Connecticut State Library
“Single Record” Workflow
Web Presentation

Presented by Stephen Slovasky, Cataloging Unit Head, and Laura Diller, Cataloging Librarian
Overview

- About the Connecticut State Library
- Accessing the Catalog of U.S. Government Publications
- New Electronic Titles Monthly Archive Report
- Batching records in OCLC
- Cataloging electronic records in OCLC
- Cataloging hybrid records in OCLC
- Cataloging hybrid records in Alma
The Connecticut State Library (CSL) is a regional depository located in Hartford, Connecticut.

Our collection of federal material dates to 1789. The CSL has been receiving Congressional documents and reports since 1855.

We were designated the Regional Library for Connecticut in 1962 and for Rhode Island in 1982. As a Regional Library, we receive and retain all publications issued through the FDLP and consult with the other depository libraries regarding compliance with FDLP procedures.

We currently serve 17 selective depositories in Connecticut and 8 in Rhode Island.
Our federal documents collection contains over 1.5 million documents in print, microform and electronic formats.

We catalog all tangible (hard copy) and electronic depository items.

We typically catalog different versions of the same GPO title using a single bibliographic record for our online catalogs and discovery environments.

The same practice applies to Connecticut state agency publications, for which CSL is the official depository.
About the CSL

- Electronic federal and state documents are both organized into local Alma electronic collections at CSL.
  - Federal documents belong to the USGPO electronic collection.
  - State documents are added to the Connecticut State Government Publications electronic collection.
• Alma view of a hybridized federal government publication.
• Primo view of hybridized federal government publications.
- Alma view of a hybridized CT state government document.
Primo view of hybridized CT state government documents.
About the CSL

- We use OCLC Connexion to catalog GPO titles.
- We access new electronic titles through the GPO’s New Electronic Titles (NET) Monthly Archive Report.
- We also use the NET report to create hybrid (single) records for documents in our collection which have tangible and electronic formats.
Accessing the New Electronic Titles (NET) Monthly Archive Report
Each month CSL catalogs the titles announced on GPO’s New Electronic Titles (NET) Monthly Archive Report.

To access the report, navigate to: https://catalog.gpo.gov/
Click on “Electronic Titles” in the top menu.
Click on the link for the New Electronic Titles Monthly Archive Report.
Search for the .CSV (Comma Separated Values) file for the month you need.
Download and save the file.
Open the .CSV file in Excel:

- **Data → From Text/CSV → Choose file → Import → Load**

- Save it as an Excel document.
Batching Records in OCLC

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### Batching Records

- Investigate records saved in the Excel document and figure out if they are currently in our collection (print, fiche) or new to us (electronic).

- Organize the Excel sheet accordingly to indicate the type of record it is and the import profile it will need.
  - Electronic only, print hybrid, or fiche hybrid

- Records of a similar type will be batched and imported together.

<table>
<thead>
<tr>
<th>Year</th>
<th>Call Number</th>
<th>Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1982</td>
<td>827218162 743245535</td>
<td>Monograph/Item</td>
<td>Not in Alma, check anyway</td>
</tr>
<tr>
<td>1981</td>
<td>827207959 956658759</td>
<td>Monograph/Item</td>
<td>Not in Alma, check anyway</td>
</tr>
<tr>
<td>1985</td>
<td>655858070 1086003108</td>
<td>Monograph/Item</td>
<td>In Alma, check fiche LC 42.8:G 25</td>
</tr>
<tr>
<td>1982</td>
<td>784826169 981024845</td>
<td>Monograph/Item</td>
<td>In Alma, check stacks LC 42.9:J 27</td>
</tr>
</tbody>
</table>
In the Excel sheet, select and copy the OCLC numbers from records of a similar format (e.g., print, fiche, or electronic).

