

# 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 within bibliographic records, baskets in search results and the OPAC view of a record, or using the Record Query function embedded within Record Buckets. Baskets and the record query allow you to add more than one record to a bucket at one time.







Keep in mind that merging records is actually merging the holdings from multiple records to the lead record and deleting the other bibliographic records from the database.

## Entering individual records in a Record Bucket

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

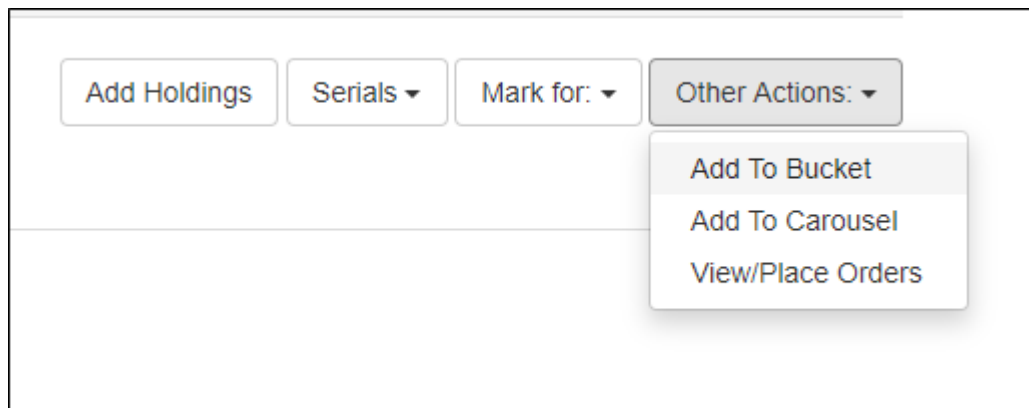
In this list of titles, there appears to be three duplicate records:

☐ Select 1 - 3 [0 selected titles](#)

<input type="checkbox"/> 1.		<b>The purple kiss.</b> <u>Mayer, Mercer 1943-</u>  Book <b>Call Number: JF</b> 1 out of 1 copy are currently available at PINES.	<a href="#">Place Hold</a> <a href="#">Add To My List</a> ?
<input type="checkbox"/> 2.		<b>The purple kiss</b> <u>Farber, Erica</u>  Book Publication Date: (1994.) <b>Call Number: J FARB</b> 4 out of 7 copies are currently available at PINES.	<a href="#">Place Hold</a> <a href="#">Add To My List</a> ?
<input type="checkbox"/> 3.		<b>PURPLE KISS (L C AND THE CRITTER KIDS).</b> <u>Mayer, Mercer 1943-</u>  Book Publication Date: (1994.) <b>Call Number: J MAYER MERCER</b> 1 out of 1 copy are currently available at PINES.	<a href="#">Place Hold</a> <a href="#">Add To My List</a> ?

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 the bibliographic records in a Record Bucket for a 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:



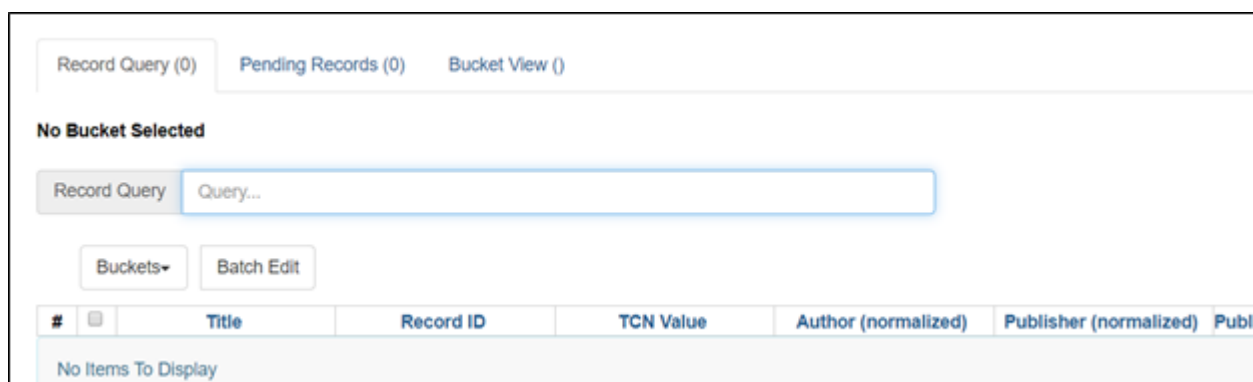
A dialog box will open for you to choose the bucket you use for merging or Add to New Bucket. If you add to new, you will need to name the new bucket.

