

# Shared Print Retention Commitments

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North/Nord acknowledges that we are on the traditional territories and homelands of many Indigenous peoples, who have existed here since time immemorial. Many Indigenous Peoples call the territories in which North/Nord works home including First Nations, Métis and Inuit. We uphold relationships and seek to collaborate with all Indigenous peoples to share truth, reconciliation and learning.

North/Nord reconnaît que nous sommes sur les territoires traditionnels et les terres d'origine de nombreux peuples autochtones, qui existent ici depuis des temps immémoriaux. De nombreux peuples autochtones considèrent les territoires dans lesquels North/Nord travaille chez eux, y compris les Premières Nations, les Métis et les Inuits. Nous entretenons des relations et cherchons à collaborer avec tous les peuples autochtones pour partager la vérité, la réconciliation et l'apprentissage.

# Outline

1. What retention statements are and what they look like
2. The value of publicly visible retention statements
3. Overview of the process for entering retention statements in ALMA
4. Process for registering OCLC retention commitments
5. Questions

# What is a Shared Print Program?

- Coordinated effort to assign collective responsibility for the preservation of physical library materials
- Member libraries commit to retain assigned titles for a predetermined period, or transfer material to another library that will retain them ; other libraries may choose to weed those same titles knowing they're still accessible via ILL
- Public retention statements are added to marc records to signal to the library to keep the item, and to signal to others that the item is being preserved

# What is a Retention Statement?

- Outcome of a shared print overlap analysis.
- A signal that a library has committed to retain the title in question for a specified length of time.
- Takes the form of a 583 Action Note in the marc record
- Currently relies on [OCLC Shared Print Metadata Guidelines](#), which are based on Preservation & Digitization Actions: Terminology for MARC 21 Field 583
- Work on a new, more comprehensive standard terminology is underway, to be known as Shared Print Actions: Terminology (SPA)
  - Upcoming webinar Nov 7, 2023 at 3pm ET - Zoom registration is still forthcoming

# What is a Retention Statement?

583 1# |acommitted to retain |c20221231 |d20471231 |fNORTH/NORD  
|uhttps://northnordsharedprint.ca/ |zGov docs monograph retention project |5CaOONL

# What is a Retention Statement?

583 **1#** | acommitted to retain | c20221231 | d20471231 | fNORTH/NORD  
| uhttps://northnordsharedprint.ca/ | zGov docs monograph retention project | 5CaOONL

<b>MARC Tag 583</b>	<b>Purpose</b>	<b>Required or Optional</b>	<b>Value to be entered</b>
Indicator 1	First Indicator-Privacy: Value =1 i.e., not private	Required	1
Indicator 2	Indicator 2 is blank		

# What is a Retention Statement?

583 1# **acommitted to retain** c20221231 | d20471231 | fNORTH/NORD  
| uhttps://northnordsharedprint.ca/ | zGov docs monograph retention project | 5CaOONL

<b>MARC Tag 583</b>	<b>Purpose</b>	<b>Required or Optional</b>	<b>Value to be entered</b>
\$a	Statement of Action	Required	committed to retain

Other examples of permitted actions include: Completeness reviewed, condition reviewed, transferred to optimal storage

# What is a Retention Statement?

583 1# |acommitted to retain **c20221231 |d20471231** fNORTH/NORD  
|uhttps://northnordsharedprint.ca/ |zGov docs monograph retention project |5CaOONL

MARC Tag 583	Purpose	Required or Optional	Value to be entered
\$c	Date action taken (20221231) <i>This is the start date for the retentions for this project.</i>	Required	
\$d	Action Interval <i>This signals the end date of the retention commitment. All North/Nord gov docs for this project will have the same end date regardless of when the commitment is made.</i>	Required	20471231

# What is a Retention Statement?

583 1# |acommitted to retain |c20221231 |d20471231 |fNORTH/NORD  
|uhttps://northnordsharedprint.ca/ |zGov docs monograph retention project |5CaOONL

<b>MARC Tag 583</b>	<b>Purpose</b>	<b>Required or Optional</b>	<b>Value to be entered</b>
\$f	Authorization	Required	North/Nord
\$u	Link to shared print program documentation	Optional	<a href="https://northnordsharedprint.ca/">https://northnordsharedprint.ca/</a>

# What is a Retention Statement?

583 1# |acommitted to retain |c20221231 |d20471231 |fNORTH/NORD

|uhttps://northnordsharedprint.ca/ zGov docs monograph retention project |5CaOONL

<b>MARC Tag 583</b>	<b>Purpose</b>	<b>Required or Optional</b>	<b>Value to be entered</b>
\$z	Public Note	Required*	Gov docs monograph retention project
\$5	Archiving institution: the Retention Library's Canadian library symbol (if available) for the archiving institution preceded by 'Ca'. Directory is available at <a href="https://sigles-symbols.bac-lac.gc.ca/eng/Search">https://sigles-symbols.bac-lac.gc.ca/eng/Search</a>	Required*	Eg. CaOONL (for LAC), CaQMM (for McGill)

# The value of publicly visible retention statements

- Visibility in local catalogues
  - Prevents library staff from weeding materials that have been committed to be retained
  - Cue to staff that those titles may warrant special care - eg. transfer to closed stack location
  - Demonstrates to the public the intention to keep the title
  - Signals to other libraries that the material will be kept for the duration of the period specified
- Visibility in shared discovery environments like OCLC and CRL's PAPR Registry
  - Larger scale across libraries can inform local decisions about weeding, since materials that already have retentions can be weeded with less risk. This frees up needed space.
  - Result of responsible deselection is better protection of the scholarly record, since unique materials won't be discarded.
- Growing trust in and reliance on the collective collection

# CRL PAPR Registry

- <http://papr.crl.edu/>
- 52 archiving programs participate, including CRL's JSTOR Print Archive
- Almost 55K journal titles have retention commitments within reporting SPPs
- An estimated 612K journal titles don't have retention commitments in PAPR!