<table>
<thead>
<tr>
<th>OCLC</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>12536832375</td>
<td>Transportation costs, coking coal, unit train.</td>
</tr>
<tr>
<td>1253682269</td>
<td>Selected references on coal, particularly western.</td>
</tr>
<tr>
<td>1253798999</td>
<td>Evaluation, coal, depreciation rates.</td>
</tr>
<tr>
<td>1253798606</td>
<td>Coal reserves, electric generating plant coal, report.</td>
</tr>
<tr>
<td>1255002795</td>
<td>Mineral valuation, solid minerals ; selected references.</td>
</tr>
<tr>
<td>1255852999</td>
<td>Coal data.</td>
</tr>
<tr>
<td>1256450110</td>
<td>Acid mine water, acid mine drainage.</td>
</tr>
<tr>
<td>1256450817</td>
<td>Coal, chemicals from : chemicals from coal.</td>
</tr>
<tr>
<td>1256450880</td>
<td>Coal.</td>
</tr>
<tr>
<td>1256431292</td>
<td>Surface mines, planning, design, engineering : op.</td>
</tr>
<tr>
<td>125645223</td>
<td>Coal, operating mines.</td>
</tr>
<tr>
<td>125645205</td>
<td>Coal, value.</td>
</tr>
<tr>
<td>125645270</td>
<td>Oil-impregnated sandstone, Uintah Basin, Utah.</td>
</tr>
<tr>
<td>1256453439</td>
<td>Industrial minerals, non-metallic minerals.</td>
</tr>
<tr>
<td>1256452200</td>
<td>Industrial minerals, non-metallic minerals, (revis.</td>
</tr>
<tr>
<td>125645673</td>
<td>Industrial minerals, talc, feldspar, fluor spar and clays.</td>
</tr>
<tr>
<td>1256454215</td>
<td>Clays, general publications.</td>
</tr>
<tr>
<td>125648838</td>
<td>Mining claims, non-mining use, injunction.</td>
</tr>
<tr>
<td>125654825</td>
<td>Milling costs.</td>
</tr>
<tr>
<td>1256550146</td>
<td>Clays, bentonite : bentonite.</td>
</tr>
</tbody>
</table>
• Copy and paste these numbers into Notepad and save the file as a .txt file.
• Open OCLC Connexion.
• Click on “Batch” and choose “Enter Bibliographic Search Keys.”
In the pop-up box:

- Change the default index to OCLC number
- Click the “Import” button and select the Notepad .txt file
- Choose “No” -- do not delete original file
• In the pop-up box:
  • Click “Save”
  • Click “Close”
• Return to “Batch”
• Choose “Process Batch”
Check the box next to the active local file (whichever one you are currently using, or the default if you only use one—mine is “DefaultBib”).

Check the box next to “Online Searches.”

Click OK
- A batch search report will be generated.
- Close this report.

### Batch Search Report

<table>
<thead>
<tr>
<th>Session ID</th>
<th>cnxux12pm1 prod oclc org-1603-kayhec2 00u4d2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Start Time</td>
<td>2021-07-22T09:34:34.04:00</td>
</tr>
<tr>
<td>Session Duration</td>
<td>00:00 02:0948891</td>
</tr>
<tr>
<td>Bibliographic exports reported</td>
<td>0</td>
</tr>
<tr>
<td>Authority exports reported</td>
<td>0</td>
</tr>
</tbody>
</table>

#### Successful Searches (6)

<table>
<thead>
<tr>
<th>Search Key</th>
<th># Records</th>
<th>Save #</th>
<th>Control #</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>no 1255625999</td>
<td>1</td>
<td>1</td>
<td>1255625999</td>
<td>Coal data</td>
</tr>
<tr>
<td>no 1255877991</td>
<td>2</td>
<td>1</td>
<td>1255877991</td>
<td>Coal, synthetic fuels, feasibility : 4b synthetic fuels, from coal, feasibility.</td>
</tr>
<tr>
<td>no 1256450510</td>
<td>3</td>
<td>1</td>
<td>1256450510</td>
<td>Acid mine water, acid mine drainage</td>
</tr>
<tr>
<td>no 1256450817</td>
<td>4</td>
<td>1</td>
<td>1256450817</td>
<td>Coal, chemicals from : 4b chemicals from coal.</td>
</tr>
<tr>
<td>no 1256450880</td>
<td>5</td>
<td>1</td>
<td>1256450880</td>
<td>Coal</td>
</tr>
<tr>
<td>no 1256451292</td>
<td>6</td>
<td>1</td>
<td>1256451292</td>
<td>Surface mines, planning, design, engineering : 4b opn pt mines, planning, design, engineering : strip mines, planning, design, engineering</td>
</tr>
</tbody>
</table>
• Return to the “Cataloging” tab.
• Choose “Search.”
• Select “Local Save File.”
• Click “OK.”
All the files from the .txt file will now be listed in your local save file.

