

# Shared Print Actions: Terminology for MARC 21 Field 583

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### Structure of *SPA: Terminology*

*SPA: Terminology* serves both as instructional guidelines and as a data dictionary. **Part 1** is introductory and presents the compendium of standardized shared print retention action terms. **Part 2** consists of construction guidelines for 583 fields focusing on particular actions. Each particular set is conceived as a “pull-out” for specific guidance. **Part 3** is a data dictionary, a compilation of all the standardized terms for shared print actions.

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April 2024

## PART 1 Overview

### Introduction

Field 583 contains information about actions taken on cataloged resources. This particular set of instructions defines practice for recording information about actions taken on materials retained for shared print.<sup>1,2,3</sup> 583 encoded information following this practice uses the convention “\$2 spa” as an indication of compliance.

*Shared Print Actions: Terminology for the MARC 21 Field 583* (hereafter referred to as *SPA: Terminology*) defines standardized terminology for shared print actions and allows institutions to record these actions. Information in the 583 field is used to inform shared print and collection management decisions at the local institutions as well as at other institutions, allowing users to determine whether materials are retained in the long term and whether and to what extent other actions have been taken to confirm and ensure the integrity of the materials.

### History of SPA: Terminology

In the early 2000s, libraries began defining new ways of collaborating across institutions and geographical distance, leveraging technological advances to pool and strategically deploy collections resources. An OCLC research report published in 2009 explored an emerging “consensus...around the core requirements for a policy framework governing inter-institution management of library print resources.”<sup>4</sup> This research was followed by The Shared Print Archives Disclosure Pilot project (2010-2012) which aimed to “develop and test a method for registering print archiving commitments using existing bibliographic infrastructure.”<sup>5</sup> The final report produced at the conclusion of this pilot project recommended “us[ing] the 583 Preservation Action Note to describe specific characteristics of the print archives action(s) for each set of holdings,”<sup>6</sup> noting that specific terms not defined in the *Preservation & Digitization*

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<sup>1</sup> “Collective Collection” Wikipedia, [https://en.wikipedia.org/wiki/Collective\\_collection](https://en.wikipedia.org/wiki/Collective_collection)

<sup>2</sup> This document addresses only actions related to formal shared print programs and retentions made under the auspices of these programs. This terminology does not address actions that may be used for other aspects of collective collections work.

<sup>3</sup> Other groups may wish to establish a controlled language for the 583 field which differs from the Shared Print terminology. If an organization (e.g., SAA) wished to establish a separate list of terms, the group could submit their list to the Network Development and MARC Standards Office ([ndmso@loc.gov](mailto:ndmso@loc.gov)) for inclusion in the MARC Code List for Relators, Sources, Description Conventions. The Network Development and MARC Standards Office would assign a \$2 code to the thesaurus.

<sup>4</sup> RLG Partnership Shared Print Collections Working Group, Shared Print Policy Review Report (Malpas, 2009): <https://www.oclc.org/content/dam/research/publications/library/2009/2009-03.pdf>

<sup>5</sup> Define Policy and Infrastructure Requirements for Shared Print (last updated 2012-05-15): <https://www.oclc.org/research/activities/policy.html>

<sup>6</sup> OCLC Print Archives Disclosure Pilot Final Report (2012): [https://docs.google.com/document/pub?id=1iM86\\_ORG0vBXqIRwezIA2pOANJdIqmlAnSS\\_t31WgNU](https://docs.google.com/document/pub?id=1iM86_ORG0vBXqIRwezIA2pOANJdIqmlAnSS_t31WgNU)

## MARC 583 \$2 Shared Print Actions

*Actions: Terminology for MARC 21 Field 583 (PDA)* document “will be integrated into [*PDA: Terminology*] during the course of the Print Archives Pilot project.”

By the early 2020s, however, 583 action terms core to shared print activities had not been integrated into *PDA: Terminology*. Other venues recorded the terminology used by the shared print community, but did not provide any mechanism for reviewing or updating a centrally-maintained terminology; emerging needs and changes in practices as the shared print community evolved over time were thus handled piecemeal.

### MARC 21 583 Action Note: Review

Official documentation for the MARC 583 structure is maintained by the Library of Congress Network Development and MARC Standards Office at:  
<http://www.loc.gov/marc/bibliographic/583terms.html>.

The following is a review of the 583 subfields as they apply to shared print retention.<sup>7</sup>

#### Indicators:

First Indicator:	Second indicator:
# - no information provided	Undefined
0 – private	
1 – not private	

**For shared print disclosure purposes, the default value of the first indicator should be “1” i.e., not private.**

#### Minimal form

At a minimum, **583\$a committed to retain** shared print action notes are required to include: \$a, \$c, \$d, and \$f. Subfield 3 is also required if applicable.

#### <sup>7</sup> Typographical Conventions

*SPA: Terminology* uses the typographical conventions of the Library of Congress Network Development and MARC Standards Office.

MARC field indicators are represented by the # symbol. Some readers may be more familiar with the use of spaces and alternate symbols representing blank space (e.g., b or slash-b symbols).

MARC subfields are represented by the \$ symbol. Some readers may be more familiar with the use of the | symbol. The \$ symbol should be read as “subfield”; for example, \$a should be read “subfield a”.

*SPA: Terminology* uses two distinct fonts, each for a specific purpose. The Times-Roman font is used for instructional information. The Arial font is used to represent MARC and MARC-encoded examples, e.g.,

583 1# \$a committed to retain \$c 20190315 \$d 20351231 \$f WEST \$2 spa \$5 OrU

Finally, some catalog systems separate various pieces of information with spaces while others do not.

*SPA: Terminology* uses a space to separate subfields and subfield information to support readability.

## MARC 583 \$2 Shared Print Actions

All other shared print action notes are required to include: \$a and \$f. Subfield 3, \$c, \$d, and \$2 are required if applicable.

*Shared Print Action: Terminology* does not define values for: \$e, \$k, \$n, \$o, \$6, \$7, and \$8.

### Overview of 583 Action Note Subfields

Subfield Code	Subfield Name	Description	Repeatable	Required
\$3	Materials specified	Detailed holdings to which action applies, often the same range of holdings described in LHR 85x/86x or 866. Indicate gaps if known.	Not Repeatable	Required if applicable <sup>8</sup>
\$a	Action	Standardized terminology descriptive of the action (e.g., committed to retain, completeness reviewed). A compendium of shared print actions (SPA) terms follow.	Not Repeatable	Required
\$b	Action identification	Code that identifies a specific action or identifies it in conjunction with the time of action in \$c. <sup>9</sup>	Repeatable	Optional
\$c	Time/date of action	Date action was initiated. Date should be recorded using ISO 8601, the International Date Standard with hyphens omitted (e.g., YYYYMMDD or YYYY). <sup>10</sup>	Not Repeatable	Required if applicable <sup>11</sup>
\$d	Action interval	A time period that cannot be expressed as a concrete time (e.g., condition surveys that might take place quadrennially). When used with \$a committed to retain, a specific date that marks the end of a retention period may be recorded using ISO	Repeatable	Required if applicable <sup>13</sup>

<sup>8</sup> Use of the \$3 is required where holdings to which the action applies do not match LHR 85x/86x or 866.

<sup>9</sup> SPA defines \$b action identification codes to be used in conjunction with the corresponding \$a action across all language translations of this terminology to indicate equivalency regardless of language of cataloging. See [PART 3 - Subfield b codes](#) for more information and a complete list of codes used in \$b.

<sup>10</sup> See the Principles of Use and Field Construction section for an explanation of when to omit \$c.

<sup>11</sup> \$c is required where \$a = committed to retain, \$a = completeness reviewed, \$a = condition reviewed, \$a = confirmed scarcity, and is optional in all other cases.

<sup>13</sup> \$d is required where \$a = committed to retain, and is optional in all other cases.

## MARC 583 \$2 Shared Print Actions

Subfield Code	Subfield Name	Description	Repeatable	Required
		8601, the International Date Standard with hyphens omitted (e.g., <b>YYYYMMDD</b> ). <sup>12</sup>		
<b>\$e</b>	Contingency for action	Time or time period expressed in terms of an unpredictable event (not generally used with SPA terms).	Repeatable	Optional
<b>\$f</b>	Authorization	Shared print program to which the shared print retention commitment was made.	Repeatable	Required
<b>\$h</b>	Jurisdiction	Name of a person, an institution, or a position or function within the institution, in whom or which responsibility for an action is vested (not generally used with SPA terms).	Repeatable	Optional
<b>\$i</b>	Method of action	Means or technique by which an action is performed. Provides further description of <b>\$a</b> term. A list of valid terms for specific shared print actions is found below.	Repeatable	Optional
<b>\$j</b>	Site of action	The site at which the described action has been undertaken (recorded as the Holdings Location Code).	Repeatable	Optional
<b>\$k</b>	Action agent	Person or organization performing the action (e.g., vendor or service provider; not generally used with SPA terms).	Repeatable	Optional
<b>\$l</b>	Status	Condition or state of the described materials. Typically succeeded by <b>583\$z</b> .	Repeatable	Optional

<sup>12</sup> The MARC21 standards define **\$d** as recording a “time period which cannot be expressed as a specific date (e.g., at end of academic term or every six months)” (see <https://www.loc.gov/marc/bibliographic/bd583.html>). The Shared Print community has used this subfield to record the end of the retention period, which is typically expressed as a specific date (e.g., if the retention period is defined as 25 years from the program’s inception, the action interval is recorded in the **\$d** as the specific date on which that retention period ends). In January 2022 the MARC Advisory Committee discussed a paper suggesting a modification to the definition of **\$d** and noted that while the Shared Print community’s use of this field is not in line with the MARC standards, it is also not causing harm to continue using it in this way. See <https://www.loc.gov/marc/mac/minutes/mw-22.html>, DISCUSSION PAPER 2022-DP03: Recording Concrete Action Interval Dates in Field 583 of the MARC 21 Bibliographic and Holdings Formats.

