



Working with Shared Print Retention Commitments in OCLC

February 19, 2021

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PARTNERSHIP FOR SHARED BOOK COLLECTIONS



ROSEMONT
SHARED PRINT ALLIANCE

Good Morning or Afternoon! My name is Sara Amato and I am the program coordinator for the Partnership for Shared Book Collections and I'd like to thank you for joining us today for a walkthrough of working with Shared Print retention commitments in OCLC.

This webinar is sponsored by the Partnership for Shared Book Collections and the Rosemont Shared Print Alliance, and is the 2nd in a series of webinars on Shared Print. If you missed the first webinar earlier this week which covered ways to register retention commitments in OCLC, you can find the recording on the Resources page of SharedPrint.org.

I'll be presenting today along with my colleague Jennifer Fairall from Siena College. We are also joined on the line by Linda Wobbe from SCELIC who presented last week, and several OCLC and CRL colleagues (names go here). We are all available to take any questions you may have that aren't answered by the end of this presentation.

I'd also like to give a thank you up front to Mei Mendez, the project manager at EAST, who has been handling the registration and technical details for these events.

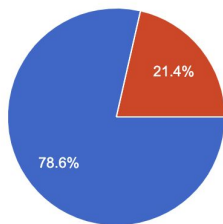
A few housekeeping notes before we get started:

-You are all currently muted, but please do put questions you have during the

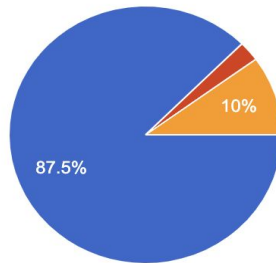
presentation in the questions or chat box or raise your hand and we will unmute you when taking questions. We will have plenty of time for that at the end.

-Also note that this session is being recorded and will be sent to all registrants along with the slides, and also will be posted on the [sharedprint.org](https://www.sharedprint.org) website.

Survey - 43 Respondents



● Library in a shared print program
● A Shared Print Program



Plan on registering or have registered commitments, wanted a webinar on working with commitments in OCLC

Just for a little background, in exploring the need for this webinar series we put out a brief survey. We received 43 responses. 3/4s of the respondents identified as being from libraries in involved in a Shared Print program, and over 85% wanting a webinar on working with shared print. We hope you find it useful!

Topics

- Discovery
 - Where can you see shared print
- Maintenance
 - Adding / Deleting / Updating
 - Moving retention commitments
 - Errors and Cleanup
- Questions from the survey
- Questions from you

Wednesday's webinar covered registering shared print retention commitments in OCLC. This week we'll be talking about finding and maintaining those shared print commitments.

Topics we will cover are:

Discovery - where you can, and can't, see shared print commitments in various OCLC services

And

Maintenance of shared print commitments, including adding, deleting, updating and moving retention commitments, along with a little bit on errors and cleanup.

We'll close with reviewing some questions that were submitted from the survey, and questions from you.

Discovery

So let's get started with Discovery and look at where you can see your, and other libraries, retention commitments in various OCLC services.

Places you will see retention commitments



English ▾

[Release Notes](#)

[System Status Dashboard](#)

[Contact OCLC Support](#)

How can we help you?

Home » Metadata Services » Shared Print

View shared print retention commitments

Last updated: Aug 12, 2020

Learn how to view shared print commitments in Connexion, FirstSearch, WorldCat Discovery, WorldShare Collection Manager, WorldShare Record Manager, and via the WorldCat Metadata API.

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

I'll start off by saying that OCLC Metadata Services has many useful guides and tutorials on their website for working with Shared Print.

Several of the slides you'll see here today are taken directly from their documentation. This screenshot shows their page on where you can view shared print, which includes step by step details on how to view commitments in:

Connexion

FirstSearch and WorldCat Discovery

WorldShare Collection Manager

WorldShare Record Manager

WorldCat Metadata API

Viewing Commitments

Cataloging Workflows (Cataloging Subscription)

- Connexion ✓
- WorldShare Collection Manager ✓
- WorldShare Record Manager ✓

Discovery (Cataloging Subscription)

- WorldCat Metadata API ✓

Discovery (FirstSearch/WorldCat Discovery Subscription)

- WorldCat Discovery ✓
- FirstSearch ✓
- Resource Sharing ✗
- WMS Circulation/Acquisition Display ✗
- WorldCat.Org ✗

For a quick overview, here you can see in which services Shared Print commitments are visible, and what type of OCLC subscription is necessary to see them.

Technical Services staff can see shared print holdings in Connexion, Collection Manager and Record Manager. While shared print can not be registered in these services, they can be used to edit, move or delete commitments. The contents of the 583 field can also be edited in these services.

Shared Print is also discoverable via the WorldCat Metadata API, and if you have a FirstSearch/WorldCat Discovery subscription you can also shared print commitments in those services.

Shared print is NOT visible in OCLC Resource Sharing products, and for WMS libraries, note that it is not visible in the Circulation or Acquisition displays.

Shared print is also NOT visible in the public facing WorldCat.org.

Indexes for Shared Print

<u>l8</u> - 583 \$f	l8:EAST
<u>SG</u> - Profiled Group	SG:WEST
<u>SH</u> - Shared Print Institution	SH:NKF
<u>IO</u> - 583 \$a c h i l 2 3 5	IO:committed to retain

In addition to the usual search indexes, there are several indexes that can be used when searching for shared print.

The l8 index searches the 583 subfield f, which is the authorized program name, e.g. l8:EAST would retrieve material that had EAST in the 583 subfield f.

The SG index checks for the presence of shared print holdings of libraries within a specified, profiled group. E..g. SG:WEST retrieves shared print holdings limited to institutions in the WEST group.

The SH index is used for searching for shared print by institution, so SH:NKF will show all shared print holdings for the OCLC symbol NKF, which is Elms College.

The IO index can be used for search the 583 field in an LHR. IO:committed to retain retrieves lhrs with that phrase in the 583 \$a.

The house of mirth /

Edith Wharton

1933
 English Book : Fiction 329 pages ; 21 cm.
 New York : C. Scribner's Sons, ; ISBN: 9781909621978 1909621978 0684719282 9780684719283

The tragic story of a beautiful young woman caught up in the shallow and corrupt world of New York society at the turn of the century, where wealth and social status are everything.

