

THE FUNDAMENTALS OF MERGING RECORDS IN ALMA

SUNY Library Shared Services
Maggie McGee



Merge Rule Basics in Alma

1. Roles Required to merge bib records in Alma:
 - a) Cataloger
 - b) Cataloger Extended role
2. NZ Records in Alma match on the OCLC #
3. Merging records can occur upon:
 - a) Importing bib records using an import profile or API integration profile
 - a) Multi-matches are merged based on how it is configured
 - b) Import bib records from OCLC
 - i. OCLC Export - multiple records in the NZ with the same OCLC # cannot be exported
 - ii. OCLC Nightly Jobs: multi-matches are either automatically or manually merged and the inventory is combined
 - c) **Merging two existing bib records in the MD Editor**
 - d) Copy cataloging using External Resources in the MD Editor

Merge Rule Basics in Alma

4. Merge rules are used to determine how matching bib records will be merged
5. Bib records need to be in the same zone to be merged
 - a) Matching records with the same OCLC maybe found in different zones, but “*Merge Records and Combine Inventory*” in the MD Editor will be grayed out
 - a) Example; IZ record will match to an NZ bib record with the same OCLC # if no matching IZ record exists
6. Merging two bib records will move all the associated inventory to the primary record (PO line, Physical items, Loans, Requests, Reading lists, Related record relationship)
7. There is always a primary and secondary record when merging

Primary and Secondary Record Behavior When Merging

1. Primary Record

- a) Contains all the merged information
- b) Merge rules either remove information in the primary record or copies information from the secondary record to the primary record

2. Secondary Record

- a) Contains information that can be merged into the primary record
- b) Merge rules do not change the secondary record
- c) The secondary record should be deleted or else it remains in the repository causing a match to be found again

Primary Record Behavior When Merging

Primary Record for Merging	
Scenario	Primary Record
Importing records using a profile (see Importing Records Using Profiles)	The existing record in Alma
Importing records from OCLC Connexion (see Importing Records from OCLC Connexion)	The existing record in Alma
Merging two already existing records (see Merging Bibliographic Records)	The record on the left (opened first)
Copy cataloging using an external resource (see Searching External Resources)	The external resource

Note Since the primary records for importing profiles and copy cataloging (as in [Searching External Resources](#)) are essentially the opposite, a merge rule written for an import profile cannot work for copy cataloging (and vice versa). You require two sets of merge rules, one for import profiles and another for copy cataloging. An example of each type of rule can be found in [Examples of Rules for Import Profiles and Copy Cataloging](#).

Possible Workflows to Merge a NZ Brief Bib with an NZ Bib Record

1. Merge Record & Combine Inventory - **USE**

Roles Required:

- Cataloger
- Cataloger Extended

Pros:

- Retains the POL and associated inventory
- Can delete the secondary bib record
- Other campus holdings are merged
- No duplicate bib records are created

Cons:

- Call number in the holdings record may need to be updated
- Change Bib Reference for the POL if title differs
- Records can be merged incorrectly if the incorrect merge routine is used

Possible Workflows to Merge a NZ Brief Bib with an NZ Bib Record

2. Copy & Overlay – ❌ DO NOT USE

Roles Required:

- Cataloger
- Cataloger Extended

Pros:

- Overlays all the MARC fields in brief bib with the secondary record's MARC fields
- Retains POL and associated inventory

Cons:

- Does not merge inventory
- Creates a duplicate bib record in the NZ
- Does not retain local notes
- Call number in the holdings record needs to be updated

3. Copy and Merge – ❌ DO NOT USE

Roles Required:

- Cataloger
- Cataloger Extended

Pros:

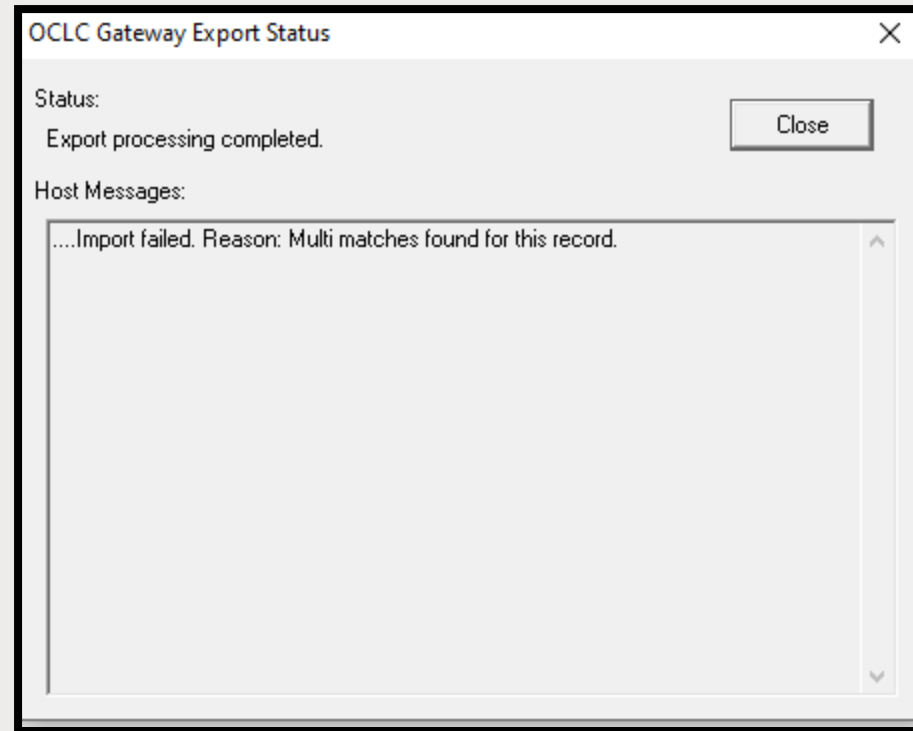
- Merges MARC fields in the primary and secondary records
- Maintains local notes
- Retains POL and associated inventory

Cons:

- Brief bib MARC fields are retained
- Does not merge inventory
- Creates a duplicate bib record in the NZ
- Call number in the holdings record needs to be updated
- Leaves user in a loop matching to the original full NZ bib record

OCLC Export Behavior with Matching OCLC Records

- OCLC cannot export a bib record into Alma when there is more than one bib record with the same OCLC # it can match on
- When you attempt to export a bib record to Alma with multiple matches you will get the following error:



MATCH CONFIGURATIONS

SUNY Library Shared Services
Maggie McGee



Match Configurations

The settings below were configured by the NZ Coordinator for your institution. They match the Network Zone (NZ) and they will reduce the number of matching records that will be found in the MD Editor:

1. Go to ***Configuration>Resources>General>Other Settings***
2. The following fields in your IZ match the settings in the NZ
 - a) *non_serial_match_profile: com.exlibris.repository.mms.match.OCLCMatchProfile*
 - b) *serial_match_profile: com.exlibris.repository.mms.match.OCLCSerialMatchProfile*
 - c) *ignore_cz_records: true*

MERGE VS. OVERLAY

SUNY Library Shared Services
Maggie McGee



Merge vs. Overlay

1. Merge – as defined by Merriam-Webster dictionary “to cause to combine, unite, or coalesce”
 - a) Combines MARC fields from the secondary record with the primary record
 - b) Fields that are combined with the primary record depends on the merge rule
2. Overlay - as defined by Merriam-Webster dictionary “to lay or spread over or across”
 - a) Over-writes all MARC fields in the primary record with the MARC fields from the secondary record, including local notes

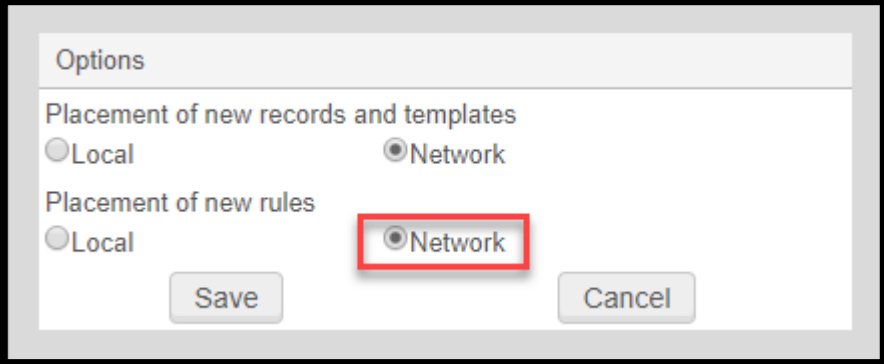
MERGE RULES

Merge Rules

- Merge rules can:
 - a) Add
 - b) Remove
 - c) Replace
- Existing Ex Libris merge rules can be used, but you want to make sure to click on “show merge preview” to make sure the merge rule works as expected
 - a) **Conditional subject headings** –
 - i. Merges all fields from the secondary record to the primary record
 - ii. Retains the subject headings from the primary record, which may create duplicate subject headings
 - b) **Keep only old value**
 - i. Retains only the fields in the primary record, including local fields
 - c) **Overlay all but local fields** –
 - i. Overlays all MARC fields in the primary record with the secondary record
 - ii. Retains the local fields in the primary record
 - d) **Replace 245 and 035 OCoLC if exist** –it will replace the 245 and 035 in the secondary record with the 245 and 035 from the primary record

