

November 14th, 2019


OCLC & CRL Shared Print Update

Agenda

- Status update on the Serials Registration and Shared Print API project
- Review of workflows, use cases, and timelines
- Review newly proposed enhancements to be addressed within this project
- Outline testing efforts: beta testing and internal test plan timeline

PROJECT STATUS

Andrew W. Mellon Foundation

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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

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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."

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See also

- [WorldCat](#)

Deliverables



Registration

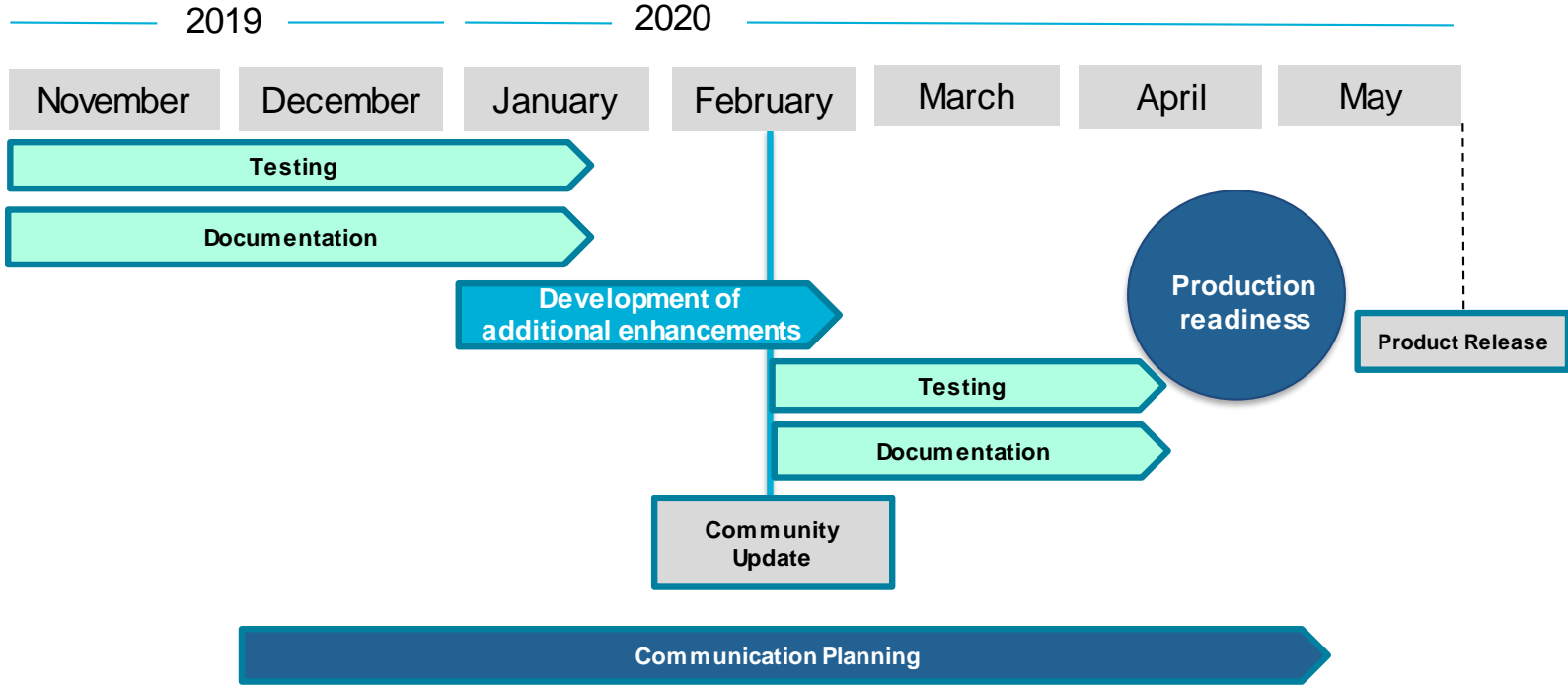
- Enabling registration for Serials
- Expand flexibility of existing registration process
- Enable group registration capabilities



