, no. 5]; Jan. 1962-Apr. 1978.

Publication History

Dashboard

Directory

Archived Titles

Statistics

Keyword



Enter search terms

Search

American men & women of science.

- **Publisher:** R.R. Bowker
- **Print ISSN:** 0000-1287
- **Electronic ISSN:**
- **OCLC Number:** 19407934
- **Subject:** Scientists United States Biography.
- **Subject code:** Q
- **Publication history:** 17th ed. (1989/90)-

Enhanced Holdings Display

Print Holdings

Archiving Institution	Program	Holdings Description	Retention
Emory University (EMU)	Scholars Trust	17th-26th (1989/1990-2009), 30th-32nd (2012-2014)	20351231
Indiana University Shared Print in Storage (IULSP)	BTAA SPR	17 (1989/1990)-18 (1992/1993), 20 (1998/1999)	June 30, 2036
University of South Carolina at Columbia (SUC)	Scholars Trust	17th ed.(1989/1990)-20th ed. (1998/1999)	20351231
Washington Research Library Consortium (CAO)	Scholars Trust, WRLC	17th ed - 24th ed, 28th ed. (2010)	20351231

Grant Project Webpage

A vital element of this effort is feedback from all interested parties.

- <https://www.crl.edu/infrastructure-shared-print-collections>

Contents

- Shared Print Advisory Board Members
- List of meetings held with the advisory board
- List of meeting held with the Shared Print Community
- Other relevant meeting notes and information about the project

The screenshot shows the homepage of the 'Infrastructure for Shared Print Collections' project. At the top, there is a header for the 'Center for Research Libraries GLOBAL RESOURCES NETWORK' with a search bar and navigation links for 'catalog' and 'website'. Below this is a dark green navigation bar with links: 'About', 'Membership', 'Collections', 'Electronic Resources', 'Services', 'Archiving & Preservation' (which is highlighted), and 'Collaborations'. The main content area has a left sidebar titled 'Archiving & Preservation' with a sub-menu for 'Print Preservation' containing links to 'Archiving by Domain', 'ICON Database', 'JSTOR Print Archive', 'PAPR Database', 'Print Archive Network (PAN)', and 'Contributing Serials to the Linda Hall Library'. The main body features the title 'Infrastructure for Shared Print Collections' and a paragraph explaining the project's goals, funded by a grant from the Andrew W. Mellon Foundation. It mentions the development of the 'Print Archives Preservation Registry (PAPR)'. There are two news items on the right: 'CRL Negotiates Extraordinary Access to Gale Primary Sources' dated 9 Apr 2020, and 'Project CERES Funds Eight Projects for 2019-2020' dated 21 Aug 2019. At the bottom, there is a 'Community Input' section with a survey link and a 'Shared Print Advisory Board' section mentioning a group meeting every 1-2 months. An 'All CRL News' link is in the bottom right corner.

Shared Print Advisory Board

- Sara Amato (EAST)
- Ian Bogus (ReCAP)
- Doug Bringham (COPPUL)
- John Burger (ASERL)
- Cheryl Cole-Bennett (Scholars Trust)
- Rebecca Crist (BTAA)
- Mark Jacobs (WRLC)
- Aaron Krebeck (WRLC)
- Matthew Revitt (Maine SC)
- Ben Walker (FLARE)
- Marie Waltz (CRL)
- Heather Weltin (Hathitrust)
- Linda Wobbe (SCELC)
- Alison Wohlers (WEST)
- Amy Wood (CRL)



Keeping the Community in the Loop

- **Shared print public meetings**
 - PAN Forum
 - Online
 - Other venues
- **Meeting notes and recordings on the webpage**
- **OCLC Resources such as:**
 - Shared Print Strategy webpage
 - Shared print group

OCLC + CRL Partnership



+



PAPR | PRINT ARCHIVES
PRESERVATION REGISTRY



 WorldCat[®]

