Peeling the Onion with Fewer Tears: Cataloging in Primo/Alma to Enhance Discovery & Access 2022 Federal Depository Library Conference

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Bound-with Items

Bound together reports/volumes of government documents (boundwiths) pose unique cataloging challenges in discovery and circulation.

- On regular open shelving the call number is used to locate items, even if they are bound together with other items.
- When a volume is checked out, the separate bibliographic records for each item should be updated to identify its availability status.
- In our automated storage software, the barcode is used to retrieve items and each bibliographic record must be linked to that barcode.









Y 3.AT 7:22/ANL Y 3.AT 7:22/UCRL

UCF Libraries – Automated Retrieval Center (ARC) with robotic forklifts and 2' x 4' bins for books







Primo Collections

The Collections feature in Alma/Primo allows staff users to create local collections of mixed materials on any topic or subject matter.

- Virtual browsing
- Showcase special items
- Persistent URLs







Sub-collections (5)









SUB-COLLECTION Staff Use

COLLECTIONS / Government Documents / ASERL Center of Excellence Collection , Energy

Department of Energy (DOE), Nuclear Regulatory Commission (NRC), Federal Energy Administration (FEA), Energy Research and Development Administration (ERDA), Atomic Energy Commission (AEC), Federal Power Commission (FPC), and related publications

Sort sub-collections by Relevance 🔻

Search

Q

Sub-collections (7)



♠ COLLECTIONS / Government Documents / ASERL Center of Excellence Collection /

Space and Aeronautics

National Aeronautics and Space Administration (NASA), National Advisory Commission for Aeronautics (NACA), and related publications

Sort sub-collections by Relevance 💌

Search

Q

Sub-collections (4)

National Advisory Committee for Aeronautics (NACA) SUB-COLLECTION National Aeronautics and Space Administration (NASA)



SUB-COLLECTION All Space and Aeronautics Titles

Bound-with Items

What are the issues we've had to consider regarding Bound-With?

- Shared bibliographic records with 39 other institutions state universities and state colleges across Florida
- Automated storage system requires public users to submit retrieval requests rather than open shelves
- Alma only allows barcode numbers to be associated with a single item
- Borrowing a bound volume checks out all bound titles



Refresher

OCLC Support & Training Bibliographic Formats and Standards

≕★ Alma	s List			E Record Actions			Q View Related Data			COld Editor
Acquisitions Resources	Records I	Record 049 086 0 100 1 245 1 0 264 1 300 336	MARC21 ‡a F I UU ‡a Y 3.At ‡a Richai ‡a React ‡a Oak R ‡a vi, 116 ‡a text ‡l	Bib (2) 01 7:22/ASAE-S-7 rdson, I. W., ‡e author. or physics of H₂O-moder Ridge, Tenn. : ‡b Technica 5 pages : ‡b charts ; ‡c 2 b txt ‡2 rdacontent	ated power reactors / ‡o al Information Service E 7 cm	c by I.W. Richardson, J.\	n, R.C. Morrison, J.R. Burr. N. Webster, E.J. Leshan, R.			
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Example

- 1 Physical Book
- 1 Barcode
- 3 Separate Items

1: Reactor Physics of H₂O-Moderated Power Reactors

2: Plutonium Recycle in the Calder Hall Type Reactor

3: Bibliography for Nuclear and Conventional Merchant Ships



Laying Out All the Pieces

Physical Resources

Bibliographic Record

Holdings Record

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Host & Related Records





1st Layer

How can we connect multiple bibliographic records together?



Laying Out All the Pieces





Cataloging: Step 1

- Host Bibliographic Record
- Reactor Physics of H₂O-Moderated Power Reactors
- Constituent Unit Entry Field
- MARC 774
 - 1st Indicator 0 for display note
 - 2nd Indicator Undefined or 8 for display constant controller
- Many subfields
 - \$o for Other Item Identifier (SuDoc)
 - \$t for Title
 - \$w for Record Control Number (MMS ID)



Cataloging: Step 2

- Related Bibliographic Records:
 - Plutonium Recycle in the Calder Hall Type Reactor
 - Bibliography for Nuclear and Conventional Merchant Ships
- Host Item Entry
- MARC 773
 - Treat same as 774 field



Relationship

One-to-many Relationship:

Host record can have multiple related titles (multiple 774s)

Related record will only have one 773 host titles*

*Unless there are multiple copies of a particular title across multiple bound with volumes.