Records are ready to be edited (if needed), saved, and exported.
Cataloging Electronic Records
• If CSL does not have a tangible copy of an item, we import an electronic record into our catalog.
• Records are batched in OCLC (see previous slides for details) to create a list that will be imported into Alma.
- Records are highlighted and exported from OCLC into a text file using the E Action Export button.
Records are imported into Alma using an import profile.

- Click on the “Resources” tab and select “Import.”
- Select the electronic record import profile (“E-feddoc”).
Electronic Records

- Click on “Select File.”
- Attach the .txt file with the exported OCLC records.
• Click on “Submit” to start the batch import.

• When the import job is finished, view the records by clicking on the ellipses and choosing “Imported Records in IZ.”
- View of an electronic-only record in Alma.
Hybrid Records:
Single Record Approach
• CSL uses a “single record” approach for its hybrid records:
  • Print/electronic
  • Fiche/electronic
  • Print/fiche/electronic
  • Print/fiche
Hybrid Records

• If CSL has a hard copy of an item and there is an electronic record with a PURL (Persistent Uniform Resource Locator) available, we use the record for the hard copy and modify it to include information from the electronic record, creating a hybrid record.

• Hybrid records can be created:
  • In OCLC through record editing and batch exports.
  • In Alma by editing records and adding an electronic portfolio.
Creating Hybrid Records in OCLC
Creating Hybrid Records in OCLC

- Investigate which records in the Excel sheet already have print or fiche holdings in your collection and label them according to format type.

- Generate a batch of print records or fiche records in OCLC.

- Do not mix formats
  - So, batch only print records OR only fiche records together.
  - These will be your base records to edit and build on.
    - For print/fiche/electronic hybrids, use the print record as the base record.
- Edit each record in the OCLC batch individually.
- In each base record (print or fiche):
  - Insert an 852 MARC field to attach holdings.
  - Scan a barcode for print or add a dash for fiche (‡z).
    - In the case of a print serial or multipart monograph, an item call number (‡8) and description (‡d) can be added.
Creating Hybrid Records in OCLC

- Look up the online version (electronic record) of your base record (use the MARC 776 field).
- In the online version (electronic record):
  - Copy the first 856 field (purl link).
  - Paste it into the base record (print or fiche record) saved in the batch list.
  - Repeat this process with the second “Address at time of PURL creation” 856 field.
Creating Hybrid Records in OCLC

- In the base record (print or fiche):
  - Change the second indicator of each recently pasted 856 field to a “1”.
  - Repeat this process for every base record in the batch list.
Once all base records have been edited, select them and use the E Action button to export them into a text file.

• Note: Make sure the text file is empty before exporting them.
Importing OCLC Hybrid Records

- Import the records into Alma using an import profile.
- Click on the “Resources” tab and select “Import.”
- Choose the appropriate import profile for the record format (print or fiche).
Importing OCLC Hybrid Records

- Click on Select File
- Attach the .txt file with the exported OCLC records.
Click on the “Submit” button to start the batch import.

When the import job is finished, view the records by clicking on the ellipses and choosing “Imported Records in IZ.”
This process is not quite finished yet. Records imported using print or fiche import profiles will only have one holding.

The import process will need to be run a second time to attach an electronic portfolio (PURL link).
Repeat the import process using the electronic record import profile.

- Resources → Import → Feddoc E-feddocs... → Select file → Submit.

When the second import is done, view the records by clicking on the ellipses and choosing “Imported Records in IZ.”
• The imported records will now show two holdings:
  • 1 electronic
  • 1 physical
If a hybrid record has print and fiche holdings, the same import process would need to be repeated a third time.
  - Resources → Import → Feddoc Microfiche → Select file → Submit.

