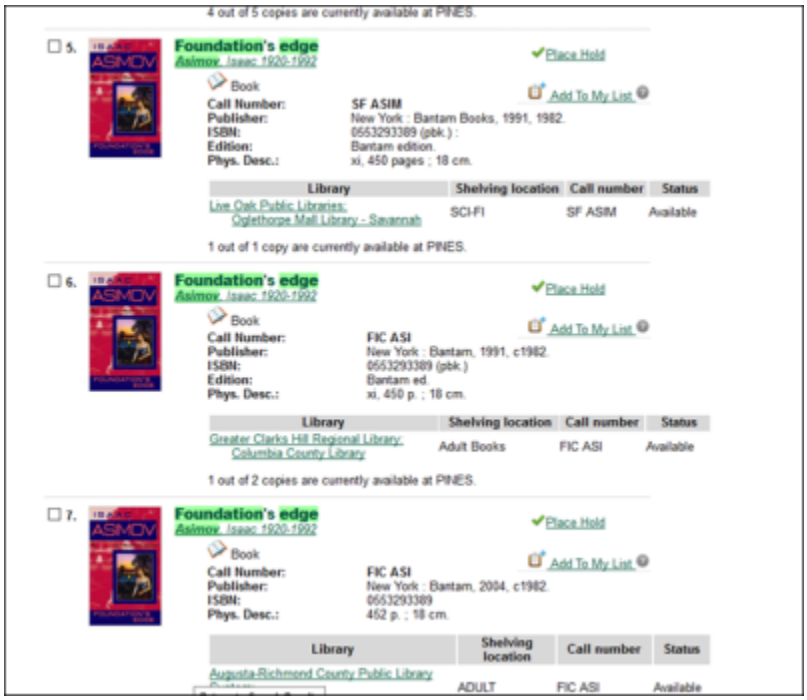
Merging Title Records in Evergreen

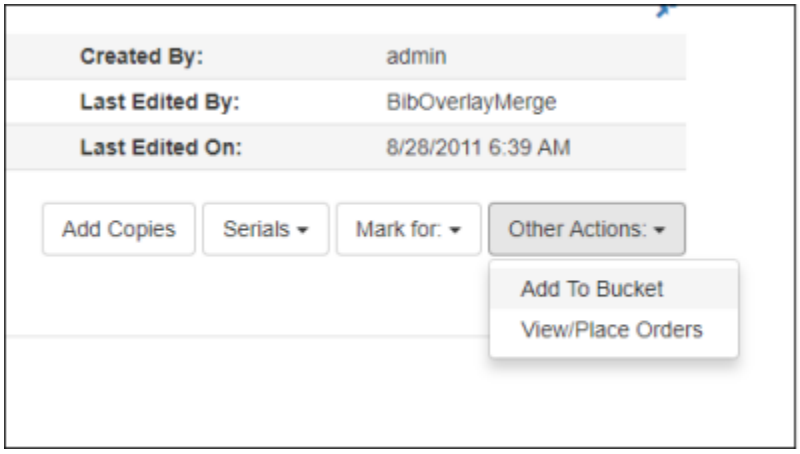
An essential function in database clean-up and maintenance is merging duplicate records. Duplicate records are two or more bibliographic records that represent the same bibliographic entity, with the same publication information and physical description. Follow PINES policies and procedures to identify duplicate records. You can enter records to be merged in Record Buckets either using the Other actions menu, baskets in search results, or using the Record Query function embedded within Record Buckets or the basket feature in search results. Baskets and the record query allow you to add more than one record to a bucket at one time.

Entering individual records in a Record Bucket

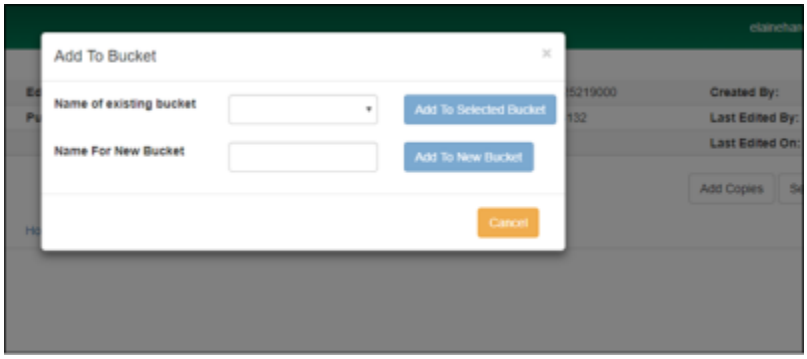
While viewing an individual title record in any view, from the Other Actions menu, add the record to a Record Bucket. In this list of Foundation's edge by Isaac Asimov, there appears to be duplicate records:



