

FDLP Data Manager (FDM) Workflows:

Presented by Brianna King

Slide One - Introduction: Hello, my name is Brianna King, and I am the Federal Documents Librarian at the South Carolina State Library in Columbia, South Carolina.

Slide Two - SC Library Information: The South Carolina State Library has served as a federal depository since 1895. As a selective depository, we maintain various materials in our collection, including a significant legacy print collection, which I am currently cataloging. We are also part of the SCLENDS consortium, which allows us to share our resources with 20 libraries across various counties in South Carolina. Our Integrated Library System (ILS) is SirsiDynix Symphony.

Slide Three - FDLP Data Manager (FDM) Workflows: Today, I will demonstrate how to use FDM to upload records into SirsiDynix Symphony. We will cover retrieving records from FDM, discuss the available record format types, and review the steps for downloading and uploading the files.

Slide Four - FDLP Data Manager Main Page: Here we have the main page of the FDLP Data Manager (FDM). If you do not have a login for the system, I recommend contacting AskGPO for assistance in setting it up. FDM offers many tools for managing and processing federal documents. Today, we will focus on the MARC Records Module tool.

Slide Five - MARC Records Module: The MARC Records Module is the tool you'll use to retrieve records. It allows for precise and specific searches when retrieving data.

Slide Six - Key Fields: Today, we will review the following fields: format types, catalog record dates, agency (by SuDoc), FDL number, and publication type.

Slide Seven - Format Type: The format type field enables you to retrieve records in various formats, including microfiche, paper, electronic media, online, and maps (both online and tangible). As many federal depositories transition to a digital-only collection, the format type field helps them identify and weed out items that would not be available in their library.

Slide Eight - Catalog Record Dates: The catalog record dates field not only allows you to look up current records from the past 15 days but also offers the option to retrieve records from different years.

Slide Nine - Between Dates: I find the "between dates" field to be very helpful, as it allows access to MARC records on a monthly basis, similar to MARCIVE.

Slide Ten - Agency (by SuDoc): If you need specific records tailored to your patrons' needs, the Agency field helps filter by different agencies, allowing you to download information relevant only to those agencies that would benefit your patrons.

Slide Eleven - FDL Number: By entering your FDL number, you can retrieve records associated with your selection profile. If you are unsure of your FDL number, you can find it on the GPO website under the Federal Depository Library Directory. The link is provided below.

Slide Twelve - Publication Type: This field allows you to retrieve records by publication type, including serials, monographs, monographic component parts, collections, integrating resources, and maps.

Slide Thirteen - Get MARC URLs: Finally, at the bottom of the page, you have the option to retrieve records with or without a PURL/URL. At my library, we follow the best practice of including the PURLs whenever available to enhance accessibility for our patrons.

Slide Fourteen - MARC Records Module: The final step in using FDM is to download the MARC records. I also recommend exporting the Excel sheet that includes the OCLC numbers for all the records you will download; this will assist you with adding OCLC holdings. To download the MARC records, simply click on the teal "Download MARC Records" box.

Slide Fifteen - MARC File: On this slide, you can see that both the records downloaded from FDM and MARCIVE have the same .mrc extension and are both in PDF format.

Slide Sixteen - SirsiDynix Symphony Workflows: As previously mentioned, the South Carolina State Library uses SirsiDynix Symphony Workflows. I will now demonstrate how we import the MARC file into our catalog. At the top of this page, you'll find a tab labeled "Utility," and under that section, select "MARC Import."

Slide Seventeen - MARC Import: In the MARC Import section, your source will be the name you assigned to your file. If you're uploading monthly, I recommend naming the file with the month and year to keep your records organized. One key difference between FDM and MARCIVE is that FDM provides a single

file of MARC records, whereas MARCIVE supplied batch records for new and changed items. For the Destination field, you can use the same file name as your source.

Slide Eighteen - Notepad: Next, Notepad will open, displaying the number of MARC records to be uploaded and highlighting any errors detected.

Slide Nineteen - Reports: At the top of this page, you'll see a tab labeled "Reports." Under this section, select "Create and Schedule New Reports."

Slide Twenty - Schedule New Reports: These are the default settings for our template.

Slide Twenty-One - Template: Our template was developed by the previous Federal Documents Librarian, with assistance from our Deputy Director and the Sirsi team.

Slide Twenty-Two - Load: After clicking on the template, select the "Load" tab. At the top of the page, next to "File to load," choose the name of your file. If the rest of your template looks correct, click "Run Now."

Slide Twenty-Three - Display Finished Report: If everything ran smoothly, the status on the Display Finished Report page should indicate "OK," confirming that the records were uploaded correctly.

Slide Twenty-Four - View Finished Reports: Next, the "View Finished Reports" page should open. This is very important because it generates your report log.

Slide Twenty-Five - Report Log: After clicking "OK" to retrieve your report log, WordPad will open. It will display the number of records uploaded and indicate if any errors were detected. Additionally, it provides a complete list of bibliographic records for every item uploaded. This list is an excellent way to perform a quality check of your records against the Online Public Access Catalog (OPAC) system.

Slide Twenty-Six - SirsiDynix Symphony: Here's an example of how the record appears in our ILS. You'll notice the fixed fields and the typical fields you'd expect. The 035 with our OCLC number, 040 our cataloging source, and 042 fields indicate the authentication code (pcc). I added my local code in the 049 field. You'll also see the 086 field with the provided SuDoc number, along with the 245, 246, and 264

fields containing the title and publication information. The PURL is located at the very bottom in the 856 field.

Slide Twenty-Seven - SC State Library Catalog: Finally, I wanted to show you what our library patrons see. The interface translates and displays the information imported into our ILS in a clear and accessible way. It indicates that the item is an online resource and provides all the necessary details for patrons to access the content easily.

Slide Twenty-Eight - FDLP Resources: If you would like to explore more information on FDM, FDLP has provided many helpful resources, which I have linked on this slide.

Slide Twenty-Nine - Contact: If you have any questions or would like to discuss what I've shared further, please feel free to contact me using the information provided on the screen.