Put each record to be merged in the same bucket.

## Using Record Query to build a record bucket

You can also use the Record Query functionality within the record bucket interface to create a list of records to add to a bucket. Record Query allows you to add more than one bibliographic record at a time to a bucket. You can also add to multiple buckets using the pending record function.

Open Record buckets and click on the Record Query tab:



You can choose a bucket for your titles directly from Record Query or from the Bucket View tab:

You can do a keyword search without a search key. Other indexes require a search key:

Search key	Definition
keyword/kw:	search keyword(s)
author/au/name:	search author(s)
title/ti:	search title
subject/su:	search subject
series/se:	search series
site:	search at specified org unit, using the library short name (STATELIB or STATELIB-L)

(keyword, title, author, subject, and series support additional search subclasses, specified with a |. For example: title|proper: gone with the wind)

You can also combine search keys. For example: au: Weber ti: by schism rent asunder. You can use Boolean operators such as \* as well as && for AND, || for OR.

Examples:

- autis\*
- subject:christmas (netherlands || dutch || holland)
- ((learning || reading) && (difference\* || difficult\*) ) || dyslexia

Once you have a list of potential duplicates, choose the records from the list to add to your bucket using the Actions menu.

1	<input checked="" type="checkbox"/>	ocm18811648	<a href="#">Why bo</a>
2	<input checked="" type="checkbox"/>	ocm00	<a href="#">A new s</a>
3	<input checked="" type="checkbox"/>	ocm00	<a href="#">Prevent</a>
4	<input checked="" type="checkbox"/>	ocm00	<a href="#">Childre</a>

Add To Pending  
Add To Bucket

Click on Bucket view to view completed bucket.

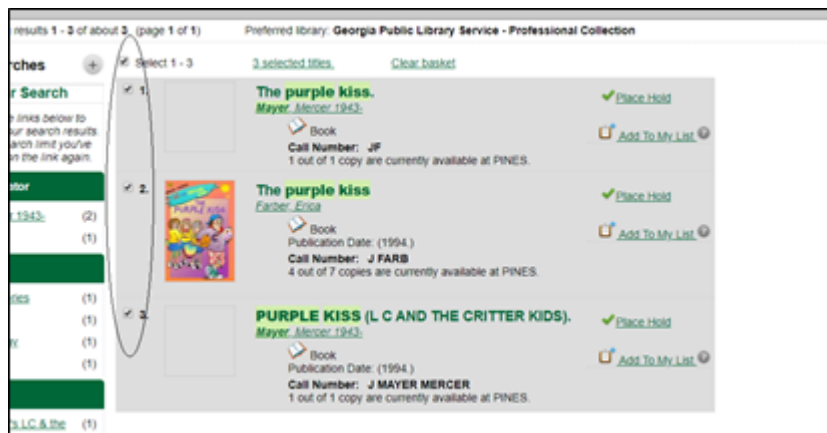


## Using baskets to build a record bucket

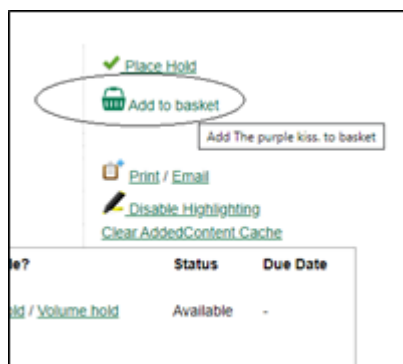
You can add records to a bucket from search results or from an individual record's OPAC view using a basket. Baskets are temporary holders for a specific action and will empty on logout.

Select the records to be added to a bucket,

From the search results:

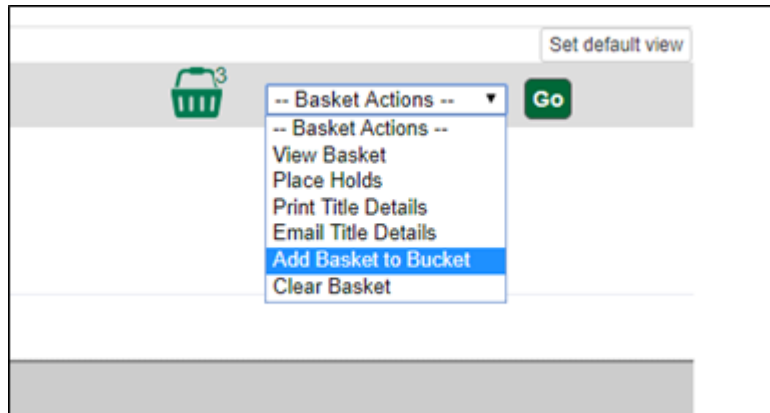


From the OPAC display of a record:



You can add records to a basket from different search results.