The imported records would then show three holdings:
  - 1 electronic
  - 2 physical
Importing OCLC Hybrid Records

- Other record import combinations:
  - Print/Fiche hybrid (top)
  - Fiche/Electronic hybrid (bottom)
Creating Hybrid Records in Alma
If a print or fiche record already exists in Alma, and needs to have an electronic portfolio attached, you can do so using Alma.

- Open Alma.
- Search for the base (print or fiche) record that you will be converting to a hybrid record.
Open OCLC and find the electronic record that corresponds to your Alma (print or fiche) record.
• Return to the record in Alma and click the “Edit Record” button.
• This will open the Alma Metadata Editor.
- Return to the electronic record in OCLC.
- Copy the first 856 link.
Return to Alma. In the Alma Metadata Editor, find the MARC field that will immediately precede the (new) 856 field.

- (In this record, it is the 830 field.)

Click on the end of this field.
Creating Hybrid Records in Alma

- While still in Alma, go to the top menu and click on “Editing Actions.”
- Choose “Add Field.”
- This will insert a blank MARC field beneath whatever field you previously selected (in my case, the 830 field).
• A new, empty field will appear in the Alma Metadata Editor.

• In this new field, paste the information copied from the first 856 link in OCLC.
  • You will need to change formatting from the “ǂ” OCLC symbol to the “$$” that Alma Metadata Editor uses.

• After pasting and formatting the 852 field information, change the second indicator from a “0” to a “1”
Creating Hybrid Records in Alma

• Repeat this process with the second OCLC electronic record 856 link.
  • In OCLC:
    • Copy the second 856 ＊z note and ＊u link
  • In Alma Metadata Editor:
    • Click on the first 856 field (the one that was just pastedformatted).
    • Go to “Editing Actions” and select “Add Field.”
      • An empty MARC field should appear beneath your first 856 field.
    • Paste in the information from the second 856 ＊z note and ＊u link
      into the empty MARC field.
    • Switch the “＊” OCLC symbols to “$$.”
    • Change the second indicator in the second 856 field from blank to “1.”
• The Alma record should now display two 856 fields.
• On the top menu screen, click on “Save” and choose “Save Record.”
• A green bar should appear at the bottom of the record with a timestamp showing when it was saved.
Creating Hybrid Records in Alma

- At the top of the Alma record menu, click on the “Add Inventory” button.
- From its drop-down menu, choose “Add Portfolio.”
A new screen with the Alma Portfolio Editor will appear.
• Under “General Information” choose “Part of an electronic collection.”
• Fill in information specific to your collection (e.g., our Electronic Collection is “USGPO,” Service is “Full Text,” and Library is “Connecticut State Library”).
Creating Hybrid Records in Alma

- Copy the PURL link from the OCLC electronic record and paste it into the URL field in the Alma Portfolio Editor.
Creating Hybrid Records in Alma

- Scroll further down the screen of the Alma Portfolio Editor. Under “Inventory and Linking Information,” change the Electronic material type to “Government Document.”
Creating Hybrid Records in Alma

- Keep scrolling down to the “Notes” section of the Alma Portfolio Editor. In the “Public note” box, type in “Permanent link.”
  - This note would be added automatically if you were creating electronic portfolios using an Alma import profile.
  - When using the Alma metadata editor notes must be added manually.
When finished with the Alma Portfolio Editor, click on the “Save and Done” button at the top of the screen.
• After saving, you will be returned to the Alma Metadata Editor screen.
• Look for a “New Portfolio created...” pop-up message in the top right portion of the screen.
Creating Hybrid Records in Alma

- Your electronic portfolio is complete and has been added to the record in Alma.
- In the top menu, click on “Save” and choose “Save and Release Record.”
- The record will be released, and you will exit the Alma Metadata Editor.
- Find the original record in Alma.
- You should now see two holdings:
  - One physical holding
  - One electronic holding
- The electronic portfolio has been successfully added. You have created a hybrid record in Alma.
Image Credits

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Questions?

Please email Stephen (Stephen.Slovasky@ct.gov) or Laura (Laura.Diller@ct.gov)