2 results for titlekeyword: black scholar

Print Digital

Title	Publisher	ISSN	Program (Institution)
The Afrocentric scholar : the journal of the National Council for Black Studies.	Center for Black Culture and Research, West Virginia University	1056-8689	View all holdings HTDL (HATHI) UCL Shared Print (ZAS) WEST (ZAS)
The Black scholar.	Black World Foundation	0006-4246	View all holdings BTAA SPR (UIUSP) COPPUL SPAN (SFB) COPPUL SPAN (UAB) CRLJSTOR (CRLAA) EAST (AUM) FLARE (FLARE) HARV@JSTOR (HJSTOR) Scholars Trust (CAO) Scholars Trust (FLARE) WEST (WAU) WEST (WAU) WRLC (CAO) CLOCKSS EJSTOR

2 results for titlekeyword: black scholar

## The Black scholar.

### Program: Council of Prairie and Pacific Libraries' Shared Print Archive Network (SPAN)

- **Publisher:** Black World Foundation
- **Print ISSN:** 0006-4246
- **Electronic ISSN:** 2162-5387
- **OCLC Number:** 1536543

- **Validation:** None
- **Retention:** 20221231
- **Institution:** Simon Fraser University Library
- **Facility:**
- **OCLC Symbol:** SFB
- **Holdings Format:**  Print

Materials	Archive Action	Date of Action	Program	Status/Note
v.18-v.39 (1987-2009)	committed to retain	20121108	COPPUL SPAN	

## Collection Comparison Tool

The Collection Comparison Tool allows you to upload a list of local records to generate an instant comparison with the PAPR archived titles registry.

### *Brief instructions:*

- Input file of local records must be a CSV file.
- Up to 12 columns of data (2 required + 10 optional) are allowed in the input file.
  - Column A must be OCLC Number and Column B must be ISSN (formatted xxxx-xxxx). Each row must include either an OCLC Number or an ISSN, or both. Each cell should only include a single OCLC number or ISSN; rows where Column A or Column B have multiple identifiers may be skipped. If neither of these fields is included for an entry, it will not be able to match to any records in the PAPR database and will be skipped.
  - The last 10 columns are optional, and can be used to include data points you would like to have included in the output report (such as local bib id, holdings location, title, call number, etc.).
- Each column must have a heading.
  - Columns that are not used in the input file will not be included in the output report.
- Files should be no larger than 100,000 rows. If your file contains more than 100,000 rows, please split it up into multiple files.

Upon uploading your local title list, the Collection Comparison Report is downloaded to your computer as a zip folder (please be aware: the larger the file, the longer it takes). This folder may contain one or two output files: NotYetCommitted (entries from your input file that did not match to any records in the PAPR database), and CommittedMatches (entries from your input file that did match to records in the PAPR database).

Please see the [User Manual](#) and [FAQs](#) for this tool for additional support. If the supporting documentation cannot answer your question, please reach out to the PAPR team at [papr@crl.edu](mailto:papr@crl.edu). If you have improvement suggestions, please use the [CCH Feedback Form](#) to let us know about them.

# Worldcat FirstSearch



## Environmental solutions through technology, innovation and partnerships /

Publication: [Ottawa] : Environment Canada, 2003

Document: English : Book

**Libraries Worldwide 67 (2 Committed to Retain)** UNIV OF ALBERTA

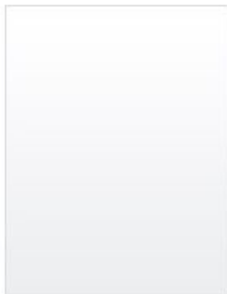
More Like This: [Advanced options...](#)

[See more details for locating this item](#)

Libraries with Item: "Environmental solutions t..." ([Record for Item](#) | [Get This Item](#))

<u>Location</u>	<u>Library</u>	<u>Local Holdings</u>	<u>Shared Print Commitment</u>	<u>Code</u>
CA,AB	UNIV OF ALBERTA			UAB
CA,AB	<a href="#">ATHABASCA UNIV LIBR</a>			JE1
CA,AB	LAKELAND COL LIBR			CNLAK
CA,AB	LETHBRIDGE COLL	<a href="#">Local Holdings Availa...</a>		L6B
CA,AB	<a href="#">NORTHWESTERN POLYTECHNIC</a>			GPRCL
CA,AB	<a href="#">SOUTHERN ALBERTA INST OF TECH LIBR</a>			CN6EG
CA,AB	<a href="#">UNIV OF CALGARY LIBR</a>			UAU
CA,BC	COLLEGE OF NEW CALEDONIA LIBR			CNCNC
CA,BC	<a href="#">LANGARA COL</a>			LANGC
CA,BC	LEGISLATIVE LIBR OF BRITISH COLUMBIA			BCLCN
CA,BC	PRINCE GEORGE PUB LIBR			CNPGL
CA,BC	<a href="#">SIMON FRASER UNIV</a>	<a href="#">Local Holdings Availa...</a>	<a href="#">Committed to Retain</a>	SFB
CA,BC	<a href="#">UNIV OF BRITISH COLUMBIA LIBR</a>			UBC
CA,BC	<a href="#">VANCOUVER PUB LIBR</a>			VP@
CA,SK	SASKATCHEWAN LEGISLATIVE LIBR			CNSLL
CA,SK	<a href="#">UNIV OF REGINA</a>			REB
CA,SK	<a href="#">UNIV OF SASKATCHEWAN LIBR</a>			UOH


# Worldcat FirstSearch



## **Environmental solutions through technology, innovation and partnerships /**

Canada. Environmental Technology Advancement Directorate. Innovative Solutions Division.