## MARC 583 \$2 Shared Print Actions

Subfield Code	Subfield Name	Description	Repeatable	Required
\$n	Extent	Number of items involved; quantifiable measurement (not generally used with SPA terms) Always used in conjunction with \$o.	Repeatable	Optional
\$o	Type of unit	Name of the unit of measurement for \$n (not generally used with SPA terms) Always used in conjunction with \$n.	Repeatable	Optional
\$u	Uniform Resource Identifier	Link to supplementary information, e.g., a URL or URN, which provides electronic access data in a standard syntax. This is usually a link to program documentation for the shared print program identified in \$f.	Repeatable	Optional
\$x	Nonpublic note	A note pertaining to an action on an item that is not displayed to the public.	Repeatable	Optional
\$z	Public note	A note pertaining to an action on an item that is displayed to the public. When used with 583\$a completeness reviewed or condition reviewed, always preceded by 583\$l. When used with 583\$a committed to retain, do not precede with \$l.	Repeatable	Optional
\$2	Source of term	A MARC code that identifies the source of the term used to record the action information, in this case “spa” for shared print action terms. See the <a href="#">Resource Action Term Source Codes</a> for a list of other \$2 sources used in the 583 Action Note field. <sup>14</sup>	Not Repeatable	Required if applicable <sup>15</sup>
\$5	Institution to which field	Institution codes can be found at:	Not Repeatable	Optional

<sup>14</sup> See the Principles of Use and Field Construction section for an explanation of when to omit \$2.

<sup>15</sup> \$2 is required for action notes where terminology is drawn from a specific source that provides definitions and usage guidelines for those terms.

## MARC 583 \$2 Shared Print Actions

Subfield Code	Subfield Name	Description	Repeatable	Required
	applies	<a href="http://www.loc.gov/marc/bibliographic/ecbdorg.html">http://www.loc.gov/marc/bibliographic/ecbdorg.html</a> <sup>16</sup>		
\$6	Linkage	Linkage is generally not used by “spa” See: <a href="http://www.loc.gov/marc/bibliographic/ecbdcntf.html#mrsc6">http://www.loc.gov/marc/bibliographic/ecbdcntf.html#mrsc6</a>	Not Repeatable	Optional
\$7 <sup>17</sup>	Data provenance	Data provenance is generally not used by “spa” See: <a href="https://www.loc.gov/marc/bibliographic/bdapndxj.html">https://www.loc.gov/marc/bibliographic/bdapndxj.html</a>	Repeatable	Optional
\$8	Field link and sequence number	Linkage is generally not used by “spa” See: <a href="http://www.loc.gov/marc/bibliographic/ecbdcntf.html#mrsc8">http://www.loc.gov/marc/bibliographic/ecbdcntf.html#mrsc8</a>	Repeatable	Optional

Subfields marked as “**(Repeatable)**” may be used more than once in any single 583 field.  
Subfields marked as “**(Not Repeatable)**” may be used only once in any single 583 field.

Example:

583 1# \$a condition reviewed \$c 2004 \$l mutilated \$z mutilated v.2 \$l brittle paper \$2 spa \$5 MiEM

Subfield l, modifying \$a, may be repeated to provide a complete description. In this example, Michigan State University has identified a mutilated copy that also has brittle paper.

To use a **Not Repeatable** subfield more than once, multiple 583 notes must be used, one for each instance of the **Not Repeatable** subfield.

Example:

583 1# \$a committed to retain \$c 2004 \$d 20351231\$f WEST \$2 spa \$5 CSdU

<sup>16</sup> The institution codes shown in the examples throughout the document are those of real institutions. However, the examples have been created solely for purposes of illustration and do not reflect usage or practices of these institutions.

<sup>17</sup> \$7 - Data provenance is only used with 583 bibliographic and authority formats, and is not used with 583 holdings format.

## MARC 583 \$2 Shared Print Actions

### Example:

583 1# \$a transferred to optimal storage \$c 2004 \$f WEST \$2 spa \$5 CSdU

Two 583 notes are required to express two actions. In this case, the first action is commitment to retain and the second is transfer to optimal storage.

## Principles of Use and Field Construction

The standard terms defined here cover shared print actions only. When recording shared print actions, terms from *SPA: Terminology* should be used if the institution complies with the terms as defined. This is acknowledged in **Subfield 2** (Source of Terms) by using the code “spa” (Shared Print Action). It is not necessary for institutions to update the 583 field to add **\$2 spa** if the 583 field was created prior to issuance of *SPA: Terminology*. If an institution uses non-standard terminology in the 583 field, **subfield 2** should not be used.

Standardized terminology naturally limits expression. These terms will be reviewed and updated biennially to allow for expansion as new technologies, methodologies, and practices emerge. The 583 field provides two ways of including additional information: notes (**\$x** or **\$z**) and links to external information (**\$u**).

## Public versus Private Information

The use of the first indicator of the 583 field enables institutions to declare whether the shared print information is intended to be public or private. Information in the 583 field may be used to track local actions, and due to the nature of shared print this information may be used by other institutions to determine whether an item has been retained for shared print and for how long, and to what extent various additional actions, such as physical validation, have been taken during the retention commitment process. Access to this kind of information may influence collection management decisions made by other institutions, therefore **Indicator 1** should be **1 (not private)** when any of the following *SPA: Terminology* **\$a** actions terms are used:

- committed to retain
- completeness reviewed
- condition reviewed<sup>18</sup>
- confirmed scarcity
- metadata reviewed
- transferred to optimal storage<sup>19</sup>

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<sup>18</sup> Term from *PDA: Terminology*; when using this **\$a** action term in a shared print context, the Indicator 1 should be 1 (public).

<sup>19</sup> Term from *PDA: Terminology*; when using this **\$a** action term in a shared print context, the Indicator 1 should be 1 (public).

## MARC 583 \$2 Shared Print Actions

### How to Use SPA Terms

The 583 field may be used at the bibliographic level, the holdings level, or both. To ensure that shared print information is shared with other institutions, it may be necessary to use the bibliographic level. How an institution implements the 583 will be determined by local systems and policies.

Certain subfields within the 583 field require standard terminology. The following table illustrates these requirements. Standardization is necessary to ensure understanding and, more importantly, computer aided query of shared print information.

Guide to Controlled Vocabulary by Subfield	
Standardized Terminology Required	No Standardization Required
<b>\$a</b> <i>Action</i>	<b>\$3</b> <i>Materials Specified</i> <sup>20</sup>
<b>\$b</b> <i>Action Identification</i>	<b>\$e</b> <i>Contingency for Action</i>
<b>\$c</b> <i>Time/Date of Action</i>	<b>\$h</b> <i>Jurisdiction</i>
<b>\$d</b> <i>Action Interval</i>	<b>\$j</b> <i>Site of Action</i>
<b>\$f</b> <i>Authorization</i>	<b>\$k</b> <i>Action Agent</i>
<b>\$i</b> <i>Method of Action</i>	<b>\$n</b> <i>Extent</i>
<b>\$l</b> <i>Status</i>	<b>\$o</b> <i>Type of Unit</i>
<b>\$2</b> <i>Source of Term</i>	<b>\$u</b> <i>Uniform Resource Identifier (URI/URL/URN)</i>
<b>\$5</b> <i>Library Identifier</i>	<b>\$x</b> <i>Nonpublic Note</i>
	<b>\$z</b> <i>Public Note</i> <sup>21</sup>

Not all subfields are recommended for use in shared print. The examples that follow show varying degrees of complexity.

<sup>20</sup> Data recorded in this field should be consistent with current MARC and [ANSI/NISO Z39.71 standards for holdings statements](#).

<sup>21</sup> Data recorded in this field should be consistent with current MARC and [ANSI/NISO Z39.71 standards for holdings statements](#).

## MARC 583 \$2 Shared Print Actions

### Shared Print Actions

\$a (Action) [not repeatable]

**Subfield a** describes a shared print action. To record more than one action, use additional 583 fields. Actions described in \$a may reflect **completed actions**, **prospective actions**, or **negative decisions**.

For \$a, the terminology used is general and as brief as possible since the information is intended for external purposes. Should new action terms be required, the number of terms is expandable. The Shared Print community will periodically review this terminology and incorporate new action terms in accordance with community needs. The updated terminology will be provided to the Network Development and MARC Standards Office for revision of the *MARC Code List for Relators, Sources, Description Conventions*.<sup>22</sup>

Completed Actions<sup>23</sup>

Most shared print action notes refer to actions that have been completed by the library.

Completed Action Term	Definition
committed to retain	Commitment by the institution to retain the materials for a given shared print program (or multiple programs, recorded in the \$f) for the duration stipulated by the shared print program(s) (recorded in the \$d). <i>Example: \$a committed to retain \$c 20190315 \$d 20351231 \$f WEST \$f UCL Shared Print</i>
completeness reviewed	The examination of items and the subsequent recording of their completeness under \$l (Status). <i>Example: \$a completeness reviewed \$c 20170523 \$f EAST \$l missing \$z Missing v.1, v.4 \$2 spa</i>
condition reviewed	The examination of items and the subsequent recording of their physical state under \$l (Status). Use of this action term is well defined in the <i>PDA: Terminology</i> , which should be consulted for proper use of this action term. In the shared print context, may be used internally to identify materials that may be replaced should a better copy become available.

<sup>22</sup> See [Standard Terminology for the MARC 21 Actions Note Field](#) for a complete list of current Action notes fields.

<sup>23</sup> All completed action terms, except committed to retain, may have unique definitions, requirements, and processes outlined by individual shared print programs. In addition, several [Best Practices](#) developed by the Partnership for Shared Book Collections also include many of these details. Outlining exact definitions and processes for each of these terms is outside the scope of SPA.