Discovery

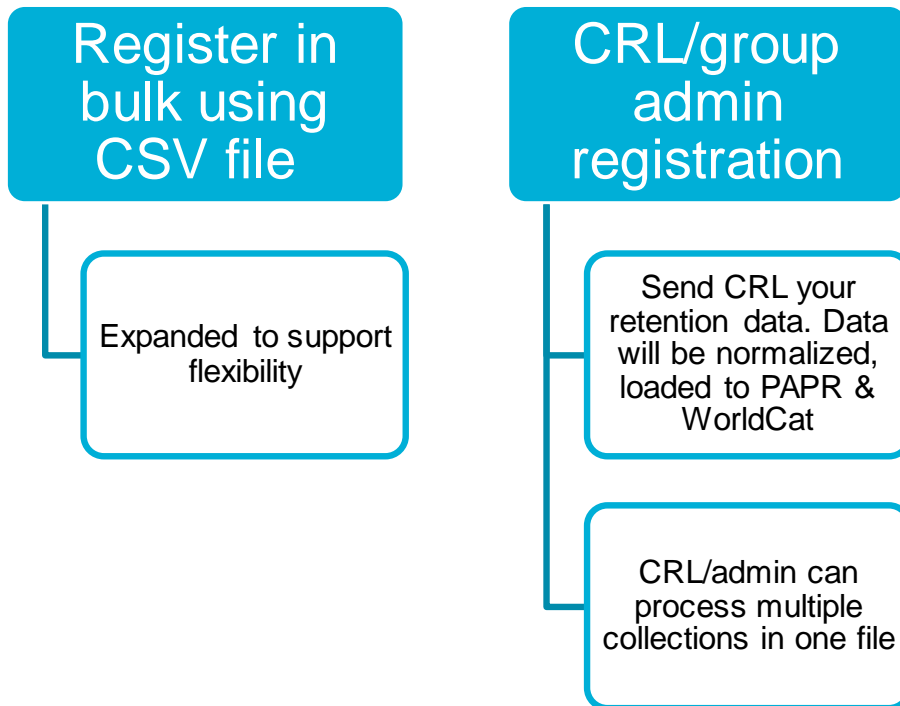
- Improved discovery of Shared Print Commitments in existing products
- Adding views of Shared Print in additional products
- Developing an API to make information discoverable