Merge Rules

- Campuses can create their own merge rules if an existing merge rule does not meet their needs
 - IZ only records require an IZ merge rule
 - NZ records require an NZ merge rule
- To create a merge rule to use with NZ bib records
 - The “Placement of new rules” needs to be set to Network
- To create a merge rule to use with IZ bib only bib records
 - The “Placement of new rules” needs to be set to Local



Options

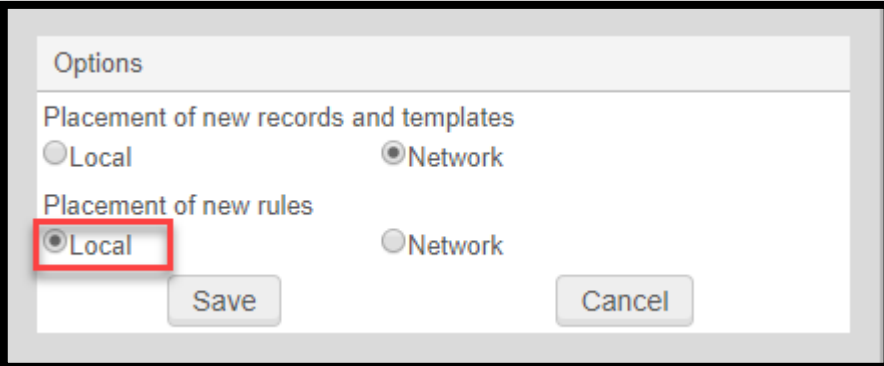
Placement of new records and templates

Local Network

Placement of new rules

Local Network

Save Cancel



Options

Placement of new records and templates

Local Network

Placement of new rules

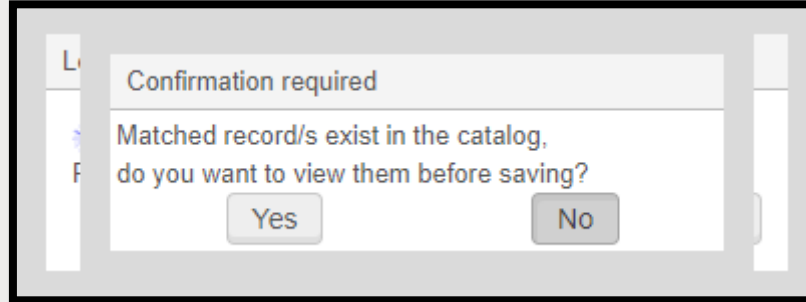
Local Network

Save Cancel

MERGE RECORDS AND COMBINE INVENTORY WORKFLOW

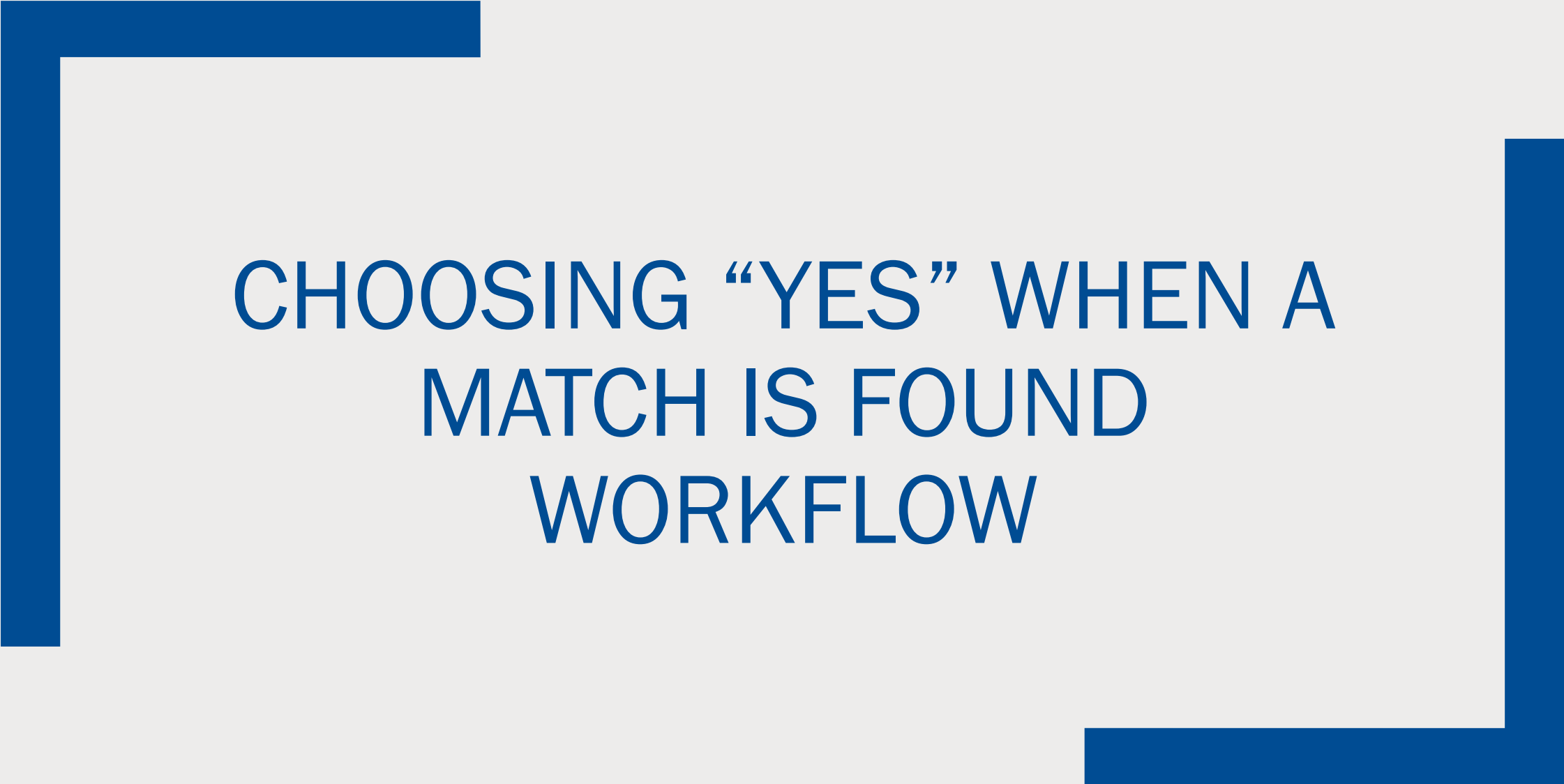
Merge Records and Combine Inventory Workflow

The following message will appear if there is a matching record while updating a bib record in the MD Editor after saving or saving and releasing the record:



You can do one of the following things:

1. Click **Yes**
2. Click **No**

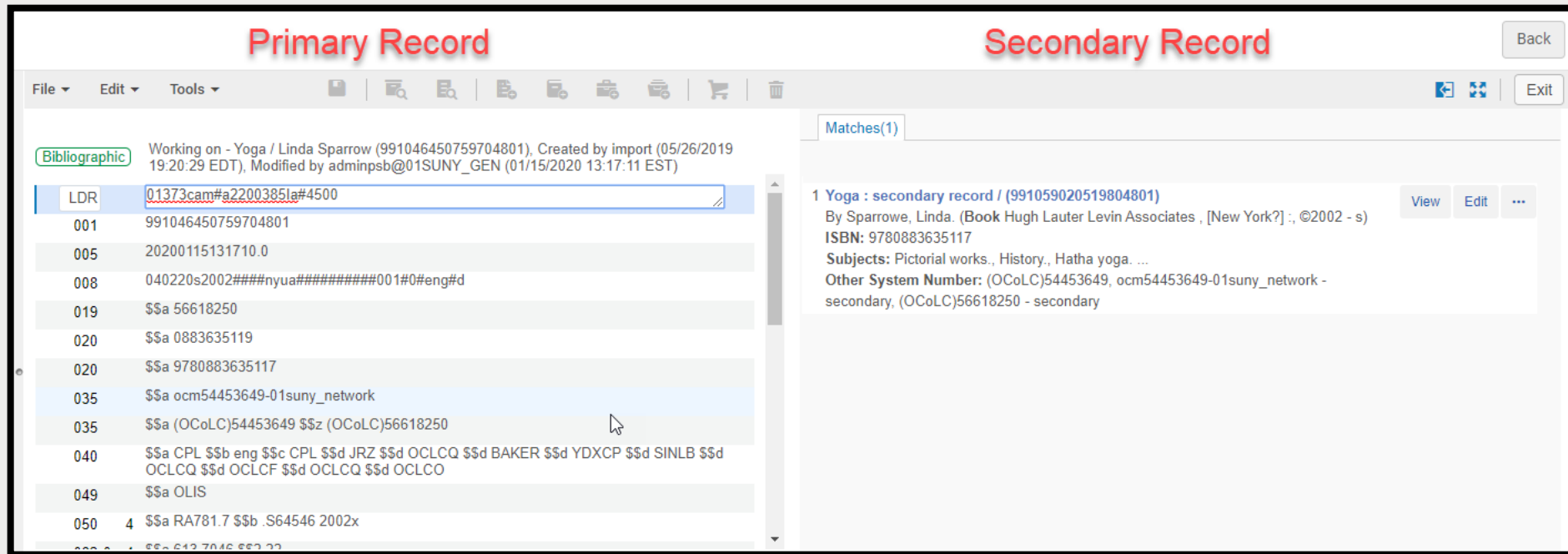
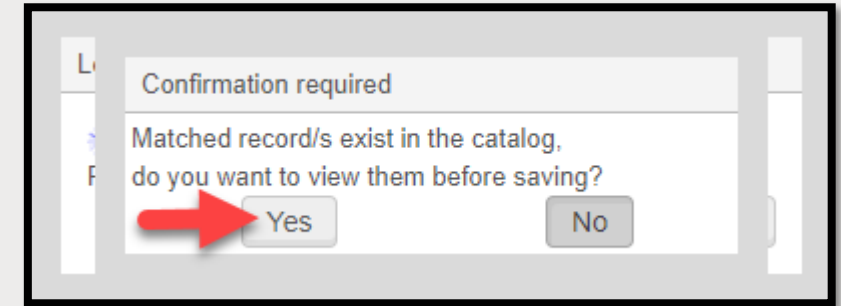


CHOOSING “YES” WHEN A
MATCH IS FOUND
WORKFLOW

Merge Records and Combine Inventory Workflow

Choosing “Yes” in the MD Editor when a match is found workflow:

1. Click Yes when the following confirmation message appears: *“Matched record/s exist in the catalog, do you want to view them before saving?”*
2. Both records will display in the MD Editor

A screenshot of the MD Editor interface showing a "Primary Record" and a "Secondary Record". The Primary Record is a bibliographic record with fields like LDR, 001, 005, 008, 019, 020, 020, 035, 035, 040, 049, and 050. The Secondary Record is a match for the primary record, showing details like "1 Yoga : secondary record / (991059020519804801)", author "By Sparrowe, Linda", ISBN "9780883635117", and subjects "Pictorial works., History., Hatha yoga. ...".

Primary Record

Working on - Yoga / Linda Sparrow (991046450759704801). Created by import (05/26/2019 19:20:29 EDT), Modified by adminpsb@01SUNY_GEN (01/15/2020 13:17:11 EST)

LDR	01373cam#a22003851a#4500
001	991046450759704801
005	20200115131710.0
008	040220s2002####nyua#####001#0#eng#d
019	\$\$a 56618250
020	\$\$a 0883635119
020	\$\$a 9780883635117
035	\$\$a ocm54453649-01suny_network
035	\$\$a (OCoLC)54453649 \$\$z (OCoLC)56618250
040	\$\$a CPL \$\$b eng \$\$c CPL \$\$d JRZ \$\$d OCLCQ \$\$d BAKER \$\$d YDXCP \$\$d SINLB \$\$d OCLCQ \$\$d OCLCF \$\$d OCLCQ \$\$d OCLCO
049	\$\$a OLIS
050	4 \$\$a RA781.7 \$\$b .S64546 2002x

Secondary Record

Matches(1)

1 Yoga : secondary record / (991059020519804801)
By Sparrowe, Linda. (Book Hugh Lauter Levin Associates , [New York?] ; , ©2002 - s)
ISBN: 9780883635117
Subjects: Pictorial works., History., Hatha yoga. ...
Other System Number: (OCoLC)54453649, ocm54453649-01suny_network - secondary, (OCoLC)56618250 - secondary

Merge Records and Combine Inventory Workflow

3. Click **View** from the secondary record
 - a) Viewing the record allows you to determine which should be the primary record
 - b) The primary record may not be as big of a concern because bib records are matching on the OCLC #

The screenshot displays a library system interface with two main sections: **Primary Record** and **Secondary Record**.

Primary Record: This section shows a bibliographic record for "Yoga / Linda Sparrow (991046450759704801)". The record is created by import on 05/26/2019 and modified on 01/15/2020. The LDR field is highlighted, showing the OCLC number: 01373cam#a22003851a#4500. Below the LDR field, there are several fields with their respective values: 001 991046450759704801, 005 20200115131710.0, 008 040220s2002####nyua#####001#0#eng#d, 019 \$\$a 56618250, and 020 \$\$a 0883635119.

Secondary Record: This section shows a match for "Yoga : secondary record / (991059020519804801)". The record is by Linda Sparrow, published by Book Hugh Lauter Levin Associates in [New York?] in 2002. The ISBN is 9780883635117. The subjects are Pictorial works., History., Hatha yoga. ... The other system number is (OCoLC)54453649, ocm54453649-01sunny_network - secondary, (OCoLC)56618250 - secondary. A red arrow points to the **View** button next to the record title.

Merge Records and Combine Inventory Workflow

4. Make sure the middle drop-down box is on **Edit**
5. Click **Execute** after viewing the bib record
 - a) *Execute opens the record in the MD Editor so that it can be edited*

The screenshot displays a library catalog interface with two main sections: **Primary Record** and **Secondary Record**. The **Primary Record** section shows a list of records with the following details:

- Bibliographic** Working on - Yoga / Linda Sparrow (991046450759704801), Created by import (05/26/2019 19:20:29 EDT), Modified by adminpsb@01SUNY_GEN (01/15/2020 13:17:11 EST)
- LDR** 01373cam#a22003851a#4500
- 001** 991046450759704801
- 005** 20200115131710.0
- 008** 040220s2002####nyua#####001#0#eng#d
- 019** \$\$a 56618250
- 020** \$\$a 0883635119
- 020** \$\$a 9780883635117
- 035** \$\$a ocm54453649-01suny_network
- 035** \$\$a (OCoLC)54453649 \$\$z (OCoLC)56618250
- 040** \$\$a CPL \$\$b eng \$\$c CPL \$\$d JRZ \$\$d OCLCQ \$\$d BAKER \$\$d YDXCP \$\$d SINLB \$\$d OCLCQ \$\$d OCLCF \$\$d OCLCQ \$\$d OCLCO
- 049** \$\$a OLIS
- 050** 4 \$\$a RA781.7 \$\$b .S64546 2002x

The **Secondary Record** section shows the following details:

- Yoga : secondary record / Linda Sparrow ; photography by David Martinez. (991059020519804801)
- LDR** 01474cam#a22003851a#4500
- 001** 991059020519804801
- 005** 20200112154725.0
- 008** 040220s2002####nyua#####001#0#eng#d
- 019** \$\$a 56618250
- 020** \$\$a 0883635119
- 020** \$\$a 9780883635117
- 035** \$\$a ocm54453649-01suny_network#-#secondary
- 035** \$\$a (OCoLC)54453649 \$\$z (OCoLC)56618250#-#secondary
- 040** \$\$a CPL \$\$b eng \$\$c CPL \$\$d JRZ \$\$d OCLCQ \$\$d BAKER \$\$d YDXCP \$\$d SINLB \$\$d OCLCQ \$\$d OCLCF \$\$d OCLCQ \$\$d OCLCO
- 049** \$\$a OLIS
- 050** 4 \$\$a RA781.7 \$\$b .S64546 2002x

At the bottom of the interface, there are three buttons: **Back to results**, **Edit** (highlighted with a red box and a red arrow), and **Execute**. The **Edit** button is a dropdown menu.

Merge Records and Combine Inventory Workflow

6. Go to *Tools>MARC Bibliographic>Merge Records & Combine Inventory*

The screenshot displays the 'Merge Records & Combine Inventory' workflow in a library management system. The interface is divided into two main sections: 'Primary Record' on the left and 'Secondary Record' on the right. The 'Tools' menu is open, and the 'MARC Bibliographic' sub-menu is selected, with 'Merge Records & Combine Inventory' highlighted. A red arrow points to this option. The 'Secondary Record' pane shows a list of records with the 019 field highlighted in yellow.