GET THIS ITEM

Availability: [Check the catalogs in your library.](#)

- Libraries worldwide that own item: 396 (2 Committed to Retain)
- [Search the OPAC at OhioLink](#)
- [Link to Z39.50 Library Catalogs](#)
- [Borrow this item from from another library](#) (Interlibrary Loan)

Libraries with Item: "The house of mirth /"([Record for Item](#) | [Get This Item](#))

Location	Library	Local Holdings	Shared Print Commitment	Code
US,OH	KENT STATE UNIV			KSU
US,OH	UNIV OF TOLEDO			TOL
US,OH	KENT FREE LIBR			UKT
US,MI	LIBRARY NETWORK, THE			EOW
US,MI	MICHIGAN STATE UNIV			EEM
US,MI	OAKLAND COMMUN COL			EIK
US,MI	OLIVET COLL			EXO
US,MI	SCHOOLCRAFT COL, BRADNER LIBR			ESL
US,PA	BLOOMSBURG UNIV OF PENNSYLVANIA			PBB
US,PA	BRYN MAWR COL	Local Holdings Availa...	Committed to Retain	BMC
US,PA	BUTLER CNTY COMMUN COL			PBT

Here's OCLC's example from FirstSearch

You can see in the results in the red highlighted box that 2 copies of the title have been 'committed to retain'.

When looking at "Libraries worldwide that own item", you can see in the Shared Print Commitment column that BMC (Bryn Mawr College) is one of those commitments.

Connexion

Edit

Action

Local Holdings Record: Anon, and various time machine poems,

OCLC 140096 **SP** **Dates** 1971 **Last Updated** 20201118

[Summary](#) Local Holdings Available.

[Leader](#) nx un

[007](#) zu

[008](#) 2011182u 0 4001aa 0201118

[014](#) 1_ .b12171372 [†b](#) VtMiM

[583](#) 1 committed to retain [†c](#) 20160630 [†d](#) 20310630 [†f](#) EAST [†u](#) <https://eastlibraries.org/retained-materials> [†2](#) pda [†5](#) VtMiM

[852](#) MDY [†b](#) MDYY

In Connexion you can see the Shard Print indicator when looking at a Local Holdings Record.

Note that after the OCLC number there is a SP.

This confirms that there is a shared print flag set on the record, i.e. this holding has been registered as shared print.

Note also the presence of the 583 field, though the 583 field **is not** an indication that the title has been registered - you need to look for that "SP" after the OCLC number.

Record Manager



How can we help you?

Home » Metadata Services » WorldShare Record Manager » Reference

[WorldShare Record Manager guide for Shared Print Registration Service users](#)

“Use this guide if your library has participated in the [Shared Print Registration Service](#) and you would like to learn how to search, edit, and delete Local Holding Records in WorldShare Record Manager with the Shared Print holding type flag.”

We'll look next at Record Manager next, but before doing that I want to plug the OCLC documentation on section titled “WorldShare Record Manager guide for Shared Print Registration Service users.” It has lots of useful tutorials, step by step guides and videos.

Here's the blurb from their page:

“Use this guide if your library has participated in the [Shared Print Registration Service](#) and you would like to learn how to search, edit, and delete Local Holding Records in WorldShare Record Manager with the Shared Print holding type flag”

Record Manager - SET YOUR PREFERENCES!

https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Reference/WorldShare_Record_Manager_guide_for_Shared_Print_Registration_Service_users?sl=en

User preferences

User preferences must be updated to display Shared Print holdings in Record Manager. If your preferences are not updated, you will not be able to successfully search for Shared Print titles.

1. Sign in to Record Manager.
2. Click **User Preferences**.
3. Open the **Searching – Basic** accordion.
 1. On the LHRs tab, select the **Shared Print** checkbox under Display Information in Search Results.
4. Open the **Working with Records** accordion.
 1. On the LHRs tab, select the **Shared Print** checkbox under Display Information in Records.
5. Click **Save**.

Before seeing Shared Print in record manager, you'll need to make sure that your User Preferences are set to display Shared Print holdings. The steps to do so are outlined here and are on the previously mentioned tutorial.

WorldShare® Need Help? [User support info](#) Sara Amato

Metadata Acquisitions Circulation Analytics Admin

Record Manager

Search

Data Type: Bibliographic Records

Scope: All WorldCat

Index: Keyword

Term(s):

[Advanced Search](#)

Request ID(s)
8TG-UH5X-5H5
9RB-VB6P-4X5
DEV-UCFD-83C
[Copy Request ID\(s\)](#)

[My Labels](#)

[Collection Manager](#)

[My Files](#)

User Preferences

- ▶ Exporting - Authority Records
- ▶ Exporting - Bibliographic Records
- ▶ Searching - Advanced
- ▼ Searching - Basic
 - ▶ Data Type Options
 - Authority Records
 - Bibliographic Records
 - LBD Records
 - LHRs

LHRs Basic Search Preferences

One Search Result Only Open record for editing

Display Information in Search Results Shared Print Lending Policy

Copy Number Display 852 \$t information in search results ?

Prefix:

(Such as c., copy, or copy number)

Search Scope(s) for LHRs


Specify whether you want each search scope to be displayed in the menu and what order you want them to be listed. You must display at least one search scope.

Click on the name of the search scope to customize the options.

	Display	Search Scope Name	Default
↓	<input type="checkbox"/>	My LHRs	<input checked="" type="radio"/>
↑	<input checked="" type="checkbox"/>	My LHRs - Browse	<input type="radio"/>

▶ Working with Records

Here's a video recording of setting those preferences:


 OCLC Number: 34284265 **WorldCat Holdings**
 Print book
 LHR(s): 2
 (1 Shared Print)


My Library: Held
[Other Libraries: 4397](#)





Other Records Linked to Work [178800](#) (338)
 Bibliographic Record
 LBD (1)
 LHRs (2)


Move LHRs ▾ View/Edit in Text View

You can move up to 100 LHRs to a different bibliographic record.

Summary (25/9999)
 Local Holdings Available. Save
 Build Automated Summary

Results 1 - 2 of 2 

<input type="checkbox"/>	Call Number	Barcode	Shared Print	Branch	Shelving Location	Action
<input type="checkbox"/>	E 184 .I6 M117 1996	0005157535	Yes	ULNN	3rd and 4th floors	 
<input type="checkbox"/>	E 184 .I6 M117 1996	0005417058	No	ULNX	3rd Floor Reading Room	 

Results 1 - 2 of 2 

Once you have that preference set, you should be able to see the “Shared Print” column when viewing LHRs. Here’s an example from a WMS library, with one LHR set to retain.