## MARC 583 \$2 Shared Print Actions

Completed Action Term	Definition
	<p><i>Example: Materials with a note \$a condition reviewed \$l brittle paper \$z v.2(1843) should be replaced if a non-brittle copy is offered.</i></p>
confirmed scarcity	<p>The examination of items and the subsequent recording of their scarcity across a specific group or collection. tease out use cases to determine \$l terminology and instructions for \$z.</p> <p><i>Example: 583 \$a confirmed scarcity \$c YYYYMMDD \$f HathiTrust Shared Print Program \$i program-level \$l 5 or fewer copies \$z 2 copies in HathiTrust \$2 spa</i></p>
metadata reviewed	<p>The examination of metadata describing an item and the subsequent recording of the process used to review the metadata.</p> <p><i>Example: 583 \$a metadata reviewed \$c YYYYMMDD \$2 spa</i></p>
transferred to optimal storage	<p>Placement of an item in an environment that meets preservation standards for relative humidity, temperature, light exposure, air quality, and emergency preparedness for the housing of that material type. Use of this action term is well defined in the <i>PDA: Terminology</i>, which should be consulted for proper use of this action term. (See Appendix A-8 of that document for relevant standards and guidelines.)</p> <p><i>Example: Materials transferred to a newly constructed off-site storage facility designed to preservation specifications have a note 583 \$a transferred to optimal storage \$c YYYYMMDD \$2 spa.</i></p>

*Note:* If other actions are taken that are not described in this document, record action using natural language in \$x (non-public note) or \$z (public note).

### Prospective Actions

The use of a **Prospective Action Term** (e.g., will validate for completeness) in \$a records the institution's intention to perform that action in the near future. Prospective actions are not necessarily used by shared print programs, but may be useful for libraries to plan and track their work locally. These should be treated as temporary notes, and either completed or removed within one year of the decision to take the action.

## MARC 583 \$2 Shared Print Actions

Prospective Action Term	Definition
will commit to retain	See “committed to retain”
will review for completeness	See “completeness reviewed”
will review condition	See “condition reviewed”
will confirm scarcity	See “confirmed scarcity”
will review metadata	See “metadata reviewed”
will transfer to optimal storage	See “transferred to optimal storage”

Once a Prospective Action has been completed, the note should be replaced with the appropriate Completed Action term.

### Negative Decisions

The use of a **Negative Decision Term** (e.g., will not commit to retain) in \$a records the institution’s decision not to take a particular action based on its policies or on an individual item review. Negative decisions are not necessarily used by shared print programs, but may be useful for libraries to record for their local collection management purposes. If a negative decision is reconsidered, the note should be removed.

Negative Decision Term	Definition
will not commit to retain	See “committed to retain”
will not review for completeness	See “completeness reviewed”
will not review condition	See “condition reviewed”
will not confirm scarcity	See “confirmed scarcity”
will not review metadata	See “metadata reviewed”
will not transfer to optimal storage	See “transferred to optimal storage”

If the institution plans to revisit these negative decisions in the future, this should also be recorded in the 583 note.

## PART 2 Guidelines for the Construction of MARC 583 Fields -- BY ACTION

\$a (Action) = committed to retain

### Subfields Used in Conjunction with \$a committed to retain

**Mandatory subfields: \$a, \$c, \$d, and \$f**

**Recommended subfields: \$3, \$b, and \$u**

**Subfield 3** (Materials Specified) may be used to specify distinct parts of a title or item, including structural and physical parts where materials described by \$a are a subset of summary holdings otherwise indicated in 86X fields. If the committed holdings are a subset of summary holdings recorded in 86x fields, use of the \$3 is mandatory. Free text is allowed, but should be consistent with current MARC and [ANSI/NISO Z39.71 standards for holdings statements](#). The following are examples, *not standard terms*.

Accompanying

pp. [#]

v. [#]

map(s)

When \$3 is used, it is always the first subfield to be listed in the 583. It is positioned before the \$a.

Example:

583 1# \$3 v.5 \$a committed to retain \$c 20140915 \$d 20351231 \$f WEST \$u <http://www.cdlib.org/services/west/docs/WESTProgramStatement.pdf>

Use of the \$3 is required where holdings to which the action applies do not match LHR 85x/86x or 866.

**Subfield b** (Action Identification) may be used to record the code corresponding to the \$a action term. The action identification code is always “aa” when \$a is “committed to retain.”

Example:

583 1# \$3 v.5 \$a committed to retain \$b aa \$c 20040915 \$d permanent \$f CRLSerials \$2 spa

## MARC 583 \$2 Shared Print Actions

**Subfield c** (Time/date of Action) must be used to record the date of action (*committed to retain*). Dates are always recorded in ISO 8601, the International Date Standard format (e.g., YYYYMMDD), with hyphens omitted. Use of months and days is not required.

Example:

583 1# \$a committed to retain \$c 20141111 \$d 20351231 \$f WEST \$u  
<http://www.cdlib.org/services/west/docs/WESTProgramStatement.pdf> \$5 OrU

The holdings were committed for retention to the Western Regional Storage Trust (WEST) shared print program by University of Oregon on November 11, 2014.

**Subfield d** (Action Interval) must be used to record the end date of the retention period. This is typically set by the shared print program, and is recorded in YYYYMMDD format. Retention commitments without an end date may be recorded as “permanent” or “retention period not specified.”<sup>24</sup>

**Subfield f** (Authorization) must be used to record the shared print program to which the retention was made, and under whose policies the materials are retained.

**Subfield h** (Jurisdiction) may be used to record the name of a person, an institution, or a position or function within the institution, in whom or which responsibility for an action is vested.

**Subfield i** (Method of Action) is not generally used when \$a action is committed to retain. No standard \$i terms exist for use.

**Subfield j** (Site of Action) may be used to record the site at which the described action has been undertaken.

**Subfield k** (Action Agent) may be used to record the person or organization performing the action (e.g., vendor or service provider).

**Subfield l** (Status) is not generally used when \$a action is committed to retain. No standard \$l terms exist for use.

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<sup>24</sup> The MARC21 standards define \$d as recording a “time period which cannot be expressed as a specific date (e.g., at end of academic term or every six months)” (see <https://www.loc.gov/marc/bibliographic/bd583.html>). The Shared Print community has used this subfield since the early 2010s to record the end of the retention period, which is typically expressed as a specific date (e.g., if the retention period is defined as 25 years from the program’s inception, the action interval is recorded in the \$d as the specific date on which that retention period ends). In January 2022 the MARC Advisory Committee discussed a paper suggesting a modification to the definition of \$d and noted that while the Shared Print community’s use of this field is not in line with the MARC standards, it is also not causing harm to continue using it in this way. See <https://www.loc.gov/marc/mac/minutes/mw-22.html>, DISCUSSION PAPER 2022-DP03: Recording Concrete Action Interval Dates in Field 583 of the MARC 21 Bibliographic and Holdings Formats.

## MARC 583 \$2 Shared Print Actions

**Subfield u** (Uniform Resource Identifier) is a URL or URN pointing to an Internet accessible database, containing more specific information about the retention commitment. Typically, this is documentation from the shared print program, such as a program statement.

Example:

583 1# \$a committed to retain \$c 20160630 \$d 20310630 \$f EAST \$u  
<https://eastlibraries.org/retained-materials> \$2 spa \$5 NAnB

**Subfield x** (Nonpublic Note) is used when further explanation is desirable without displaying the information to the general public.

Example:

583 1# \$a committed to retain \$b aa \$c 20151001 \$d permanent \$f CRLSerials  
\$x women's history project \$2 spa \$5 ICRL

In this case, the note describes a special project that exposed the need for this retention.

**Subfield z** (Public Note) is used to communicate additional information or when further explanation is desirable.

Example:

583 1# \$a committed to retain \$c 20211103 \$d 20351231 \$f WEST \$z Women's  
History Project \$2 spa \$5 CU

**Subfield 2** (Source of Term) always holds the value "spa" when \$a is "committed to retain." Use of \$2 spa commits the user to full compliance with these terms.

Example:

583 1# \$a committed to retain \$c 20211103 \$d 20310630 \$f EAST \$2 spa \$5  
NPV

**Subfield 5** (Institution to Which Field Applies) always holds the user's assigned MARC institutional code. Institution codes can be found at:

<http://www.loc.gov/marc/bibliographic/ecbdorg.html>

Example:

583 1# \$a committed to retain \$b aa \$c 20141014 \$d permanent \$f FLARE \$2  
spa \$5 FIGaFAR

The materials in this example were committed to retain by the Florida Academic Repository (FLARE).

## \$a (Action) = completeness reviewed

### Subfields Used in Conjunction with \$a completeness reviewed

**Mandatory subfields: \$a, \$c, \$f, and \$2**

**Recommended subfields: \$3, \$b, \$h, \$i, \$l, \$z, and \$u**

**Subfield 3** (Materials Specified) may be used to specify distinct parts of a title or item, including structural and physical parts where materials described by \$a are a subset of summary holdings otherwise indicated in 86X fields. If the reviewed holdings are a subset of summary holdings recorded in 86x fields, use of the \$3 is mandatory. Free text is allowed, but should be consistent with current MARC and [ANSI/NISO Z39.71 standards for holdings statements](#). The following are examples, *not standard terms*.

Accompanying  
pp. [#]  
v. [#]  
map(s)

When \$3 is used, it is always the first subfield to be listed in the 583. It is positioned before the \$a.

Example:

583 1# \$3 v.5 \$a completeness reviewed \$c 20140915 \$f WEST \$i issue-level \$2  
spa

Use of the \$3 is required where holdings to which the action applies do not match LHR 85x/86x or 866.

**Subfield b** (Action Identification) may be used to record the code corresponding to the \$a action term. The action identification code is always “ka” when \$a is “completeness reviewed.”

Example:

583 1# \$3 v.5 \$a completeness reviewed \$b ka \$c 20040915 \$f COPPUL SPAN  
\$i page-level \$2 spa

**Subfield c** (Time/date of Action) must be used to record the date of action (*completeness reviewed*). Dates are always recorded in ISO 8601, the International Date Standard format (e.g., **YYYYMMDD**), with hyphens omitted. Use of months and days is not required.

Example:

583 1# \$a completeness reviewed \$b ka \$c **20160922** \$f WEST \$i volume-level  
\$l missing volumes \$z missing v.1, 5 \$2 spa \$5 AzTeS

## MARC 583 \$2 Shared Print Actions

The holdings were physically reviewed for completeness at the volume level by Arizona State University on September 22, 2016.