Primary Record

Secondary Record

Tools Menu:

- Search Resources
- View Versions
- View versions of original record
- Validate (Ctrl+U)
- Validate in Network Zone
- Browse Shelf Listing (Alt+C)
- Browse Bib Headings
- View Notes
- View Collections
- Release All Records for User
- Test external records
- MARC Bibliographic**
 - Derive New Record
 - Merge Records & Combine Inventory**
 - Add Holdings (Ctrl+Alt+N)
 - Add Local Portfolio
 - Add Representation (Alt+R)
 - Create POLine & Exit (Ctrl+Alt+O)
 - Find Matches (Ctrl+M)
 - View Inventory (Ctrl+I)
 - View In Search (Ctrl+Alt+V)
 - View Orders (no orders)
 - Related records
- Set Management Tags

Merge Records and Combine Inventory Workflow

7. The Merge Records & Combine Inventory screen pops-up

a) Choose merge routine: [select the merge rule]

b) Click ***Show merge preview***


i. Preview the merge behavior

ii. Click **Ok**

Merge Records & Combine Inventory

You are about to merge record (MMS ID: 991059020519804801) with the record (MMS ID: 991046450759704801).

Choose merge routine: Keep only old value

 Show merge preview

You are about to move the following:

- 0 physical item(s)
- 0 digital remote representations(s)
- 0 digital representations(s)
- 0 PO line(s)
- 0 electronic portfolio(s)
- 0 electronic collection(s)


0 Record(s) related to the secondary record might get affected by the process

Update holdings call number

Ok Cancel

Merge Preview

LDR	01373cam#a22003851a#4500
001	991046450759704801
005	20200115131710.0
008	040220s2002####nyua#####001#0#eng#d
019	\$\$a 56618250
020	\$\$a 0883635119
020	\$\$a 9780883635117
035	\$\$a ocm54453649-01suny_network
035	\$\$a (OCoLC)54453649 \$\$z (OCoLC)56618250
040	\$\$a CPL \$\$b eng \$\$c CPL \$\$d JRZ \$\$d OCLCQ \$\$d BAKER \$\$d YDXCP \$\$d SINLB \$\$d OCLCQ \$\$d OCLCF \$\$d OCLCQ \$\$d OCLCO
049	\$\$a OLIS
050	4 \$\$a RA781.7 \$\$b .S64546 2002x
082	0 4 \$\$a 613.7046 \$\$2 22
---	---

 Ok

Merge Records and Combine Inventory Workflow

7. The Merge Records & Combine Inventory continued

c) Update holdings call number

- i. Depends on the merge routine and if the holdings call number needs to be updated

d) Secondary record: Delete

- i. Always select delete so the duplicate bib record no longer exists in the NZ

e) Click **Ok**

8. The newly merged bib record opens in the MD Editor

9. Click **File>Save and Release Record (Ctrl+Alt+R)**

Merge Records & Combine Inventory

You are about to merge record (MMS ID: 991059020519804801) with the record (MMS ID: 991046450759704801).

Choose merge routine: Keep only old value

Show merge preview

You are about to move the following:

- 0 physical item(s)
- 0 digital remote representations(s)
- 0 digital representations(s)
- 0 PO line(s)
- 0 electronic portfolio(s)
- 0 electronic collection(s)



0 Record(s) related to the secondary record might get affected by the process

Update holdings call number

Secondary record: Delete Suppress Keep it

Note: this operation is non-reversible!

Ok Cancel

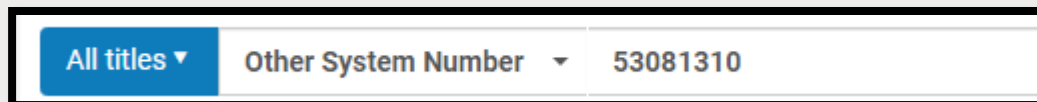
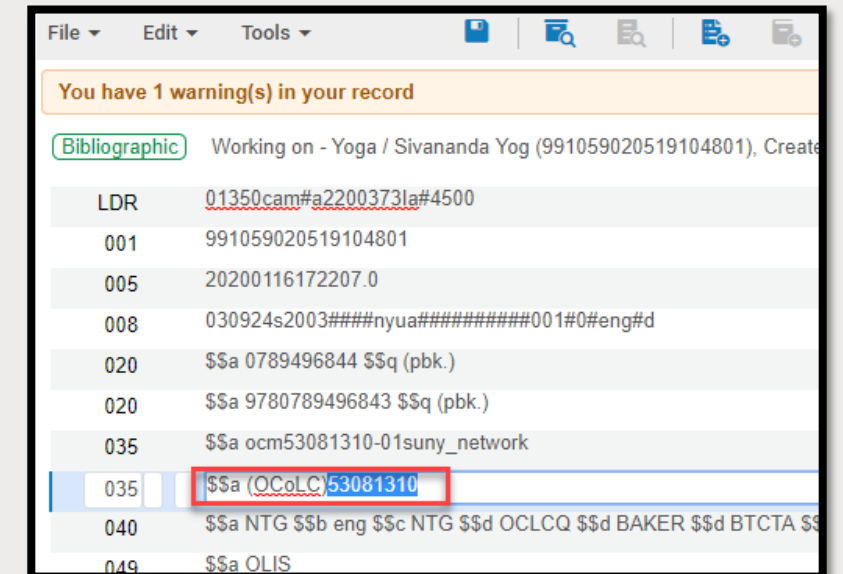
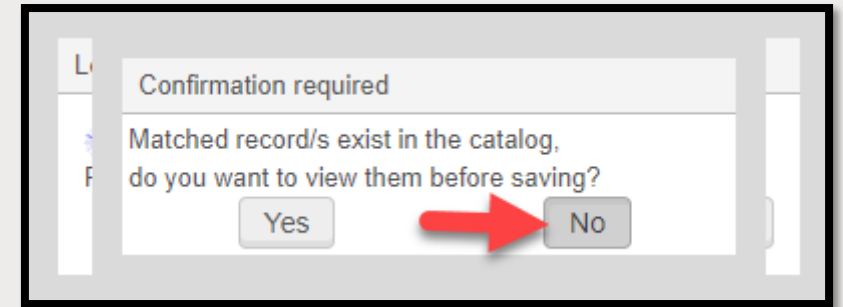


CHOOSING “NO” WHEN A MATCH IS FOUND WORKFLOW

Merge Records and Combine Inventory Workflow

Choosing “No” in the MD Editor when a match is found workflow:

1. Click “No” when the confirmation box appears with the following message” “Matched record/s exist in the catalog, do you want to view them before saving?”
2. Copy the OCLC # from the record in the MD Editor
3. Click *Back* (<)
 - a) Do not release the bib record from the MD Editor
4. Perform an All Titles repository search by Other System Number



Merge Records and Combine Inventory Workflow

5. Click *Edit Record* from the matching bib record that is not linked to the IZ



2 **Yoga / Sivananda Yoga Vedanta Centre ; [editors, Lucinda Hawksley, Ian Whitelaw].**

Book (Book - Physical) text; unmediated; volume By Hawksley, Lucinda. (New York : DK Pub 2003.)

Subject: Hatha yoga.

Series: 101 essential tips (New York, N.Y.)

Edition: Pbk. ed.

Creation Date: 05/26/2019 17:46:00 EDT

Modification Date: 01/15/2020 09:19:33 EST

ISBN: 0789496844 and others
Record number: ocm53081310-01suny_network

Language: English
MMS ID: 991044941949704801

Electronic Digital Held by (1) Other details

Edit Record Order ...

6. Click on the **Split Screen** icon



File Edit Tools

Split Screen icon

Exit

Merge Records and Combine Inventory Workflow

5. Click into the right-side of the MD Editor
6. Click on the NZ linked bib record from *Records>MARC21 Bibliographic*

The screenshot shows the MD Editor interface. On the left, a sidebar lists records under 'MARC21 Bibliographic'. One record, 'Yoga / Sivanand... (9910', is highlighted with a red box and a red arrow. The main area displays the record details for 'Bibliographic' with the following fields:

LDR	01350cam#a22003731a#4500
001	991044941949704801
005	20200115091838.0
008	030924s2003####nyua#####001#0#eng#d
020	\$\$a 0789496844 \$\$q (pbk.)
020	\$\$a 9780789496843 \$\$q (pbk.)
035	\$\$a ocm53081310-01suny_network

On the right side of the interface, a large blue box contains the text 'Click Here' in red.

Merge Records and Combine Inventory Workflow

7. Both records open in the MD Editor

a) See the workflow on how to make a secondary record a primary record if applicable

The screenshot displays the MD Editor interface with two records side-by-side. The left record is labeled "Primary Record" and the right is "Secondary Record". Both records are bibliographic and contain MARC LDR and data fields.

Primary Record:

Working on - Yoga / Sivananda Yog (991044941949704801), Created by import (05/26/2019 17:46:00 EDT), Modified by adminpsb@01SUNY_ESC (01/15/2020 09:19:33 EST)

LDR 01350cam#a22003731a#4500

001 991044941949704801

005 20200115091838.0

008 030924s2003####nyua#####001#0#eng#d

020 \$\$a 0789496844 \$\$q (pbk.)