Discovery – Host Record

BOOK Reactor physics of H ₂ O-moderated power reactors
ASAE (Series); S-7. ASAE; S-7
Richardson, I. W., author.; Webster, J. W., author.; Leshan, E. J., author.; Morrison, R. C., autho Burr, J. R., author.; American Radiator and Standard Sanitary Corporation.; U.S. Atomic Ener Commission.
1958
Available at UCF Main Library U.S. Documents (Y 3.At 7:22/ASAE-S-7 - 10)
🗱 Full Text Available at HathiTrust 🛛

Bound with	Units : Y 3.AT 7:22/ASAE-S-08 Plutonium recycle in the calder hall type reactor			
	Units : Y 3.AT 7:22/ASAE-S-10 Bibliography for nuclear and conventional merchant ships			



Discovery – Related Record 1

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BOOK

Plutonium recycle in the calder hall type reactor

Y 3.AT 7:22/ASAE-S-07 Reactor physics of H₂O-moderated power reactors no : 32103020228045 ASAE (Series) ; S-8. ASAE ; S-8 Atomic Energy Commission. Technical Information Service Extension. ASAE (American-Standard Atomic Energy Division)- S-8 Barbieri, L. J.; Webster, J. W.; Chow, K. T.; U.S. Atomic Energy Commission. Division of Reactor Development.; American Radiator and Standard Sanitary Corporation. Atomic Energy Division.; U.S. Atomic Energy Commission.

Available at UCF Main Library U.S. Documents (Y 3.At 7:22/ASAE-S-7 - 10) >

📴 Full Text Available at HathiTrust 🛽

Included with

Y 3.AT 7:22/ASAE-S-07 Reactor physics of H₂O-moderated power reactors



Discovery – Related Record 2

MULTIPLE VERSIONS

Bibliography for nuclear and conventional merchant ships

May, Frederick L.; U.S. Atomic Energy Commission. Division of Reactor Development.;U.S. Atomic Energy Commission. Division of Reactor Development, Maritime Reactors Branch.;U.S. Atomic Energy Commission.

Available at UCF Main Library U.S. Documents (Y 3.At 7:22/ASAE-S-7 - 10) >

🏙 Full Text Available at HathiTrust 🛽

2 versions found. See all versions >

Included with

Y 3.AT 7:22/ASAE-S-07 Reactor physics of H₂O-moderated power reactors



2nd Layer

How can we show that the host and constituent titles all have the same location on the shelf?



Laying Out All the Pieces

Physical Resources

Host & Related Records





Cataloging: Step 3

Build Out the Holdings Record

- Only Host title will have Holdings Record
- Linkage Number
- MARC 014
 - 1st Indicator 1 for Bibliographic Record Number
 - 2nd Indicator undefined
- 2 Subfields
 - \$a Linkage Number
 - \$b Source of Number



Source of Number

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005	20220706105922.0
008	1604132p 8 4001uueng0000000
014	1_ a 99383450466706596 b Y 3.AT 7:22/ASAE-S-08 Plutonium recycle in the calder hall type reactor
014	1_ a 99383450466506596 b Y 3.AT 7:22/ASAE-S-10 Bibliography for nuclear and conventional merchant ships
852	3_ a FOFT b CFMGC c USDOC h Y 3.At 7:22/ASAE-S-7 - 10 z Bound with subsequent items in series (with gaps).
996	a (FOFT)DOCS BOUND WITH



3rd Layer

How can we request a Bound With volume?