**Subfield d** (Action Interval) may be used to indicate a regular or irregular schedule for reviewing completeness of the materials.

Example:

583 1# \$a completeness reviewed \$c 20230622 \$d every 5 years \$f WRLC \$i volume-level \$2 spa

**Subfield f** (Authorization) must be used to record the shared print program under whose auspices and policies the completeness review was conducted.

**Subfield h** (Jurisdiction) may be used to record the name of a person, an institution, or a position or function within the institution, in whom or which responsibility for an action is vested.

Example:

583 1# \$a completeness reviewed \$c 20231010 \$f EAST \$h Elms College staff \$i volume-level \$2 spa

**Subfield i** (Method of Action) refers to the level at which the completeness of the materials was reviewed. Standardized terminology should be used in \$i when \$a is completeness reviewed.

Standard \$i terms used when \$a = completeness reviewed
volume-level
issue-level
page-level

*Note:* Use of the terms above is encouraged. If alternate terms are necessary, record them using natural language in \$x or \$z.

Example:

583 1# \$a completeness reviewed \$c 20110101 \$f OCA DPR \$f WEST \$i volume-level \$l missing \$z missing v.4, v.38 \$2 spa \$5 OrU

Example:

583 1# \$a completeness reviewed \$b ka \$c 20110101 \$f WEST \$j AZFSP \$i issue-level \$l missing \$z missing maps for v.6-v.7 (1959-1960) and v.17 (1970) \$l reprints \$z reprints v.3-v.5 (1951-1958) \$2 spa \$5 AzTeS

**MARC 583 \$2 Shared Print Actions**

**Subfield j** (Site of Action) may be used to record the site at which the described action has been undertaken.

**Subfield k** (Action Agent) may be used to record the person or organization performing the action (e.g., vendor or service provider).

**Subfield l** (Status) contains the state of the described materials, sometimes but not always resulting from an action. The standardized terminology listed below should be used. In general, \$x or \$z should be used when none of the standardized language fits the circumstances. Subfields x or z may also be used in addition to \$l to provide greater detail.

Standard \$l terms used when \$a = completeness reviewed	
Terms	Definitions
binding patterns vary	Use \$z Public note to specify volumes where binding patterns differ. E.g., “Vols 32-35 bound as a single unit.”
facsimile	Use \$z Public note to specify issues or volumes that are facsimile copies of the original source material.
incomplete	Specify that physical material was never received. Use \$z Public note to specify which issues or volumes are incomplete.
lost	Specify that physical material was received but has since gone missing. Use \$z Public note to specify which issues or volumes are incomplete.
missing	Specify that physical material is missing, without specifying whether it was received or not. Use \$z Public note to specify which issues or volumes are missing or where covers/pages are missing.
reprints	Use \$z Public note to specify which issues or volumes are reprints issued by the publisher.

Example:

583 1# \$a completeness reviewed \$c 20200111 \$f Keep@Downsview \$i volume-level **\$l missing** \$z missing volumes v.10-15 \$2 spa

## MARC 583 \$2 Shared Print Actions

### Example:

583 1# \$a completeness reviewed \$c 20200111 \$f OhioLINK Print Depository Program \$i issue-level **\$I facsimile** \$z facsimile copies v.16:1-6 \$2 spa

**Subfield u** (Uniform Resource Identifier) is a URL or URN pointing to an Internet accessible database, containing more specific information about the completeness review process (e.g., validation guidelines from the shared print program). Use of the \$u is highly encouraged when the review has been performed according to documented standards or guidelines.

### Example:

583 1# \$a completeness reviewed \$c 20211103 \$f WEST \$i issue-level \$l missing issues \$z missing v.1:no.2, v.4:no.1 **\$u**

<https://cdlib.org/wp-content/uploads/2022/04/WEST-Standards-for-Issue-and-Volume-Level-Validation.pdf> \$2 spa \$5 CU

**Subfield x** (Nonpublic Note) is used when further explanation is desirable without displaying the information to the general public.

**Subfield z** (Public Note) is used to communicate additional information or when further explanation is desirable.

### Example:

583 1# \$a completeness reviewed \$c 20211103 \$f WEST \$i issue-level \$l missing issues **\$z missing v.1:no.2, v.4:no.1** \$2 spa \$5 CU

**Subfield 2** (Source of Term) always holds the value “spa” when \$a is “completeness reviewed.” Use of \$2 spa commits the user to full compliance with these terms.

### Example:

583 1# \$a completeness reviewed \$b ka \$c 20211103 \$f EAST \$h Vassar College staff **\$2 spa** \$5 NPV

**Subfield 5** (Institution to Which Field Applies) always holds the user’s assigned MARC institutional code. Institution codes can be found at:

<http://www.loc.gov/marc/bibliographic/ecbdorg.html>

### Example:

583 1# \$a completeness reviewed \$c 20141014 \$f FLARE \$2 spa **\$5 FIGaFAR**

The materials in this example were reviewed for completeness by the Florida Academic Repository (FLARE).

\$a (Action) = condition reviewed<sup>25</sup>

### Subfields Used in Conjunction with \$a condition reviewed

**Mandatory subfields: \$a, \$c, \$f, and \$2**

**Recommended subfields: \$3, \$b, \$h, \$i, \$l, \$z, and \$u**

**Subfield 3** (Materials Specified) may be used to specify distinct parts of a title or item, including structural and physical parts where materials described by \$a are a subset of summary holdings otherwise indicated in 86X fields. If the reviewed holdings are a subset of summary holdings recorded in 86x fields, use of the \$3 is mandatory. Free text is allowed, but should be consistent with current MARC and [ANSI/NISO Z39.71 standards for holdings statements](#). The following are examples, *not standard terms*.

Accompanying  
pp. [#]  
v. [#]  
map(s)

When \$3 is used, it is always the first subfield to be listed in the 583. It is positioned before the \$a.

Example:

583 1# \$3 v.5 \$a condition reviewed \$c 20140915 \$f WEST \$i issue-level \$2 spa

Use of the \$3 is required where holdings to which the action applies do not match LHR 85x/86x or 866.

**Subfield b** (Action Identification) may be used to record the code corresponding to the \$a action term. The action identification code is always “ha” when \$a is “condition reviewed.”

Example:

583 1# \$3 v.5 \$a condition reviewed \$b ha \$c 20040915 \$f Maine SC \$2 spa \$5  
CSt

**Subfield c** (Time/date of Action) must be used to record the date of action (*condition reviewed*). Dates are always recorded in ISO 8601, the International Date Standard format (e.g., **YYYYMMDD**), with hyphens omitted. Use of months and days is not required.

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<sup>25</sup> The following guidelines for the construction of MARC 583 fields where \$a (Action) is “condition reviewed” have been adapted from the [Preservation and Digitization Actions: Terminology for MARC 21 Field 583](#) to apply those rules specifically to shared print use cases. The Shared Print and Preservation communities have collaboratively aligned the \$l (Status) terms for “condition reviewed.” Users seeking more information about preservation use cases should look to the *PDA: Terminology* document as the authoritative source of information for this action.

## MARC 583 \$2 Shared Print Actions

### Example:

583 1# \$a condition reviewed \$c 20160922 \$f WEST \$i volume-level \$l highlighting \$z highlighting v.1, 5 \$2 spa \$5 AzTeS

The holdings were physically reviewed for condition at the volume level by Arizona State University on September 22, 2016.

**Subfield d** (Action Interval) may be used to indicate a regular or irregular schedule for reviewing the condition of the materials.

**Subfield f** (Authorization) must be used to record the shared print program under whose auspices and policies the condition review was conducted.

**Subfield h** (Jurisdiction) may be used to record the name of a person, an institution, or a position or function within the institution, in whom or which responsibility for an action is vested.

### Example:

583 1# \$a condition reviewed \$b ha \$c 20180715 \$f WEST \$h UC NRLF staff \$i issue-level \$l highlighting \$z highlighting v.1, 5 \$2 spa \$5 CU-NL

Staff at the UC Northern Regional Library Facility conducted the condition review on July 15, 2018.

**Subfield i** (Method of Action) refers to the level at which the condition of the materials was reviewed. Standardized terminology should be used in \$i when \$a is condition reviewed.

Standard \$i terms used when \$a = condition reviewed
volume-level
issue-level
page-level

*Note:* Use of the terms above is encouraged. If alternate terms are necessary, however, record them using natural language in \$x or \$z.

### Example:

583 1# \$a condition reviewed \$b ha \$c 20200111 \$f North/Nord \$i volume-level \$2 spa

### Example:

583 1# \$a condition reviewed \$c 20200111 \$f Maine SC \$i page-level \$2 spa

## MARC 583 \$2 Shared Print Actions

**Subfield j** (Site of Action) may be used to record the site at which the described action has been undertaken.

**Subfield k** (Action Agent) may be used to record the person or organization performing the action (e.g., vendor or service provider).

**Subfield l** (Status) contains the condition or state of the described materials, sometimes but not always resulting from an action. The standardized terminology listed below should be used. In general, \$x or \$z should be used when none of the standardized language fits the circumstances. Subfields x or z may also be used in addition to \$l to provide greater detail.

Standard \$l terms used when \$a = condition reviewed	
Term	Usage guidelines
acidic paper	Method used to identify acidic paper should be reported in \$z Public note, e.g. pH pen test etc.
alkaline paper	Method used to identify alkaline paper should be reported in \$z Public note, e.g. publisher note on title page, pH pen test etc.
brittle paper	Assessment method and outcome should be reported in \$z Public note, e.g. Double Fold test – breakage on second fold.
cockled	Use \$z Public note to specify pages, issues, or volumes that are cockled or have portions that are cockled.
defaced	Use \$z Public note to specify what has been defaced (e.g., images, words, names) and the extent of the defacement (e.g., all, several, 10%)
faded	Specify faded text, faded cover, etc. Use \$z Public note to specify which pages, issues or volumes are faded.
foxed	Specify foxed pages, foxed cover, etc. Use \$z Public note to specify which pages, issues or volumes are foxed.