Jennifer will go through maintenance of LHRs in the next section but note that you can see them here. Make sure you turn on those preferences!

Record Manager - Use the sh: index



Record Manager

Search

Data Type
Bibliographic Records

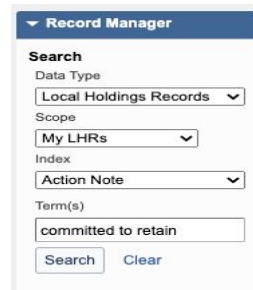
Scope
All WorldCat

Index
Keyword

Term(s) ?
sh:MDY

Search Clear

Three ways to find retentions in Record Manager.



Record Manager

Search

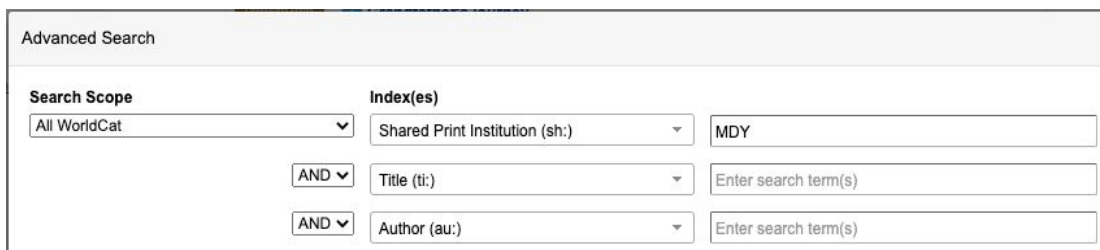
Data Type
Local Holdings Records

Scope
My LHRs

Index
Action Note

Term(s)
committed to retain

Search Clear



Advanced Search

Search Scope
All WorldCat

Index(es)
Shared Print Institution (sh:)

MDY

AND Title (ti:)
Enter search term(s)

AND Author (au:)
Enter search term(s)

“Once your user preferences are updated, you can search for your Shared Print records using three different options: an advanced bibliographic record search, as you can see in the bottom box - using the sh: index (shared print institution) and here the example is looking for shared print registered to MDY (Middlebury College.)

You can also use the sh: index in the basic search box, as you see in the upper left, again searching for retentions for MDY.

Or you can search the Local Holdings Records Action Note as shown in the upper right. In this case it is searching data type ‘local holdings records’, scope is set to ‘my lhrs’, the Index is “Action Note” (the 583 field) and searching the term ‘committed to retain’. NOTE that this is just searching for the 583 data, and IS NOT looking specifically for LHRs that have the Shared Print flag set.

WorldShare Need Help? [User support info](#)

[Metadata](#)
[Acquisitions](#)
[Circulation](#)
[Analytics](#)
[Admin](#)

Record Manager

Search: Expert Search = SH:ULN (All WorldCat)

Local Holdings Records
 Scope: My LHRs
 Index: Action Note
 Term(s): committed to retain

Search: Expert Search = SH:ULN (All WorldCat)
 Search: Shared Print Institution = ULN (All ...

Request ID(s)
[J2B-47CA-75V](#)
[W7H-52WU-W2N](#)
[C6rv-Request ID\(s\)](#)

Hide Facets
 Language of Cataloging
 English 60678
 French 36
 German 23
 Dutch 16
 Spanish 13
[Show More](#)

Format
 Book 60784
 Print Book 60760
 eBook 22
 Large Print 1
 Manuscript 1
[Show More](#)

Year
 1987 2414
 1986 2325
 1998 2205
 1996 2008
 1997 1987
[Show More](#)

Author
 Society Of Plastics Engineers 54
 Bloom, Harold 51
 United States 29
 Dickens, Charles 22
 Garcia Marquez, Gabriel 22
[Show More](#)

Language
 English 60225
 Spanish 222
 German 107
 French 103

Results 1 - 10 of 60784 (only first 5000 available.)

Rows << 1 2 3

Sort by

<p>The Da Vinci code : a novel by Dan Brown <input type="checkbox"/> Print book, English Publisher: New York : Doubleday, 2003. ISBN#: 0385504209 (alk. paper) Series: Brown, Dan., 1964- Robert Langdon series ; 2. DLC, DLC eng Full, OCLC#: 50920659 Open Details</p>	<p><input checked="" type="checkbox"/> Held by my library 4869 libraries hold this item</p>
<p>Harry Potter and the Sorcerer's Stone by J. K. Rowling; Mary GrandPré <input type="checkbox"/> Print book, English Publisher: New York : A.A. Levine Books, [1998] ISBN#: 0590353403 (hardcover) Series: Harry Potter Series ;, 1 DLC, DLC, lca eng Full, OCLC#: 37975719 Open Details</p>	<p><input checked="" type="checkbox"/> Held by my library 4782 libraries hold this item</p>
<p>Truman by David G. McCullough <input type="checkbox"/> Print book, English Publisher: New York : Simon & Schuster, ©1992. ISBN#: 0671456547 DLC, DLC eng Full, OCLC#: 25411163 Open Details</p>	<p><input checked="" type="checkbox"/> Held by my library 4721 libraries hold this item</p>
<p>Harry Potter and the deathly hallows by J. K. Rowling; Mary GrandPré <input type="checkbox"/> Print book, English</p>	

Here's a quick video showing those in action.

Record Manager - Use the sh: index and format

sh:MDY AND mt:ser

Usually though you don't want to see ALL of your commitments. More likely you'll combine the sh index with another index, as shown here with the material type index. This example finds serials that are committed to retain.

Collection Query

WorldShare Collection Manager

You can [create a query collection](#) in WorldShare Collection Manager to output MARC records that include the 583 retention note. For your query, enter one of the following:

- Individual libraries - sh:Library's OCLC symbol (e.g., sh:**OCWMS**)
- Groups - sg:Your group symbol (e.g., sg:**WEST**)

You can use Collection Manager to gather a set of shared print records. Again from the OCLC documentation, you can create a query collection in WorldShare Collection Manager to output MARC records for materials you have committed to retain, again using the SH:index, possibly with other limiters. This is useful if you wanted to work on a set of records.

The link on the OCLC page shown here leads to a nice video tutorial on how to create a query collection. Note that results are chunked into 100,000 record sets, so if you have a large number of commitments the results will span across several files.

