FDM Tutorial: Creating an inventory using metadata from shipping lists and catalog records

Process:

- Identify a section of your collection to inventory or evaluate for weeding.
- Log into FDM.
- Click on **MARC Records**.
- Do a high-level search for records in the area to be evaluated.
  - Use the **Format type** field to limit results to the Paper format (or whatever format you are evaluating).
  - Use the **SuDoc** field to limit the results to the section being evaluated. Be sure to use the % wildcard character.
- Click **Get MARC** to review the search results.

Example: if you are evaluating your Department of Agriculture collection in paper format:

1) If the record set is acceptable for your needs, click **Export to Excel**

What is returned are all the catalog records in the CGP/FDM that match your criteria. There will be a mix of serial records and monographic records. The resources cataloged may be older resources, but the records will have been created, and likely modified, more recently.

Dive deeper: To get some measure of item-level information for serials, make use of the Shelflist module.

- Click on **Home** > **Shelf List**.
- Use the **SuDoc** number field to limit to the area being evaluated. Make use of the wildcard %.
- Limit the type of shipping list to the format you are evaluating. For example, if you are evaluating the paper format, you may want to do one search for the Paper shipping lists and another search for the Separates shipping lists.
- Click **Submit**.

For example:

What is returned is item or piece-level information for material shipped out going back to 1997 (if your search did not limit by date).

Next, open a new spreadsheet and populate it with data from both spreadsheets. If you are creating a weeding list, and your library uses FDLP eXchange, use the FDLP eXchange Offers template. Copy and paste into the offers template relevant fields from the MARC Records and Shelf List exports, such as the SuDoc numbers, Titles, OCLC, Shipping list date, etc.

Tip: Shipping list data will not have OCLC numbers. MARC Record data will not have a Shipping list date.

Sort the information by the SuDoc number column. If it helps, to better visualize multiple SuDoc numbers (indicative of duplicate records or a record and associated shipping list entry), select the SuDoc column and on the **Home** tab, under **Conditional Formatting**, select: **Highlight Cells Rules** > **Duplicate Values**.
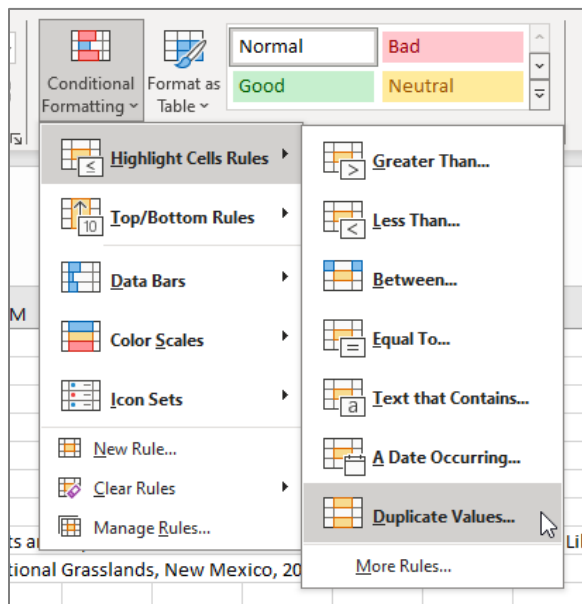
Return to the area of your collection you are evaluating. Delete anything on your new spreadsheet that you do not have or are not evaluating. What remains on the list are your holdings or offers.

