CARLI

CATALOGING GOVERNMENT DOCUMENTS IN I-SHARE BRAINSTORMING SESSION
SEPTEMBER 9, 2020

- Session Goals
- CARLI Q&A for members
- Import Profile Basics
- Participant Q & A

Help I-Share libraries pick-up where they left off with gov docs cataloging work.

- Creating and using import profiles to add catalog records and inventory

- Explore expectations for gov docs catalog records

  - Expectations of the data

  - Expectations of each other, i.e., how we collaborate

- Attendees participate

Today's session is the start of a discussion.

- What governments' documents are you providing?

- Who is providing your records?

- What data/metadata are included in these records?

  - Are any metadata customized for your institutiton?

  - Does your contract restrict you from sharing records with non-customers?

- What expectations do gov docs users have for discovery of gov docs?

- What expectations do docs librarians and catalogers have for gov docs records?

- What expectations do docs librarians and catalogers have of other gov docs libraries?

- Roles for creation & management
  - Acquisitions Administrator, Catalog Administrator
- Use Network Zone
- Import Type: Repository
- Originating System
- Import Protocols
  - FTP
    - May be scheduled or run manually
  - Upload from workstation
    - May be run manually
- Physical Source Format (i.e., of the import file)
  - Binary = MARC21

- Normalization
  - Normalization rules apply after portfolio created
- Match Profiles
- Match Actions
  - Handling Method = Automatic: Upon Match
    - What to do if single match occurs
  - Merge/Overlay: Select Action
    - Allow bibliographic deletion – if LDR/05 = 'd'
- Automatic Multi-Match Handling
  - Check all the boxes

- Inventory Operations
  - Electronic (portfolios) or Physical (holdings/items)
  - Mixed: Specify tag-subfield containing "E" or "P"
  - Inventory fields mapped from MARC tags/subfields
- Electronic Inventory
  - Standalone or Collection
  - Material Type
- Physical Handling
  - Material Type
  - Default library and location
  - Holdings Mapping gets call number

- Roles for running imports
  - Catalog Manager, Cataloger
  - Purchasing Manager, Purchasing Operator
- Import > Actions menu > Run
- Monitor and View Imports
  - View Report
  - View Imported Records

Ideas Exchange

- Include MARCIVE GPO database in CDI

  - https://ideas.exlibrisgroup.com/forums/574345-content/suggestions/32919835-marcive-gpo-database

- Add URLs to US Government Documents

  - https://ideas.exlibrisgroup.com/forums/574345-content/suggestions/18827677-add-the-urls-to-the-us-government-documents-they

Or just Google "Idea Exchange GPO"

You can always contact CARLI at support@carli.Illinois.edu

Thank you!

10:35:51   From Susan Howell : We have gpo and Illinois documents

10:35:51   From Illinois State Library : fed and IL

10:35:54   From Alice Creason : Mostly federal docs; GPO

10:35:54   From Jonathan Nabe : MARCIVE, MARCIVE, full MARC records for online gov docs, no - metadata is not customized for institution, not sure about contract restrictions

10:35:55   From Kyle Olney : GPO

10:35:57   From Shirley Haworth : Here at WIU we provide Federal GPO docs and Illinois docs

10:36:01   From Angela Bonnell : GPO and Illinois

10:36:06   From jlstrain : Olivet is a FDLP library -- Federal documents

10:36:08   From Kate : fed and IL

10:36:11   From Sangeeta : from goo

10:36:12   From markhamilton : Here at Northern it is Federal and State. We have an inactive UN collection.

10:36:12   From Russell Kracke : Just FDLP. We are a selective depository.

10:36:15   From gabrielletoth : Chicago State - we're a federal depository and a state depository.

10:36:19   From Illinois State Library : Fed and IL respository and house everything for botht

10:36:37   From John Whisler : Federal documents (selected physical, complete electronic) Same for Illinois docs.

10:36:49   From Debbie : McKendree has Federal. We use Marcive through the CDRP program.

10:36:51   From Russell Kracke : MARCIVE, but mostly we download from from OCLC Connexion.

10:36:58   From bredeme : Federal and State. The records come from GPO through MARCIVE. State we provide the cataloging.

10:37:00   From John Whisler : I receive all records from OCLC

10:37:04   From Shirley Haworth : We import our records from OCLC. We got rid of MARCIVE several years ago because there were too many problems and too much duplication.

10:37:09   From gabrielletoth : Marcive, but not happy with it.

10:37:15   From jlstrain : "MARCIVE, MARCIVE, full MARC records for online gov docs, no - metadata is not customized for institution, not sure about contract restrictions" - this applies to Olivet as well

10:37:26   From Denise Green @CARLI : Anyone catalog your city ordinances or local codes?

