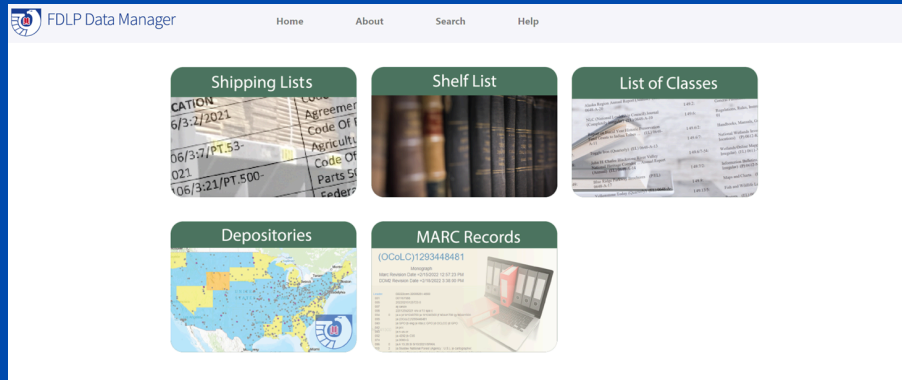# FDLP Data Manager (FDM) Workflows Guide

Overview

This guide provides steps for using FDLP Data Manager (FDM) to upload records into SirsiDynix Symphony, including retrieving records, understanding format types, and downloading/uploading files.

Using FDM

1. Accessing FDLP Data Manager (FDM):
- Visit the FDLP Data Manager main page (https://fdm.gpo.gov/Account/Login?ReturnUrl=%2FMarc%2FMarc1).
- If you don't have a login, contact AskGPO for help.

2. MARC Records Module:
- This is the tool I use for retrieving records.

Key Fields in FDM

- Format Type: Retrieve records in formats like microfiche, paper, electronic media, and maps.
- Catalog Record Dates: Look up records from the past 15 days or from specific years.
- Between Dates: Use this feature to access monthly MARC records.
- Agency (by SuDoc): Filter records by agency to tailor information for your patrons.
- FDL Number: Enter your FDL number to retrieve records based on your selection profile.
- Publication Type: Get records by type, such as serials, monographs, and maps.

Retrieving MARC Records

- Get MARC or MARC URLs: Select whether to include PURLs/URLs in your records for better accessibility.
- Download Records: Click the "Download MARC Records" button to save your files.

Importing into SirsiDynix Symphony

1. Importing MARC Files:
- Go to the "Utility" tab and select "MARC Import."
- Name your source file clearly (e.g., include the month and year).
- The source and destination fields can share the same file name.

2. Notepad Overview:
- A Notepad window will show the number of MARC records uploaded and highlight any errors.

3. Creating Reports:
- Navigate to the "Reports" tab and select "Create and Schedule New Reports."
- Use the provided default settings or adjust as needed.

4. Loading the Template:
- Click on your template and go to the "Load" tab.
- Choose your file and click "Run Now" if everything looks correct.

5. Checking Upload Status:
- Look for the "OK" status on the Display Finished Report page to confirm successful uploads.
- Retrieve your report log from WordPad, which will show the number of records uploaded and any errors.

Additional Resources
- FDLP Data Manager - https://fdlp.gov/collection-tools/fdlp-data-manager
- Introducing FDLP Data Manager Webinar - https://www.fdlp.gov/training/introducing-fdlp-data-manager-fdm-new-tool-assist-managing-fdlp-collections
- Other FDLP Tutorials - https://fdlp.gov/file-repository/1030/file-data-manager