Check each suspected record in MARC View to determine if they should be merged. If there is not enough information in the record, you may need to check the item itself. 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: from the Other Actions menu:

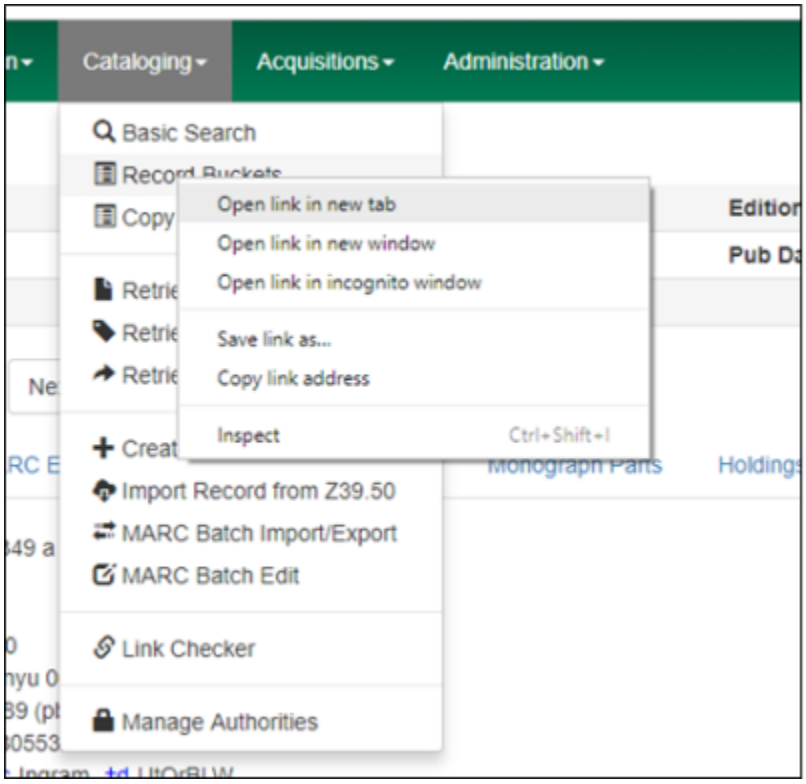


From the dialog box, choose the bucket you use for merging or Add to New Bucket. If you add to new, you will need to name the new bucket.

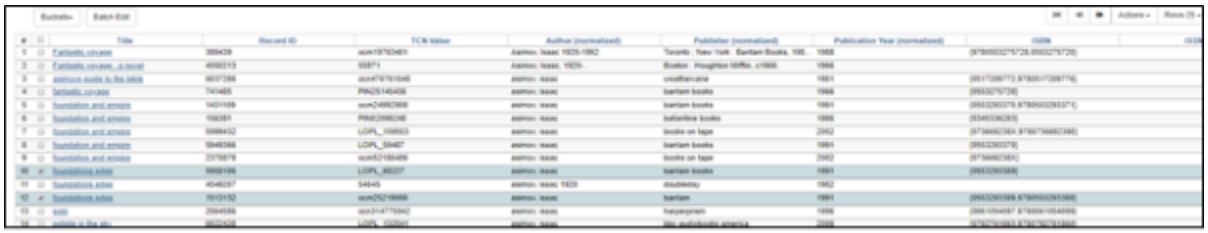


Put each record to be merged in the same bucket.

Open a new tab for the record bucket from the Cataloging drop down menu. Right click at Record Buckets and choose Open in new Tab:



From the drop-down menu Buckets, pick the bucket you use for merging. A list of records in that bucket will be displayed. Click the box beside each record you want to merge, then access the Actions menu and choose Merge Selected Records. Only those records selected from the list will be included in the merge record interface.