020 \$\$a 9780789496843 \$\$q (pbk.)

035 \$\$a ocm53081310-01suny_network

035 \$\$a (OCoLC)53081310

040 \$\$a NTG \$\$b eng \$\$c NTG \$\$d OCLCQ \$\$d BAKER \$\$d BTCTA \$\$d YDXCP \$\$d OCLCF \$\$d OCLCO \$\$d OCLCQ \$\$d TDS

049 \$\$a OLIS

050 4 \$\$a RA781.7 \$\$b .Y62 2003

Secondary Record:

You have 1 warning(s) in your record

Working on - Yoga / Sivananda Yog (991059020519104801), Created by adminpsb@01SUNY_ESC (01/16/2020 17:22:07 EST), Modified by adminpsb@01SUNY_ESC (01/16/2020 17:23:17 EST)

LDR 01350cam#a22003731a#4500

001 991059020519104801

005 20200116172207.0

008 030924s2003####nyua#####001#0#eng#d

020 \$\$a 0789496844 \$\$q (pbk.)

020 \$\$a 9780789496843 \$\$q (pbk.)

035 \$\$a ocm53081310-01suny_network

035 \$\$a (OCoLC)53081310

040 \$\$a NTG \$\$b eng \$\$c NTG \$\$d OCLCQ \$\$d BAKER \$\$d BTCTA \$\$d YDXCP \$\$d OCLCF \$\$d OCLCO \$\$d OCLCQ \$\$d TDS

049 \$\$a OLIS

8. Continue with the Merge Records & Combine Inventory Workflow



HOW TO MAKE THE
SECONDARY RECORD THE
PRIMARY RECORD

Merge Records and Combine Inventory Workflow

When you want to make the secondary record the primary record

1. After viewing the secondary record make sure the middle drop-down box is on **Edit** then click **Execute**

The screenshot displays a library catalog interface with two records side-by-side. The left record is labeled "Primary Record" and the right is "Secondary Record". The secondary record's "Edit" button is highlighted with a red box, and a red arrow points to the "Execute" button.

Primary Record

You have 2 warning(s) in your record

Bibliographic Working on - The genius of yoga : (996350356604825), Created by adminpsb@01SUNY_ESC (12/18/2019 21:40:52 EST), Modified by adminpsb (01/15/2020 17:55:16 EST)

LDR	02642cam#a22004578i#4500
001	996350356604825
005	20200115175516.0
008	191018s2020####cou#####b####001#0#eng##
010	\$\$a ##2019042343
019	\$\$a 14028222
020	\$\$a 9781611808049 \$\$q (trade paperback)
020	\$\$a 1611808049
035	\$\$a (OCoLC)1122799125
035	\$\$a (OCoLC)on1122799125
040	\$\$a DLC \$\$b eng \$\$e rda \$\$c DLC \$\$d BDX \$\$d OCLCO \$\$d OCLCF
042	\$\$a pcc
049	\$\$a ZBMM
050 0 0	\$\$a B132.Y6 \$\$b F559 2020

Secondary Record

The genius of yoga : how yogic meditation can unlock your innate brilliance / Alan Finger and Peter Ferko. (996350222004825)

LDR	02746cam#a22004818i#4500
001	996350222004825
005	20191218214928.0
008	191018s2020####cou#####b####001#0#eng##
010	\$\$a ##2019042343
019	\$\$a 14028222
020	\$\$a 9781611808049 \$\$q (trade paperback)
020	\$\$a 1611808049
035	\$\$a (OCoLC)1122799125
035	\$\$a (OCoLC)on1122799125
040	\$\$a DLC \$\$b eng \$\$e rda \$\$c DLC \$\$d BDX \$\$d OCLCO \$\$d OCLCF
042	\$\$a pcc
049	\$\$a ZBMM
050 0 0	\$\$a B132.Y6 \$\$b F559 2020

Buttons: Back to results, Edit, Execute

Merge Records and Combine Inventory Workflow

2. Click into the right-screen of the MD Editor with the secondary record
3. Click on the Split Screen icon
 - a) This will open the secondary record into the main screen of the MD Editor
 - b) The previous primary record will still be “locked” and found under *Records>MARC21 Bibliographic*

The image shows two overlapping screenshots of the MD Editor interface. The top screenshot, labeled "Primary Record" and "Secondary Record", shows a split-screen view. The left pane displays the primary record with a warning: "You have 2 warning(s) in your record". The right pane displays the secondary record, also with a warning. A red arrow points to the "Split Screen" icon in the top right corner of the secondary record pane. The bottom screenshot, titled "The Secondary Record Becomes Primary", shows the MD Editor with the secondary record now as the primary record. The left sidebar shows a tree view of records, with "The genius of y... (99635" selected and highlighted in red. The main pane shows the record details for this selected record, including the LDR and various fields.

Primary Record

Secondary Record

The Secondary Record Becomes Primary

File Edit Tools

You have 2 warning(s) in your record

Bibliographic Working on - The genius of yoga : (996350356604825), Created by adminpsb@01SUNY_ESC (12/18/2019 21:40:52 EST), Modified by adminpsb (01/15/2020 17:55:16 EST)

LDR	02642cam
001	99635035
005	20200115
008	191018s2

MD Editor

File Edit Tools

You have 2 warning(s) in your record

Bibliographic Working on - The genius of yoga : (996350222004825), Created by import (12/10/2019 11:56:46 EST)

LDR	02746cam#a22004818#4500
001	996350222004825
005	20191218214928.0
008	191018s2020####cou#####b####001#0#eng##
010	\$\$a ##2019042343

Templates >

Records v

- Dublin Core
- MARC21 Bibliographic
 - The genius of y... (99635**
 - The genius of y... (99635
 - Yoga / Liz Lark. (991040
- MARC21 Holdings

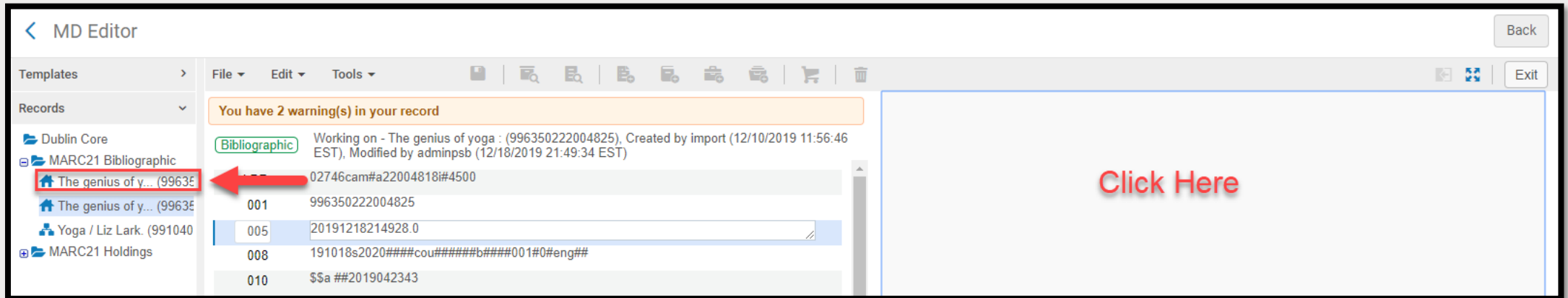
Merge Records and Combine Inventory Workflow

4. Click on the Split Screen Icon



5. Click on the right-screen of the MD Editor

6. Click on the “original” primary record from *Records>MARC21 Bibliographic*

A screenshot of the MD Editor interface. The interface is split into two panes. The left pane shows a sidebar with 'Templates' and 'Records'. Under 'Records', there is a list of records. The record 'The genius of y... (99635)' is highlighted with a red box. A red arrow points to this record. The right pane shows the details of the selected record, including a warning message 'You have 2 warning(s) in your record' and a table of records. The table has columns for record ID and MARC21 fields. The record ID '001' is highlighted. A red arrow points to the record ID '001'. The text 'Click Here' is written in red in the right pane.