2003

**English**  Book 40, 40 pages : color illustrations ; 28 cm

[Ottawa] : Environment Canada, ; ISBN: 0662671155 9780662671152

### **SIMON FRASER UNIV (SFB)**

**Summary:** Local Holdings Available.

**OCLC Number:** 51735710

**Date of Report:** 20230412

**Location:** SFBA

**Format:** Unspecified

**Shared Print:** committed to retain

**Commitment from:** North/Nord

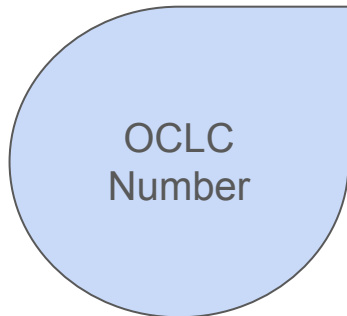
**Action Date:** 2022-12-31 **Expiration Date:** 2047-12-31

**Note:** Gov docs monograph retention project

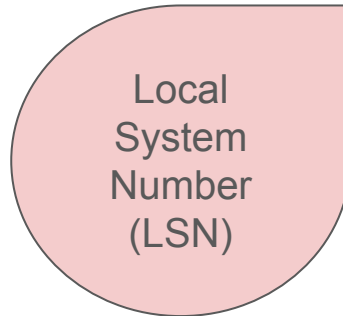
# Adding Retention Statements

What data is needed?

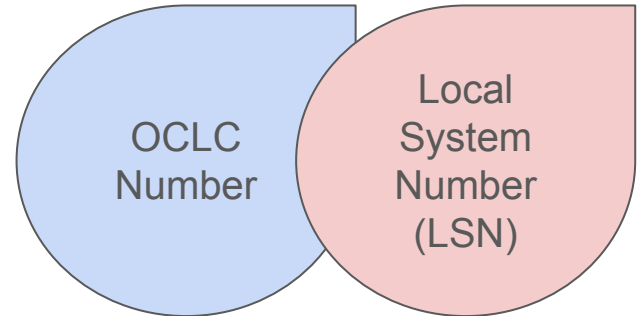
**North/Nord Retention Assignments**



**Local System (LSP/ILS) Retention Statements**



**OCLC Local Holding Record (LHR) Retention Statements**



# Verifying Retention Assignments

## Alma Analytics

### North/Nord

Gov Docs Phase 2 master list of ... .XLSX

File Edit View Insert Format Data Tools Help

100% View only

AH:AH WorldCat OCLC Number

	AA	AB	AC	AD	AE	AF	AG	AH
1	- Same E	- Any Exst	Public	ust In Co	hiTrust	ldCat Re	LC Wor	ldCat OCLC N
2	0	0	No	No	<a href="#">WorldCat Rec</a>	1681211		29368478
3	0	0	No	No	<a href="#">WorldCat Rec</a>	1681211		29368478
4	0	0	No	No	<a href="#">WorldCat Rec</a>	1681211		29368478
5	0	0	No	No	<a href="#">WorldCat Rec</a>	1681211		29368478
6	0	0	No	No	<a href="#">WorldCat Rec</a>	1681211		29368478
7	0	0	No	No	<a href="#">WorldCat Rec</a>	7208205		229463311

Criteria Results Prompts Advanced

Subject Areas Physical Items

Selected Columns

Bibliographic Details Physical Item Details Holding Details

OCLC Control Number (035a) MMS Id Local Param 06 Lifecycle Barcode

Filters Lifecycle is equal to / is in Active

AND Y OCLC Control Number (035a) is equal to / is in 86002496; 20834317; 433025; 61422990; 36112430; 29445110; 794489735; 746596488; 247376; 244313318; 1065020581; 637444491; 839797737; 859652628; 56371251; 951643; 548800; 36697366; 19701971; 673818; 823717828; 758800381; 812064011; 769259195; 829303296; 712973062; 12035743; 759669415; 715113; 839691807; 458724672; 820330517; 76870863; 43276028; 712851157; 56753198; 16071327; 22507795; 16022673; 778678015; 31518689; 32085955; 796273836; 44673473; 2180193; 1217894; 311230160; 46627513; 15431420; 759668743; 723412412; 723412614; 693658035; 824645125; 773174841; 185451; 15766679; 773987598; 725055022; 640332472; 701244066; 683214121; 24304141; 311230172; 5073980; 39747616; 707637333; 39335164; 7903071; 664430699; 27107230; 759668836; 759668808; 14413524; 69785353; 4857060; 10937488; 1057740293; 3749665; 702801198; 182040130; 716829224; 20831083; 18007239; 828233806; 55641173; 977488657; 16921800; 3367303; 219945108; 809934002; 851180045; 767693742; 700677789; 700677796; 704552209; 1174975; 824645108; 804030154; 499428901; 768964124; 23235792; 830078354; 824179443; 708726856; 1028034915; 32544373; 6736444; 711935504; 706653232; 693658014; 53901218; 1059271410; 6582735; 44943547; 20834965; 7575102; 4210263; 828902726; 1016055617; 35943798;