Circulation/Acquisition Display

The screenshot shows the WorldShare interface with the 'Circulation' tab selected. The main content area displays the 'Item Details' for 'The reign of Edward the Sixth, (2027672)'. The details are as follows:

Status	Available
Holding Location	Trexler Library
Shelving Locations	Permanent General Collection Previous Temporary
Call Number	AC1 .E8 no.375
Copy Number	1
Receipt Status	Received and complete or ceased
Barcode	32072000114547
Use Restrictions	
Cost(s)	
Note(s)	

At the bottom of the details section, there is an 'Edit Item' button.

Shared Print indication is not currently available when viewing items in Circulation or Acquisitions

Just want put in a quick reminder here for WMS libraries that while you will see shared print indications in metadata searches, Shared Print is not visible in acquisitions, circulation. And again it is not visible in resource sharing services.

WorldCat Search API



WorldCat Search API v. 2 2.0.0 OAS3

<https://developer.api.oclc.org/wcv2>

The final place you can discover retentions is by using the WorldCat Search API v.2. The link here is to their documentation. While using the API does require some technical expertise, OCLC has said that they are working on a Google Sheet add on that will make it simpler to use the API for small batches of lookups.

I'll show one quick example of using the API on the next 2 slides.

WorldCat Search API 2.x

<https://americas.discovery.api.oclc.org/worldcat/search/v2/bibs-retained-holdings?oclcNumber=650&heldByGroup=EAST&offset=1&limit=10>

Here's an example URL that can be passed to the Search API. In this case it is looking for OCLC Number "650" limited to shared print retentions for EAST.

```

{
  "numberOfRecords": 1,
  "briefRecords": [
    {
      "oclcNumber": "650",
      "title": "The foundations of arithmetic; a
logico-mathematical enquiry into the concept of number.",
      "creator": "Gottlob Frege",
      "date": "1968",
      "language": "eng",
      "generalFormat": "Book",
      "specificFormat": "PrintBook",
      "edition": "2d rev. ed.",
      "publisher": "Northwestern University Press",
      "mergedOclcNumbers": [
        "8175414",
        "8523973",
        "977166596",
        "985142560",
        "1053638586",
        "1154397842"
      ]
    }
  ],

```

```

"catalogingInfo": {
  "catalogingAgency": "DLC",
  "transcribingAgency": "DLC"
},
"institutionHolding": {
  "totalHoldingCount": 331,
  "briefHoldings": [
    {
      "country": "US",
      "state": "MA",
      "oclcSymbol": "NKF",
      "institutionNumber": "8077",
      "institutionName": "ELMS COL",
      "illStatus": "S"
    },
    {
      "country": "US",
      "state": "NH",
      "oclcSymbol": "SAC",
      "institutionNumber": "103",
      "institutionName": "SAINT ANSELM COL",
      "illStatus": "S"
    }
  ]
}
]

```

The api returns JSON as shown here. You can see in the right hand side that two libraries, NKF and SAC, retain this OCN for EAST, and the total holdings in OCLC for this title is 331.

WorldCat Search API 2.x

Recorded Webinar from April 2020



If you'd like more information on the API, OCLC did a webinar last spring on the topic and the recording is available and linked from this slide. And with that I'm going to pass the mic over to Jennifer to talk about maintaining Shared Print LHRs.

<https://www.oclc.org/en/events/2020/devconnect-online-2020/devconnect-2020-collaborative-collections-and-oclc-shared-print-api.html>

Discover Shared Print Commitments

SG

SH

Connexion	<ul style="list-style-type: none">• New shared print (group & institution) search indexes added
Record Manager	<ul style="list-style-type: none">• New shared print (group & institution) search indexes added• Ability to delete shared print commitments
FirstSearch	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• Run queries to obtain access to LHR data (shared print & non)• Data can be downloaded, scheduled, and delivered
WorldCat Metadata API	<ul style="list-style-type: none">• Search bibliographic & holdings data on shared print commitments

This is a slide from OCLC's webinar outlining some of the new features that make shared print discoverable in these services. For example in FirstSearch one can see the total number of shared print commitments on a title across all registered programs. Collection Manager can be used to create a collection of your shared print holdings for download. Again their website has detailed information and examples on how to discover Shared Print in these services.

Maintenance

- Adding
- Deleting
- Moving
- Updating
- Errors and Cleanup

Now that we've gone through discovery of shared print retention commitments let's move on to maintenance. We'll be talking about how to Add, Delete, Move, and Update commitments, and also touch on errors and cleanup.

WorldShare Record Manager guide for Shared Print Registration Service users

“Use this guide if your library has participated in the [Shared Print Registration Service](#) and you would like to learn how to search, edit, and delete Local Holding Records in WorldShare Record Manager with the Shared Print holding type flag.”

https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Reference/WorldShare_Record_Manager_guide_for_Shared_Print_Registration_Service_users?sl=en

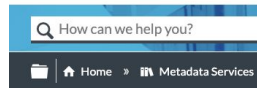


Before diving into some of the details, please know that OCLC has a page dedicated to using Record Manager with Shared Print commitments entitled “Worldshare Record Manager guide for Shared Print Registration Service users.” It covers a lot of what we’ll talk about today.

OCLC also recently added a 9 minute training video on editing shared print in connexion and record manager, which walks you through the steps. I’d encourage you to share these resources with colleagues who work with shared print.

Note that while you can edit and delete Shared print LHRs in Connexion, Record manager has the most functionality, so we are encouraging libraries to do their work in Record Manager.

Adding a Commitment



Shared Print

Register shared print retention commitments

Learn how to register shared print retention commitments as an agent/group coordinator, individual non-WMS library, or individual WMS library.

- Register shared print retention commitments as an agent/group coordinator
- Register shared print retention commitments for individual non-WMS libraries
- Register shared print retention commitments for individual WMS libraries
- List of approved archiving program names
- Register shared print retention commitments with MARC processing for shared print

Must use the registration service!

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

OCLC is looking at making it possible to add a registration via the UI interfaces

By now many of you have retention commitments in OCLC that have been loaded via the batch processes discussed on Wednesday. If you are interested in batch registration there is good information both in the recording of that session and on the OCLC Metadata Services Shared Print page, which we have a snippet of here.

If you want to register additional commitments, whether one or ten thousand, you need to use the registration service to do so. OCLC is looking at making it possible to add registrations via the user interfaces in the future, but that is not possible today.

Adding (Registering) a Retention Commitment

Manually adding a 583 to an LHR
does NOT set SP flag

No SP

Use the Registration Service!