Record ID	MARC21 Fields
001	996350222004825
005	20191218214928.0
008	191018s2020####cou#####b#####001#0#eng##
010	\$\$a ##2019042343

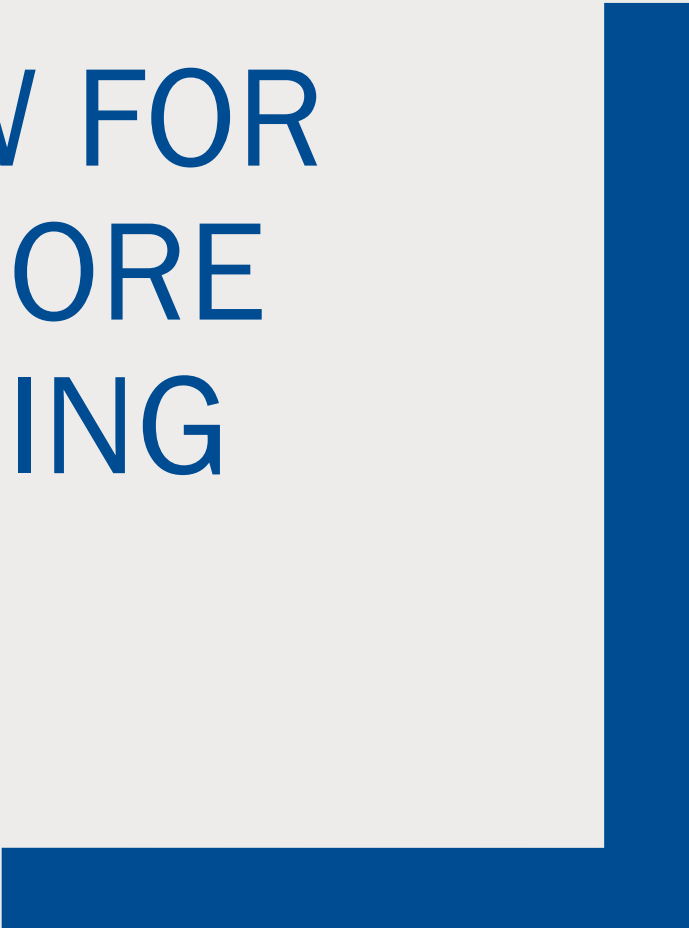

Merge Records and Combine Inventory Workflow

7. Both records will display in the MD Editor

The screenshot displays two record editors side-by-side. The left editor is titled 'New Primary Record' and the right is 'New Secondary Record'. Both show a 'Bibliographic' record with the following MARC fields:

Field	Value
LDR	02746cam#a22004818i#4500
001	996350222004825
005	20191218214928.0
008	191018s2020###cou#####b###001#0#eng##
010	\$\$a ##2019042343
019	\$\$a 14028222
020	\$\$a 9781611808049 \$\$g (trade paperback)

8. Continue with the Merge Records and Combine Inventory workflow

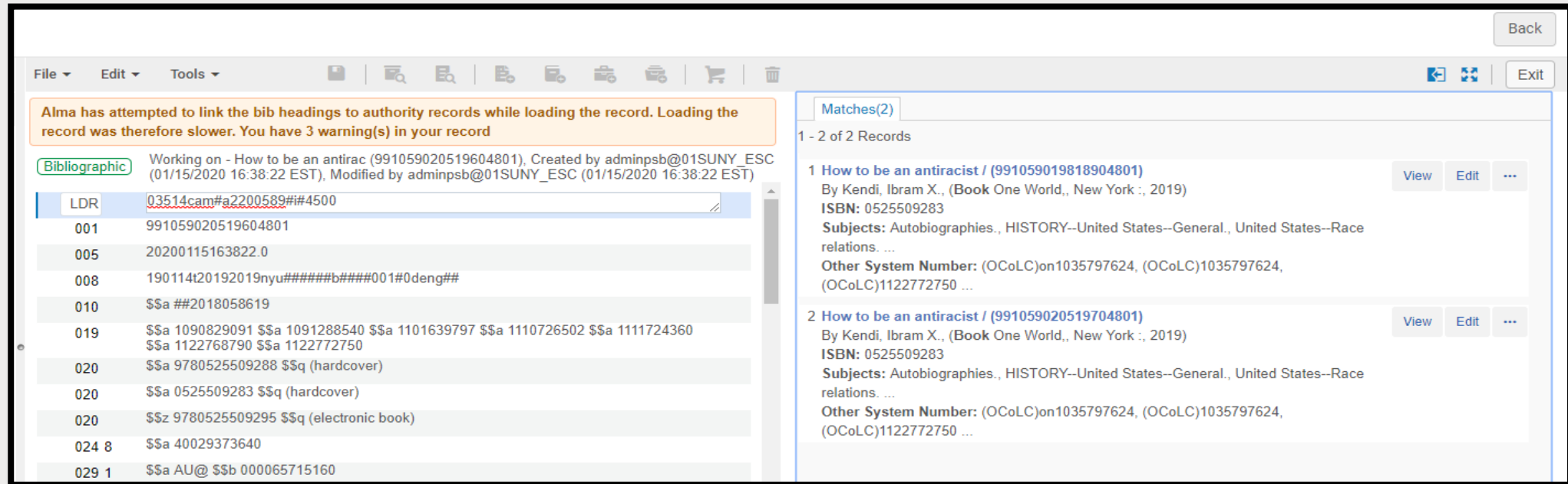
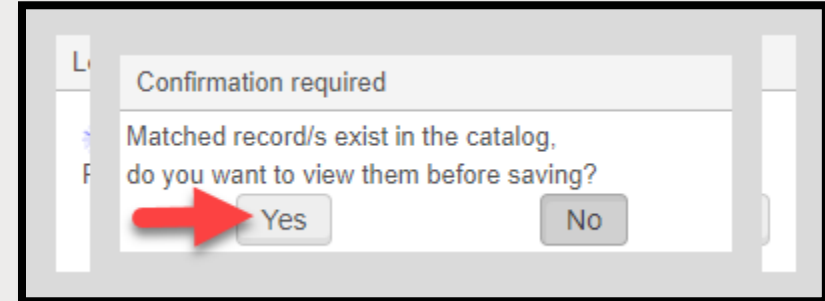


MERGE WORKFLOW FOR WHEN THERE IS MORE THAN ONE MATCHING RECORD

Merge Records and Combine Inventory Workflow

When there is more than one matching bib record

1. Click Yes when the following confirmation message appears: *“Matched record/s exist in the catalog, do you want to view them before saving?”*
2. All records will display in the MD Editor

A screenshot of the MD Editor interface. The top menu bar includes "File", "Edit", and "Tools". A warning message at the top states: "Alma has attempted to link the bib headings to authority records while loading the record. Loading the record was therefore slower. You have 3 warning(s) in your record". The main area is divided into two panes. The left pane shows a list of records with columns for LDR and MARC fields. The right pane, titled "Matches(2)", displays two matching records for "How to be an antiracist" by Kendi, Ibram X., with details like ISBN, subjects, and other system numbers. Each record in the right pane has "View" and "Edit" buttons.

Merge Records and Combine Inventory Workflow

3. Click *View* each record


Alma has attempted to link the bib headings to authority records while loading the record. Loading the record was therefore slower. You have 3 warning(s) in your record


Bibliographic Working on - How to be an antiracist (991059020519604801), Created by adminpsb@01SUNY_ESC (01/15/2020 16:38:22 EST), Modified by adminpsb@01SUNY_ESC (01/15/2020 16:38:22 EST)

LDR	03514cam#a2200589###4500
001	991059020519604801
005	20200115163822.0
008	190114t20192019nyu#####b#####001#0deng##
010	\$\$a ##2018058619
019	\$\$a 1090829091 \$\$a 1091288540 \$\$a 1101639797 \$\$a 1110726502 \$\$a 1111724360 \$\$a 1122768790 \$\$a 1122772750
020	\$\$a 9780525509288 \$\$q (hardcover)
020	\$\$a 0525509283 \$\$q (hardcover)
020	\$\$z 9780525509295 \$\$q (electronic book)
024 8	\$\$a 40029373640
029 1	\$\$a AU@ \$\$b 000065715160
035	\$\$a (OCoLC)1035797624 \$\$z (OCoLC)1090829091 \$\$z (OCoLC)1091288540 \$\$z (OCoLC)1101639797 \$\$z (OCoLC)1110726502 \$\$z (OCoLC)1111724360 \$\$z (OCoLC)1122768790 \$\$z (OCoLC)1122772750
035	\$\$a (OCoLC)on1035797624
040	\$\$a DLC \$\$b eng \$\$e rda \$\$c DLC \$\$d OCLCF \$\$d OCLCO \$\$d ZVR \$\$d TP7 \$\$d AYP \$\$d UAP \$\$d OCLCA \$\$d WVU \$\$d YDX \$\$d VP@ \$\$d ILC \$\$d YUS \$\$d TEU \$\$d CG4

Matches(2)

1 - 2 of 2 Records

1 **How to be an antiracist / (991059019818904801)**  [View](#) [Edit](#) [...](#)
By Kendi, Ibram X., (Book One World,, New York :, 2019)
ISBN: 0525509283
Subjects: Autobiographies., HISTORY--United States--General., United States--Race relations. ...
Other System Number: (OCoLC)on1035797624, (OCoLC)1035797624, (OCoLC)1122772750 ...

2 **How to be an antiracist / (991059020519704801)**  [View](#) [Edit](#) [...](#)
By Kendi, Ibram X., (Book One World,, New York :, 2019)
ISBN: 0525509283
Subjects: Autobiographies., HISTORY--United States--General., United States--Race relations. ...
Other System Number: (OCoLC)on1035797624, (OCoLC)1035797624, (OCoLC)1122772750 ...