# Verifying Retention Assignments

A2    fx    =VLOOKUP(AI2, Sheet2!\$A\$1:\$C\$1999, 2, FALSE)

	A	B	C	D	E	F	G	H	I	AI	AJ
1	MMS ID	Type	Call Number	Call Num	LAC Par	LAC Par	Preserva	Holding I	Title	WorldCat OCLC	Governm
2	991007627629703611	monograph	COP.CA.3.2	8COP.CA.3	BAC-LAC	B2Q, BD	LAC-BAC	SFU	Eating well with Cana	86002496	2,3,4,5,7,8
3	#N/A	monograph	HD7261	0	BAC-LAC	DKU, MU	LAC-BAC	SFU	A Beginner's guide to	20834317	1,2,3,5,7,9
4	991000176429703611	monograph	KE4170	0	BAC-LAC	BDP, DU	LAC-BAC	SFU	A consolidation of the	433025	2,9
5	991021207739703611	monograph	TK6570.M6	0	BAC-LAC	CNUTO,	LAC-BAC	SFU	A guide for the radiot	61422990	1,2,3,5,7,9
6	991023975189703611	monograph	HD9940.C3	0	BAC-LAC	CNUTO,	LAC-BAC	SFU	A guide to benchmar	36112430	1,2,3,4,5,7,9
7	991010153699703611	monograph	JF1338	0	BAC-LAC	BDP, CAI	LAC-BAC	SFU	A management mode	29445110	1,2,3,4,5,7
8	991009913219703611	monograph	RA395.C3	S 0	BAC-LAC	CN3GA,	LAC-BAC	SFU	A snapshot of health	794489735	1,2
9	991005269239703611	monograph	COP.CA.3.2	8COP.CA.3	BAC-LAC	BDP, CN	LAC-BAC	SFU	A strategic plan for al	746596488	1,2,3,5,7,8,9
10	991004397039703611	monograph	q 127.c3	c3.0	BAC-LAC	BDP, CAI	LAC-BAC	SFU			
11	991022127839703611	monograph	SD145	C3620	BAC-LAC	BDP, CN	LAC-BAC	SFU			
12	#N/A	monograph	COP.CA.3.2	8COP.CA.3	BAC-LAC	CN3GA,	LAC-BAC	SFU			
13	#N/A	monograph	E78.C3	A26 0	BAC-LAC	CEF, CN	LAC-BAC	SFU			
14	991011340349703611	monograph	COP.CA.2.2	8COP.CA.2	BAC-LAC	CN3GA,	LAC-BAC	SFU			

Sheet1    Sheet2

	A	B	C
1	OCLC Control	MMS Id	Title
2	63055931	991000074959703	The Canadian Constitution a
3	645775276	991000103759703	Sheet metal worker /
4	650304	991000165749703	Canada's parliament.
5	433025	991000176429703	A consolidation of the Britis
6	65423181	991000400029703	Heating with oil /
7	614857579	991000797279703	Responding to changing nee

Sheet1    Sheet2

# Retention Statements in Alma

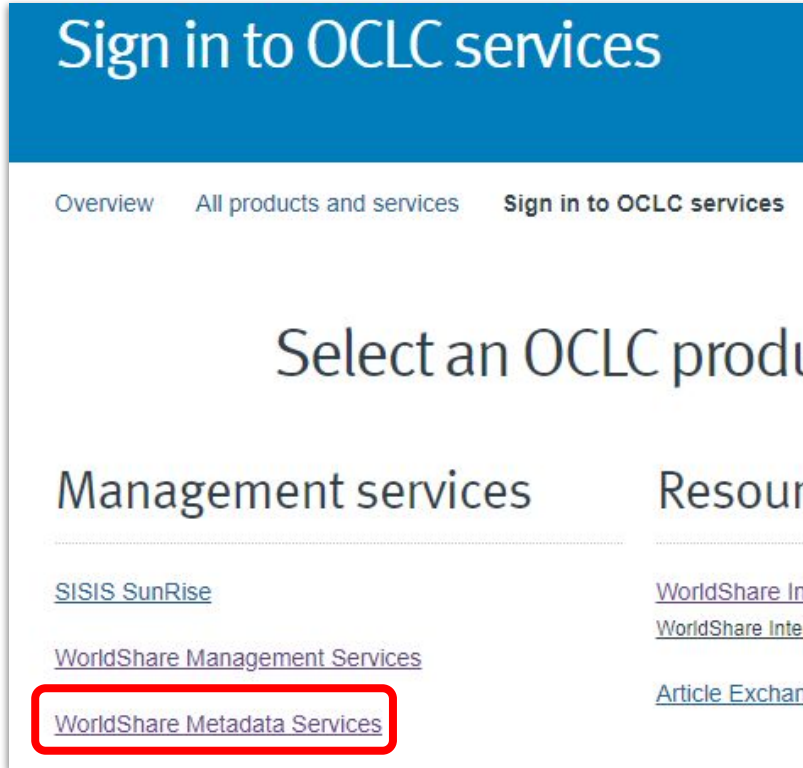
- Update records using local batch updating processes
  - Create set with identified MMS IDs (LSN)
  - Metadata team creates Normalization Rule using North/Nord 583 field elements