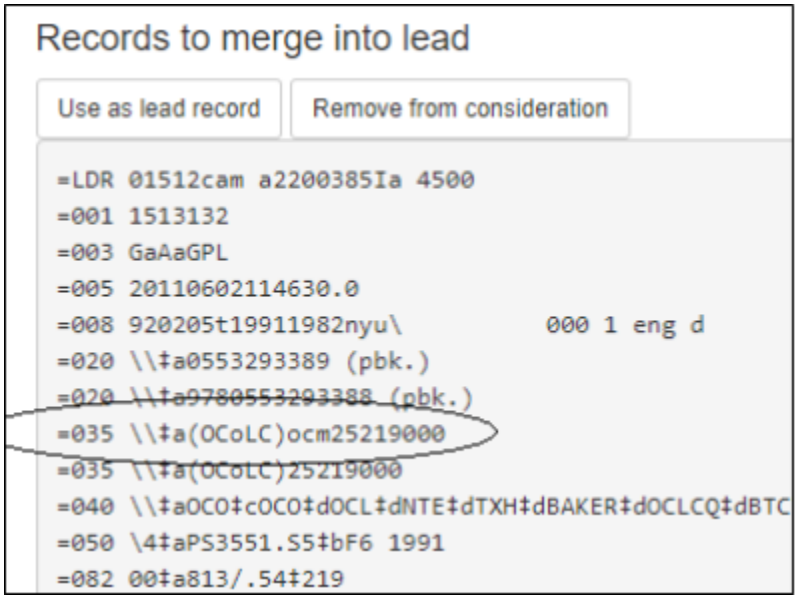


Limit the records you choose for merging to a number you can manage easily. Since the merge record interface is now vertical and includes all holdings, scrolling through the records can be cumbersome.

You can add multiple duplicate sets to the same bucket since you select the specific records you want to merge from the list. Just make sure you merge the correct duplicates.

Your records will be displayed vertically, with all holdings visible. From here you can also *Remove from Consideration, Edit Bib record*, or view and edit Holdings

Currently, the record summary is no longer displayed in the Merge Records interface. Check the 035 to determine if the record is the OCLC record to be used as the lead record.



Choose your lead record by clicking on *Use as lead record* button. The record will be moved to the left of the screen.

PINES does not use a merge profile, so ignore that option.

Edit opens the MARC editor interface within the merge record interface.

Edit using full editor opens the MARC editor in a popup box.

Editing the bibliographic record here 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. Best practice, however, is to edit the record in OCLC's Connexion Client and then overlay it after you merge the duplicates.

There is currently a bug that does not allow you to save any edits to the bibliographic record will in the merge record interface. Until the bug is fixed, do not edit from the merge record interface.

Edit Volumes allows you to edit the call number

Edit volumes and copies allows you to edit either the call number, copy attributes, and/or assign a parts label.

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 library's holdings separate.) Before you merge the record, you should edit the call number by adding the volume designation.

Some of our 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 the volume and copy attributes to see if the call number or local shelving location gives you a clue. When in doubt, request the item or refer it to the cataloging coordinator at the owning library.

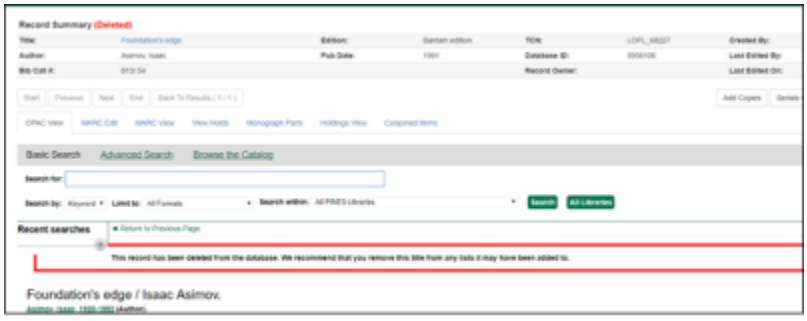
Similarly, some of our old, bad records are sound recordings or visual materials on book format. Again, the only way you can be certain is to check the volume and copy attributes. When in doubt, request the item or refer it to the cataloging coordinator at the owning library.

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.

You can cancel by either closing the Merge record interface at the X or clicking on the Cancel button.

Once you have confirmed the records are duplicates, made any necessary changes to the bibliographic records, copies, or call numbers, *Removed From Consideration* any that should not be merged, and chosen the *Lead Record* (the record all others are to be merged with), then click Merge at the bottom right of the merge interface.

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 note that is is deleted and will have no holdings attached:



Before proceeding, clean out your bucket after you have merged all duplicate sets!

Currently, the system redisplays the newly merged record in the same tab as the bucket. To return to the bucket for further actions, use your browser back button or reopen from the Cataloging menus.

From:
https://pines.georgialibraries.org/dokuwiki/ - **PINES Documentation**

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