OCLC & CRL Shared Print Update
Kristin Ewig
Senior Product Manager, OCLC

Amy Wood
Head of Technical Services, CRL
Today’s Meeting Objectives

• Sharing project background and details
• Sharing meeting purpose and goals
• Review proposed workflow improvements
• Review use cases for API & survey results
• Review key milestones & next steps
PROJECT BACKGROUND AND MEETING DETAILS
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."
Deliverables

Registration

• Enabling registration for Serials
• Expand flexibility of existing registration process
• Enable group registration capabilities
• Ability to delete Shared Print commitments

Discovery

• Improved discovery of Shared Print Commitments in existing products
• Adding views of Shared Print in additional products: FirstSearch
• Developing an API to make information discoverable anywhere
Shared Print Serials Roadmap

2019

H1

Meeting updates

Member validation

Begin Development

H2

Meeting updates

Member validation

Development/QA

Testing/Product

Release/Grant End

2020

H1

Meeting updates

Member validation

Development Complete

H2

Meeting updates

Member validation

Product Release
Engagement & Updates

Virtual Status Updates

- Generalized status updates occurring quarterly or as updates become sharable
- Meetings will be recorded to allow for viewing as schedules allow
- Discussions will be limited due to time sensitivity and meeting goals

Member Validation

- 1-2 representatives from each Shared Print Program
- Intended to have further discussions on identified complex topics
- Representatives encouraged to reach out to other SME’s when needed
Themes heard from Community

• Concerns on existing monograph workflow: rigid data inputs & creating multiple profiles for differing data

• Ability for agent to register on behalf of libraries or an admin to register on behalf of a group

• Ability to search and view all the shared print retention commitments for my library, another library, my consortium, another consortium, or combinations of consortium

• Ability to delete shared print commitments
Where did we land?

OCLC will...

- support flexibility of profile data
- support agent registration
- make supporting updates to existing analytics
- develop an API for search and retrieval of shared print items based on user feedback
- make index updates to allow for search and discovery of shared print items in OCLC products
- allow for deletion of shared print commitments
SHARED PRINT REGISTRATION & WORKFLOW IMPROVEMENTS
Expanded Format Support

Today:

- Single-part monographs

Included in Mellon Project:

- Multi-part monographs
- Serials
Maintain Batch Approach

Step 1: Create Collection

(Fill out an online form in Collection Manager)

Step 2: Upload Commitments

(Monograph Data can be downloaded from GG)

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- **Properties**
  - **Collection Name**: My Library Shared Print Retentions
  - **Collection ID**: New
  - **Institution**: Training Library
  - **Symbol**: T525W
  - **Group**: Yes
  - **WMS Library**: Yes
  - **Collection Type**: Local Holdings Records
  - **Original Data Format**: MARC
  - **Shared Print**: Yes
  - **Default Data Sync Collection**: No
  - **Created**: 05/21/2018 12:23:39 PM by OCLC Trainer
  - **Collection Last Updated**: 05/21/2018 12:23:39 PM by OCLC Trainer
  - **Collection Status**: None
  - **Collection Status Last Updated**: 05/21/2018 12:23:39 PM by OCLC Trainer
  - **Description**: None
Extended Support of Guidelines


“committed to retain” $i Method of Action
“completeness reviewed” $l Status
“condition reviewed” $z Public Note
### Workflow Enhancements

#### Profile Flexibility

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Other columns added for data creation or override values:
- HoldingLibrary_852$
- ActionNote_583$a
- ActionDate_583$c
- ExpirationDate_583$d
- MethodofAction_583$i
- Status_583$l
- PublicNote_583$z
- HoldingSummary_583$3
Workflow Enhancements

Group Registration:
Deleting Shared Print Commitments

Delete Commitment

1. Missing
2. Damaged
3. Reallocated
CRL ENHANCEMENTS & SUPPORT
Center for Research Libraries (CRL)

“Center for Research Libraries to partner with OCLC to develop project”

- Adding additional data elements in PAPR
- Synchronization of WorldCat and PAPR holdings information for registered titles
PAPR changes currently in development:

- Representing projects and collaborations in the PAPR Directory,
- Identifying title matches when no ISSN is in the record,
- Pulling families of titles or related titles together,
- Making format an actionable data point.
<table>
<thead>
<tr>
<th>Title</th>
<th>Publisher</th>
<th>ISSN</th>
<th>Program(Institution)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.M.A. archives of dermatology and syphilology</td>
<td>American Medical Association</td>
<td>0096-5679</td>
<td>WEST (CUISSP) UCL Shared Print (CUISSP) PORTICO</td>
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<td>American Medical Association</td>
<td>0096-5359</td>
<td>WEST (CUISSP) UCL Shared Print (CUISSP) PORTICO</td>
</tr>
<tr>
<td>A.M.A. archives of general psychiatry</td>
<td>American Medical Association</td>
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<td>EAST (LOY) EAST (MAFCI) Scholars Trust (FUG) FLARE (FUG) WEST (WAUSP) MedPrint (WAUSP) PORTICO</td>
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Infrastructure for Shared Print Collections

The Center for Research Libraries will work with OCLC on a two-year grant from The Andrew W. Mellon Foundation to make accessible actionable data for shared print serials management. The plan will build on the underlying infrastructure of the OCLC WorldCat database and CRL’s Print Archives Preservation Registry (PAPR), enabling registration of print serial retention commitments in WorldCat while supporting further development of CRL’s capability to collect and manage serial holdings data in PAPR. This initiative will accommodate new content and processes for archiving print serials.

Community Input
A vital element of this effort is feedback from all interested parties. Please use this survey form to ask questions and comment on the project.

News and Information
Charleston Meeting 11/5/2018
OCLC Slides || Notes
CRL webinar to provide more information on the project, July 31, 2018.
Webex Recording || Slides
OCLC Press Release, June 24, 2018
OCLC Shared Print Strategy webpage

https://www.crl.edu/infrastructure-shared-print-collections
DISCOVERY OF SHARED PRINT COMMITMENTS
FirstSearch Mockup
Title: A Cabinet of curiosities: five episodes in the evolution of American museums  

Author: Bell, Whitfield J  
Accession Number: 522319

<table>
<thead>
<tr>
<th>Location</th>
<th>Library</th>
<th>Local Holdings</th>
<th>Code</th>
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<td>ELMS COL</td>
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<td></td>
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<tr>
<td>US, MA</td>
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<tr>
<td>US, MA</td>
<td>BOSTON COL THEOLOGY &amp; MINISTRY LIBR</td>
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<table>
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<tr>
<th>Library</th>
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</table>
Local Holdings Information

- This screen shows details about a library's holdings of an item.

**ELMS COL (NKF)**

**Summary:** Local Holdings Available.

- **OCLC Number:** 522319
- **Date of Report:** 20150606
- **Location:** NKFA, Stacks
- **Call Number:** AM11.C11
- **Format:** Unspecified

**Shared Print:** Committed to Retain

- Commitment from: EAST
- Commitment dates: 2016-06-30 through 2020-06-30
SHARED PRINT API
Discovery

New: Data API

WorldCat

API

Shared Print Registration Data
Survey Distributed

• Survey distributed late November 2018 with the intention to understand:
  – Use cases
  – Formatting needs
  – Expectations on immediate & future capabilities

*Responses collected from 11 shared print groups
API: Use Cases

- Identify duplicate commitments
- Identify gaps
- Commitment comparison
- Risk analysis
- LHR details: Locations, expiration, updated
- Ensure enough copies available when needed
- Collection assessment & maintenance
- Find titles w/ no commitments
- Identify scarce titles
- Securing the right materials
What else did we learn?

• Attributes/parameters needed for effectively searching, sorting, and filtering to meet use cases

• Importance of searching at a group level or over multiple institutions (i.e. location searching)

• Type of data returned: Bibliographic data, LHR data, details of the 583/Shared Print Commitment
API Open Questions

Understanding Format Needs
• MARC vs. Non-MARC

Importance of broad searching vs. submitting OCLC #s in batch
WHAT’S NEXT?
Dates

Feb 2019:  Additional insights from Shared Print Advisory Group

Spring 2019:  Potential Status Update & Check-In

Summer 2019:  FirstSearch Shared Print Enhancements*

Spring 2020:  Mellon Shared Print Enhancements*

*Anticipated delivery dates/timeframes
Thank you!

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Amy Wood
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wood@crl.edu

Because what is known must be shared.™

oc.lc/sp-update