Laying Out All the Pieces

Physical Resources

Bibliographic Record

Holdings Record



Host & Related Records





Cataloging: Step 4

Assign the Barcode

- Related Parts
- MARC 773/774 Subfield g

774 08 |o Y 3.AT 7:22/ASAE-S-08 |t Plutonium recycle in the calder hall type reactor |w 99383450466706596 |g no : 32103020228045 |9 unrelated

774 08 |o Y 3.AT 7:22/ASAE-S-10 |t Bibliography for nuclear and conventional merchant ships |w 99383450466506596 |g no : 32103020228045 |9 unrelated

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m 773 0_ |o Y 3.AT 7:22/ASAE-S-07 |t Reactor physics of H₂O-moderated power reactors |w 990341642390306596 |g no : 32103020228045 |9 unrelated



Graphic Representation



Host Title Availability





Host Title Request

Request	
REQUEST OPTIONS: Request	
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Host Title Availability

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BOOK Reactor physics of H₂O-moderated power reactors ASAE (Series) ; S-7. ASAE ; S-7 Richardson, I. W., author.; Webster, J. W., author.; Leshan, E. J., author.; Morrison, R. C., author.; Burr, J. R., author.; American Radiator and Standard Sanitary Corporation.; U.S. Atomic Energy Commission. 1958

🔟 Not Available 🔉

Available Online >

🕎 Full Text Available at HathiTrust 🖂



Related Title 1 Availability



Plutonium recycle in the calder hall type reactor

Y 3.AT 7:22/ASAE-S-07 Reactor physics of H₂O-moderated power reactors no : 32103020228045 ASAE (Series) ; S-8. ASAE ; S-8 Atomic Energy Commission. Technical Information Service Extension. ASAE (American-Standard Atomic Energy Division)- S-8

Barbieri, L. J.; Webster, J. W.; Chow, K. T.; U.S. Atomic Energy Commission. Division of Reactor Development.; American Radiator and Standard Sanitary Corporation. Atomic Energy Division.; U.S. Atomic Energy Commission.

1958

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№ Not Available >
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 Full Text Available at HathiTrust [2]

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Out of library , U.S. Documents ; Y 3.At 7:22/ASAE-S-7 - 10		



Related Title 2 Availability

MULTIPLE VERSIONS

Bibliography for nuclear and conventional merchant ships

May, Frederick L.; U.S. Atomic Energy Commission. Division of Reactor Development.;U.S. Atomic Energy Commission. Division of Reactor Development, Maritime Reactors Branch.;U.S. Atomic Energy Commission.

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REQUEST OPTIONS: Request / Request from Other Libraries (Statewide) LOCATIONS V We couldn't find any items to display for your selection. Please clear the filter or select another value. LOCATIONS FOR RELATED TITLES UCF Main Library
 →BOUND WITH: Reactor physics of H₂O-moderated power
 reactors
 Out of library, U.S. Documents ; Y 3.At 7:22/ASAE-S-7 - 10



Primo Fulfillment Configuration

Resource Sharing

Workflow Profiles

Locate Profiles

Patron Query Types

Levels of Service

Library Mapping

Brief Audit Fields

Resource Languages

Item Policy Exceptions

Request Form Type by Genre

Borrowing Requests Inactive Filters

Shipping Cost Lender Rules

Shinning Cost Borrower Pules

Additional Requested Media

Requested Media Definition

Sending Borrowing Request Rules

Library Management =. Alma Opening Hours Transit Time 5 Reshelve Without Transit Rules Acquisitio SIP2 Bin Configuration 10

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Locations Remote Storage Physical Fulfillment Fulfillment Units Terms of Use and Policies Block Preferences Auto Loan Renewal Rules

Item Policy Advanced Policy Configuration Overdue and Lost Loan Profile Loan Recalls Configuration Loan Status Name Request Task Name Request Pickup Configuration Self Check Messages Request Priorities Scan In Messages Configuration

Patron Configurations

Patron Groups Patron Limits Patron User Authentication Loan Limits User Block Description Liser Block Definitions User Demerits

Digital Fulfillment Digitization Departments Electronic Document Delivery Rules Delivery Profiles Metadata Alma Viewer Labels

Courses Processing Departments Academic Departments Additional Reading List Citation Statuses Citation Processing Rules Course Terms Citation Attributes Types Citation Attributes Citation Attributes To Citation Attributes Types Locate Citation by Fields Tags Tag Mapping List Subjects

