

Merging Title Records in Evergreen

An essential function in database clean-up and maintenance is merging duplicate records. Duplicate records are two or more bibliographic records that represent the same bibliographic entity, with the same publication information and physical description. Follow PINES policies and procedures to identify duplicate records. You can enter records to be merged in **Record Buckets** either individually using the **Actions for this Record** menu or several at once using the **Record Query** function imbedded within **Record Buckets**.

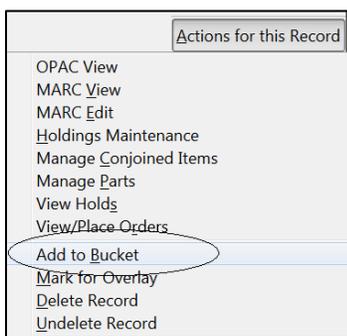
Entering individual records in a Record Bucket

While viewing an individual title record in any view, you can from the **Actions for this Record** menu add the record to a **Record Bucket**.

In this list of titles by Samuel R. Delany, *Driftglass* appears to be a duplicate:



Check each suspected record in **MARC View** to determine if they should be merged. You can also place them in a **Record Bucket** for side-to-side comparison for final verification of their suitability for merging. Place each record in a **Record Bucket** while viewing it by choosing **Add to Bucket (CTRL B)**: from the **Actions for this Record** menu:



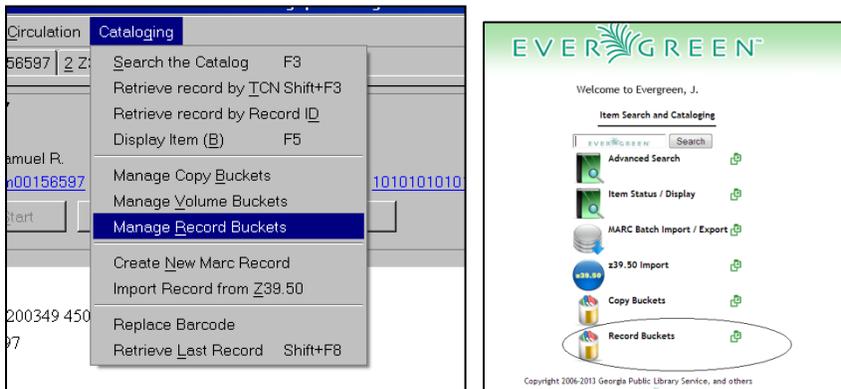


From the **Add to Bucket** dialog box, choose the bucket you use for merging or **Add to New Bucket**. If you add to new, you will be prompted to name the new bucket:

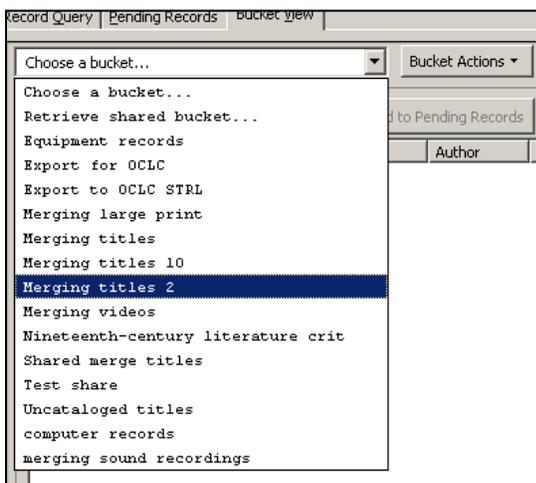


Put each record to be merged in the same bucket. Limit the number of records in a bucket to the amount you can manage. Attempting to merge large numbers of records can slow system response time.

Open a new tab and, either from the **Cataloging** menu, choose **Manage Records Buckets (CTRL R)** or, from the portal page, click on the **Record Bucket** icon (the green arrow opens the bucket in a new tab):

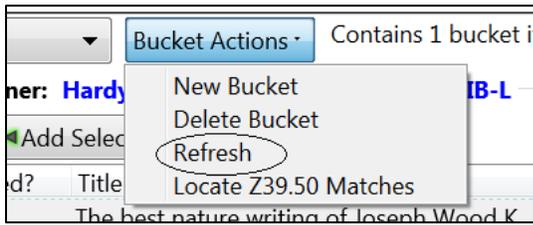


From the drop-down menu **Choose a bucket**, pick the bucket you need:





A list of records in that bucket will be displayed:



If you add more titles to the bucket, you may need to **Refresh** to display the entire list.