Local Holdings Record: The lore of spices :	
OCLC 25740393	ISBN 0517051745 9780517051740 Dates 1991 Last Updated 20181126
Summary	Local holdings available.
Leader	nu un
* + 007	tu
* + 008	1811260u 8 0001uueng0181126
020	0517051745
020	9780517051740
583 1	committed to retain \$c 20160630 \$d 20310630 \$f EAST \$u http://eastlibraries.org/retained-materials \$z Smith copy: EAST commitment \$5 MNS
* + 852	KZK \$b KZKA \$c General Collection \$h TX 587 \$i S87 1991

Just to reiterate, the only way to register a commitment, and set the Shared Print flag on a record, is to use the registration service.

Even if you just want to add a retention commitment to a single record, perhaps your library decided to take on an additional commitment or was assigned a new commitment, it has to go through the registration service. You might think that you could simply create an LHR with a 583 field or add the 583 field to an existing LHR. That would be a good guess, but at this point that would be wrong.

Note in this example in Connexion that there is a shared print 583, but there is no SP after the OCLC number indicating that it is Shared Print. This record is NOT registered as shared print.

Deleting (Un-Registering) a Retention Commitment

Delete the LHR

Or

Delete the 583

Or

“Remove Shared Print Commitment” in Record Manager

Make sure to follow any guidelines from your Shared Print Program on removing commitments

Moving on to deleting retentions - deleting a retention is much simpler. You may need to remove a commitment on a record that has become lost or damaged or which your library is no longer able to commit to retain.

If you no longer need the Local Holdings Record, you can delete the LHR either in Connexion or Record Manager, and this removes the shared print flag from the record.

OR, If you need to keep the LHR...

You can delete the 583, and this also should delete the shared print commitment.

Or in record manager, you can use the menu item “Remove Shared Print Commitment” - we’ll see a screenshot of this in the next slide.

Note that while it is possible for a library to remove a shared print commitment, you should always be sure to follow any guidelines that your Shared Print Program has on withdrawal of commitments!

The screenshot displays the WorldShare Record Manager interface for editing LHR 232780720. The 'Record' menu is open, highlighting the 'Remove Shared Print Commitment' option. A modal dialog box is shown in the foreground with the following text:

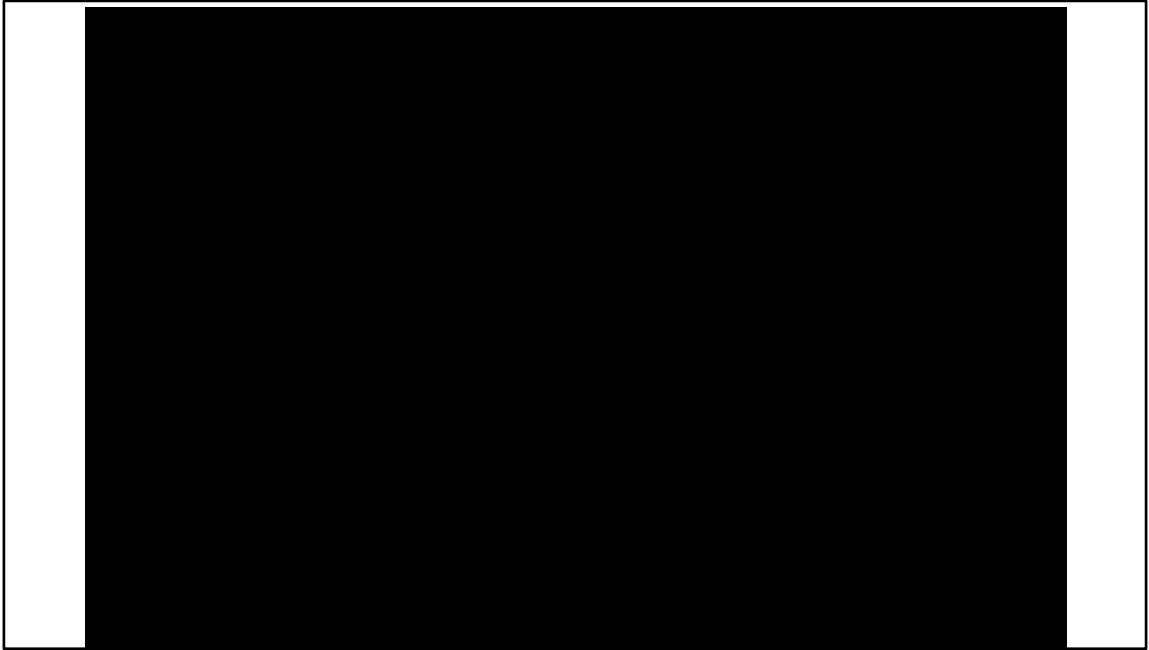
Remove the Shared Print Commitment

⚠ You are about to remove the shared print commitment. The action is not complete until you save the record.

Buttons: Remove, Cancel

The background interface includes a search sidebar on the left, a top navigation bar with 'Metadata', 'Interlibrary Loan', 'Analytics', and 'Admin', and a main record list table with columns for Record Number, Date Entered, Last Updated, and Related Bibliography. The table contains several rows, including one with record number 583 and a related bibliography entry.

Here's the screenshot showing the "Remove Shared Print Commitment" in Record Manager using the Record menu. You will receive a warning about this action. Video next page of removing 583



Video of removing 583 to remove shared print flag:

Using the sh:OCLC symbol search to find my library's shared print holdings.

Open the bibliographic record

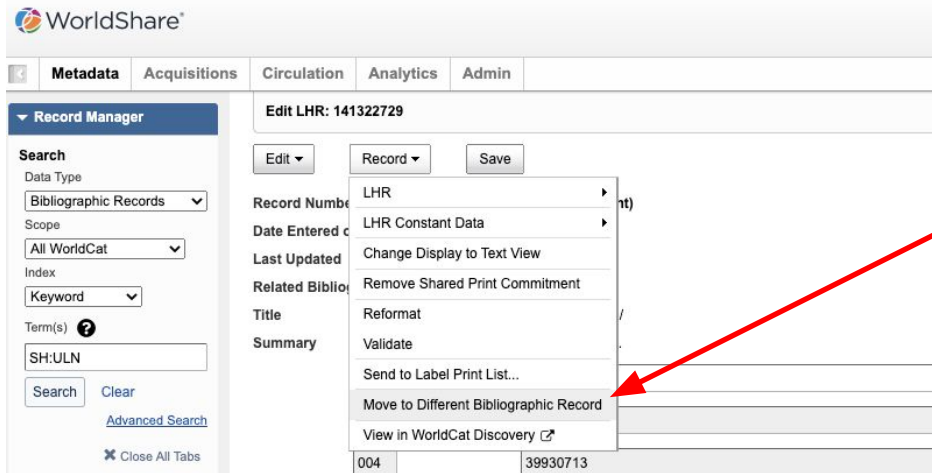
Scroll down to the LHR

Remove the 583

Save

Record menu: Remove Shared Print Commitment option is greyed out

Moving a Retention Commitment



As you saw, while it is easy to delete a single retention commitment, if you want to register a commitment on a new OCLC number, you would have to go through the registration service.