Discover Shared Print Commitments

Connexion

- New shared print (group & institution) search indexes added

Record Manager

- New shared print (group & institution) search indexes added
- Ability to delete shared print commitments

FirstSearch

- Limit by shared print commitments
- View the # of total commitments that exist for a given record
- View shared print commitments by record by library

Collection Manager

- Run queries to obtain access to LHR data (shared print & non)
- Data can be downloaded, scheduled, and delivered

WorldCat Metadata API

- Search bibliographic & holdings data on shared print commitments

New WorldCat Metadata API

WorldCat Metadata API

- Read/write bibliographic records

WorldCat Metadata API version 1.1

- Search/retrieval of shared print data
- Built on new modernization standards

Documentation and more information about the API can be accessed at oc.lc/metadataapi

New WorldCat Metadata API

[About Us](#) [Contact Us](#)[Get Started](#)[Develop](#)[Collaborate](#)[Gallery](#)[News](#)[Events](#)[Home](#) › [Develop](#) › [Web Services](#) › [WorldCat Metadata API](#)

Web Services

WorldCat Metadata API

More information

[Read-write Endpoints](#)[Search Endpoints](#)[Sandbox Testing](#)[Get support for this Web service »](#)

WorldCat Metadata API

The WorldCat Metadata API is a read-write service for WorldCat that makes it possible to add or update master bibliographic records in WorldCat, maintain holdings information, and work with local bibliographic data. In May 2020, the WorldCat Metadata API 1.1 was released to support searching WorldCat by all available indexes and retrieval of shared print information, such as retention commitments. This new version runs in parallel with the original WorldCat Metadata API.

Status: Production Sandbox access: Yes

This service allows libraries to write MARCXML bibliographic records to WorldCat, either as new records or updated records that are replacing existing records. Existing WorldCat bibliographic records can be accessed with search and read operations. The API enables an institution to set and delete its holdings on WorldCat bibliographic records, and retrieve its own local holdings records as well as retained local holdings records. [Local bibliographic data records](#) can be created, read, updated, and deleted.

Try the API Explorer »

[Interact with this API](#)

Request a key »

[Request and manage your WSKeys](#)

Documentation and more information about the API can be accessed at [oclc.org/metadataapi](https://oclc.org/oclc/metadataapi)

Basics of the New API

Who will be able to access the API?

- Any OCLC member with a cataloging subscription

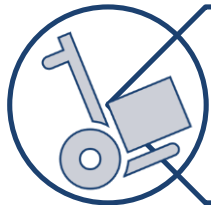
What data is indexed/accessible within the API?

- Bibliographic: basic bibliographic data in the MARC record
- Brief Holdings: simple data about what institution holds a shared print record
- Detailed Holdings: detailed shared print data from the MARC LHR record. The majority of the LHR fields including 583 |a, 3, 5, c, d, f, l, j, l, u, z

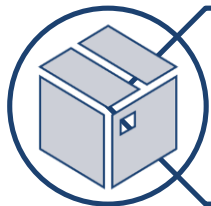
What format will data to be returned in?

- Custom Non-MARC JSON
- Read only

Benefits and Growth of Shared Print



Enables informed deselection and retention decisions



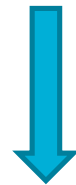
Allows the community to build and manage a global retention safety net for the scholarly record



Inform the development of 'collective collections' to enable interlibrary cooperation

July 2019

(573,930)



January 2020

(2,370,533)

+400%

Ongoing Engagement and Support



- Shared Print Advisory Group
- Shared Print Metadata Guidelines Working Group
- Shared Print / GreenGlass Community Center

OCCLC Metadata Services



David Whitehair

Director, Metadata Services
whitehad@oclc.org



Jody Stroh

Product Manager, Metadata Services
strohj@oclc.org

Questions?

Documentation

https://help.oclc.org/Metadata_Services/Shared_Print

FAQs

<https://www.oclc.org/content/dam/oclc/shared-print/FAQs-Mellon-Grant-Shared-Print-Enhancements.pdf>

Thank you!

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