10:37:27   From Susan Howell : We have UN documents as well

10:37:28   From Illinois State Library : Marcive OCLC and original cataloging

10:37:37   From Tami Luedtke : We're an e-only FDLP (fed) depository at the university library . We get out records from OCLC's Collection Manager of our FLDP profile records Our Law library is a different instance.

10:37:38   From Alice Creason : We import records from OCLC; but mostly electronic, very little print; so most of our records migrated to Alma as standalone portfolios

10:37:40   From Kelley Plass : FDLP - mostly electronic federal

10:37:50   From karsten : Partial GPO Catalog from OCLC

10:38:49   From Mary Konkel : Catalog federal documents at librarian selectors' request. Using OCLC.

10:39:38   From Russell Kracke : We use GPO mostly to verify MARC records.

10:41:53   From Illinois State Library : ISL adds URL or pearls

10:41:57   From Alice Creason : Mostly interested in the PURL

10:41:58   From Joan Schuitema : Ted: do you mean local fields for coded info as well as regular MARC fields?

10:42:02   From markhamilton : Marcive adds a location code d=govpubs stacks, w=microforms, 4=storage, e=CD/DVD, 9=e resource

10:42:05   From Russell Kracke : We are always looking for a record with a PURL and a 500 that has a "Shipping List no." Then we have to add our local extension (694) about what kind of government collection it is (Basic, Academic Core, etc.)

10:42:33   From John Whisler : In addition to the PURL, I often get unwanted URLs that should be weeded out before creating portfolios.

10:42:56   From Mary Konkel : Since the requests for govdoc cataloging are mostly for the real hot, and popular titles, full cataloging is generally available. I may add summary/abstract, a few more access points, and when the document has a popular name, I'll add a 246 Also known as: title.

10:43:36   From Illinois State Library : CARLI was doing custumization for ISL with Voyager

10:44:43   From Angela Bonnell : barcodes for monographs at Illinois State University

10:45:02   From Illinois State Library : They are public records

10:45:32   From Mary Konkel : The sponsor or lead on the report is often what users are asking for and also what news reporting agencies call it.

10:46:18   From Illinois State Library : Jim Noel would be a good person to add this discussion

10:46:31   From Illinois State Library : Jim Noel is with MArcive

10:46:35   From Tami Luedtke : As we are an e-only FDLP and are getting our records from a "collection" on OCLC Collection Manager we've been coding a local collection code and name in a local field (thought I might use it to gather these into a local collection in Alma/Primo, but hadn't fully figured that out yet)

10:47:49   From markhamilton : I do not know if we have restrictions.

10:47:54   From bredeme : GPO has stated that they are fine with us sharing the MARCIVE records received through the CDRP

10:47:55   From Jonathan Nabe : WE will have to contact the vendor to get this answer

10:48:19   From Russell Kracke : We've always shared our records. No known restrictions.

10:48:53   From Gordon Fellows : MARCIVE has two programs for delievering gov pub records. One is cheaper than the other but I don't know the difference

10:51:28   From Alice Creason : We want to make sure they are discoverable in Primo as electronic porfolios; we catalog mostly electronic

10:52:21   From Mary Konkel : User expectation, especially our community members, hear something on the news and look for it immediately at the library.

10:52:59   From Russell Kracke : In the past, when we downloaded a record for a print gov doc, we've always downloaded a record for the online record, too (if it existed). Now that our repository is closed due to COVD, we're thinking about going online only. Plus, we hope we'd get more usage that way. This would require a discussion with our rep. (Our repository is in the lower level of the library).

10:53:01   From Jonathan Nabe : Correct links - make sure that a record update process is working well to replace metadata

10:53:03   From Angela Bonnell : Easily understood records especially for serials/analytics/bound withs

10:53:04   From Kyle Olney : yes, that's our primary goal as well … electronic GPO resources available in Primo (with links that work!)

10:53:23   From Denise Green @CARLI : Anyone here from a law school library? Do your patrons use docs differently?

10:54:04   From Alice Creason : We only have paralegal program; they are fine with online-only; or online-mostly

10:54:45   From Mary Konkel : Eresources preferred as link can be forwarded to user when requests come in via chat or call,

10:55:21   From Kate : NIU Law here; we are almost exclusively online for gov docs

10:56:10   From Mary Konkel : In the cataloging record, important to be specific when document comes in various iterations eg. executive summary, full document, or preliminary report-- ALL with the same title

10:56:26   From markhamilton : Echo Jonathan Nabe: clean overlay of corrected records.

10:57:15   From Alice Creason : Best practices for creating a local electronic collection for gov docs

10:57:33   From Illinois State Library : Best practices for print also

10:57:57   From Russell Kracke : Hoping to find good records we can link to through the network zone. Biggest pain is invalid URLs.