Notification types

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Bibliographic Mapping Rules

Viewer Share Buttons

Additional List Subjects Citation Material Type Reading List Statuses Additional Reading List Statuses

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Resource Sharing Directory Member

Discovery Interface Display Logic Display Logic Rules

Related Records Direct Linking General Electronic Services Viewer Services Online Services Order General Electronic Services Order Locations Ordering Profile Other Settinas Currency Symbols

General Fulfillment Jobs Configuration

Other Settings Printers Article Form Mandatory Fields Book Form Mandatory Fields

Copyright Management Digitization and Copyright Rules Access Rights Copyright Declaration Copyrights Statements - Digital Digital Watermark

Copyright Publishers

Resource Sharing Copyright Declaration

Citation Default Copyright Status

Discovery Interface Display Logic Display Logic Rules Related Records Direct Linking General Electronic Services Viewer Services Online Services Order General Electronic Services Order Locations Ordering Profile Other Settings

Currency Symbols

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UCF

Fulfillment Configuration

Related Record Services Configuration




Additional Display Configurations

Done

Bound With vs. Is Part Of

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Done

Additional Considerations

- MMS Build Record Relations Job
- Local Fields in a Shared Bibliographic Catalog buggy; related titles displaying in other institutions
- Orphan Records no holdings or items get suppressed or deleted
- Serials Records in Bound Withs or multi part monographs require holdings and dummy records – still investigating



Collections in Alma/Primo

Why use Collections?

- Organize into themed groups
- Virtual representation of holdings in storage
- Spotlight "hidden" materials
- Increase exposure

Advantages to using Collections

- Ease of use
- Low entry barrier
- Persistent URLs
- Banner images





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Accessing Collections

ENGLISH · LIBRARY CARD SIGN IN DATABASE LIST NEW SEARCH ASK US Start a new Primo Search. Browse or search UCF's Databases List. Chat with a real live librarian or email a question. Find subject specialized databases. JOURNALS LIST NEWSPAPERS SEARCH BROWSE CATALOG Browse or search for journals. Browse Search Newspapers CITATION LOOK UP STATEWIDE LIBRARY CATALOG COURSE RESERVES Items put on reserve by UCF faculty. Enter a citation for a book or article to The combined catalog for state college Available for short loans to students in see options for getting copy in print or and university libraries. online. specific courses. READING LISTS AND ILL REQUEST COLLECTIONS Request a book from other libraries. Titles curated by UCF Librarians to

highlight items from our collection.





Top-Level Collection (Primo)



Sub-collections (5)





Manage Collections in Alma

Cataloging

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Open Metadata Editor Search Resources Browse Bibliographic Headings Browse Shelf Listing Authority Control Task List Reminders

Create Inventory Add Local Electronic Collection Add Local Portfolio Add Physical Item

Manage Inventory Manage Collections

Community Zone Opdates Task List Manage Electronic Resource Activation Network Harvesting Report List My Electronic Resources by Provider Shelf Report Import Import Upload Single Record From File Monitor and View Imports Resolve Import Issues

Advanced Tools Overlap and Collection Analysis Duplicate Title Analysis Merge Records and Combine Inventory Manage Deleted Repository Restore Jobs PC to CDI Activation Report



Q Ctrl+Alt+F to search any menu links

Manage Collections in Alma (cont.)

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Top-Level Collection (Alma)

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Sub-Collection (Primo)

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Sub-Collection (Alma)

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Car Salesman:*Slaps roof of Collections*

This baby can fit so many sub-collections in it!