If you need to move a retention from one OCLC number to another, perhaps to a better record, it is simpler to use record managers "Move to Different Bibliographic Record" feature, as this will transfer the commitment from the old to the new record. As you can see in the screenshot here, under the Record menu, there is an option to "Move to a different bibliographic record" - this option moves the LHR, complete with its shared print retention flag.

Deleting (Un-Registering) Many Retention Commitments

How to batch delete

- 1) Create set of records from OCLC list via https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workflow/Data_sync_collections/Create_an_ongoing_data_sync_collection/Non-MARC_numeric_search_key_collection/oCreate_a_non-MARC_numeric_search_key_collection
- 2) Edit to make leader 05 = d
- 3) Submit marc https://help.oclc.org/Metadata_Services/Shared_Print/Register_shared_print_retention_commitments/Register_shared_print_retention_commitments_with_MARC_processing_for_shared_print#Submit_your_data_file

Make sure to follow any guidelines from your Shared Print Program on removing commitments

We just looked at removing a single commitment, but what if you want to remove a batch of commitments, for example you have a few hundred water damaged books, or books that have been transferred to a repository and are going to be re-registered with a different OCLC symbol. You can always contact [OCLC first for advice at sharedprint@oclc.org](mailto:sharedprint@oclc.org)

It is possible to batch delete by using a [data sync collection to delete local holdings records](#) in Collection Manager. You will need to work with your OCLC database specialist or implementation manager to set this up. This data sync collection type allows you to choose whether you want to keep the WorldCat holding on the WorldCat bibliographic record or delete the WorldCat holding when deleting the LHR. Again the OCLC MetaData Services Shared Print pages have detailed instructions on how to do this.

OR

If you already are using the marc registration service you can use the same collection to submit a batch to delete, making sure to set the leader position 05 character to 'd'

Updating commitment data - Editing the 583

committed to retain [⌘c 20160630](#) [⌘d 20310630](#) [⌘f EAST](#) [⌘u https://eastlibraries.org/retained-r](#)
[⌘3 v.1-v.3](#)

Local Holdings Record: Dog anatomy-illustrated /

OCLC 1177160 SP **ISBN** 0883760541 9780883760543 **Dates** 1974 **Last Updated** 20201008

Summary	Local Holdings Available.
Leader	nx un
007	zu
008	2010082u 0 4001aa 0201008
014	1_ 991002064469703851 ⌘b MMeT
583	1_ committed to retain ⌘c 20160630 ⌘d 20310630 ⌘f EAST ⌘u https://eastlibraries.org/retained-materials ⌘
852	TUFTV ⌘b MAIN

It is fine to edit some fields of the 583. Note that the subfield a for shared print must always be , 'committed to retain' or 'condition reviewed' or 'completeness reviewed'. Also note that the subfield f uses a controlled vocabulary so you would not want to edit that. However if you wanted to update the holdings in the subfield 3 you could simply edit them. Or if you have holdings in 8xx fields it is fine to update them in the record. These actions will not affect the shared print flag.

Updating: Batch

Contact your regular Data Sync database specialist

OCLC can enable a
“Modify Shared Print”
option in a collection

If you want to update a batch of shared print commitments, for example if you batch load and update your serials holdings on a regular basis, OCLC can assist in creating a collection to do so. You should contact a Data Sync specialist who can help set that up, allowing for batch updating of your shared print collection.

Summary

Activity	Connexion	Record Manager	Registration Service
Add Shared Print Flag to new or existing LHR, single or batch			x
Move LHR & Shared Print Flag to a different bib record		x	
Delete LHR (deletes shared print flag), single record	x	x	
Delete shared print flag from LHR, retain LHR, single record		x	
Edit 583 retention statement (does not affect shared print flag)	x	x	

To wrap up here's a quick summary of what you can do where. As you can see, Record Manager has the most functionality and is included with your OCLC Cataloging subscription.

—

Maintenance - Errors and Cleanup

Errors and Cleanup: Non Print Records

The screenshot shows the WorldShare Record Manager interface. The search criteria are 'Expert Search = SH:FUG (All WorldCat)'. The search results are displayed in a list view, showing the first 10 of 148,240 results. The facets are expanded, showing the following counts:

- Language of Cataloging:
 - English: 147,742
 - French: 212
 - Spanish: 132
 - German: 82
 - Dutch: 23
- Format:
 - Book: 147,568
 - Print Book: 144,160
 - Thesis/Dissertation: 3,059
 - Microform: 98
 - eBook: 93

A red arrow points to the 'Microform' facet under the 'Format' category.

In our last webinar Anna and Linda covered some of the errors you might see in the registration process.

Post registration you may also discover some anomalies, particularly if you registered a large batch of monograph titles.

One error we see frequently that you can see in this screenshot from Record Manager is that retentions have ended up on non print records, which should not be the case when registering shared “print”.

This can be due either to errors in the libraries metadata, or errors on the OCLC side, for example incorrect coding in the master bib or incorrectly merged print and electronic records. We’ve found this to be a moving target as records in OCLC do merge and change over time, but feel it is worth at least an initial look by the library to determine if they may have accidentally committed to retain a non print format.

You can discover these either by doing a query in Record Manager as shown here, SH:{your symbol} and looking at the facets, or {next slide}

=====

=====

This from Julie: “I think those are all bad record merges on OCLC's part. The few I

have looked at have multiple OCLC #s in the 019 field, and 006 or 007 fields that do not belong on print records. 856 40s added to the master records by individual libraries to indicate they have online access to a print book. All sorts of shenanigans.”