Merge Records and Combine Inventory Workflow

4. Click **Back to Results** to view the other record and/or to select the record to merge with

Alma has attempted to link the bib headings to authority records while loading the record. Loading the record was therefore slower. You have 3 warning(s) in your record

Bibliographic Working on - How to be an antirac (991059020519604801), Created by adminpsb@01SUNY_ESC (01/15/2020 16:38:22 EST), Modified by adminpsb@01SUNY_ESC (01/15/2020 16:38:22 EST)

Field	Value
LDR	03514cam#a2200589##4500
001	991059020519604801
005	20200115163822.0
008	190114t20192019nyu#####b###001#0deng##
010	\$\$a ##2018058619
019	\$\$a 1090829091 \$\$a 1091288540 \$\$a 1101639797 \$\$a 1110726502 \$\$a 1111724360 \$\$a 1122768790 \$\$a 1122772750
020	\$\$a 9780525509288 \$\$q (hardcover)
020	\$\$a 0525509283 \$\$q (hardcover)
020	\$\$z 9780525509295 \$\$q (electronic book)
024 8	\$\$a 40029373640
029 1	\$\$a AU@ \$\$b 000065715160
035	\$\$a (OCoLC)1035797624 \$\$z (OCoLC)1090829091 \$\$z (OCoLC)1091288540 \$\$z (OCoLC)1101639797 \$\$z (OCoLC)1110726502 \$\$z (OCoLC)1111724360 \$\$z (OCoLC)1122768790 \$\$z (OCoLC)1122772750
035	\$\$a (OCoLC)on1035797624
040	\$\$a DLC \$\$b eng \$\$e rda \$\$c DLC \$\$d OCLCF \$\$d OCLCO \$\$d ZVR \$\$d TP7 \$\$d AYP \$\$d UAP \$\$d OCLCA \$\$d WVU \$\$d YDX \$\$d VP@ \$\$d ILC \$\$d YUS \$\$d TEU \$\$d CG4

How to be an antiracist / Ibram X. Kendi. (991059019818904801)

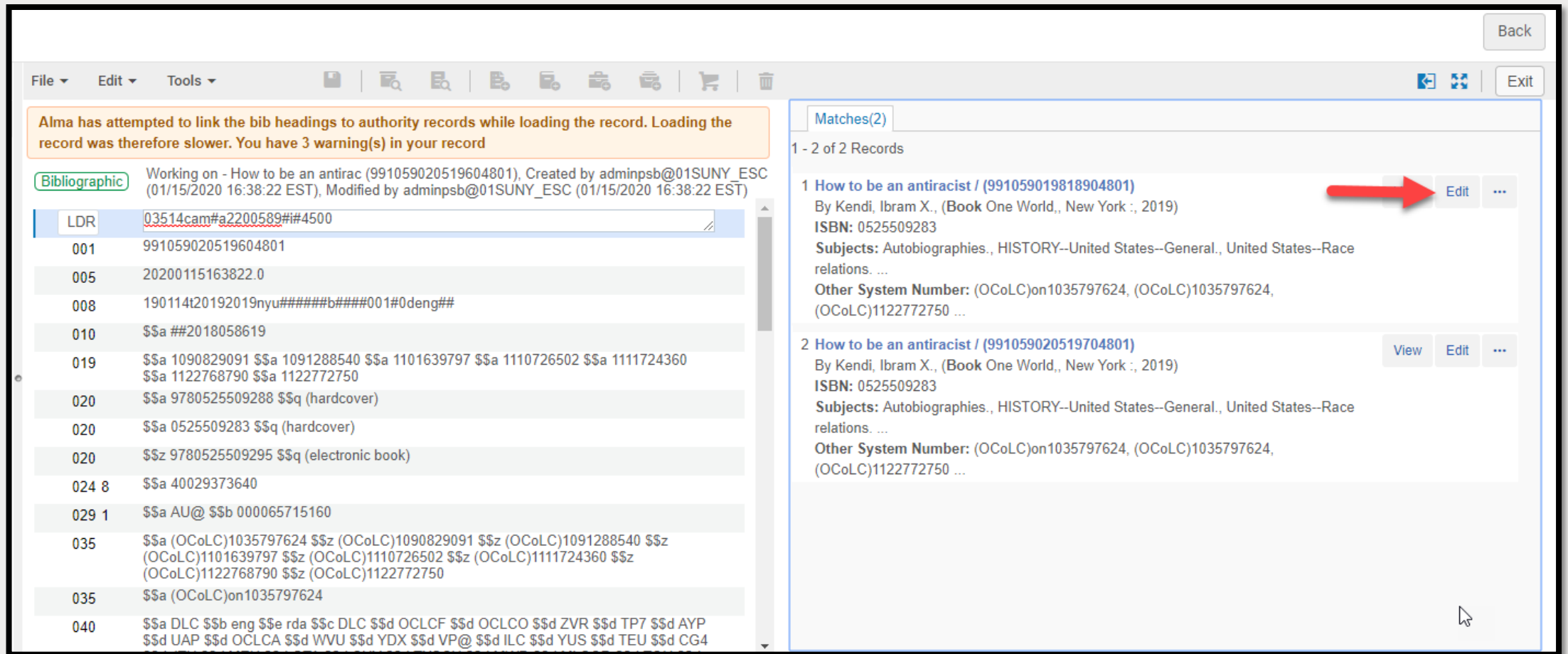
Field	Value
LDR	03453cam#a2200589##4500
001	991059019818904801
005	20191115111018.0
008	190114t20192019nyu#####b###001#0deng##
010	\$\$a ##2018058619
019	\$\$a 1090829091 \$\$a 1091288540 \$\$a 1101639797 \$\$a 1110726502 \$\$a 1111724360 \$\$a 1122768790 \$\$a 1122772750
020	\$\$a 9780525509288 \$\$q (hardcover)
020	\$\$a 0525509283 \$\$q (hardcover)
020	\$\$z 9780525509295 \$\$q (electronic book)
024 8	\$\$a 40029373640
035	\$\$a (OCoLC)1035797624 \$\$z (OCoLC)1090829091 \$\$z (OCoLC)1091288540 \$\$z (OCoLC)1101639797 \$\$z (OCoLC)1110726502 \$\$z (OCoLC)1111724360 \$\$z (OCoLC)1122768790 \$\$z (OCoLC)1122772750
035	\$\$a (OCoLC)on1035797624
040	\$\$a DLC \$\$b eng \$\$e rda \$\$c DLC \$\$d OCLCF \$\$d OCLCO \$\$d ZVR \$\$d TP7 \$\$d AYP \$\$d UAP \$\$d OCLCA \$\$d WVU \$\$d YDX \$\$d VP@ \$\$d ILC \$\$d YUS \$\$d TEU \$\$d CG4 \$\$d JTH

Back to results Edit Execute

Info Alerts Linked Data

Merge Records and Combine Inventory Workflow

5. Click *Edit* from the record that has been chosen to be merged with



The screenshot shows a library catalog interface. At the top right, there are 'Back' and 'Exit' buttons. Below the header is a menu bar with 'File', 'Edit', and 'Tools' options, followed by various icons. A warning message in an orange box states: 'Alma has attempted to link the bib headings to authority records while loading the record. Loading the record was therefore slower. You have 3 warning(s) in your record'. Below this, a 'Bibliographic' tab is active, showing the record details for 'Working on - How to be an antiracist (991059020519604801)'. The record is displayed in a table-like format with fields such as LDR, 001, 005, 008, 010, 019, 020, 020, 020, 024 8, 029 1, 035, 035, and 040. On the right side, a 'Matches(2)' panel shows two matching records. The first record is 'How to be an antiracist / (991059019818904801)' by Kendi, Ibram X., with an ISBN of 0525509283. A red arrow points to the 'Edit' button next to this record. The second record is 'How to be an antiracist / (991059020519704801)' by Kendi, Ibram X., with an ISBN of 0525509283. Below the second record, there are 'View', 'Edit', and '...' buttons.