100	0_  a Ducornet, Rikki,  d 1943-
245	10  a Weird sisters.  n Rikki.
264	_1  a Vancouver, B.C. :  b Intermedia,  c [1976]
264	_4  c ©1976
300	__  a 60 pages :  b illustrations ;  c 22 cm
336	__  a text  b txt  2 rdacontent
337	__  a unmediated  b n  2 rdamedia
338	__  a volume  b nc  2 rdacarrier
500	__  a Poems.
583	1_  a Committed to retain  c 20170101  d 20321231  f COPPUL SPAN Monograph  5 BVAS
583	1_  a Committed to retain  c 20221231  d 20471231  f North/Nord  u <a href="https://northnordsharedprint.ca/">https://northnordsharedprint.ca/</a>  z Gov docs monograph retention project  5 CaBVAS
901	__  a 2017-05-15  b MILL
902	__  a PR 9317 I39 W4 1976
907	__  a .b10592283
916	1_  a Committed to retain  c 20170101  d 20321231  f COPPUL SPAN Monograph  5 BVAS
916	1_  a Committed to retain  c 20221231  d 20471231  f North/Nord  u <a href="https://northnordsharedprint.ca/">https://northnordsharedprint.ca/</a>  z Gov docs monograph retention project  5 CaBVAS

# Registering Retention Commitments in OCLC

1. Create Data Sync Collection
2. Prepare Data File
3. Upload Data File
4. Review Post-processing Reports

# OCLC WorldShare Metadata Services



Sign in to OCLC services

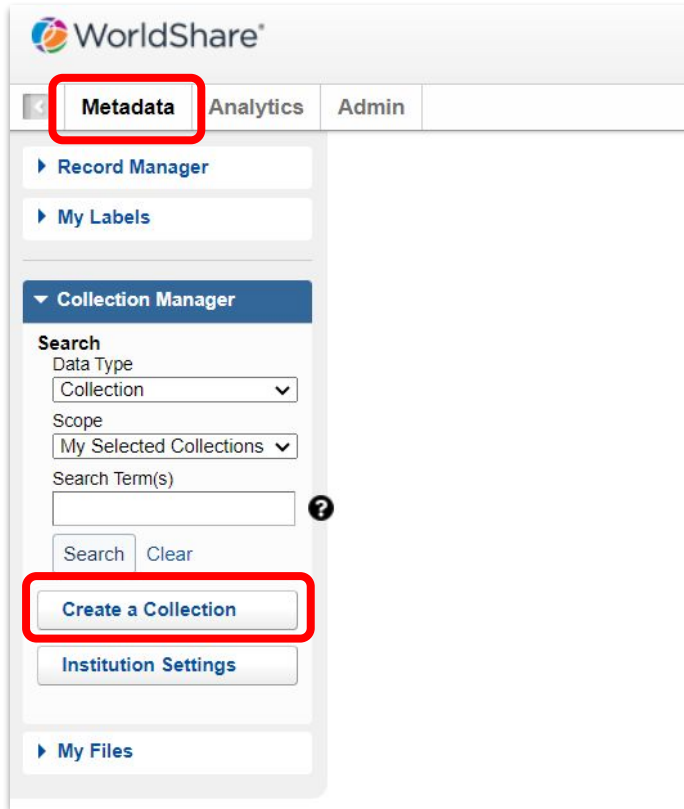
Overview All products and services **Sign in to OCLC services**

Select an OCLC product

Management services	Resources
<a href="#">SISIS SunRise</a>	<a href="#">WorldShare In</a>
<a href="#">WorldShare Management Services</a>	<a href="#">WorldShare Inter</a>
<a href="#">WorldShare Metadata Services</a>	<a href="#">Article Exchan</a>

<https://www.oclc.org/en/services/logon.html>

# Create Data Sync Collection



WorldShare<sup>®</sup>

Metadata Analytics Admin

Record Manager

My Labels

Collection Manager

**Search**

Data Type  
Collection

Scope  
My Selected Collections

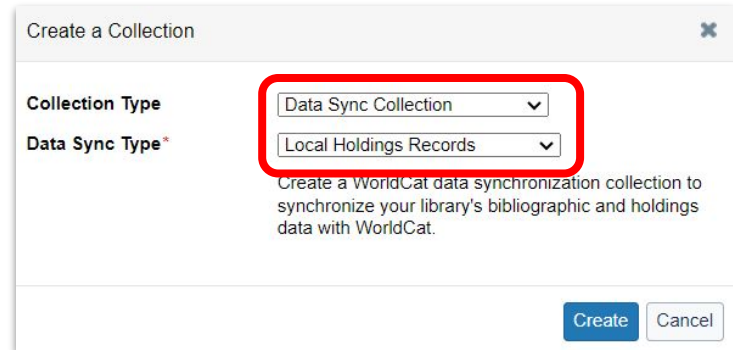
Search Term(s)

Search Clear

**Create a Collection**

Institution Settings

My Files



Create a Collection

Collection Type  
Data Sync Collection


Data Sync Type\*  
Local Holdings Records

Create a WorldCat data synchronization collection to synchronize your library's bibliographic and holdings data with WorldCat.

Create Cancel

# Create Data Sync Collection

Create a Collection ✕

 An existing WorldCat Data Synchronization collection of this same type already exists. We recommend editing this existing collection; however, you can create a secondary collection of the same type.