Errors and Cleanup: Non Print Records

Create a Collection Query:

sh:FUG AND x4:digital

[OCLC Documentation on Creating a Collection Query](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workflow/Query_collections/Create_a_query_collection/020Create_a_query_collection)

https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workflow/Query_collections/Create_a_query_collection/020Create_a_query_collection

Or, To retrieve the non print items, you can create a Query collection in **Collection Manager** and enable MARC record delivery. for example, you could use the query **sh:{your symbol} AND x4:digital**. (x4 is format) This query will retrieve only your registered records on electronic materials. You might also wish to consult the OCLC documentation on creating a collection query to gather records together.

Errors and Cleanup: Non Print Records

A little more on non print errors:

- Truly non print
- Miscoding in 006 or 007
- Incorrectly merged print and electronic records

AskQC@oclc.org or sharedprint@oclc.org
<https://www.oclc.org/forms/record-quality.en.html>



WorldCat Bibliographic and Authority Record Change Request

As mentioned previously, the retentions on non print might be library metadata errors, miscoding in the master bib, or incorrectly merged records. Records are constantly merging in WorldCat via Duplicate Detection Resolution, the Member Merge Project, and other algorithms OCLC runs regularly to maintain the database. If you are a library that has registered retentions and find errors that you can not correct, we encourage you to report them to OCLC. You can use the email address "AskQC@OCLC.ORG", the form linked here, the error reporting option within Connexion, or the Record Change Request in Record Manager.

If you have a large set of records that all have the same problem you can send examples to sharedprint@oclc.org and they will advise next steps.

Errors and Cleanup: Non Registered Records

How to Find Records with
583 |f {your shared print program}
Which DO NOT have the shared print flag set

(I4:{OCLC Symbol} AND I8:{your shared print
program}) NOT I8:lhrforsharedprint

Here is a search to find any non-registered records - records that have the LHR with the shared print 583 field, but no Shared Print flag. Those are L's: L4 and L8

(I4:ULN AND I8:EAST) NOT I8:lhrforsharedprint"

I4:VKM AND I8:EAST) NOT I8:Ihrforsharedprint

WorldShare
Metadata Interlibrary Loan Analytics Admin

Record Manager

Search: Expert Search - (I4:VKM AND I8:EAST) NOT I8:Ihrforsharedprint (All WorldCat)

Search
Data Type: Bibliographic Records
Scope: All WorldCat
Index: Keyword
Terms: (I4:VKM AND I8:EAST) NOT I8:Ihrforsharedprint
Search Clear Advanced Search

Hide Facets
Language of Cataloging: English 3
Format: Book 3

Results 1 - 3 of 3
Sort by: Relevance

	Tuesdays with Morrie: an old man, a young man, and life's greatest lesson by Mitch Albom Print book, English Publisher: New York: Doubleday, ©1997. ISBN#: 0385484518 DLC, DLC, pcc eng Full, OCLC#: 36130729 Open Details	Held by my library 4453 libraries hold this item
	John Adams by David G. McCullough Print book, English Publisher: New York: Simon & Schuster, [2001] ISBN#: 0684813637 DLC, DLC eng Full, OCLC#: 45827978 Open Details	Held by my library 4802 libraries hold this item
	Who moved my cheese? : an amazing way to deal with change in your work and in your life by Spencer Johnson Print book, English Publisher: New York: Fulham, ©1998. ISBN#: 0399144463 (hardcover) DLC, DLC eng Full, OCLC#: 38752964 Open Details	Held by my library 4641 libraries hold this item

Here is a screenshot of the 3 books I experimented with removing the shared print flag. These records still have the 583 in the LHR, but no Shared Print flag. I need to go through the registration process for these 3 records, meaning upload a CSV file using Collection Manager, in order to get the Shared Print flag set again.

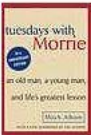
LHR but no Shared Print Flag

Record Manager

Edit 36130729

Print Edit Record Advanced Action Save

Search
Data Type: Bibliographic Records
Scope: All WorldCat
Index: Keyword
Term(s): (I4:VKM AND I8:EAST) NOT
Search Clear
[Advanced Search](#)

 OCLC Number: 36130729
Print book
LHR(s): 1

WorldCat Holdings
My Library: Held
[Other Libraries: 4452](#)

Other Records Linked to Work [103033854](#) (255)

Bibliographic Record

Clear Selections

The LHR is present, but no shared print flag.

Shared Print Flag in Record Manager

The screenshot displays the Record Manager interface for record 39706973. On the left is a search sidebar with filters for Data Type (Bibliographic Records), Scope (All WorldCat), Index (Keyword), and Term(s) ((14.VKM AND 18.EAST)). The main content area shows the record details: OCLC Number: 39706973, WorldCat Holdings, Print book, My Library: Held, and Other Libraries: 2647. A yellow highlight is placed over the text 'LHR(s): 1' and '(1 Shared Print)'. Below the main details, there are sections for 'Other Records Linked to Work 752912 (91)' and 'Bibliographic Record'.

For complete shared print registration, you will have both the Shared Print flag and the LHR.

Shared Print Flag in Record Manager

The screenshot displays two instances of the Record Manager interface, each showing a Local Holdings Record (LHR). The top instance shows a table with a 'Shared Print' flag highlighted in yellow, set to 'No'. The bottom instance shows the same table with the 'Shared Print' flag highlighted in yellow, set to 'Yes'.

Summary (25/9999)
Local Holdings Available. Save
Build Automated Summary

Results 1 - 1 of 1

	Call Number	Barcode	Shared Print	Branch	Shelving Location
<input type="checkbox"/>			No	VKMA	

Results 1 - 1 of 1

Summary (25/9999)
Local Holdings Available. Save
Build Automated Summary

Results 1 - 1 of 1

	Call Number	Barcode	Shared Print	Branch	Shelving Location
<input type="checkbox"/>			Yes	VKMA	

You can also see the Shared Print flag by scrolling all the way down to the LHR when you have a record open in Record Manager. Both records have the LHR, but only one has the Shared Print flag.

...and now back to Sara for Questions from the Survey...

OCLC#: 647764624

According to

https://help.oclc.org/Librarian_Toolbox/Searching_WorldCat_Indexes/Format_Document_Type_values_and_codes/WorldShare_and_WorldCat_Discovery, 008/23 = s is what's triggering the ebook icon.