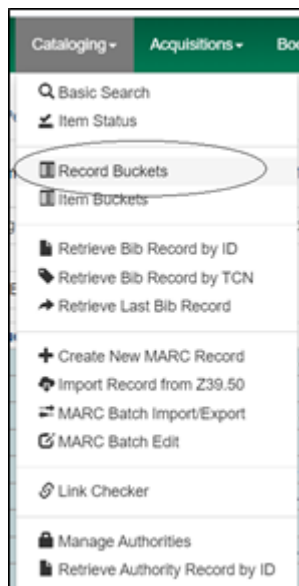
Once you have all desired record in a basket, you can transfer them to a bucket.



A dialog box will open for you to choose a bucket. You will need to clear the basket to reuse it for a different search in the same session.

## Merging bibliographic records

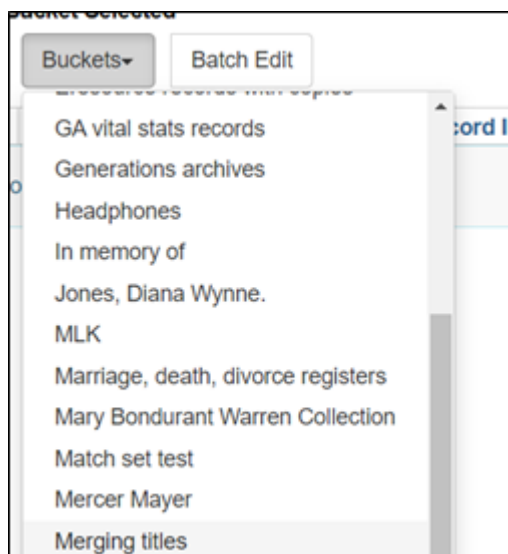
Open a record bucket loaded with records to be merged. You can open the Record Buckets interface from the cataloging menu:



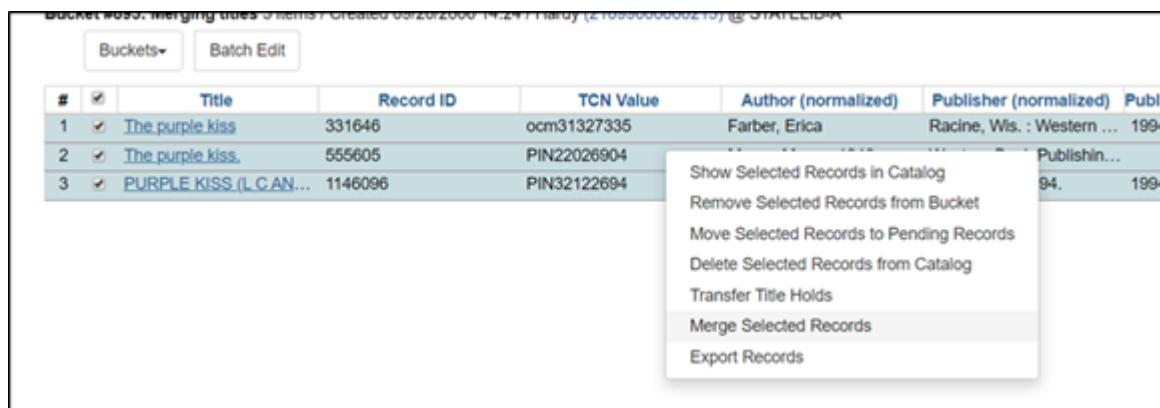
Or the home page:



From the drop-down menu Buckets, pick the bucket you are using 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. You can merge some of the records in a bucket and then choose more to merge since you can select specific records from the list.



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.

The merge records interface will open:

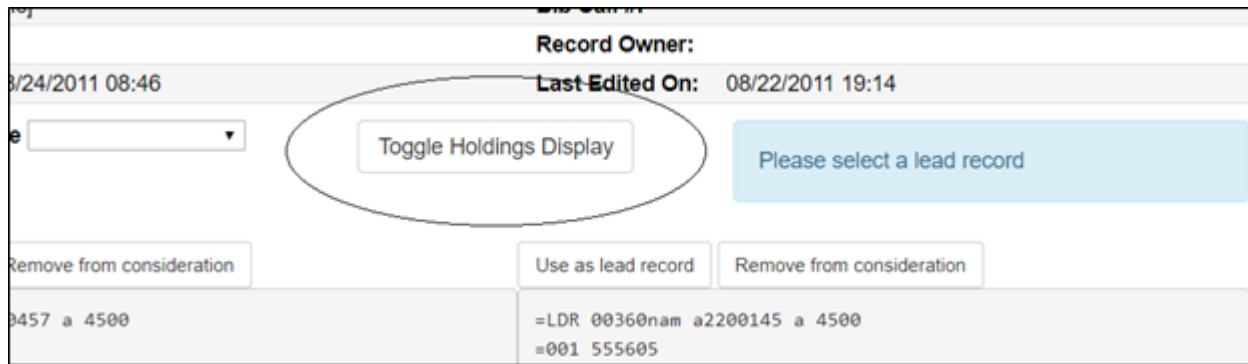
<b>Record Summary</b>	(MARC)	<b>Record Summary</b>	(MARC)	<b>Record Summary</b>	(MARC)
Title:	The purple kiss	Title:	The purple kiss.	Title:	PURPLE KISS (L C AND THE CRITTER KIDS).
Edition:		Edition:		Edition:	
TCN:	oom31327335	TCN:	PIN22026904	TCN:	PIN32122694
Created By:	admin	Created By:	admin	Created By:	admin
Author:	Farber, Erica	Author:	Mayer, Mercer 1943-	Author:	Mayer, Mercer 1943-
Pub Date:	1994	Pub Date:	1994	Pub Date:	1994
Database ID:	331646	Database ID:	555605	Database ID:	1146096
Last Edited By:	BibOverlayMerge	Last Edited By:	BibOverlayMerge	Last Edited By:	BibOverlayMerge
Bib Call #:	[Fic]	Bib Call #:		Bib Call #:	
Record Owner:		Record Owner:		Record Owner:	
Last Edited On:	08/24/2011 08:46	Last Edited On:	08/22/2011 19:14	Last Edited On:	08/15/2011 18:05

The records are displayed with their record summaries. You can use the summary to easily determine record with an OCLC based TCN to be used as your target record.



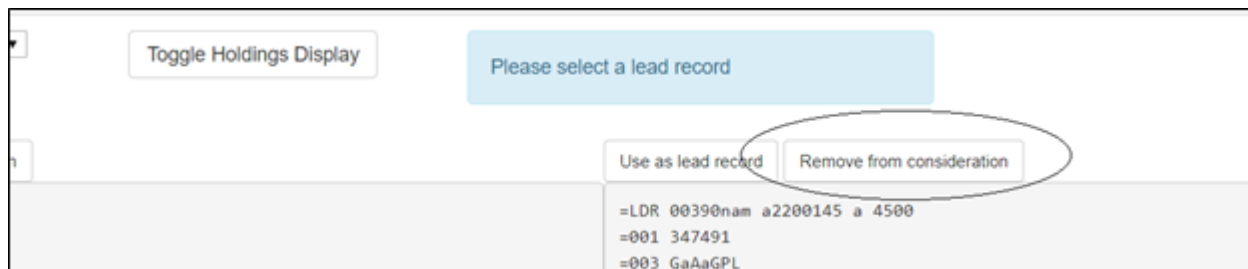
You can add several records to be the possible lead record if you want to compare them to the potential duplicates and make the determination within the merge interface. Make sure you remove from consideration any good record that you determine not to be a match ***BEFORE*** you merge the records

Some of our bad records are large print on regular print records, or sound recordings or visual materials on book format. Some of these records do not indicate in the body of the bibliographic record that they are not regular print or book format. If needed, check the volume and copy attributes to see if the call number or local shelving location gives you a clue this is a possibility. When in doubt, check the item itself (request the item or refer it to the cataloging coordinator at the owning library if it is not in your library). Use the Toggle Holdings Button to check the call number and other holding information if needed.



The screenshot shows the 'Merge record' interface. At the top, it displays 'Record Owner:' and 'Last Edited On: 08/22/2011 19:14'. Below this, there is a dropdown menu with a downward arrow, a button labeled 'Toggle Holdings Display' (which is circled in red), and a blue button labeled 'Please select a lead record'. At the bottom, there are two buttons: 'Remove from consideration' and 'Use as lead record'. Below these buttons, there is a text area containing the following information: '9457 a 4500', '=LDR 00360nam a2200145 a 4500', and '=001 555605'.

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.



The screenshot shows the 'Merge record' interface. At the top, there is a button labeled 'Toggle Holdings Display' and a blue button labeled 'Please select a lead record'. Below these buttons, there are two buttons: 'Use as lead record' and 'Remove from consideration' (which is circled in red). Below these buttons, there is a text area containing the following information: '=LDR 00390nam a2200145 a 4500', '=001 347491', and '=003 GaAaGPL'.