**Collection Type**

**Data Sync Type\***

Create a WorldCat data synchronization collection to synchronize your library's bibliographic and holdings data with WorldCat.



# Create Data Sync Collection

Local Holdings Records Information

Shared Print

**Initial Estimate for Record Count**

LHR Field Information The system uses the following values for creating and updating LHRs for shared print.

[Preview LHR Field Information](#)

Retention Commitment | **ILL Policies** | Location | Linkage Information | Ownership History

If you are retaining material under multiple programs that have different expiration dates, create a separate commitment for each program.  
If the programs have the same expiration date, create one retention commitment and enter each program in a separate row.

**Treatment of Existing LHRs**

Merge field information  
 Do not update

**Action (583 \$a)** committed to retain + -

**Archiving Program Name (583 \$f) \*** If all your programs have the same expiration date, enter each program below.  
Select from the list of available archiving programs.

✕

**Action Date (583 \$c) \***  (Format YYYYMMDD)

**Retention Commitment Expiration Date (583 \$d) \***  (Format YYYYMMDD)

Retention period not specified

**Optional Information**

Select  (0/500) + -

# Create Data Sync Collection

Retention Commitment | ILL Policies | Location | Linkage Information | Ownership History

If you are retaining material under multiple programs that have different expiration dates, create a separate commitment for each program. If the programs have the same expiration date, create one retention commitment and enter each program in a separate row.

**Treatment of Existing LHRs**

Merge field information  
 Do not update

**Action (583 \$a)** committed to retain + -

**Archiving Program Name (583 \$f) \*** If all your programs have the same expiration date, enter each program below. Select from the list of available archiving programs.  
 ✕

**Action Date (583 \$c) \***  (Format YYYYMMDD)


**Retention Commitment Expiration Date (583 \$d) \***  (Format YYYYMMDD)

Retention period not specified

**Optional Information**

**u - URL to Documentation for Archiving Program** (31/500) + -

**z - Public Note** (36/500) + -



# Create Data Sync Collection

Local Holdings Records Information

Shared Print

Initial Estimate for Record Count \*

LHR Field Information The system uses the following values for creating and updating

Retention Commitment | ILL Policies | Location | Linkage Information | Ownership History

This information is used by WorldShare Interlibrary Loan.

**Lending Policy (008/20) \***

Treatment of Existing LHRs

**Reproduction Policy (008/21) \***

Treatment of Existing LHRs

**Lending Policy (008/20) \***

Treatment of Existing LHRs

**Reproduction Policy (008/21) \***

Treatment of Existing LHRs

Merge field information  
 Do not update

Merge field information  
 Do not update

# Create Data Sync Collection

Local Holdings Records Information

Shared Print

Initial Estimate for Record Count \*

LHR Field Information The system uses the following values for creating and updating LHRs for shared print.

Retention Commitment | ILL Policies | Location | Linkage Information | Ownership History

This information specifies the location of the archived item.

OCLC Symbol of Current Location (852 \$a) SFB

**Holdings Library Code of Current Location (852 \$b)**

# Create Data Sync Collection

Local Holdings Records Information

Shared Print

**Initial Estimate for Record Count \***

**LHR Field Information** The system uses the following values for creating and updating LHRs for shared print.


**Retention Commitment** **ILL Policies** **Location** **Linkage Information** **Ownership History**

The MARC Organization Code is for the institution whose control number is contained in 014 \$a. (For example: OCoLC.)

If you do not enter your library's MARC Organization Code, then OCLC will automatically set this subfield value to your OCLC symbol: **SFB**

**Treatment of Existing LHRs**

Merge field information  
 Do not update

**MARC Organization Code (014 \$b)** Find your code at the Library of Congress [MARC Code List for Organizations](#) 

# Create Data Sync Collection

Local Holdings Records Information

Shared Print

Initial Estimate for Record Count \*

LHR Field Information The system uses the following values for creating and updating LHRs for shared print.

[Preview LHR Field Information](#)

Retention Commitment | ILL Policies | Location | Linkage Information | **Ownership History**

This information is used to identify the original owner who contributed the material to the print archive specified in the Location field (852 \$a).

**Include Ownership and Custodial History Note**  Yes  No

Treatment of Existing LHRs  Merge field information  Do not update

OCLC Symbol of Previous Owner or Location (561 \$a) \*

MARC Organization Code of Previous Owner or Location (561 \$5)  Find your code at the Library of Congress [MARC Code List for Organizations](#)

# Create Data Sync Collection

### Create a Data Synchronization Collection

**Save** Collection Actions ▾

- ▶ Properties
- ▶ Local Holdings Records Information
- ▾ MARC Record Output Information
  - Enable MARC Record Delivery**  Yes  No
  - Records Returned Select ▾
  - Holdings Visibility Level All WorldCat ▾

# Create Data Sync Collection

### Create a Data Synchronization Collection

Collection Actions ▾

- ▶ Properties
- ▶ Local Holdings Records Information
- ▶ MARC Record Outout Information
- ▾ Contact Information**

\* Required field

Fill out all of the contact information fields for at least one individual. We recommend that you provide the contact information for two to three individuals. List the contacts in order with the primary contact in the first row.

	Last Name *	First Name *	Title *	Telephone *	Email Address *	Action
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

OCLC is a global library cooperative operating in more than 100 countries with the headquarters located in the United States. For information on how this contact information is used by OCLC, see the [Privacy Policy](#).