I don't think this record has ever been merged with others, so the 008/23 s has been there since originally cataloged by PVU. It's coded s (electronic) as opposed to o (online). Note the 337 field = computer; that field was added in Feb 2019, but I can't tell if it was OCLC staff or an automated process that did it. Probably worth reporting this one to the WorldCat QC folks.

OCLC #: 727559

Referring to same doc, next column to the right -- I believe the ebook icon here is being triggered by the 2nd indicator on the 856 fields.

I'm not cataloger, even though I frequently play one on TV. I'm wondering whether the 2nd indicator value here really ought to be 1, not zero. If 2nd ind = 1, the ebook icon would not be displayed. Couldn't easily locate HathiTrust cataloging practices documentation to check!


From MARC bib standard:

856 / 2nd indicator:

0 - Electronic location in field 856 is for the same resource described by the record as a whole. In this case, the item represented by the bibliographic record is an electronic resource.

1 - Location in field 856 is for an electronic version of the resource described by the record. In this case, the item represented by the bibliographic record is not electronic but an electronic version is available

From Julie Nye, May 1, 2020



Searching and Formats

“If you submit the same expert search in Record Manager as in Connexion, e.g. **sh:FGM AND mt:mic** the results are the same,

Microform facet is different than using mt:mic

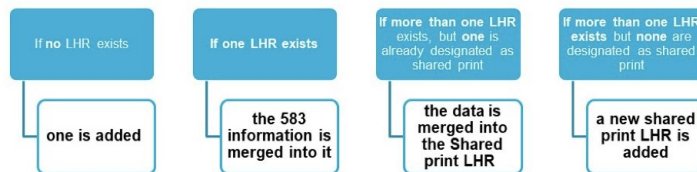
From alicia - 10/21/20 - Record manager format facet is more granular- mt:mic contains also “Thesis/Dissertation” records while the facet list only has “Microform” (haven’t compared all records but that is what you see at first glance). “

Registering Monographs: LHRs

Creation of or update to Local Holdings Records (LHRs) and setting the SHARED PRINT FLAG

SP

Merge/Match Logic



Something about multiple LHRs?

The file is then submitted to OCLC via MyFiles and results in the creation Local Holdings Records which contain shared print 583s, and **sets the Shared Print flag** on the record.

I'm going to repeat that - it SETS A SHARED PRINT FLAG on the record.

Manually adding a 583 to an LHR is NOT THE SAME as registering a commitment through this service.

If an OCLC number is submitted for retention and the library does not already have their holdings set on the record, a holding will be set, and an LHR created.

There is also Match and Merge logic if LHRs already exist for your library on the OCLC number - you can see that screenshot from their webinar here

If no LHR exists, one is added

- If one LHR exists, and is not a shared print LHR, the 583 information is merged into it and the shared print flag is set on it

- If more than 1 LHR exists, but one already is designated as Shared Print, the data is merged into that Shared print LHR
- If more than 1 LHR exists but none is designated as shared print, a new shared print LHR is added.

Questions from Survey

What additional topics would you want to see covered in a webinar or open forum discussion?

In the survey sent out last month asking about interest in webinars on working with Shared Print in OCLC, we received a number of suggestions of topics folks wanted to see covered. We're going to go through a few of them here.

Questions from Survey

Dealing with missing/lost items that have been committed for retention

Dealing with missing/lost items that have been committed for retention

Your local program should have a process for you to follow. I can say for EAST we have a form to report lost and missing items, and now that registrations have been made, libraries will need to remove the registration from OCLC along with their catalog. But again consult with your local program.

Questions from Survey



Financial obligations, information on updating holdings after initial registration

Financial obligations, information on updating holdings after initial registration

I'm not sure I understand complete understand this comment, but my understanding is that a full cataloging subscription is required to register and retain shared print commitments in OCLC services.

As for updating holdings, hopefully the previous slides on maintenance answered that.

If you still have questions I'd suggest contacting sharedprint@oclc.org.

Questions from Survey

Information on batch updates as well as updates to individual records. How to ensure consistency between library systems, OCLC, and program databases.

Information on batch updates as well as updates to individual records. How to ensure consistency between library systems, OCLC, and program databases.

Great question, and I'm sure one that we'll be discussing more as time goes on. Anna Stricker from WEST did cover some good options for syncing collections between local catalogs and OCLC in Wednesday's webinar. I also suspect that at some point shared print programs may ask for exports of shared print records, which as we've seen can be done through Collection Manager. I'm sure this will be an ongoing topic

of discussion.

Questions from Survey



Integration of LHRs in OCLC and Alma

Integration of LHRs in OCLC and Alma

I think this merits its own workshop for Alma users, though again Anna did cover some of this in Wednesday's webinar.

If there are Alma users on the call who are interested we could pull in some alma experts to talk about this. Drop me a note.

Questions from Survey

Joint shared print/resource sharing webinar to include our resource sharing staff so that they understand what they are seeing

Really great suggestion, though to the best of my understanding Shared Print is not visible in OCLC resource sharing products. If you feel it is important in your workflows that shared print commitments be surfaced in these

Questions from Survey



Using the OCLC API to do searches of commitments in bulk

This definitely requires some programming expertise, and also makes me wonder about how much 'bulk' you are interested in. OCLC has promised to release a google sheets add on that will allow for some querying of the API, though I don't think it is intended to handle more than a few thousand records at a time.

Questions from Survey

We are currently using a separate OCLC institution id for shared print holdings. I'm interested in the process for moving these to our regular institution id.

I believe there is a process for this, and has been done for the Maine Shared Collections libraries. I'd reach out to sharedprint@oclc.org to start the discussion of the process for your library.

Questions?

Ask in the Questions box or Raise your hand and we will unmute you

OCLC: sharedprint@oclc.org

Thanks for attending!

Want more discussions with colleagues?

-Join the PAN Listserv <https://www.crl.edu/subscribe>
PAN Forums and the 'Water Cooler'

-Join the google group discussion@sharedprint.org
<https://groups.google.com/a/sharedprint.org/g/discussion>
unmoderated discussion forum

Feedback welcome! sara@sharedprint.org

Thanks for attending today. Slides and the recording of this session will be posted to sharedprint.org.

Also as a reminder if you want more discussions with colleagues, Join the PAN Listserv <https://www.crl.edu/subscribe-pan> for information on the PAN Forums and the 'Water Cooler' discussions that follow them, and/or join the google group discussion@sharedprint.org for general conversations of all things shared print.

We also welcome any feedback on this webinar and/or suggestions for future topics you'd like to see covered by Rosemont and the Partnership.