Tip: to reduce duplicate entries in the spreadsheet, where MARC record data is listed as well as the shipping list data, you can de-duplicate the entries.
- Select the SuDoc column. On the **Home** tab, under **Editing**, click **Sort & Filter** > **Custom Sort** > **Expand the selection** > **Sort**.
- Sort by SuDoc should be listed (1).
- **Add Level** > Then by **OCLC** (2).
- **OK** (3).
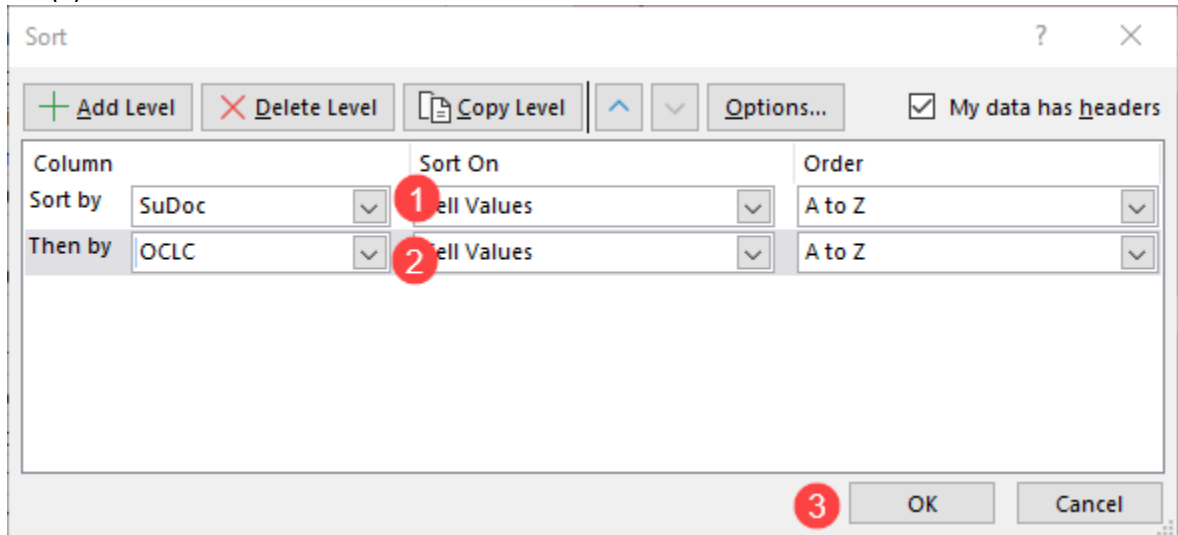
- **Sort numbers and numbers stored as text separately** > **OK**
- Select the entire table by clicking in the triangle above cell A1
- Click on the **Data** tab.
- **Remove Duplicates**
- **Unselect All** (1)
- Check the box for **SuDoc** (2)
- **OK** (3)
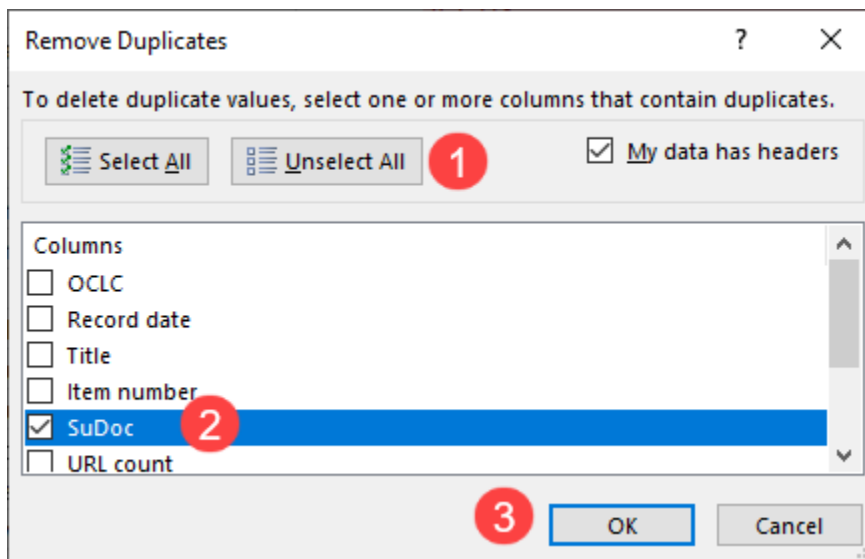
When a duplicate SuDoc number is found, it will retain the first entry. Because the list was sorted first by SuDoc and then by OCLC, the entry with the OCLC (if it exists) will be retained.

Notes:
- Overall, this method provides SuDoc and title information for all existing CGP records. It also adds item or piece-level information going back to 1997. There will be some overlap and there will be gaps, but it may be faster than manually typing an inventory or offers list.
- If you used the FDLP eXchange Offers template, you can autofill some of the required fields, such as the Classification field. Fields like the Condition may be autofilled to be "Good," but be sure to note instances where the condition is not Good and adjust the values where needed.

Date 12/31/2024