Closing the Merge record interface at the X or clicking on the Cancel button, cancels the merge.

Choose your lead record (the record all the others are to be merged to) by clicking on the Use as lead record button.



<b>Edition:</b>	
<b>TCN:</b>	ocm31327335
<b>Created By:</b>	admin
<b>Author:</b>	Farber, Erica
<b>Pub Date:</b>	1994
<b>Database ID:</b>	331646
<b>Last Edited By:</b>	BibOverlayMerge
<b>Bib Call #:</b>	[Fic]
<b>Record Owner:</b>	
<b>Last Edited On:</b>	08/24/2011 08:46
<b>Choose merge profile</b>	<input type="text" value=""/> <span>▼</span> <span>Toggle</span>
<input type="button" value="Use as lead record"/>	<input type="button" value="Remove from consideration"/>
<pre>=LDR 01450cam a2200457 a 4500 =001 331646 =003 GaAaGPL =005 20110608155915.0 =008 940606s1994\ wiua b 000 1 eng d</pre>	

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

Once you select the lead record, you can edit it if needed. Editing the bibliographic record here is handy if you want to add a MARC field from a duplicate to the lead record or make any other edits to the lead record. Best practice, however, is to edit the record in OCLC's Connexion Client and then overlay it after you merge the duplicates.

<input type="button" value="Edit"/>	<input type="button" value="Edit using full editor"/>
<pre>=LDR 01450cam a2200457 a 4500 =001 331646 =003 GaAaGPL =005 20110608155915.0 =008 940606s1994\ wiua b 000 1 eng d =010 \\\$a 93080651 =020 \\\$a0307159809 =020 \\\$a9780307159809 =020 \\\$a0307659801 (lib bdg.) =020 \\\$a9780307659804 (lib bdg.) =035 \\\$a(OCOLC)ocm31327335 =035 \\\$a(OCOLC)31327335 =040 \\\$aTHS&amp;DLCS&amp;DOCL&amp;DBAKES&amp;BCT&amp;DOCLCG&amp;DJRO&amp;DU</pre>	

- *Edit* opens the MARC editor interface within the merge record interface. Click on Cancel if you decide not to make any edits.
- *Edit using full editor* opens the MARC editor in a popup box. You will need to Save and then click on the Done button to close the editor. If you decide not to make any edits, click on the Done button.

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.

You can also edit item information, if needed. Do not add a parts label at this point since the label is dependent on the lead record. Add or edit parts labels after the records are merged, even if the record to be merged has a parts designation.

To edit the holdings information, click on the Toggle Holdings Display button:

The holdings list for each record will display:

Owning Library	Call Number	# Items
CHRL ... CHRL-LW	R 304.6 ...	1

- *Edit Volumes* allows you to edit the call number
- *Edit volumes and copies* allows you to edit either the call number or item attributes.

Once you have edited the call number, click on the Save Changes button and then the Done button to close the editor:

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, you are ready to merge the records. Click on the Merge button just under the record summary.

Your records will be merged in the database and the lead record will open in a new tab. You can overlay the record at this point. It is best practice to overlay older records with their most current form from OCLC's WorldCat. Overlaying can update subject headings, notes, and 33X and 34X fields.

Keep in mind that merging records is actually merging the holdings from multiple records to the lead record and deleting the other bibliographic records from the database.



If you use the same bucket each time you merge records, clean out your bucket after you have merged all duplicate sets!

Bucket #893: Merging titles 3 items / Created 09/20/2006 14:24 / Hardy (21099000000213) @ STATELIB-A

Buckets- Batch Edit

#	✓	Title	Record ID	TCN Value	Author (normalized)	Publisher (normalized)
1	✓	The purple kiss	331646	oocm31327335	Farber, Erica	Racine, Wis. : Western...
2	✓	The purple kiss.	555605	PIN22026904	Mayer, Mercer 1943-	Western Book Publishin...
3	✓	PURPLE KISS (L.C. AN...	1146096	PIN32122694	Mayer, Mercer 1943-	WESTERN, 1994.

Actions ▾

- Show Selected Records in Catalog
- Remove Selected Records from Bucket
- Move Selected Records to Pending Records
- Delete Selected Records from Catalog
- Transfer Title Holds
- Merge Selected Records
- Export Records

Sometimes, some or all of the merged and thus deleted records may still display in a search result list until re-indexing occurs. A merged record will note that is deleted and will have no holdings attached. The record will also have the date the merge occurred and the Record/Database ID of the lead record:

**Record Summary (Deleted)**

Record merged to #331646 on 01/17/2020 14:24

**Title:** The purple kiss.

**Author:** Mayer, Mercer 1943-

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