Shared Print Serials Roadmap

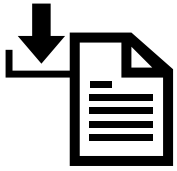


REGISTRATION: WORKFLOW IMPROVEMENTS, USE CASES & TESTING

Workflows & Use Cases



Registration Enhancements: Testing



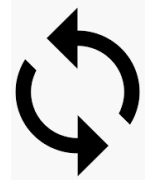
Submission of
data



Validation of
reports

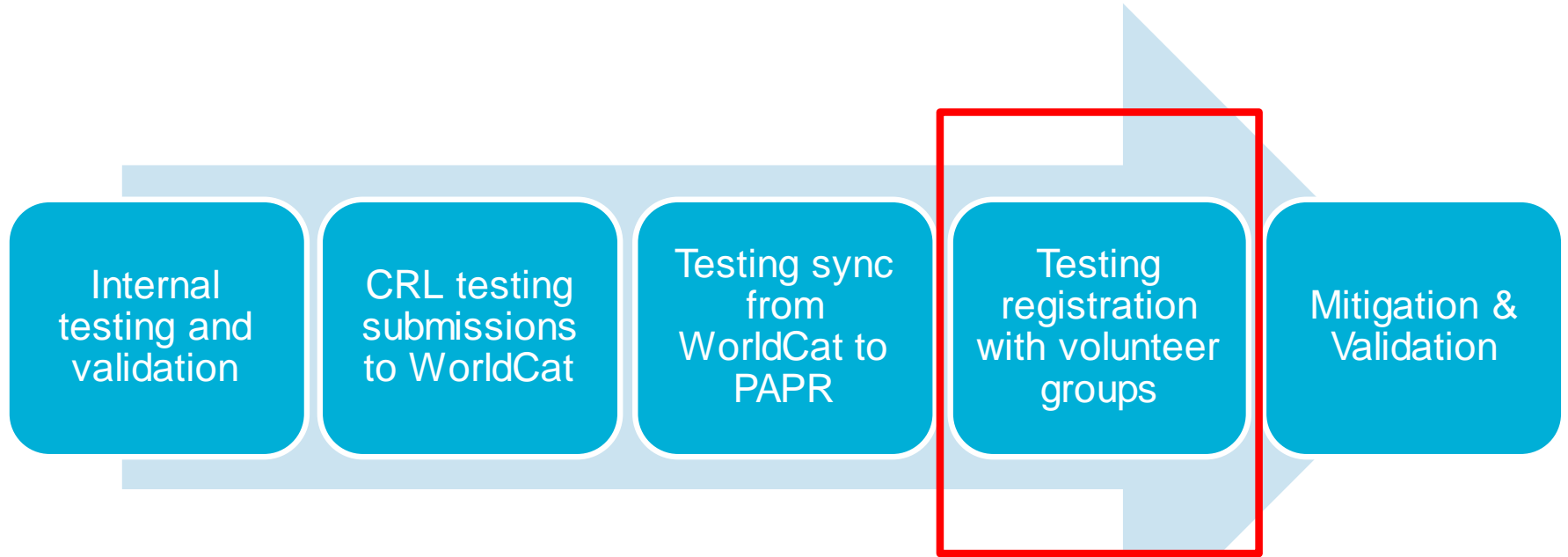


Availability in
WorldCat



Sync to PAPER
database

Registration Enhancements: Testing



*Need support from 2 groups to assist in testing the registration enhancements with mid-December timing

DISCOVERY/API: WORKFLOW, USE CASES & TESTING

Discover Shared Print Commitments

- FirstSearch
- Connexion
- Record Manager
- Collection Manager

Today

API

Near Future

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 deeper data (all LHR data)
- Queries can be scheduled

Supporting API Use Cases

Find bibliographic records based on the standard WorldCat indexes

Find which institution(s) have a shared print commitment for single known item or a list of known items

View details of a specific shared print commitment from a particular institution

Find items my institution or group has a shared print commitment on

Find an LHR record at my institution by barcode or OCLC #

View all shared print LHRs within an institution

View specific LHR details, including 583 details at the item/bib level

Shared Print API: FAQs

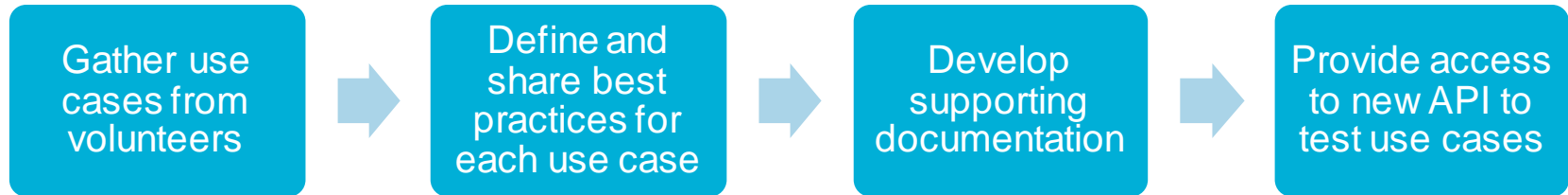
- Who will be able to access the API?
 - Any OCLC member with a cataloging subscription
 - Shared print programs with an agreement to register and synchronize shared print commitments in WorldCat
- What data is indexed/accessible within the API?
 - **Bibliographic:** nearly all fields present in the bibliographic MARC record
 - **Brief Holdings:**– simple data about what institution holds a given bibliographic record
 - **Detailed Holdings**– detailed 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 can I expect data to be returned in?
 - Custom Non-MARC JSON/XML