**MARC 583 \$2 Shared Print Actions**

<b>Standard \$1 terms used when \$a = condition reviewed</b>	
<b>Term</b>	<b>Usage guidelines</b>
highlighted	Use \$Z Public note to specify location of highlighted.
insect damaged	Use \$Z Public note to specify which pages, issues or volumes are insect damaged.
loose	Specify loose pages, loose binding, loose covers, etc. Use \$Z Public note to specify issue or volume with loose binding, covers, pages etc.
marginalia	Use \$Z Public note to specify issue or volume where marginalia is found.
mold damaged	Use \$Z Public note to specify which issues or volumes are damaged.
obscured text block	Use \$Z Public note to specify location of obscured text.
rebacked	Use \$Z Public note to specify which issues or volumes have been rebacked.
rehoused poorly	Use \$Z Public note to specify which issues or volumes were inappropriately rehoused, so that they may be identified for future preservation actions.
repaired poorly	Use \$Z Public note to specify which issues or volumes were inadequately or inappropriately repaired, so that they may be identified for future preservation action.
repaired soundly	Use \$Z Public note to specify which issues or volumes show evidence of prior repair.
stained	Specify covers, pages, etc. Use \$Z Public note to specify which pages, issues or volumes are stained.
tight binding	Use \$Z Public note to specify tightly bound issues or volumes.

MARC 583 \$2 Shared Print Actions

Standard \$I terms used when \$a = condition reviewed	
Term	Usage guidelines
torn	Specify covers, pages, etc. Use \$Z Public note to specify which pages, issues or volumes are torn.
undamaged	Use of the \$Z is not necessary if all materials are found to be undamaged.
underlined	Use \$Z Public note to specify location of underlined text.
warped	Use \$Z Public note to specify which pages, issues or volumes are warped.
yellowed/browning pages	Use \$Z Public note to specify location of yellowed or browning pages.

Example:

583 1# \$a condition reviewed \$c 20211202 \$f WEST \$i issue-level **\$I brittle paper** \$z Brittle paper \$2 spa \$5 MoU

Example:

583 1# \$3 v.1-v.20 \$a condition reviewed \$b ha \$c 20160713 \$f WEST \$i volume-level **\$I loose pages** \$z loose pages v.4 \$2 spa \$5 TxHR

**Subfield u** (Uniform Resource Identifier) is a URL or URN pointing to an Internet accessible database, containing more specific information about the condition review process (e.g., validation guidelines from the shared print program). Use of the \$U is highly encouraged when the review has been performed according to documented standards or guidelines.

Example:

583 1# \$a condition reviewed \$c 20041011 \$f WEST **\$u**  
<https://cdlib.org/wp-content/uploads/2022/04/WEST-Standards-for-Issue-and-Volume-Level-Validation.pdf> \$2 spa \$5 CU-NL

**Subfield x** (Nonpublic Note) is used when further explanation is desirable without displaying the information to the general public.

Example:

583 1# \$a condition reviewed \$c 2004 \$f EAST \$i defaced **\$x faces in illustrations are blacked out** \$2 spa \$5 NIC

## MARC 583 \$2 Shared Print Actions

### Example:

583 1# \$a condition reviewed \$b ha \$c 20200111 \$f HathiTrust Shared Print Program \$i volume-level **\$x poor \$2 spa**

In the first example, the note further describes the type of defacement but does not share this description with the public.

In the second example, the note indicates an overall assessment of the condition of the material, but does not share this information with the public.

**Subfield z** (Public Note) is used to communicate additional information or when further explanation is desirable.

### Example:

583 1# \$a condition reviewed \$b ha \$c 20050311 \$f HathiTrust Shared Print Program \$l highlighted **\$z highlighting on several pages \$2 spa**

**Subfield 2** (Source of Term) always holds the value “spa” when \$a is “condition reviewed.” Use of \$2 spa commits the user to full compliance with these terms as described in the SPA: Terminology document.

### Example:

583 1# \$a condition reviewed \$c 20050201 \$f SCEL Shared Print **\$2 spa**

**Subfield 5** (Institution to Which Field Applies) always holds the user’s assigned institutional code. Institution codes can be found at: <http://www.loc.gov/marc/bibliographic/ecbdorg.html>

### Example:

583 1# \$a condition reviewed \$c 20050221 \$l undamaged \$f Scholars Trust \$2 spa **\$5 FU**

Staff at the University of Florida (FU) reviewed the condition of the item in this example. On February 21, 2005 this item was in undamaged condition.

## **\$a (Action) = confirmed scarcity**

### Subfields Used in Conjunction with \$a confirmed scarcity

**Mandatory subfields: \$a, \$c, \$f, and \$2**

**Recommended subfields: \$3, \$b, \$h, \$i, \$l, \$z, and \$u**

**Subfield 3** (Materials Specified) may be used to specify distinct parts of a title or item, including structural and physical parts where materials described by \$a are a subset of summary

## MARC 583 \$2 Shared Print Actions

holdings otherwise indicated in 86X fields. If the holdings that are confirmed to be scarce are a subset of summary holdings recorded in 86x fields, use of the \$3 is mandatory. Free text is allowed, but should be consistent with current MARC and [ANSI/NISO Z39.71 standards for holdings statements](#). The following are examples, *not standard terms*.

Accompanying  
pp. [#]  
v. [#]  
map(s)

When \$3 is used, it is always the first subfield to be listed in the 583. It is positioned before the \$a.

Example:

583 1# \$3 accompanying videotape \$a confirmed scarcity \$c 20050406 \$f  
WEST \$2 spa \$5 MiU

Use of the \$3 is required where holdings to which the action applies do not match LHR 85x/86x or 866.

**Subfield b** (Action Identification) may be used to record the code corresponding to the \$a action term. The action identification code is always “sa” when \$a is “confirmed scarcity.”

Example:

583 1# \$3 v.5 \$a confirmed scarcity \$b sa \$c 20040915 \$f WEST \$2 spa \$5 CSt

**Subfield c** (Time/date of Action) must be used to record the date of action (*confirmed scarcity*). Dates are always recorded in ISO 8601, the International Date Standard format (e.g., YYYYMMDD), with hyphens omitted. Use of months and days is not required.

Example:

583 1# \$a confirmed scarcity \$b sa \$c 20160922 \$f WEST \$i program-level \$2  
spa \$5 AzTeS

The holdings were physically reviewed for confirmed scarcity at the program level by Arizona State University on September 22, 2016.

**Subfield d** (Action Interval) may be used to indicate a regular or irregular schedule for confirming scarcity of the materials.

**Subfield f** (Authorization) must be used to record the shared print program under whose auspices and policies the scarcity confirmation was conducted.

## MARC 583 \$2 Shared Print Actions

**Subfield h** (Jurisdiction) may be used to record the name of a person, an institution, or a position or function within the institution, in whom or which responsibility for an action is vested.

Example:

583 1# \$a confirmed scarcity \$b sa \$c 202201115 \$f WEST \$h **WEST program staff** \$i national-level \$x WEST project to identify titles scarcely held in the US \$2 spa

Example:

583 1# \$a confirmed scarcity \$c 20160922 \$f EAST \$h **Mount Holyoke College staff** \$i institution-level \$l last copy \$z last copy in institution \$x do not withdraw \$2 spa

**Subfield i** (Method of Action) refers to the level at which the scarcity was reviewed and confirmed. Standardized terminology should be used in \$i when \$a is confirmed scarcity.

Standard \$i terms used when \$a = confirmed scarcity
institution-level
program-level
national-level
international-level

*Note:* Use of the terms above is encouraged. If alternate terms are necessary, however, record them using natural language in \$x or \$z.

Example:

583 1# \$a confirmed scarcity \$c 20200111 \$f FLARE \$i **institution-level** \$l last copy \$2 spa

Example:

583 1# \$a confirmed scarcity \$c 20200111 \$f EAST \$i **international-level** \$i 5 or fewer copies \$2 spa

**Subfield j** (Site of Action) may be used to record the site at which the described action has been undertaken.

**Subfield k** (Action Agent) may be used to record the person or organization performing the action (e.g., vendor or service provider).

## MARC 583 \$2 Shared Print Actions

**Subfield I** (Status) contains the condition or state of the described materials, sometimes but not always resulting from an action. The standardized terminology listed below should be used. In general, \$x or \$Z should be used when none of the standardized language fits the circumstances. Subfields x or \$Z may also be used in addition to \$I to provide greater detail.

Standard \$I terms used when \$a = confirmed scarcity	
Term	Usage guidelines
5 or fewer copies	Use \$i to indicate level of review and use the \$Z to record additional details as needed
last copy	Use \$i to indicate level of review and use \$Z to record additional details as needed
other	Use \$i to indicate level of review and use \$Z to record additional details as needed

Example:

583 1# \$a confirmed scarcity \$c 20211202 \$f WEST \$i program-level **\$I last copy** \$z last copy in WEST \$2 spa \$5 MoU

Example:

583 1# \$a confirmed scarcity \$c 20211202 \$f WEST \$i national-level **\$I other** \$Z 10 copies in OCLC \$2 spa \$5 MoU

**Subfield u** (Uniform Resource Identifier) is a URL or URN pointing to an Internet accessible database, containing more specific information about the criteria for determining the scarcity of the holdings. Use of the \$u is highly encouraged when the determination has been made according to documented criteria.

Example:

583 1# \$a confirmed scarcity \$c 20041011 \$f WEST **\$u**  
<https://drive.google.com/file/d/1ZBYjLiiZHbnAudQgDEzPhfht1tw83M4h/view>  
**\$u** \$I last copy \$z Rosemont Last Known Copy \$2 spa \$5 CU-NL

**Subfield x** (Nonpublic Note) is used when further explanation is desirable without displaying the information to the general public.

Example:

583 1# \$3 v.1-v.20 \$a confirmed scarcity \$c 20160713 \$f WEST \$i international-level \$I 5 or fewer copies **\$x 5 or fewer copies identified internationally using OCLC** \$2 spa \$5 TxHR

## MARC 583 \$2 Shared Print Actions

In this case, the note further describes how the scarcity review was performed but does not share this description with the public.