Collection nesting

Top Level Collection

Sub-Collection 1

Sub-Collection 2

Sub-Collection 3

Sub-Collection 4





Sub-sub-Collection (Primo)

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Librarie:		ent Documents / New GPO Prin		BROWSE CATALOG 2022		Sign in Menu 👻
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	Items (3)				View	
	MAP Firewood cutting map, Magdalena Ranger District, Cibola National Forest, New Mexico.	BOOK Fifty years of protecting communities and safeguarding the nation: a history of the Los Angeles District, U.S. Army Corps of Engineers, 1966-2016	BOOK Covert legions : U.S. Army intelligence in Germany, 1944-1949			



Sub-sub-Collection (Alma)

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2		99383824765706596	Fifty years of protecting communities and safeguarding the nation: a history of the Los / U.S. Army Corps of Engineers, 1966-2016 /	Angeles District,	Book]
3		99383824766106596	Firewood cutting map, Magdalena Ranger District, Cibola National Forest, New Mexico.		Map			



Collection Bib Record (Primo)

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BOOK

Fifty years of protecting communities and safeguarding the nation: a history of the Los Angeles District, U.S. Army Corps of Engineers, 1966-2016

Sadin, Paul, author.; Weaver, Lindsey, author.; Young, Morgen, author.; United States. Army. Corps of Engineers. Los Angeles District, issuing body. 2021

National State of the Available at UCF Main Library U.S. Documents (D 103.2:L 89 A/2/966-2016)

Other Identifiers	(UCOLC)1337610316 tmp97482893
MMS ID	99383824765706596 >
Source Database	Library Catalog
Collection Path	♠ COLLECTIONS / Government Documents / New GPO Print Titles /
	New GPO print titles for August 22, 2022 /





Adding to a Collection

All Titles

Facets

Material Type

Book - Physical (1)

Book (1) Resource Type

English (1)
Publication Year

2022 (1) Collection «

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Adding to a Collection (sets)

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	🕈 Name	🗘 Туре	Content Type	💠 Content Origin	 Creation Date 	
1.	Occs-Boundwith2	Itemized	All Titles	Institution only	08/04/2022 11:35:05 EDT	
1.	Occs-Coll-New-2022-07-29	Itemized	Physical items	Institution only	07/29/2022 14:56:29 EDT	
1.	C Docs-Boundwith	Itemized	All Titles	Institution only	07/22/2022 12:12:53 EDT	
1.	Occs-Coll-New-2022-07-06	Itemized	Physical items	Institution only	07/07/2022 09:51:22 EDT	
1.	Occs-Coll-New-2022-06-17	Itemized	Physical items	Institution only	06/17/2022 14:39:34 EDT	



Images (default)

New GPO Print Titles 2021

ASERL Center of Excellence Collection





Images (Alma)





Images (sourcing - screenshots)

2 of 93 Q

Windows key+shift+S For a quick screenshot





CENTER ON IRREGULAR WARFARE AND ARMED GROUPS





THE RUSSIAN MARITIME ARCTIC: REGION OF GREAT CHANGE



563

.7

Images (sourcing - custom)





Limitations (display)

F

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		BOOK Stress decay in an orthotropic half-plane under self-equilibrating sinusoidal loading	BOOK An aeroelastician's perspective of wind tunnel and flight experiences with active control of structural response and stability	BOOK Effect of impact damage and open holes on the compression strength of tough resin/high strain fiber laminates	BOOK A manned-machine space station construction concept	BOOK Concepts for improving the damage tolerance of composite compression panels	



Limitations (search)



Didn't find what you were looking for? Try searching in all collections

Items (0)



Didn't find what you were looking for? Try searching in all collections

Sub-collections (1)



Items (0)



Limitations (the waiting is the hardest part)

F5 F5 F5 F5 F5 F5 F5 F5 F5



Other Issues

568 votes

Vote

F

Enable Alma collections items linked to logical sets to be updated as the set changes

Currently it seems that Alma Collections can only be updated by manually adding individual items or adding items from sets. If the set is a logical set, as new items that fulfill the set search criteria are added, could they also automatically update the Alma Collection. This would save having to manually maintain Alma Collections to some degree.

Anonymous shared this idea · May 10, 2022



Best Practices

Keep end users in mind

- Bibliographic record readable
- Availability & retrieval process
- Computer screen "above the fold" – use subfolders
- Visually distinct banners

Trouble-shooting

- Internal communication
- Cross-institution discussions
- Vendor wishlists for new features

Stay patient



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