Best Practices for Discovery and Disclosure of Shared Print Items

Disclosure ensures long term access, discovery, and sharing of shared print commitments. Shared Print programs rely on bibliographic and holdings metadata for decision-making within and across programs and in collection analysis/management decisions. The availability of local, program level, and national bibliographic and holdings metadata is necessary to manage a collective collection, and the ability to disclose and discover these commitments is paramount to the success of shared print. For disclosing, best practices dictate that metadata be recorded using MARC21 Format for Holdings Data Records according to shared print metadata guidelines, and that it be widely shared.

Best Practice

Each level presumes that the criteria of the previous level have been met.

Good

- The Shared Print Program outlines for its members specific requirements for disclosure and discovery in policies using the OCLC's Detailed Metadata Guidelines for using the 583 field in shared print projects.

- Member libraries record retention commitments in local catalogs using the MARC 583 "Action Note," and this information is added to the holdings/item/checkin level when possible.
- Shared print commitments of member libraries are registered in their ILS.

Better

- Monograph commitments are registered and maintained in WorldCat or other systems of record by either member libraries or by Program staff.
- Serials/journal commitments are entered in the Center for Research Libraries' Print Archives Preservation Registry ([PAPR](#)) and either allow syncing with other systems such as WorldCat or the commitments are registered there by either member libraries or by Shared Print Program staff.
- Programs strongly encourage member libraries to openly share their bibliographic and holdings metadata.

Best

- Member libraries ensure that holdings level data for multi part titles is included in metadata and is shared in standard formats.
- Member libraries use the 583 $3 to describe retained holdings in any shared data system beyond the local system, unless that data is contained in an LHR which is also shared.
  NOTE: See "Documentation for Disclosure" below for detailed guidelines.
- In situations where retention information has changed, member libraries maintain holdings data both in local and shared systems,

and they notify the shared print program of status changes immediately.
- Programs establish a schedule of updates to maintain metadata consistency between local and national systems.
- Libraries openly share bibliographic and holdings metadata when requested to do so.

Aspirational

- Shared print resources are discoverable at the point of need in order to fully operationalize collection management decisions and resource sharing in shared print.
- The Program encourages member libraries to think about ways in which all records which have retention commitments, regardless of physical location, can be drawn into local and other discovery layers.

TABLE: GOOD, BETTER, BEST, ASPIRATIONAL LEVELS

	Good	Better	Best	Aspirational
OCLC's Detailed Metadata Guidelines for using the 583 field in shared print projects.	x			
The Shared Print Program outlines for its members specific requirements for disclosure and discovery in policies using the Member libraries record retention commitments in local catalogs using the MARC 583 "Action Note," and this information is added to the holdings/item/checkin level when possible.	x			
Shared print commitments of member libraries are registered in their ILS.	x			

Monograph commitments are registered and maintained in WorldCat or other systems of record by either member libraries or by Program staff.		x		
Serials/journal commitments are entered in the Center for Research Libraries' Print Archives Preservation Registry (PAPR) and either allow syncing with other systems such as WorldCat or the commitments are registered there by either member libraries or by Shared Print Program staff.		x		
Programs strongly encourage member libraries to openly share their bibliographic and holdings metadata.		x		
Member libraries ensure that holdings level data for multi part titles is included in metadata and is shared in standard formats.			x	
Member libraries use the 583 $3 to describe retained holdings in any shared data system beyond the local system, unless that data is contained in an LHR which is also shared. NOTE: See "Documentation for Disclosure" below for detailed guidelines.			x	
In situations where retention information has changed, member libraries maintain holdings data both in local and shared systems, and they notify the shared print program of status changes immediately.			x	
Programs establish a schedule of updates to maintain metadata consistency between local and national systems.			x	
Libraries openly share bibliographic and holdings metadata when requested to do so.			x	
Shared print resources are discoverable at the point of need in order to fully operationalize collection management				x

decisions and resource sharing in shared print.				
The Program encourages member libraries to think about ways in which all records which have retention commitments, regardless of physical location, can be drawn into local and other discovery layers.				**x**

Documentation for Disclosure in Local ILS

As stated above, an ideal best practice is that shared print programs should encourage member libraries to record shared print commitments in local systems. These libraries should record commitments in local catalogs using the MARC 583 "Action Note," and this information should be added to the holdings/item/checkin level when possible. Member libraries should also use the 583 $3 to describe retained holdings in any shared data system beyond the local system. This includes the following:

- ○ For multi-part monographs, libraries use the 583 $3 due to a lack of other holdings information when LHRs are absent.
- ○ For serials, programs and libraries leverage other summary holdings fields in the record (e.g. 86X fields), from which 583 $3 may be generated to support consistency across the formats in external systems. The retention commitment may be for a different holdings range than reported elsewhere in the record.
  - ■ Data for this field may be generated from a variety of sources at the local level, but should be summarized at the shared system level, consistent with current MARC and ANSI/NISO standards for holdings statements.
  - ■ Any gaps notated in the 583 $z should also follow these standards.

Metadata Guidelines for 583

Shared Print Programs should follow the OCLC Detailed Metadata Guidelines which outline the MARC tags that should be used for shared print disclosures.

Based on the OCLC Detailed Metadata Guidelines, MARC tags will have different information depending on the shared print program for which a library is making a commitment. See individual program disclosure guidelines for this information, e.g. MSCC and EAST.
NOTE: See also the Rosemont Best Practices for Metadata for a discussion of serials and journal specific disclosure topics.

NOTE: For examples of how to record retentions in various local systems, please see the Shared Print Toolkit's "Recording Retentions."

Last Updated December 2022