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
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

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

2019

November
Testing

December
Documentation

2020

January

February
Development of additional enhancements

March
Testing

April
Documentation

May
Community Update

Communication Planning

Production readiness

Product Release
REGISTRATION:
WORKFLOW IMPROVEMENTS,
USE CASES & TESTING
Workflows & Use Cases

Register in bulk using CSV file

Expanded to support flexibility

CRL/group admin registration

Send CRL your retention data. Data will be normalized, loaded to PAPR & WorldCat

CRL/admin can process multiple collections in one file
Registration Enhancements: Testing

- Submission of data
- Validation of reports
- Availability in WorldCat
- Sync to PAPR database
Registration Enhancements: Testing

- Internal testing and validation
- CRL testing submissions to WorldCat
- Testing sync from WorldCat to PAPR
- Testing registration with volunteer groups
- Mitigation & Validation

*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:
1. Gather use cases from volunteers
2. Define and share best practices for each use case
3. Develop supporting documentation
4. Provide access to new API to test use cases
Discover Commitments: API Timeline

- Internal Testing
- Beta testing with volunteer groups
- Understand use cases, define best practices
- Develop documentation
- Mitigation & validation
- Release to shared print community
- Develop additional features for API to support broader search & discovery
ADDITIONAL ENHANCEMENTS
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

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
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.

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."