**Subfield z** (Public Note) is used to communicate additional information or when further explanation is desirable.

Example:

583 1# \$a confirmed scarcity \$b sa \$c 20050311 \$f EAST \$i national-level \$l last copy **\$z Rosemont Last Known Copy \$2 spa \$5 NAnB**

Example:

583 1# \$3 maps \$a confirmed scarcity \$c 20050311 \$f EAST \$i institution-level \$l last copy **\$z last copy in institution \$2 spa \$5 NAnB**

**Subfield 2** (Source of Term) always holds the value “spa” when \$a is “confirmed scarcity.” Use of \$2 spa commits the user to full compliance with these terms as described in the *SPA: Terminology* document.

Example:

583 1# \$a confirmed scarcity \$b sa \$c 20050201 \$f Washington Research Library Consortium (WRLC) **\$2 spa**

**Subfield 5** (Institution to Which Field Applies) always holds the user’s assigned institutional code. Institution codes can be found at:

<http://www.loc.gov/marc/bibliographic/ecbdorg.html>

Example:

583 1# \$a confirmed scarcity \$c 20050221 \$f Scholars Trust \$2 spa **\$5 FU**

Staff at the University of Florida (FU) confirmed the scarcity of the item in this example on February 21, 2005.

## \$a (Action) = metadata reviewed

### Subfields Used in Conjunction with \$a metadata reviewed

**Mandatory subfields: \$a, \$f, and \$2**

**Recommended subfields: \$b, \$c, \$h, and \$u**

**Subfield 3** (Materials Specified) may be used to specify distinct parts of a title or item, including structural and physical parts where materials described by \$a are a subset of summary holdings otherwise indicated in 86X fields. If the holdings that have had their metadata reviewed are a subset of summary holdings recorded in 86x fields, use of the \$3 is mandatory.

## MARC 583 \$2 Shared Print Actions

Free text is allowed, but should be consistent with current MARC and [ANSI/NISO Z39.71 standards for holdings statements](#). The following are examples, *not standard terms*.

Accompanying  
pp. [#]  
v. [#]  
map(s)

When \$3 is used, it is always the first subfield to be listed in the 583. It is positioned before the \$a.

Example:

583 1# \$3 accompanying videotape \$a metadata reviewed \$c 20050406 \$f  
HathiTrust Shared Print Program \$i item-level \$2 spa \$5 MiU

Use of the \$3 is required where holdings to which the action applies do not match LHR 85x/86x or 866.

**Subfield b** (Action Identification) may be used to record the code corresponding to the \$a action term. The action identification code is always “ma” when \$a is “metadata reviewed.”

Example:

583 1# \$3 v.5 \$a metadata reviewed \$b ma \$c 20040915 \$f WEST \$2 spa \$5  
CSt

**Subfield c** (Time/date of Action) must be used to record the date of action (*metadata reviewed*). Dates are always recorded in ISO 8601, the International Date Standard format (e.g., YYYYMMDD), with hyphens omitted. Use of months and days is not required.

Example:

583 1# \$a metadata reviewed \$c 20160922 \$f WEST \$i item-level \$2 spa \$5  
AzTeS

The metadata for this holdings was reviewed at the item level by Arizona State University on September 22, 2016.

**Subfield d** (Action Interval) may be used to indicate a regular or irregular schedule for reviewing the metadata in the record.

**Subfield f** (Authorization) must be used to record the shared print program under whose auspices and policies the metadata review was conducted.

**Subfield h** (Jurisdiction) may be used to record the name of a person, an institution, or a position or function within the institution, in whom or which responsibility for an action is vested.

## MARC 583 \$2 Shared Print Actions

### Example:

583 1# \$a metadata reviewed \$f HathiTrust Shared Print Program \$h  
**University of Michigan staff \$i bibliographic-level \$2 spa \$5 MiU**

**Subfield i** (Method of Action) refers to the level at which the metadata was reviewed. Standardized terminology should be used in \$i when \$a is metadata reviewed.

<b>Standard \$i terms used when \$a = metadata reviewed</b>
item-level
holdings-level
bibliographic-level

*Note:* Use of the terms above is encouraged. If alternate terms are necessary, however, record them using natural language in \$X or \$Z.

### Example:

583 1# \$a metadata reviewed \$b ma \$c 20200111 \$f UCL Shared Print \$i  
**item-level \$i bibliographic-level \$2 spa**

### Example:

583 1# \$a metadata reviewed \$c 20200111 \$f Ivy Plus Libraries Confederation \$i  
**holdings-level \$2 spa**

**Subfield j** (Site of Action) may be used to record the site at which the described action has been undertaken.

**Subfield k** (Action Agent) may be used to record the person or organization performing the action (e.g., vendor or service provider).

**Subfield l** (Status) contains the condition or state of the described materials, sometimes but not always resulting from an action. Since \$l is regarding the physical described material and this action is dealing with the metadata there are no recommended standard \$l terms when \$a is “metadata reviewed.”

**Subfield u** (Uniform Resource Identifier) is a URL or URN pointing to an Internet accessible database, containing more specific information about the criteria for reviewing the metadata. Use of the \$u is highly encouraged when the determination has been made according to documented criteria.

### Example:

583 1# \$a metadata reviewed \$b ma \$c 20041011 \$f HathiTrust Shared Print  
Program \$u

## MARC 583 \$2 Shared Print Actions

[https://docs.google.com/document/d/1ysirS\\_x3c4lfHsE4D4h6M6cH15ww0\\_IR4zi7rDYNfjo/edit?usp=sharing](https://docs.google.com/document/d/1ysirS_x3c4lfHsE4D4h6M6cH15ww0_IR4zi7rDYNfjo/edit?usp=sharing) \$2 spa \$5 CU-NL

**Subfield x** (Nonpublic Note) is used when further explanation is desirable without displaying the information to the general public.

Example:

583 1# \$a metadata reviewed \$c 2004 \$f HathiTrust Shared Print Program \$u [https://docs.google.com/document/d/1ysirS\\_x3c4lfHsE4D4h6M6cH15ww0\\_IR4zi7rDYNfjo/edit?usp=sharing](https://docs.google.com/document/d/1ysirS_x3c4lfHsE4D4h6M6cH15ww0_IR4zi7rDYNfjo/edit?usp=sharing) \$x HathiTrust Phase 3 metadata validation project \$2 spa \$5 NIC

In this case, the note further describes the type of defacement but does not share this description with the public.

**Subfield z** (Public Note) is used to communicate additional information or when further explanation is desirable.

Example:

583 1# \$a metadata reviewed \$c 2004 \$f HathiTrust Shared Print Program \$u [https://docs.google.com/document/d/1ysirS\\_x3c4lfHsE4D4h6M6cH15ww0\\_IR4zi7rDYNfjo/edit?usp=sharing](https://docs.google.com/document/d/1ysirS_x3c4lfHsE4D4h6M6cH15ww0_IR4zi7rDYNfjo/edit?usp=sharing) \$z HathiTrust Phase 3 metadata validation project \$2 spa \$5 NIC

**Subfield 2** (Source of Term) always holds the value “spa” when \$a is “metadata reviewed.” Use of \$2 spa commits the user to full compliance with these terms as described in the *SPA: Terminology* document.

Example:

583 1# \$a metadata reviewed \$b ma \$c 20050201 \$f ALI-PALNI Shared Print Project \$2 spa

**Subfield 5** (Institution to Which Field Applies) always holds the user’s assigned institutional code. Institution codes can be found at:

<http://www.loc.gov/marc/bibliographic/ecbdorg.html>

Example:

583 1# \$a metadata reviewed \$f FLARE \$2 spa \$5 FU

Staff at the University of Florida (FU) reviewed the metadata of the holdings in this example on February 21, 2005.

\$a (Action) = transferred to optimal storage<sup>26, 27</sup>

### Subfields Used in Conjunction with \$a transferred to optimal storage

**Mandatory subfields: \$a, \$f, and \$2**

**Recommended subfields: \$b and \$c**

**Subfield 3** (Materials Specified) may be used to specify distinct parts of a title or item, including structural and physical parts where materials described by \$a are a subset of summary holdings otherwise indicated in 86X fields. If the transferred holdings are a subset of summary holdings recorded in 86x fields, use of the \$3 is mandatory. Free text is allowed, but should be consistent with current MARC and [ANSI/NISO Z39.71 standards for holdings statements](#). The following are examples, *not standard terms*.

Accompanying  
pp. [#]  
v. [#]  
map(s)

When \$3 is used, it is always the first subfield to be listed in the 583. It is positioned before the \$a.

Example:

583 1# \$3 **accompanying videotape** \$a transferred to optimal storage \$c  
20050406 \$f HathiTrust Shared Print Program \$2 spa \$5 MiU

Use of the \$3 is required where holdings to which the action applies do not match LHR 85x/86x or 866.

**Subfield b** (Action Identification) may be used to record the code corresponding to the \$a action term. The action identification code is always “ta” when \$a is “transferred to optimal storage.”

Example:

583 1# \$3 v.5 \$a transferred to optimal storage **\$b ta** \$c 20040915 \$f Ivy Plus  
Libraries Confederation \$2 spa \$5 CSt

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<sup>26</sup> The following guidelines for the construction of MARC 583 fields where \$a (Action) is “transferred to optimal storage” have been adapted from the [Preservation and Digitization Actions: Terminology for MARC 21 Field 583](#) to apply those rules specifically to shared print use cases. Users of this *SPA: Terminology* document should look to the *PDA: Terminology* document as the authoritative source of information for this action.

<sup>27</sup> For shared print purposes, the state of being in storage is more critical than the act of transferring to storage. However, because this is an established Action Term in *PDA: Terminology*, the same action is retained in *SPA: Terminology* for consistency and to support data analysis in the future.

## MARC 583 \$2 Shared Print Actions

**Subfield c** (Time/date of Action) is used to record the date of action (*transferred to optimal storage*). Dates are always recorded in ISO 8601, the International Date Standard format (e.g., YYYYMMDD), with hyphens omitted. Use of months and days is not required. If the date the materials are transferred is known, it should be recorded in the \$c. If the date of transfer is not known, it should not be recorded.

