Registering EAST Commitments in OCLC

What you need to know and what to do next

June 29th, 10 a.m. / June 30th, 1 p.m. 2020
Who is on this call / Getting Help

EAST:  Sara Amato, Mei Mendez
       Matthew Revitt, Susan Stearns

OCLC:  Julie Nye, Kristin Ewig

CRL:   Amy Wood
Poll

Did you attend or watch the recording of the OCLC Shared Print Registration webinar held on June 17th?
Topics We Will Cover Today

- Registering Monographs
- Process and Results
- Viewing Retentions
- Errors and Cleanup

Quick comments on Registering Serials

Next Steps to Get Started
Why we are registering with OCLC?
Why Now?

Expose EAST Collective Collection in:
FirstSearch / WorldCat Discovery
Connexion
WorldShare Record & Collection Manager
OCLC Metadata API

GreenGlass access for C1/C2 ends January 2021
Overview of OCLC Service

Shared Print Registration Service
https://help.oclc.org/Metadata_Services/Shared_Print

Webinar Recording, Workflows, Templates
Thanks to our Testing Libraries!

Monographs - Bucknell, DeSales, Elms, Phillips, Exeter, UMass Lowell, Bryn Mawr

Serials - USCGA, MBL/WHOI, UMass Medical

Monographs and Serials - Siena College
Registering Monographs

Shared print registration workflows

The following workflows are available for registering shared print retention commitments.

I am an institution participating in a shared print program and I need to create a collection profile. I intend to submit my own data.

- If you would like OCLC to create a collection profile for you, send the required information in the [Collection profile template](mailto:sharedprint@oclc.org) with this request.
- If you would like to create a collection profile yourself:
  - WMS libraries: Follow the steps detailed in [Register shared print retention commitments for individual WMS libraries](mailto:sharedprint@oclc.org).
  - Non-WMS libraries: Follow the steps detailed in [Register shared print retention commitments for individual non-WMS libraries](mailto:sharedprint@oclc.org).

I am an institution participating in a shared print program and I need to create a collection profile. I will authorize an agent/group coordinator to submit my data.

- If you would like OCLC to create a collection profile for you, send the required information in the [Collection profile template](mailto:sharedprint@oclc.org) with this request.
- If you would like to create a collection profile yourself:
  - WMS libraries: Follow the steps detailed under [Register shared print retention commitments for individual WMS libraries](mailto:sharedprint@oclc.org).
  - Non-WMS libraries: Follow the steps detailed under [Register shared print retention commitments for individual non-WMS libraries](mailto:sharedprint@oclc.org).
- Once your collection profile has been created:
  - Add a comment in the Comments accordion that states the agent/group coordinator which has permission to submit your data (i.e., CRL, group admin, etc.)
  - Communicate your collection ID to the agent/group coordinator who will be submitting your data.
Individual institution

Submitting own data
- Create a collection profile
- Submit CSV file

An agent/group coordinator will submit my data
- Create a collection profile & indicate who is submitting your data
- Provide your collection ID and data to the agent/group coordinator
Collection Profile

Action (583 $a)

Archiving Program Name (583 $f) *

committed to retain

If all your programs have the same expiration date, enter each program below. Select from the list of available archiving programs.

EAST

Action Date (583 $c) *

20160625 (Format YYYYMMDD)

Retention Commitment Expiration Date (583 $d) *

20310630 (Format YYYYMMDD)
Registering Monographs

OCLC_Number

LSN

Blank Column unless you are a WMS Library

Barcode
Registering Monographs: LHRs

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

Move/Match Logic

- If no LHR exists
  - one is added

- If one LHR exists
  - the 583 information is merged into it

- If more than one LHR exists, but one is already designated as shared print
  - the data is merged into the Shared print LHR

- If more than one LHR exists but none are designated as shared print
  - a new shared print LHR is added
## Viewing Commitments