Click on the **Merge All Records** button on the bottom right-hand side of the screen:



The next screen will display your records side-by-side.

Once in **Merge All Records**, for each individual record, you can **Remove from Consideration**, **View Bib** (default), **Edit Bib** record, or view and edit **Holdings**:



Edit Bib is handy if you want to add a MARC field from a duplicate to the target record or make any other edits to the target record. Please note, that if you are merging more than three (3) records, when in **Edit Bib**, you may not be able to resize the individual records to access the Save button. This means you may only be able to edit bibliographic records from the record bucket interface if you have three or less records to merge.

The **Holdings** view is handy if you either need to edit the call number or view holdings to see if the record is for a large print or audio-visual item. Some PINES records for multi-volume sets are on separate records rather than on the correct multivolume record. Some of those individual records for the same library do not indicate volume designation in the call number, thus having identical call numbers. If you merge these records without editing the call number, Evergreen will merge so that there is one volume record attached to the owning library with multiple copies. (Please note that it will keep different libraries holdings separate.) Before you merge the record, you should edit the call number by adding the volume designation. Switching to **Holdings** view allows you to edit the call number as you would from **Holdings Maintenance**. You can also **Edit Items** from here if needed, as well as any other functionality within **Holdings Maintenance, Actions for Selected Rows**.

Some of our really bad records are large print on regular print records. Some of these records do not indicate in the body of the bibliographic record that they are large print. You can check **Holdings** view here to see if the call number or local shelving location gives you a clue.

Similarly, some of our old, bad records are sound recordings or visual materials on book format. Again, the only way you can be certain is to check **Holdings** view.



You can **Remove from Consideration** any record that you do not want to include in the merger. The record remains in the **Record Bucket**; but, is no longer a candidate for the specific merge.

Once you have confirmed they are duplicates, made any changes to the bibliographic records or call number necessary, **Removed From Consideration** any that should not be merged, pick the **Lead Record** (the record all others are to be merged with) by clicking on the radio button for that record, then click **Merge**:

Merge these records? (Select the 'lead' record first)

Lead Record?

Record Summary ([View MARC](#))

Title: The best nature writing of J
Author: Krutch, Joseph Wood
Edition:
Pub Date: 1969 [©1970]
Bib Call #: 500.9/08
TCN: ocm00053253
Database ID: 5725534

View Bib Edit Bib Holdings

Your records will be merged in the database. However, some or all records may still display in a search result list until re-indexing occurs. A merged record will have a the Record Summary caption highlighted in red and will have 0/0 holdings attached:

Record Summary ([Add Volumes](#)) ([View MARC](#))

Title: Isaac Asimov's magical worlds of fantasy : witches & wizards
Author: Asimov, Isaac, 1920- .

Clean out your bucket before proceeding!

1 Record Buckets +

Record Query Pending Records Bucket View

Merging titles Bucket Actions - Contains 2 bu

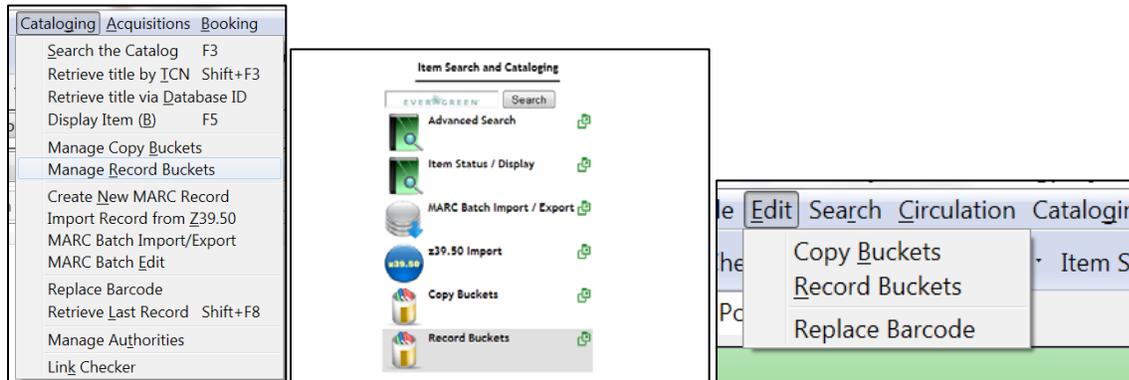
Bucket # 000 Merging titles Owner: Hardy (2109900000213) @ STATELI

#	Author	Deleted?	Title
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Using Record Query to build a record bucket for merging bibliographic records.

