



Best Practices for Discovery and Disclosure of Items in Local Systems

Disclosure ensures long term access, discovery, and sharing of shared print commitments. Shared Print Programs often require that member libraries disclose and maintain retention commitments in their local collection management systems following Shared Print Programs Metadata requirements and [OCLC's Detailed Metadata Guidelines](#).

Best Practice

Shared print programs may outline specific requirements, but individual libraries in shared print programs are encouraged to follow these best practices:

1. Disclose and maintain retention information in local collection management systems; this should be done for each shared print program in which a library participates.
2. Notify the shared print program, via the program manager or coordinator, when commitments status change.

Documentation for Disclosure in Local ILS

Retention commitments are recorded in local catalogs using the MARC 583 "Action Note". This information should be added to the holdings/item/checkin level whenever possible. Libraries should review their Shared Print Program's Metadata requirements and [OCLC's Detailed Metadata Guidelines](#) for using the 583 field in shared print projects before proceeding.

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 you are making the commitment for. See individual program disclosure guidelines for this information.

Instructions for Monographs

The information below includes instructions from several different ILS's and should be used as general instructions only. They may not work for your institution exactly, but are included to help you think through this process for your local needs and systems.

Examples

- [Alma](#)
- [Aleph Batch Records Update](#)
- [Millennium / Sierra Batch Records Update](#)
- [Voyager Batch Records Update](#)
- [WMS registration \(OCLC Documentation\)](#)

Thank you to the numerous programs that helped us compile our examples and were willing to share them, including EAST and SCELC. If your program would be willing to share your instructions, please let us know via the [feedback form](#).

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