Example:

583 1# \$a transferred to optimal storage \$b ta \$c 20041211 \$f HathiTrust  
Shared Print Program \$2 spa \$5 MiU

This item was transferred to optimal storage on December 11, 2004.

Example:

583 1# \$a transferred to optimal storage \$f WEST \$2 spa \$5 AzTeS

This item was transferred to optimal storage, but the date of transfer is unknown so no \$c is recorded.

**Subfield f** (Authorization) must be used to record the shared print program under whose auspices and policies the transfer to storage was conducted.

**Subfield h** (Jurisdiction) may be used to record the name of a person, an institution, or a position or function within the institution, in whom or which responsibility for an action is vested.

**Subfield i** (Method of Action) is not generally used when \$a action is transferred to optimal storage. No standard \$i terms exist for use.

**Subfield j** (Site of Action) may be used to record the site at which the described action has been undertaken.

**Subfield k** (Action Agent) may be used to record the person or organization performing the action (e.g., vendor or service provider).

**Subfield u** (Uniform Resource Identifier) is a URL or URN pointing to an Internet accessible database, containing more specific information about the optimal storage facility and its environment. Use of the \$u is highly encouraged when this information is available.

Example:

583 1# \$a transferred to optimal storage \$f HathiTrust Shared Print Program \$u  
<http://www.umich.edu/pres/buhr=aaa0123> \$2 spa \$5 MiU

**Subfield x** (Nonpublic Note) is used when further explanation is desirable without displaying the information to the general public.

## MARC 583 \$2 Shared Print Actions

### Example:

583 1# \$a transferred to optimal storage \$c 2004 \$f UCL Shared Print **\$x Annex 50/30 \$2 spa**

In this case, the library has chosen to add a non-public note indicating the location as “Annex” and “50/30” to reflect an environment with ideal conditions for that material type (50 degrees F, 30% relative humidity).

**Subfield z** (Public Note) is used to communicate additional information or when further explanation is desirable.

### Example:

583 1# \$a transferred to optimal storage \$b ta \$c 20050407 \$f SCEL Shared Print **\$z Iron Mountain \$2 spa**

In this case, the institution wishes to distribute the information that the item has been transferred to optimal storage and that the off-site facility is an Iron Mountain facility.

**Subfield 2** (Source of Term) always holds the value “spa” when \$a is “transferred to optimal storage.” Use of \$2 spa commits the user to full compliance with these terms.

### Example:

583 1# \$a transferred to optimal storage \$c 20050201 \$f FLARE **\$2 spa**

**Subfield 5** (Institution to Which Field Applies) always holds the user’s assigned institutional code. Institution codes can be found at: <http://www.loc.gov/marc/bibliographic/ecbdorg.html>.

### Example:

583 1# \$a transferred to optimal storage \$b ta \$c 20050221 \$f HathiTrust Shared Print Program \$2 spa **\$5 MiU**

The University of Michigan (MiU) transferred this item to optimal storage on February 21, 2005.

## PART 3 Data Dictionary of Shared Print Actions

### Terminology

Controlled vocabulary (for use in \$a, \$i, and \$l)

Term	Definition <sup>28</sup>	Usage
5 or fewer copies	Reviewing scarcity for a title across 5 or fewer holding libraries.	\$l, when \$a=confirmed scarcity
acidic paper	Paper with a pH below 7. May show signs of yellowing, foxing, and brittleness.	\$l, when \$a=condition reviewed
alkaline paper	Paper with a pH above 7. May also be called acid-free paper.	\$l, when \$a=condition reviewed
bibliographic-level	Reviewing metadata for an item or set of items in any physical form, either serial or nonserial, published, issued or treated as an entity and, as such, forming the basis for a single bibliographic description.	\$i, when \$a=metadata reviewed
binding patterns vary	The covers holding the pages of a book together in which they are not consistent across the title. <i>Examples: Vols 32-35 bound as a single unit.</i>	\$l, when \$a=completeness reviewed
brittle paper	Paper that easily breaks with comparatively smooth fracture. The paper has rigidity but lacks tensile strength.	\$l, when \$a=condition reviewed
cockled	Distorted paper that can show as wrinkles, ripples, and puckers.	\$l, when \$a=condition reviewed
completeness reviewed	The examination of items and the subsequent recording of their completeness under \$l (Status).	\$a

<sup>28</sup> Definitions were created using a combination of PDA definitions, [Cataloger's Reference Shelf](#), and the [Partnership for Shared Book Collection's Glossary](#).

**MARC 583 \$2 Shared Print Actions**

Term	Definition <sup>28</sup>	Usage
committed to retain	Commitment by the institution to retain the materials for a given shared print program (or multiple programs, recorded in the \$f) for the duration stipulated by the shared print program(s) (recorded in the \$d).	\$a
condition reviewed	The examination of items and the subsequent recording of their physical state under \$l (Status). May be used internally to record survey results and later retrieve items for a specific treatment. <i>Examples: brittle, mutilated, rehoused poorly</i>	\$a
confirmed scarcity	The examination of items and the subsequent recording of their scarcity across a specific group or collection. tease out use cases to determine \$l terminology and instructions for \$z.	\$a
defaced	The appearance is damaged at the surface level which may affect legibility. Example damage may include but is not limited to scratching, drawing, and painting.	\$l, when \$a=condition reviewed
facsimile	Generation of a paper copy from the original paper format (e.g., book, manuscript, map, plates) using the same collation as the original. A facsimile attempts to reproduce the visual and tactile qualities of the original. Requires adherence to preservation standards for paper quality and image permanence. Whole volumes are bound. A master copy of the digital intermediate may be retained.	\$l, when \$a=completeness reviewed
faded	A diminishment of color or tone, usually due to exposure to light.	\$l, when \$a=condition reviewed
foxed	Describes paper with golden, tan, or brown marks that form due to a chemical reaction between acid in the paper and moisture in the air.	\$l, when \$a=condition reviewed

**MARC 583 \$2 Shared Print Actions**

Term	Definition <sup>28</sup>	Usage
highlighted	Parts of the text or images are marked in a different color from the original publication.	\$l, when \$a=condition reviewed
holdings-level	Reviewing metadata for a title using the record of the locations(s) and bibliographic units of a specific bibliographic item held at one or more locations.	\$i, when \$a=metadata reviewed
incomplete	Lacking all the necessary parts, including cases where published pieces were not received (as in the case of serials subscriptions).	\$l, when \$a=completeness reviewed
insect damaged	The evidence of damage may include tunnels, holes, losses, and stains spread throughout the textblock and found in the spine margins. Text and images may be obscured.	\$l, when \$a=condition reviewed
institution-level	Reviewing scarcity for a title using a comparator group of a defined institution.	\$i, when \$a=confirmed scarcity
international-level	Reviewing scarcity for a title using a comparator group of international entities.	\$i, when \$a=confirmed scarcity
issue-level	Reviewing completeness or condition for a title at the specific publication of a serial or periodical level.	\$i, when \$a=completeness reviewed or condition reviewed
item-level	The physic unit or a single exemplar or instance of a man infestation.	\$i, when \$a=metadata reviewed
last copy	A title held by only one library across a defined entity.	\$l, when \$a=confirmed scarcity

**MARC 583 \$2 Shared Print Actions**

Term	Definition <sup>28</sup>	Usage
lost	An item that was at one point part of the collection, but is no longer on the shelf.	\$l, when \$a=completeness reviewed
loose	The text block or individual pages are coming free from the binding.	\$l, when \$a=condition reviewed
marginalia	Notes in the margins of a book made of marks, doodles, or comments.	\$l, when \$a=condition reviewed
metadata reviewed	The examination of metadata describing an item and the subsequent recording of the process used to review the metadata.	\$a
missing	An item that cannot be found on the shelf or on the location identified in the local catalog. This term is agnostic as to why the item may be missing, as opposed to “incomplete” and “lost,” above, which encode information about whether the materials were ever included in the collection or not.	\$l, when \$a=completeness reviewed
mold damaged	Describes a book discolored, stained or otherwise altered by the growth of mold, which may be either active or dormant at the time of discovery.	\$l, when \$a=condition reviewed
national level	Reviewing scarcity for a title using a comparator group of a defined nation.	\$i, when \$a=confirmed scarcity
obscured text block	Parts of the text and/or images are blocked from viewing or illegible through damage to the surface or a covering applied to the surface. This damage would not include physical losses of paper.	\$l, when \$a=condition reviewed
other	Standard term used when other standard term is not applicable. Record action using natural language in \$x (non-public note) or \$z (public note). This will be necessary more often with non-print formats for which a standard terminology has not yet been established.	\$l, when \$a=confirmed scarcity

**MARC 583 \$2 Shared Print Actions**

Term	Definition <sup>28</sup>	Usage
page-level	Reviewing completeness or condition for a title by examining both sides of each page in the item.	\$i, when \$a=completeness reviewed or condition reviewed
program-level	Reviewing scarcity for a title using a comparator group of a shared print program.	\$i, when \$a=confirmed scarcity
rebacked	The original spine of a bound book or manuscript has been replaced.	\$l, when \$a=condition reviewed
rehoused poorly	Additional storage container for the object (not original to the object at the time of its creation) which is not meeting the preservation needs of the object. This may include (but is not limited to) poor fit, inferior material qualities, or the deteriorating condition of the storage housing.	\$l, when \$a=condition reviewed
repaired poorly	Item has been repaired (determined via physical inspection or knowledge of the object's provenance) and the repair shows evidence of imperfect execution, early deterioration, or causing damage to the original object.	\$l, when \$a=condition reviewed
repaired soundly	Item has been repaired (determined via physical inspection or knowledge of the object's provenance) and the repair is well-executed with no evidence of deterioration or of causing damage to the original object.	\$l, when \$a=condition reviewed
reprints	A commercial paper copy reissued by the publisher, or a re-publication of an item, which is often done by a publisher. Unlike an edition, there are no substantial changes made in a reprint.	\$l, when \$a=completeness reviewed