API Testing with Volunteer Groups

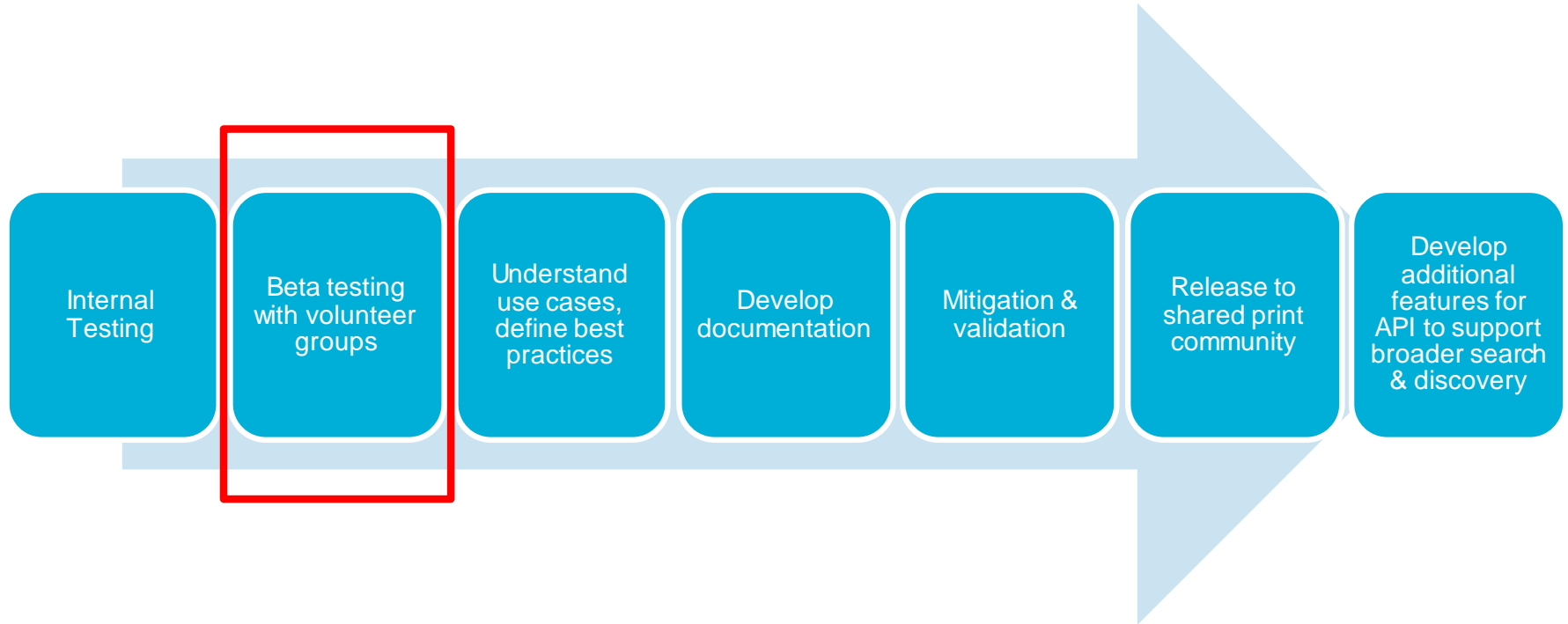
Need two volunteer groups to assist in testing

- Preferably same groups who are assisting in registration testing
- Mid-December timing

OCLC will:



Discover Commitments: API Timeline



ADDITIONAL ENHANCEMENTS

Additional Improvements in Review

Controlled Archiving Program Names

- Create consistency in the Archiving Program Name (583\$f field) by:
 - Adding approved program name to the collection profile
 - Develop a controlled way for shared print program managers to add their program name to the list
- **Benefit: controlled name will ensure consistency within data which will aid in discovery**

Adding Archiving Program Name to the CSV file

- Add a 583 \$f (program name) column to the expanded csv file
- **Benefit: Allows a library who is a member of multiple programs to create only one collection profile and submit to multiple programs simultaneously.**

Additional Improvements in Review

Accepting MARC format

- In addition to accepting data in a CSV format, OCLC is looking at ways to support ingest of MARC data
- **Benefits:** Allow for those using the second symbol method to continue to do so, if desired and transfer to desired symbol. Makes bulk updates to retention data possible

Profile Creation

- OCLC can help you create your collection/profile in order to register commitments

Advisory & Working groups

Shared Print Advisory Group

- Meeting monthly and involved in validation and advisement of project & enhancement efforts

Metadata working group

- Formed by Matt Barnes and a few Shared Print Community Leaders to review and update the full shared print metadata guidelines

QUESTIONS?

Next Steps

Next update planned for **February**

- Topics will include an update on:
 - Testing
 - Documentation
 - Communication & confirmation of release timing

Thank you!

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**Because
what is
known must
be shared.SM**