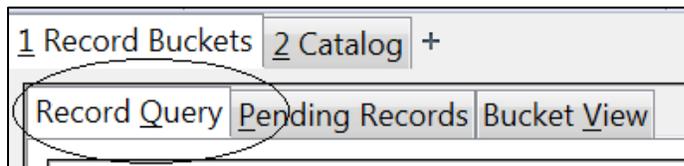
If you are merging duplicate records, you can use the **Record Query** search imbedded in **Record Buckets** management to load multiple records into a bucket at one time rather than adding records one at a time from individual views.

If you have a group of titles you suspect need to be merged, open the **Record Buckets** interface:



Choose the bucket you wish to use or create a new one if needed. Make sure the bucket is empty.

Click on the **Record Query** tab within the **Record Buckets** interface:



You can add columns to the view in **Record Query**; but you cannot rearrange the columns as you can in other interfaces.

Search strategies are different here than elsewhere in Evergreen. The default search is keyword of almost all MARC fields. You can add some search filters to narrow down searches. Click on Help on the upper right of the screen for a list of search filter labels. The most useful will be **title:** and **title|proper:**. You can also search title and author as a single keyword search: for example: big red fire engine greydanus. You can also search ISBNs, UPCs, LCCNs, and ISSNs.

Using the keyword search: big red fire engine greydanus, the system retrieves five hits:

The screenshot shows the 'Record Query' results page. The search query is 'big red fire engine greydanus'. The results are displayed in a table with 5 hits. The table has columns for #, Author, Edition, ISBN, Publication Date, Publisher, TCN, and Title.

#	Author	Edition	ISBN	Publication Date	Publisher	TCN	Title
1	Greydanus, Rose,			c1981	Troll Associates	ocm07502722	Un carro de bomberos grande y rojo
2	Greydanus, Rose,			1980	TROLL	PIN32183283	BIG RED FIRE ENGINE (FIRST EASY START REA...
3	Greydanus, Rose,			c1980	Troll Associates	ocm06384848	Big red fire engine
4	Greydanus, Rose,		089375272X	c1980	Troll Associates	ocm22255527	Big red fire engine
5	Greydanus, Rose,			1980	Troll Assoc.	bslw014057	Big red fire engine



Four of these titles appear to be duplicates. Choose the titles you want in your bucket using the Shift or Shift/Ctrl keys and left clicking with your mouse:

#	Author	Edition	ISBN	Publication Date	Publisher	TCN	Title
1	Greydanus, Rose.			c1981	Troll Associates	ocm07502722	Un carro de bomberos grande y rojo
2	Greydanus, Rose.			1980	TROLL	PIN32183283	BIG RED FIRE ENGINE (FIRST EASY START REA...
3	Greydanus, Rose.			c1980	Troll Associates	ocm06384848	Big red fire engine
4	Greydanus, Rose.		089375272X	c1980	Troll Associates	ocm22255527	Big red fire engine
5	Greydanus, Rose.			1980	Troll Assoc.	bslw014057	Big red fire engine

Then click on **Add Selected to Pending Records** on the bottom right of the screen:

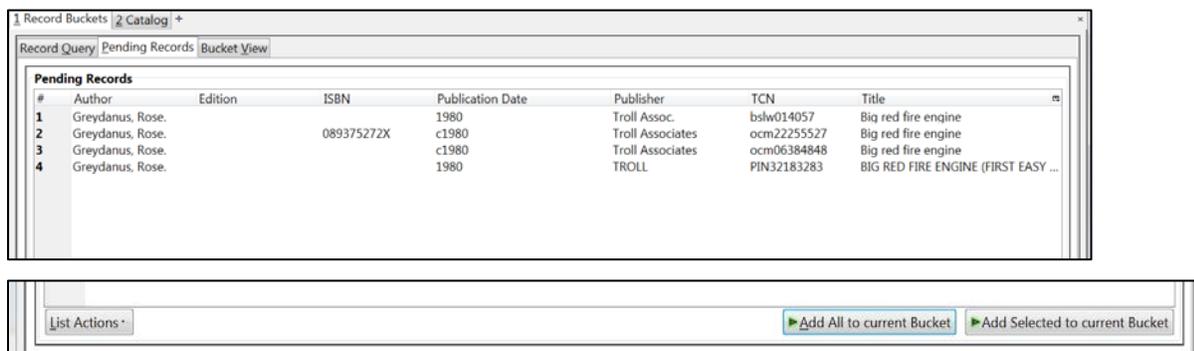


Or, if you wish to look at all of the retrieved titles in the record bucket, click on **Add All to Pending Records**.