# Submit Collection to OCLC

**Create a Data Synchronization Collection**

▼ Properties

- Make Default Collection
- Submit Collection to OCLC** (Save Collection to Submit)

\* Required

**Collection Name \***

**Collection ID**

# View Existing Collections

Navigation: Metadata | Analytics | Admin

Record Manager

My Labels

Collection Manager

Search

Data Type

Data Sync Collection

Search Term(s)

Search Clear

Close All Tabs

Search: Keyword =

Search: Keyword =

Filter by Select

Results 1 - 5 of 5

Collection Name

- [New holdings \(electronic format\)](#)
- [SFB North Nord Gov Docs Monograph](#)
- [SFB SPAN monographs](#)
- [Deleted holdings \(electronic format\)](#)

Print holdings

Results 1 - 5 of 5

# Prepare Data File

## Shared Print File Template Options

- Abbreviated Format
- Full Format

## Abbreviated Format Required Fields

- OCLC Number
- LSN
- Barcode (for WMS libraries only)
  - Do not remove column if values are blank

	A	B	C
1	OCLC_Number	LSN	Barcode
2	842523950	991013219959703611	
3	811407269	991013178859703611	
4	53131660	991022293459703611	
5	48752662	991009105549703611	
6	2913885	991009022299703611	
7	733718334	991004207829703611	

# Prepare Data File

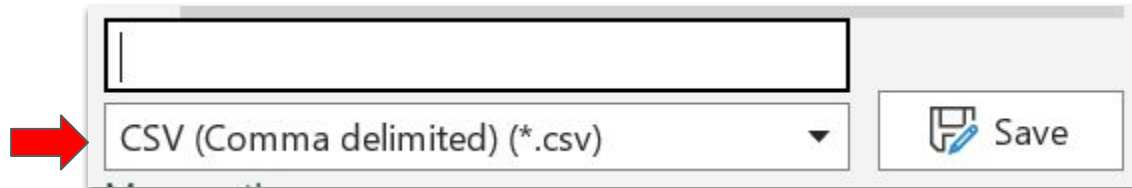
Required File Name Conventions:

`<collectionID>.<OCLCsymbol>.sharedprint_<optionaltext>_<YYYYMMDD>.<optionalfile#>.csv`

Example:

1234567.sfb.sharedprint\_first\_20230927.csv

1234567.sfb.sharedprint\_second\_20230927.csv



# Upload Data File

WorldShare®

Metadata Analytics Admin

Record Manager

My Labels

Collection Manager

My Files

Uploads

Downloads

Uploads

Upload File **Choose File** No file chosen

File Type

Data sync bibliographic

Data sync LHR

Upload

Results 1 - 2 of 2

WorldShare®

Metadata Analytics Admin

Record Manager

My Labels

Collection Manager

My Files

Uploads

Downloads

Uploads

Upload File **Choose File** 1234567.sf...0230308.csv

File Type

Data sync bibliographic

**Data sync LHR**

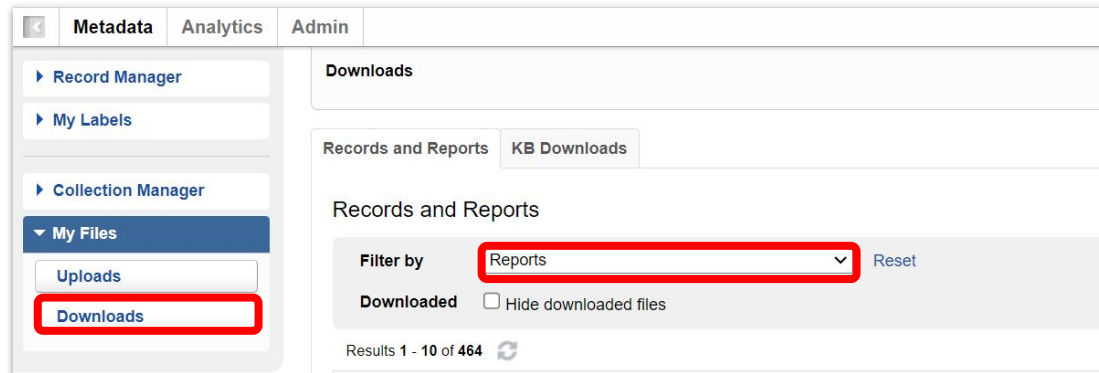
Upload

Results 1 - 2 of 2

# Review Post-processing Reports

## Report Types

- Summary Report
  - Summary of LHRs created or updated
  - Notification if any records failed
- Exception Detail Report
  - Provides details for failed records



The screenshot displays a web application interface with a navigation menu on the left and a main content area on the right. The navigation menu includes 'Record Manager', 'My Labels', 'Collection Manager', 'My Files', 'Uploads', and 'Downloads'. The 'Downloads' option is highlighted with a red box. The main content area shows the 'Downloads' section, with 'Records and Reports' and 'KB Downloads' tabs. The 'Records and Reports' tab is active, and the 'Filter by' dropdown menu is set to 'Reports', also highlighted with a red box. The 'Downloaded' checkbox is checked, and the 'Reset' button is visible. The results show 'Results 1 - 10 of 464'.

# View Retention Commitments

Metadata Analytics Admin

Record Manager

Search

Data Type: Local Holdings Records

Scope: My LHRs

Index: OCLC Number

Term(s): 2847644

Search Clear

Close All Tabs

Browse: Call Number  
Browse = 2847644 (Call...)