10:58:10   From karsten : Full level cataloging with authority work.

10:58:41   From Alice Creason : Right now we have lots of standalone portfolios, and I'm not sure how to wrangle them together.

10:59:16   From Shirley Haworth : Full level cataloging with authority work, clean overlay of edited/corrected records

10:59:23   From Russell Kracke : Records should include: PURLs, Sudoc, Item no., 505s, 520s, 500 (Shipping lit no.)

10:59:28   From Mary Konkel : Including the Month,Date will help differentiate titles with same title and clarify various iterations.

11:00:16   From markhamilton : Item numbers preferably in the 074 rather than 500 fields.

11:01:18   From Jennifer Masciadrelli : Alice: this document describes how to make a local collection and link local portfolios to it: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources

for cleaning up P2E resources: I'm still working on documentation for those steps specifically, though this document goes over the steps in a broad sense

11:02:17   From Kyle Olney : yes about the standalone portfolios! … all of our marcive records migrated in this way … if multiple CARLI members are subscribed to the same package/collection (?) from Marcive can this be streamlined for all of us and automated like resources are for other electronic vendors?

11:02:51   From Alice Creason : Yes, what Kyle said!

11:03:57   From Illinois State Library : Agree with Kyle -

11:05:43   From Jonathan Nabe : The electronic holdings (portfolios) are at the institution level though so collections would need to be created at the IZ level.

11:11:37   From Joan Schuitema : But in this model, wouldn't each library have to have a metadata records in order to be grouped together? IN other words, everyone would still have to purchase metadata

11:14:06   From Jonathan Nabe : Here is a MARCIVE record that also has a CZ record. ocm38235396 Search Alma for title and by OCLC Control Number

11:30:36   From Kyle Olney : regarding FTP server, i think our former process was set up so that our Marcive files were going to a CARLI server and was being added in an automated process ... is there any way to know if the monthly files are still being sent there (but obviously not acted upon since the process was set up for Voyager)?

11:32:04   From Gordon Fellows : I am still downloading all the files from Marcive that I had automatic loads into Voyager set uo for

11:34:19   From Kyle Olney : Gordon, thanks -- that's helpful to know

11:35:23   From Gordon Fellows : Marcive only keeps files on there ftp site for a short time, so if you want to set up a load into Alma I have all the files since Voyager loading ended

11:43:40   From Kyle Olney : And when you say "load," Gordon, does that basically mean creating an Alma import profile that we'd connect those files to?

11:44:51   From Gordon Fellows : Yes

11:50:15   From bredeme : The State Library should be getting 100% of GPO's records through MARCIVE from the CDRP and they want us to share them. They should be able to use them as a profile. The titles you would not receive would be titles that GPO does not catalog (e.g. some items from the Federal Reserve Banks). There would also be the issue of when GPO uses a serial record when a number of depositories use a monographic record or vice versa.

11:55:13   From Tami Luedtke : Sorry lots of construction noise here. We use the electronic collection manager associated with our profile to get a subset of those records and it has worked relatively well.

11:57:17   From Jonathan Nabe : Thank you for that clarification!

11:57:18   From Tami Luedtke : I had thought about using the whole collection and not associating it with our profile just to get everthing in the collection and I think we could import all of the records from theat electronic collection if we decided to

11:58:37   From Jonathan Nabe : MARCIVE is working on updating the purl links

11:59:33   From Jonathan Nabe : The updated purls will be included in changed records sent during the next few months.

12:03:19   From Andrea : Love that idea!

12:03:32   From Tami Luedtke : Definitely think that is worth looking into

12:03:38	From Alice Creason : Yes, we love this idea.
12:04:30	From Alice Creason : :D We all have our to-do lists...
12:04:59	From Mary Konkel : Job security seemingly forever-- or at least until retirement.
12:05:14	From Theodore Carl Schwitzner : So forever
12:05:42	From Illinois State Library : thank you
12:05:43	From Angela Bonnell : Thank you!
12:05:49	From Alice Creason : Thank you!
12:05:49	From markhamilton : Thank you
12:06:01	From Shirley Haworth : Thank you so much!
12:06:02	From Jonathan Nabe : Thank you!
12:06:06	From Mary Konkel : This was extremely helpful, especially the walk through the import file profiling.
12:06:08	From Tami Luedtke : Thanks!
12:06:11	From Denise Green @CARLI : Thank you for coming
12:06:18	From Russell Kracke : Many thanks, Ted, and all.
12:06:31	From Karin Lela Wece : Thank you!
12:06:33	From Kate : Thanks!
12:06:38	From Kyle Olney : thanks everyone!
12:06:46	From Dasheka Whitaker : Thanks!
12:06:59	From Neil Das : Thanks.