If you have searched by author, you can sort by title (click on the column label for **Title**) and add to **Pending Records** all the possible matches (Not recommended for prolific authors!):

#	Author	Edition	ISBN	Publication Date	Publisher	TCN	Title
1	Greydanus, Rose.						Bedtime story
2	Greydanus, Rose.		0816709963 (lib. bdq) :	c1988	Troll Associates	PIN92042946	Bedtime story
3	Greydanus, Rose.		080375272X	c1980	Troll Associates	ocm15015735	Big red fire engine
4	Greydanus, Rose.		0803759023	c1983	Troll Associates	ocm06384848	Big red fire engine
5	Greydanus, Rose.		0803759023 (text)	c1983	Troll Associates	ocm08866665	Changing seasons
6	Greydanus, Susan.		0803759023 (text)	c1983	Troll Associates	ocm26202682	Changing seasons
7	Greydanus, Rose.		0816710996	c1988	Troll Associates	ocm16406974	Climb aboard
8	Greydanus, Rose.			1988	Troll Associates	ocm26101418	Climb aboard
9	Greydanus, Rose.			1988	Troll Assoc.	bslw015159	Climb aboard
10	Greydanus, Rose.		0089375529	1	Troll	PIN25059657	Double trouble
11	Greydanus, Rose.		080375529X	c1981	Troll Associates	ocm07277546	Double trouble
12	Greydanus, Rose.			c1981	Troll Associates	ocm07512783	Federiquito el sapo
13	Greydanus, Rose.		0893752762	c1980	Troll Associates	ocm06431996	Freddie the frog
14	Greydanus, Rose.		[v. 4]		Troll Associates	bslw067610	Hocus focus, magic show!
15	Greydanus, Rose.		0803755397	c1981	Troll Associates	ocm07306299	Hocus focus, magic show!
16	Greydanus, Rose.		0803759007	c1983	Troll Associates	ocm08866722	Horses
17	Greydanus, Rose.			1981	TROLL	PIN33097712	LET'S PRETEND PREBOUND ED
18	Greydanus, Rose.		0816709866 (lib. bdq)	c1988	Troll Associates	ocm15656991	Let's get a pet
19	Greydanus, Rose.		0803755451	c1981	Troll Associates	ocm07277534	Let's pretend
20	Greydanus, Rose.		0803753823	c1980	Troll Associates	ocm06454883	Mike's new bike
21	Greydanus, Rose.			1980	Troll Associates	ocm317634516	My secret hiding place
22	Greydanus, Rose.		0803752835	c1980	Troll Associates	PIN26075377	My secret hiding place
23	Greydanus, Rose.		0803752894 :	[1960]	Troll Associates	PIN04069154	Susie goes shopping
24	Greydanus, Rose.	1st ed.	0803752916	1980	Troll Associates	ocm06670419	Tree house fun
25	Greydanus, Rose.		0803755176 (case)	c1981	Troll Associates	ocm07233220	Trouble in space
26	Greydanus, Rose.			c1981	Troll Associates	ocm07502722	Un carro de bomberos grande y rojo
27	Greydanus, Rose.		080375515X :	c1981	Troll Associates	ocm07307276	Valentine's Day grump
28	Greydanus, Rose.			c1980	Troll Associates	ocm06432613	Willie the slowpoke

From **Pending Records**, you can either further refine the records to be added by selecting records and clicking on **Add selected to current Bucket** or you can **Add All to current Bucket**:





If you have added several of an author's titles, select the duplicate titles from **Pending** and add to **Current Bucket**. Once those are merged or rejected, return to **Pending** and add the next title set for consideration:

Record Buckets 2 Catalog +							
Record Query Pending Records Bucket View							
Pending Records							
#	Author	Edition	ISBN	Publication Date	Publisher	TCN	Title
1	Greydanus, Rose.		0893752835	c1980	Troll Associates	PIN26075377	My secret hiding place
2	Greydanus, Rose.			1980	Troll Associates	ocn317634516	My secret hiding place
3	Greydanus, Rose.		0893755451	c1981	Troll Associates	ocm07277534	Let's pretend
4	Greydanus, Rose.			1981	TROLL	PIN33097712	LET'S PRETEND PREBOUND ED
5	Greydanus, Rose.		0893755397	c1981	Troll Associates	ocm07306299	Hocus pocus, magic show!
6	Greydanus, Rose.			[n.d.]	Troll Associates	bslw067610	Hocus Pocus, magic show!
7	Greydanus, Rose.		089375529X	c1981	Troll Associates	ocm07277546	Double trouble
8	Greydanus, Rose.		0089375529	1	Troll	PIN25059657	Double trouble
9	Greydanus, Rose.			1988	Troll Assoc.	bslw015159	Climb aboard
10	Greydanus, Rose.			1988	Troll Associates	ocm26101418	Climb aboard
11	Greydanus, Rose.		0816710996	c1988	Troll Associates	ocm16406974	Climb aboard
12	Greydanus, Susan.		0893759023 (text)	c1983	Troll Associates	ocm26202682	Changing seasons
13	Greydanus, Rose.		0893759023	c1983	Troll Associates	ocm08866665	Changing seasons
14	Greydanus, Rose.		0816709963 (lib. bdg.):	c1988	Troll Associates	ocm15015735	Bedtime story
15	Greydanus, Rose.					PIN92042446	Bedtime story
16	Greydanus, Rose.	[1st ed.]	0893753718	1980	Troll Associates	ocm07711073	Animals at the zoo
17	Greydanus, Rose.					PIN87138260	ANIMALS AT THE ZOO
18	Greydanus, Rose.			1980	Troll Assoc.	bslw014057	Big red fire engine
19	Greydanus, Rose.		089375272X	c1980	Troll Associates	ocm22255527	Big red fire engine
20	Greydanus, Rose.		089375272X	c1980	Troll Associates	ocm06384848	Big red fire engine
21	Greydanus, Rose.			1980	TROLL	PIN32183283	BIG RED FIRE ENGINE (FIRST EASY START REA...

Click on **Bucket View** to see your previously chosen bucket. You can remove any title that may not be a duplicate at this point, or you can wait until viewing the records in **Merge All Records**

Once in **Merge All Records**, for each individual record, you can **Remove from Consideration**, **Edit Bib** record, or view and edit **Holdings**:

View Bib
 Edit Bib
 Holdings
 Remove from consideration?

When ready, choose your **Lead Record** and click on **Merge**.

Clean out your bucket before proceeding!

Things to remember

- The bibliographic records do not actually merge. Holdings from the records to be merged are moved to the **Lead** record during a merger and then the other records are marked deleted.
- Currently, **Pending Records** can only be cleared by reopening the **Record Buckets** interface.
- Record Query** is cleared by a new search.
- You can remove a record from consideration after you are in **Merge all Records**.
- While there may be no limit to the number of records you can add to the bucket for merging, don't add more than you can easily keep track of. If you do add more than 20, there will be considerable time lag to merge them.
- You can sort the **Record Query** and **Pending Record** tab by any column.
- If you want to see a subset of the records in your bucket in the catalog, open a different, empty bucket. Return to **Pending Records** and choose the ones you want to view and add them to the **Current Bucket**. Or, add the records you wish to display from your bucket to **Pending Records**. Then open another bucket, adding all from pending to the



Current Bucket. In that bucket, click on **Show All in Catalog**. A new tab for each record will open, so keep the number manageable.

-  Your end result should be an OCLC record. This may mean that you will need to overlay the newly merged record with a current OCLC record.
-  Avoid using records input by European libraries as the lead record. They follow different cataloging standards and may have terminology in the language of cataloging. A clue is an older publication date title with an ocn prefix record. If needed, overlay these records with a better record.
-  If you make a mistake merging, it can be fixed. Overlaying with the correct record if you used the incorrect record as **Lead** is easy. Transferring individual volumes or items to another record is easy. If you are unsure how, open a helpdesk ticket. If you haven't cleaned out the bucket, send us the bucket number along with as much information as possible to assist.
-  Ask questions if you are unsure.
-  Take your time.
-  Understand the records in the bucket before you finalize the merge.