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

<table>
<thead>
<tr>
<th><strong>Cataloging Workflows (Cataloging Subscription)</strong></th>
<th>![SG: EAST]</th>
<th>![SH: NKF]</th>
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</thead>
<tbody>
<tr>
<td>Connexion</td>
<td>![Green Check]</td>
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<tr>
<td>WorldShare Collection Manager</td>
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<tr>
<td>WorldShare Record Manager</td>
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<th><strong>Discovery (Cataloging Subscription)</strong></th>
<th>![SG: EAST]</th>
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<tr>
<td>WorldCat Metadata API</td>
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<tr>
<th><strong>Discovery (FirstSearch/WorldCat Discovery Subscription)</strong></th>
<th>![SG: EAST]</th>
<th>![SH: NKF]</th>
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<tbody>
<tr>
<td>WorldCat Discovery</td>
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<tr>
<td>FirstSearch</td>
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| WorldCat.Org                                                | ![Red X]    |           |
Discover Shared Print Commitments

- **Connexion**: New shared print (group & institution) search indexes added
- **Record Manager**: New shared print (group & institution) search indexes added, Ability to delete shared print commitments
- **FirstSearch**: Limit by shared print commitments, View the # of total commitments that exist for a given record, View shared print commitments by record by library
- **Collection Manager**: Run queries to obtain access to LHR data (shared print & non), Data can be downloaded, scheduled, and delivered
- **WorldCat Metadata API**: Search bibliographic & holdings data on shared print commitments
<table>
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<tr>
<th>Summary</th>
<th>Leader</th>
<th>Local Holdings Available.</th>
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<tr>
<td>008</td>
<td>1903222u</td>
<td>0 4001aa 0190322</td>
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<tr>
<td>014</td>
<td>1</td>
<td>966410360</td>
</tr>
<tr>
<td>561</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>583</td>
<td>1</td>
<td>committed to retain $f OCWMS-SP $c 20180101 $d 20231231 $2 pda</td>
</tr>
<tr>
<td>852</td>
<td></td>
<td>OCWMS $b MAIN</td>
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The tragic story of a beautiful young woman caught up in the shallow and corrupt world of New York society at the turn of the century, where wealth and social status are everything.
Search: Action Note = committed to retain (My LHRs)

Select up to 100 records for performing tasks in the Actions menu.

Filter by Branch/Shelving Location: Any

Results 1 - 10 of 64400 (only first 1000 available.)

<table>
<thead>
<tr>
<th>Call Number</th>
<th>Barcode(s)</th>
<th>Shared Print</th>
</tr>
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<tbody>
<tr>
<td>HC383_V513</td>
<td>Active Barcode(s): 0003401035</td>
<td>Yes</td>
</tr>
<tr>
<td>ND1265.N4 1966</td>
<td>Active Barcode(s): 0002266555</td>
<td>Yes</td>
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Monographs: Things that go wrong

File creation:
- No OCLC #
- Bound With

On input:
- No holdings on OCLC #
- Invalid OCLC #

Post Reg:
- Wrong Format
Monographs: Things that go wrong
Reporting Errors

A little more on non print errors:
- Truly non print
- Miscoding in 006 or 007
- Incorrectly merged print and electronic records

AskQC@oclc.org
https://www.oclc.org/forms/record-quality.en.html
### Registering Monographs

#### Group Coordinator/Agent vs. Self Registration

<table>
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<tr>
<th>EAST as a Group Coordinator</th>
<th>Library Self Registers</th>
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<tbody>
<tr>
<td>EAST can reuse data we already have</td>
<td>Staff become familiar with the process</td>
</tr>
<tr>
<td>Minimal work on staff to initially register</td>
<td>No middle man if problems arise / Familiarity with local collections</td>
</tr>
<tr>
<td>Ensure consistency in data profile and in approach to handling errors</td>
<td>EAST and OCLC help, guidance and documentation available</td>
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With either option the library will need to create a collection profile, and do any resulting cleanup work from the registration.
Registering Serials

Several EAST libraries have agreed to let CRL use their data for testing
U.S. Coast Guard Academy, MBL/WHOI, Siena College, UMass Medical Library

Ideally we would like to use the data from PAPR to register retentions in WorldCat

We will be asking you via a survey after this webinar if you will allow CRL to do this work for you
Next Steps

Fill out Survey

Create Collection if asking EAST to register for you

Complete initial registration by end of January 2021
Questions?

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

Email questions to:

EAST:  samato@blc.org, mmendez@blc.org
OCLC:  sharedprint@oclc.org

EAST Website:  https://eastlibraries.org/oclc-registration