Search: OCLC Number = 2847644 (My LHRs)



Search: OCLC Number = 2847644 (My LHRs)

Actions (0) Send to Record Work List

Select up to 100 records for performing tasks in the Actions menu. Select up to 9,000 records for sending to the Record Work List.

Filter by Branch/Shelving Location Any Any Apply Filter(s) Reset

Results 1 - 1 of 1

<input type="checkbox"/>	Call Number	Barcode(s)	Shared Print	Branch	Shelving Location	Bibliographic Record Information
<input type="checkbox"/>	 <a href="#">No Call Number</a>		Yes	W.A.C. BENNETT LIBR (SFBA)		 <b>Weird sisters</b> by Rikki Ducornet Print book, English Publisher: Vancouver : Intermedia, ©1976. ISBN#: 0889560285 DLC, DLC   eng   Full, OCLC#: 2847644

Results 1 - 1 of 1

Rows 10

# View Retention Commitments

Edit LHR: 324780347 1 of 1 <>

Edit Record Save

▼ LHR Record

000			cx un	
001			324780347	
004			2847644	
007			zu	
008			2007012u 0 4001aa 0230422	
↓	014	1	991002709999703611 \$b BVAS	+ -
↑	014	1	.b10592283 \$b BVAS	+ -
↓	583	1	committed to retain \$c 20221231 \$d 20471231 \$f North/Nord \$u https://northnordsharedprint.ca/ \$z Gov docs monograph retention project \$2 pda \$5 BVAS	+ -
↑	583	1	committed to retain \$c 20170101 \$d 20321231 \$f COPPUL SPAN \$u https://coppul.ca/programs/span/span-monographs-project \$z Retain for COPPUL SPAN \$2 pda \$5 BVAS	+ -
↑	852		SFB \$b SFBA	+ -

# View Retention Commitments

The screenshot shows the 'Record Manager' interface with the 'User Preferences' section selected. The left sidebar contains navigation options: Record Manager, Search, Create Record, Record Work Lists, Export Lists, Toolbox, User Preferences (highlighted with a red box), My Labels, Collection Manager, and My Files. The main content area is titled 'User Preferences' and includes a 'Save' button and a 'Discard Page Changes' button. A list of preference categories is shown, with 'Data Type Options' highlighted by a red box. Under 'Data Type Options', there are tabs for 'Authority Records', 'Bibliographic Records', 'LBD Records', and 'LHRs' (highlighted with a red box). The 'LHRs Basic Search Preferences' section includes a 'Reset Form' button and several checkboxes: 'One Search Result Only' (unchecked), 'Open record for editing' (unchecked), 'Display Information in Search Results' (unchecked), 'Lending Policy' (unchecked), 'Shared Print' (checked, highlighted with a red box), and 'Display 852 \$t information in search results' (unchecked). A 'Prefix' input field is also present, with a note '(Such as c., copy, or copy number)'. At the bottom, there is a section for 'Search Scope(s) for LHRs'.

# Additional Resources

## OCLC Documentation

- Register Shared Print retention commitments for individual non-WMS libraries:  
[https://help.oclc.org/Metadata\\_Services/Shared\\_Print/Register\\_Shared\\_Print\\_retention\\_commitments/10Register\\_Shared\\_Print\\_retention\\_commitments\\_for\\_individual\\_nonWMS\\_libraries](https://help.oclc.org/Metadata_Services/Shared_Print/Register_Shared_Print_retention_commitments/10Register_Shared_Print_retention_commitments_for_individual_nonWMS_libraries)
- Register Shared Print retention commitments for individual WMS libraries:  
[https://help.oclc.org/Metadata\\_Services/Shared\\_Print/Register\\_Shared\\_Print\\_retention\\_commitments/20Register\\_Shared\\_Print\\_retention\\_commitments\\_for\\_individual\\_WMS\\_libraries](https://help.oclc.org/Metadata_Services/Shared_Print/Register_Shared_Print_retention_commitments/20Register_Shared_Print_retention_commitments_for_individual_WMS_libraries)

## Shared Print Data File Templates

- Non-WMS libraries:  
[https://help.oclc.org/Metadata\\_Services/Shared\\_Print/Register\\_Shared\\_Print\\_retention\\_commitments/10Register\\_Shared\\_Print\\_retention\\_commitments\\_for\\_individual\\_nonWMS\\_libraries#Submit\\_your\\_data\\_file](https://help.oclc.org/Metadata_Services/Shared_Print/Register_Shared_Print_retention_commitments/10Register_Shared_Print_retention_commitments_for_individual_nonWMS_libraries#Submit_your_data_file)
- WMS libraries:  
[https://help.oclc.org/Metadata\\_Services/Shared\\_Print/Register\\_Shared\\_Print\\_retention\\_commitments/20Register\\_Shared\\_Print\\_retention\\_commitments\\_for\\_individual\\_WMS\\_libraries#Submit\\_your\\_data\\_file](https://help.oclc.org/Metadata_Services/Shared_Print/Register_Shared_Print_retention_commitments/20Register_Shared_Print_retention_commitments_for_individual_WMS_libraries#Submit_your_data_file)

## OCLC Training Videos

- Shared print registration for individual libraries
  - <https://youtu.be/1oaMN398fYw>
- Get started with WorldCat data sync collections
  - <https://youtu.be/CigRJ02jjzA>

# Thank you! Questions?

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