Alma has attempted to link the bib headings to authority records while loading the record. Loading the record was therefore slower. You have 3 warning(s) in your record

Bibliographic Working on - How to be an antiracist (991059020519604801), Created by adminpsb@01SUNY_ESC (01/15/2020 16:38:22 EST), Modified by adminpsb@01SUNY_ESC (01/15/2020 16:38:22 EST)

LDR	03514cam#a2200589##4500
001	991059020519604801
005	20200115163822.0
008	190114t20192019nyu#####b####001#0deng##
010	\$\$a ##2018058619
019	\$\$a 1090829091 \$\$a 1091288540 \$\$a 1101639797 \$\$a 1110726502 \$\$a 1111724360 \$\$a 1122768790 \$\$a 1122772750
020	\$\$a 9780525509288 \$\$q (hardcover)
020	\$\$a 0525509283 \$\$q (hardcover)
020	\$\$z 9780525509295 \$\$q (electronic book)
024 8	\$\$a 40029373640
029 1	\$\$a AU@ \$\$b 000065715160
035	\$\$a (OCoLC)1035797624 \$\$z (OCoLC)1090829091 \$\$z (OCoLC)1091288540 \$\$z (OCoLC)1101639797 \$\$z (OCoLC)1110726502 \$\$z (OCoLC)1111724360 \$\$z (OCoLC)1122768790 \$\$z (OCoLC)1122772750
035	\$\$a (OCoLC)on1035797624
040	\$\$a DLC \$\$b eng \$\$e rda \$\$c DLC \$\$d OCLCF \$\$d OCLCO \$\$d ZVR \$\$d TP7 \$\$d AYP \$\$d UAP \$\$d OCLCA \$\$d WVU \$\$d YDX \$\$d VP@ \$\$d ILC \$\$d YUS \$\$d TEU \$\$d CG4

Matches(2)
1 - 2 of 2 Records

1 How to be an antiracist / (991059019818904801)
By Kendi, Ibram X., (Book One World,, New York :, 2019)
ISBN: 0525509283
Subjects: Autobiographies., HISTORY--United States--General., United States--Race relations. ...
Other System Number: (OCoLC)on1035797624, (OCoLC)1035797624, (OCoLC)1122772750 ...

2 How to be an antiracist / (991059020519704801)
By Kendi, Ibram X., (Book One World,, New York :, 2019)
ISBN: 0525509283
Subjects: Autobiographies., HISTORY--United States--General., United States--Race relations. ...
Other System Number: (OCoLC)on1035797624, (OCoLC)1035797624, (OCoLC)1122772750 ...

Merge Records and Combine Inventory Workflow

6. Go to *Tools>MARC Bibliographic>Merge Records & Combine Inventory*

The screenshot displays the library catalog interface with two records side-by-side: a **Primary Record** on the left and a **Secondary Record** on the right. The **Tools** menu is open, and the **MARC Bibliographic** sub-menu is selected, with the **Merge Records & Combine Inventory** option highlighted. A red arrow points to this option. The interface also shows a warning message: "You have 2 warning(s) in your record".

Primary Record:

- Record ID: 020519604801
- Created by: adminpsb@01SUNY_ESC
- Modified by: adminpsb@01SUNY_ESC (01/15/2020 16:38:22 EST)
- Warning: records while loading the record. Loading the record

Secondary Record:

- Record ID: 991059019818904801
- Created by: System (11/15/2019 11:10:22 EST)
- Modified by: System (11/15/2019 11:10:21 EST)
- Warning: You have 2 warning(s) in your record

Tools Menu:

- Search Resources
- View Versions
- View versions of original record
- Validate (Ctrl+U)
- Validate in Network Zone
- Browse Shelf Listing (Alt+C)
- Browse Bib Headings
- View Notes
- View Collections
- Release All Records for User
- Test external records
- MARC Bibliographic** (selected)
 - Derive New Record
 - Merge Records & Combine Inventory** (highlighted)
 - Add Holdings (Ctrl+Alt+H)
 - Add Local Portfolio
 - Add Representation (Alt+R)
 - Create POLine & Exit (Ctrl+Alt+O)
 - Find Matches (Ctrl+M)
 - View Inventory (Ctrl+I)
 - View In Search (Ctrl+Alt+V)
- MARC21 Holdings
- Dublin Core
- Set Management Tags

Record Details:

- Record 019: \$\$a 1090829091 \$\$a 1091288540 \$\$a 1101639797 \$\$a 1110726502 \$\$a 1111724360
- Record 020: \$\$a 9780525509288 \$\$q (hardcover)
- Record 020: \$\$a 0525509283 \$\$q (hardcover)
- Record 020: \$\$z 9780525509295 \$\$q (electronic book)


Merge Records and Combine Inventory Workflow

7. The Merge Records & Combine Inventory screen pops-up
 - a) Choose merge routine: [select the merge rule]
 - b) Click ***Show merge preview***
 - i. Preview the merge behavior
 - ii. Click **Ok**

Merge Records & Combine Inventory

You are about to merge record (MMS ID: 991059020519804801) with the record (MMS ID: 991046450759704801).

Choose merge routine: Keep only old value

 Show merge preview

You are about to move the following:

- 0 physical item(s)
- 0 digital remote representations(s)
- 0 digital representations(s)
- 0 PO line(s)
- 0 electronic portfolio(s)
- 0 electronic collection(s)


0 Record(s) related to the secondary record might get affected by the process

Update holdings call number

Ok Cancel

Merge Preview

LDR	01373cam#a2200385la#4500
001	991046450759704801
005	20200115131710.0
008	040220s2002####nyua#####001#0#eng#d
019	\$\$a 56618250
020	\$\$a 0883635119
020	\$\$a 9780883635117
035	\$\$a ocm54453649-01suny_network
035	\$\$a (OCoLC)54453649 \$\$z (OCoLC)56618250
040	\$\$a CPL \$\$b eng \$\$c CPL \$\$d JRZ \$\$d OCLCQ \$\$d BAKER \$\$d YDXCP \$\$d SINLB \$\$d OCLCQ \$\$d OCLCF \$\$d OCLCQ \$\$d OCLCO
049	\$\$a OLIS
050	4 \$\$a RA781.7 \$\$b .S64546 2002x
082	0 4 \$\$a 613.7046 \$\$2 22
---	---

 Ok

Merge Records and Combine Inventory Workflow

7. The Merge Records & Combine Inventory continued

c) Update holdings call number

i. Depends on the merge routine and if the holdings call number should be updated

d) Secondary record: Delete

e) Click *Ok*

8. The newly merged bib record opens in the MD Editor

9. Click *File>Save (Ctrl+S)* or *File>Save and Release Record (Ctrl+Alt+R)*

Merge Records & Combine Inventory

You are about to merge record (MMS ID: 991059020519804801) with the record (MMS ID: 991046450759704801).

Choose merge routine: Keep only old value

Show merge preview

You are about to move the following:

- 0 physical item(s)
- 0 digital remote representations(s)
- 0 digital representations(s)
- 0 PO line(s)
- 0 electronic portfolio(s)
- 0 electronic collection(s)

0 Record(s) related to the secondary record might get affected by the process

Update holdings call number

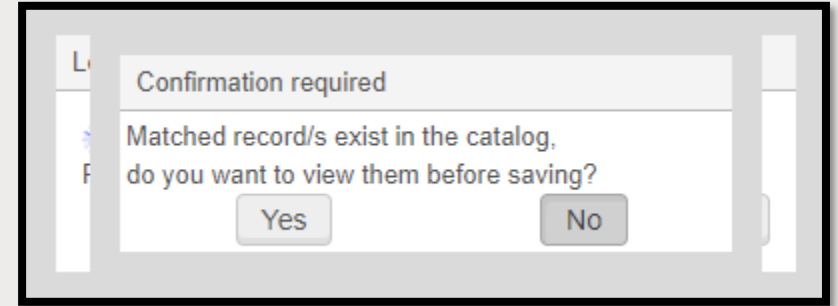
Secondary record: Delete Suppress Keep it

Note: this operation is non-reversible!

Ok Cancel

Merge Records and Combine Inventory Workflow

10. Confirmation box with the following message appears because there are more matching records: *“Matched record/s exist in the catalog, do you want to view them before saving?”*
- a) *Yes – follow the steps above to merge records*
 - b) *No – leaves two bib records with the same OCLC in the IZ or the NZ*



Merge Records and Combine Inventory Workflow

- If there is more than one matching NZ record:
 - Check to see if there is inventory on all the NZ bib records
 - Perform a repository search by “Other System Number”



A screenshot of a library search interface. The search bar contains the text "Other System Number" followed by a dropdown arrow and the number "1035797624". To the left of the search bar is a blue button labeled "All titles" with a dropdown arrow. To the right of the search bar are icons for a close button (X), a list view (three squares), and a search button (magnifying glass).

- Submit the NZ record to be deleted to the NZ Coordinator if there is not inventory on a NZ bib record with the same OCLC #
 - Go to the SUNY Shared LSP Overview Libguide: <https://slcny.libguides.com/>
 - Click *Communication Channels*
 - Click *Form and Contacts for SLSS*
 - Click *Request to Delete to Delete NZ Bib Records*
 - Fill out the request form

SUPPORTING DOCUMENTATION

Supporting Documentation

- FAQ: [How do I reduce the number of matching bib records a bib record is matching with in the MD Editor?](#)
- Ex Libris Documentation: [Merging Bibliographic records](#)
- Ex Libris Documentation: [Working with Merge Rules](#)
- Ex Libris Documentation: [Configuring BIB Redirection Fields](#)