Best Practices for Discovery and Disclosure of Shared Print Items

Note: This Best Practice uses the Good, Better, Best, Aspirational terminology

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 OCLC shared print metadata guidelines and the Shared Print Actions Terminology, and that the metadata be widely shared.

Best Practices for Programs

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

Good

- Outline for members specific requirements for disclosure and discovery in policies using OCLC's Detailed Metadata Guidelines for using the 583 field in shared print projects.

Better

- If requested, aid member libraries in registering and maintaining monograph commitments in WorldCat or other systems of record.

- If requested, aid member libraries enter serials/journal commitments in the Center for Research Libraries' Print Archives Preservation Registry (PAPR) and help member libraries register them in WorldCat or other systems and/or allow syncing with other systems, such as WorldCat. .

- Strongly encourage member libraries to openly share their bibliographic retention and holdings metadata as is feasible.

Best

- Establish a schedule of updates to maintain metadata consistency between local and national systems.

Aspirational

- When requested, aid members in making sure that shared print resources are discoverable at the point of need in order to fully operationalize collection management decisions and resource sharing in shared print.

- Encourage 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 1: GOOD, BETTER, BEST, ASPIRATIONAL LEVELS FOR PROGRAMS	Good	Better	Best	Aspirational
Outline for members specific requirements for disclosure and discovery in policies using OCLC's Detailed Metadata Guidelines for using the 583 field in shared print projects.	x			
If requested, aid member libraries in registering and maintaining monograph commitments in WorldCat or other systems of record.		x		
If requested, aid member libraries enter serials/journal commitments in the Center for Research Libraries' Print Archives Preservation Registry (PAPR) and help member libraries register them in WorldCat or other systems and/or allow syncing with other systems, such as WorldCat. .		x		
Strongly encourage member libraries to openly share their bibliographic retention and holdings metadata as is feasible.		x		
Establish a schedule of updates to maintain metadata consistency between local and national systems.			x	
When requested, aid members in making sure that shared print resources are discoverable at the point of need in order to fully operationalize collection management decisions and resource sharing in shared print.				x
Encourage 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

Best Practices for Member Libraries

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

Good

- Record retention commitments in local catalogs using the MARC 583 "Action Note," and this retention commitment is added to the holdings/item/check-in level when possible.

- Register shared print commitments in the catalog.

- Ensure that the 583 $3 is populated.

Better

- Register and maintain monograph commitments in WorldCat or other systems of record.

- Enter serials/journal commitments in the Center for Research Libraries' Print Archives Preservation Registry ([PAPR](#)) and register them in WorldCat or other systems and/or allow syncing with other systems, such as WorldCat.

- Openly share bibliographic retention and holdings metadata, as is feasible.

Best

- Ensure that holdings-level data for multipart titles is included in metadata and is shared in standard formats.

- 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, maintain holdings data both in local and shared systems, and notify the shared print program of status changes immediately.

- When feasible, openly share bibliographic and holdings metadata when requested to do so.

- For multipart monographs, use the 583 $3 due to a lack of other holdings information when LHRs are absent.

- For serials, if possible, 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.

Aspirational

- Make sure that shared print resources are discoverable at the point of need in order to fully operationalize collection management decisions and resource sharing in shared print.

TABLE 2: GOOD, BETTER, BEST, ASPIRATIONAL LEVELS FOR MEMBER LIBRARIES	Good	Better	Best	Aspirational
Record retention commitments in local catalogs using the MARC 583 "Action Note," and this retention commitment is added to the holdings/item/check-in level when possible.	x			
Register shared print commitments in the catalog.	x			
Ensure that the 583 $3 is populated.	x			
Register and maintain monograph commitments in WorldCat or other systems of record.		x		
Enter serials/journal commitments in the Center for Research Libraries' Print Archives Preservation Registry (PAPR) and register them in WorldCat or other systems and/or allow syncing with other systems, such as WorldCat.		x		
Openly share bibliographic retention and holdings metadata, as is feasible.		x		
Ensure that holdings-level data for multipart titles is included in metadata and is shared in standard formats.			x	
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.			x	
In situations where retention information has changed, maintain holdings data both in local and shared systems, and notify the shared print program of status changes immediately.			x	

When feasible, openly share bibliographic and holdings metadata when requested to do so.			x	
For multipart monographs, use the 583 $3 due to a lack of other holdings information when LHRs are absent.			x	
For serials, if possible, 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.			x	
Make sure that shared print resources are discoverable at the point of need in order to fully operationalize collection management decisions and resource sharing in shared print.				x

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 along with the language described in the Shared Print Actions Terminology.

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."

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