**MARC 583 \$2 Shared Print Actions**

Term	Definition <sup>28</sup>	Usage
stained	Item has sustained discoloration from contact with foreign materials (e.g., dirt, coffee).	\$l, when \$a=condition reviewed
tight binding	The binding of the text block is tight enough to make it difficult to open the book and can prevent it from staying open at a safe angle. Damage to the binding or pages may be unavoidable when the book is open wide enough for use without obscuring text or images close to the gutter.	\$l, when \$a=condition reviewed
torn	Describes cloth or paper which has split from being pulled apart by force or stress over time.	\$l, when \$a=condition reviewed
transferred to optimal storage	Placement of an item in an environment that meets preservation standards for relative humidity, temperature, light exposure, air quality, and emergency preparedness for the housing of that material type. <i>Example: transfer to a newly constructed off-site storage facility designed to preservation specifications.</i>	\$a
undamaged	Item has no wear or tear negatively impacting its appearance or function.	\$l, when \$a=condition reviewed
underlined	A line has been drawn under parts of the text in ink or pencil for emphasis.	\$l, when \$a=condition reviewed
volume-level	Reviewing completeness or condition for a title at a level that has its own title-page and pagination and bound within a cover.	\$i, when \$a=completeness reviewed or condition reviewed
warped	A curved or bent type of distortion to a rigid or semi-rigid material, such as a hardback book cover.	\$l, when \$a=condition reviewed

**MARC 583 \$2 Shared Print Actions**

Term	Definition <sup>28</sup>	Usage
will commit to retain	See “committed to retain”	\$a
will not commit to retain	See “committed to retain”	\$a
will not confirm scarcity	See “confirmed scarcity”	\$a
will not review condition	See “condition reviewed”	\$a
will not review for completeness	See “completeness reviewed”	\$a
will not review metadata	See “metadata reviewed”	\$a
will not transfer to optimal storage	See “transferred to optimal storage”	\$a
will confirm scarcity	See “confirmed scarcity”	\$a
will review for completeness	See “completeness reviewed”	\$a
will review condition	See “condition reviewed”	\$a
will transfer to optimal storage	See “transferred to optimal storage”	\$a
yellowed/browning pages	Paper that has become more discolored over time due to conditions such as foxing, embrittlement, poor air quality, high humidity, ultraviolet light exposure, dust accumulation, and off-gassing.	\$l, when \$a=condition reviewed

## Subfield b codes

SPA defines \$b action identification codes for each version of each \$a action term (completed, prospective, and negative decision versions). SPA is focused on completed actions, but also defines terms for prospective actions and negative decisions to support libraries and shared print programs that may find them valuable. Action identification codes are also defined for prospective actions and negative decisions to further support libraries and programs that choose to use these action terms in their work.

**Construction note:**

- The first character stands for the action (e.g. a = retain, k = completeness review, etc.)
- The second character stands for the status of the action (e.g. a = completed, b = prospective and c = negative decision [an internal logic repeated for each action])

\$a action term	\$b action identification code	Action status
committed to retain	aa	Completed action
will commit to retain	ab	Prospective action
will not commit to retain	ac	Negative decision
completeness reviewed	ka	Completed action
will review for completeness	kb	Prospective action
will not review for completeness	kc	Negative decision
condition reviewed	ha	Completed action
will review condition	hb	Prospective action
will not review condition	hc	Negative decision
confirmed scarcity	sa	Completed action
will confirm scarcity	sb	Prospective action
will not confirm scarcity	sc	Negative decision
metadata reviewed	ma	Completed action
will review metadata	mb	Prospective action
will not review metadata	mc	Negative decision

**MARC 583 \$2 Shared Print Actions**

<b>\$a action term</b>	<b>\$b action identification code</b>	<b>Action status</b>
transferred to optimal storage	ta	Completed action
will transfer to optimal storage	tb	Prospective action
will not transfer to optimal storage	tc	Negative decision

## Appendix A: Relevant Standards and Guidelines

### **\$a action = “committed to retain”**

Britton, Scott, and John Renaud. *Print Retention Decision Making*. Association of Research Libraries, 2013.

### **\$a action = “completeness reviewed”**

Koch, Teresa, and Andrew J. Welch. “Collaborative Librarianship: Five Years and Counting.” *Collaborative Librarianship*, vol. 8, no. 3, 2016, <https://doi.org/https://digitalcommons.du.edu/collaborativelibrarianship/vol8/iss3/7>.

### **\$a action = “condition reviewed”**

Amato, Sara and Susan Stearns. “Documenting the Stewardship of Libraries: The Eastern Academic Scholars’ Trust Validation Sample Studies,” *Collaborative Librarianship*, vol. 10, no. 3, 2018. <https://digitalcommons.du.edu/collaborativelibrarianship/vol10/iss3/4>

American Institution for Conservation. “Lexicon,” *AIC Wiki*. <https://www.conservation-wiki.com/wiki/Lexicon>. Accessed 27 February 2024.

ISO 11798: 2023 *Information and documentation — Permanence and durability of writing, printing, and copying on paper*. Geneva, Switzerland: International Organization for Standardization, 2023.

Koch, Teresa, and Andrew J. Welch. “Monograph Validation Strategies in Shared Print Programs: Variations and Value.” *Collaborative Librarianship*, vol. 8, no. 3, 2016. <https://digitalcommons.du.edu/collaborativelibrarianship/vol8/iss3/7>.

### **\$a action = “confirmed scarcity”**

ACRL. “Guidelines on the Selection and Transfer of Materials from General Collections to Special Collections.” *Association of College & Research Libraries (ACRL)*, 25 June 2015, [www.ala.org/acrl/standards/selctransfer](http://www.ala.org/acrl/standards/selctransfer).

France, F. and I. Bogus. *National Book Collection*, [nationalbookcollection.org/overview](http://nationalbookcollection.org/overview). Accessed 11 Aug. 2023.

OCLC. “Weeding and Deselection Bibliography.” *OCLC Support*, 4 Aug. 2023, [help.oclc.org/Library\\_Management/SCS\\_and\\_GreenGlass/Weeding\\_and\\_deselection\\_bibliography?sl=en#CollaborativeCollectionManagement](http://help.oclc.org/Library_Management/SCS_and_GreenGlass/Weeding_and_deselection_bibliography?sl=en#CollaborativeCollectionManagement).

## MARC 583 \$2 Shared Print Actions

Partnership for Shared Book Collections. “Best Practices for Scarce Copies.” *The Partnership For Shared Book Collections*, Dec. 2022, [sharedprint.org/best-practices/scarce-copies/](https://sharedprint.org/best-practices/scarce-copies/).

### **\$a action = “metadata reviewed”**

ISO 23081-1:2007 *Information and documentation — Records management processes — Metadata for records - Part 1: Principles*. Geneva, Switzerland: International Organization for Standardization, 2007.

ISO 23081-2:2021 *Information and documentation — Records management processes — Metadata for records - Part 2: Conceptual and Implementation issues*. Geneva, Switzerland: International Organization for Standardization, 2021.

ISO 23081-3:2011 *Information and documentation — Records management processes — Metadata for records - Part 3: Self-assessment method*. Geneva, Switzerland: International Organization for Standardization, 2011.

### **\$a action = “transferred to optimal storage”**

ISO 11799: 2003 *Information and documentation — Document storage requirements for archive and library materials*. Geneva, Switzerland: International Organization for Standardization, 2003.

ISO 18911: 2000 *Imaging Materials – Processed safety photographic films – Storage practices*. Geneva, Switzerland: International Organization for Standardization, 2000.

ISO 18918: 2000 *Imaging Materials – Processed photographic plates – Storage practices*. Geneva, Switzerland: International Organization for Standardization, 2000.

ISO 18920: 2000 *Imaging Materials – Processed photographic reflection prints – Storage practices*. Geneva, Switzerland: International Organization for Standardization, 2000.

ISO 18921: 2002 *Imaging Materials – Compact discs (CD-ROM) – Method for estimating the life expectancy based on the effects of temperature and relative humidity*. Geneva, Switzerland: International Organization for Standardization, 2002.

ISO 18923: 2000 *Imaging Materials – Polyester-base magnetic tape – Storage practices*. Geneva, Switzerland: International Organization for Standardization, 2000.

ISO 18924: 2000 *Imaging Materials – Test method of Arrhenius-type predictions*. Geneva, Switzerland: International Organization for Standardization, 2000.

## MARC 583 \$2 Shared Print Actions

- ISO 18925: 2002 *Imaging Materials – Optical disc media – Storage practices*. Geneva, Switzerland: International Organization for Standardization, 2002.
- ISO 18928: 2002 *Imaging Materials – Unprocessed photographic films and papers – Storage practices*. Geneva, Switzerland: International Organization for Standardization, 2002.
- ISO 18929: 2003 *Imaging Materials – Wet processed silver-gelatin type black-and-white photographic reflection prints – Specifications for dark storage*. Geneva, Switzerland: International Organization for Standardization, 2003.
- ISO/TR18931: 2001 *Imaging Materials – Recommendations for humidity measurement and control*. Geneva, Switzerland: International Organization for Standardization, 2001.
- ISO/DIS 18934 *Imaging Materials – Multiple media archives – Storage environment*. Geneva, Switzerland: International Organization for Standardization.
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- National Bureau of Standards (NBS). *Air Quality Standards for Storage of Paper-Based Archival Records*. BNSTR 83-2795. Gaithersburg, MD: NBS, 1983.
- National Information Standards Organization. *Environmental Guidelines for the Storage of Paper Records*. Technical Report. NISO-TR01-1995.
- Partnership for Shared Book Collections. “Best Practices for Moving Items to Storage.” *The Partnership For Shared Book Collections*, 5 May 2022, [sharedprint.org/best-practices/scarce-copies/](https://sharedprint.org/best-practices/scarce-copies/).
- Reilly, James M. *Storage Guide for Color Photographic Materials*. Rochester, NY: Image Permanence Institute, 1998.
- Reilly, James M., Douglas W. Nishimura, and Edward Zinn. *New Tools for Preservation/Assessing Long-Term Environmental Effects on Library and Archives Collections*. Washington, DC: Commission on Preservation and Access, 1995.