

WASN'T IN NZ OR OCLC WHEN  
ORDERED? AND IT IS NOW?  
HERE'S HOW YOU PROPERLY  
MERGE IT!

SUNY Library Shared Services  
Maggie McGee



# Topics being covered in Today's Training Session

1. How to edit brief bib records created for ordering to include the OCLC #
2. What to do after the brief bib record has been updated with an OCLC #
  - a) Export from OCLC
  - b) Merge with an existing NZ bib records when a match exists
3. Troubleshooting what to do if a duplicate bib record is created by mistake in the NZ when updating a brief bib record

# UPDATING A NZ BRIEF BIB WHEN AN OCLC MASTER RECORD NOW EXISTS

# Updating a NZ brief bib when an OCLC master record Now Exists

1. Search OCLC for the bib record
2. Copy the OCLC #

<a href="#">OCLC</a>		1122799125	No holdings in ZBM - 4 other holdings								
Books	Rec stat	c	Entered	20191018	Replaced	201911					
Type	a	ELvl	8	Srcce		Audn		Ctrl		Lang	eng
BLvl	m	Form		Conf	0	Biog		MRec		Ctry	cou
Desc	i	llls		GPub		LitF	0	Indx	1	Dates	2020
				Fest	0	DtSt	s				
010			2019042343								
040			DLC #b eng #e rda #c DLC #d BDx #d OCLCO #d OCLCF								
020			9781611808049 #q (trade paperback)								
020			1611808049								
042			pcc								
050	0	0	B132.Y6 #b F559 2020								
082	0	0	181/.45 #2 23								
090			#b								
049			ZBMM								
100	1		<a href="#">Finger, Alan</a> , #d 1946- #e author.								
245	1	4	The genius of yoga : #b how yogic meditation can unlock your innate brilliance / #c Alan Finger and Peter Ferko								
250			First edition.								
263			2006								
264	1		Boulder, Colorado : #b Shambhala, #c [2020]								

Search WorldCat

Command Line Search

Enter numeric, derived, keyword, or scan search here...

Keyword/Numeric Search

Search for:    Retain Search

AND

AND 9781611808049 ISBN (bn:)

Language: [Any] Format: [Any] Internet: [Any]

Source: [Any] Microform: [Any] Years: [Any] Material Type: [Any]

Apply Language of Cataloging Limiter

Search Results:  Display using GLIMIR clustering

Enter Diacritics... Expand/Collapse

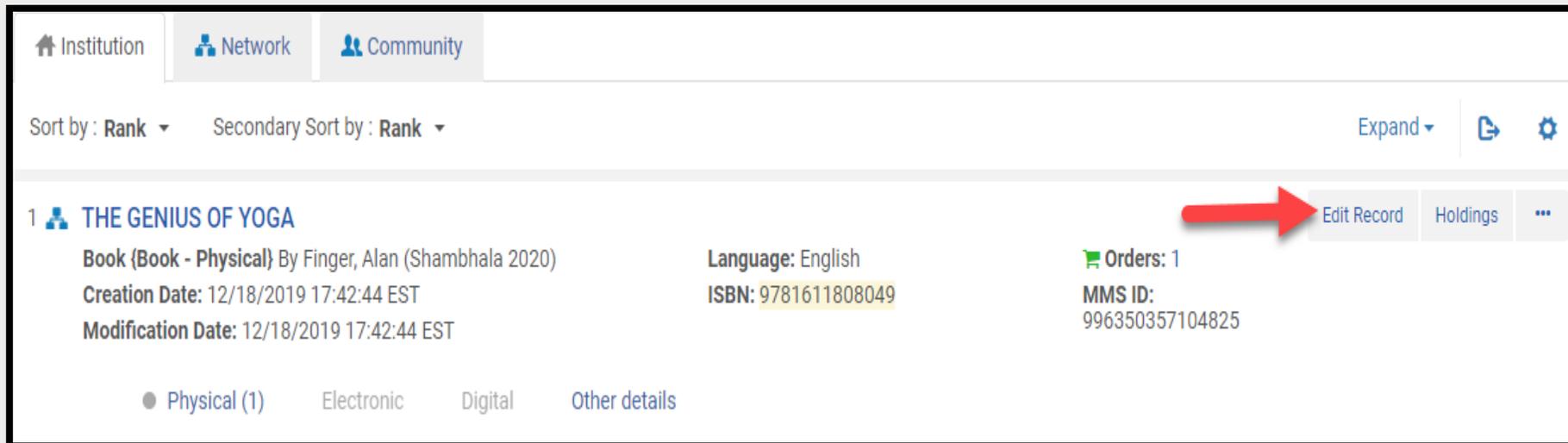
Settings... OK Cancel Clear Search Help

# Updating a NZ brief bib when an OCLC master record Now Exists

3. Perform a repository search in the IZ for the brief bib in Alma

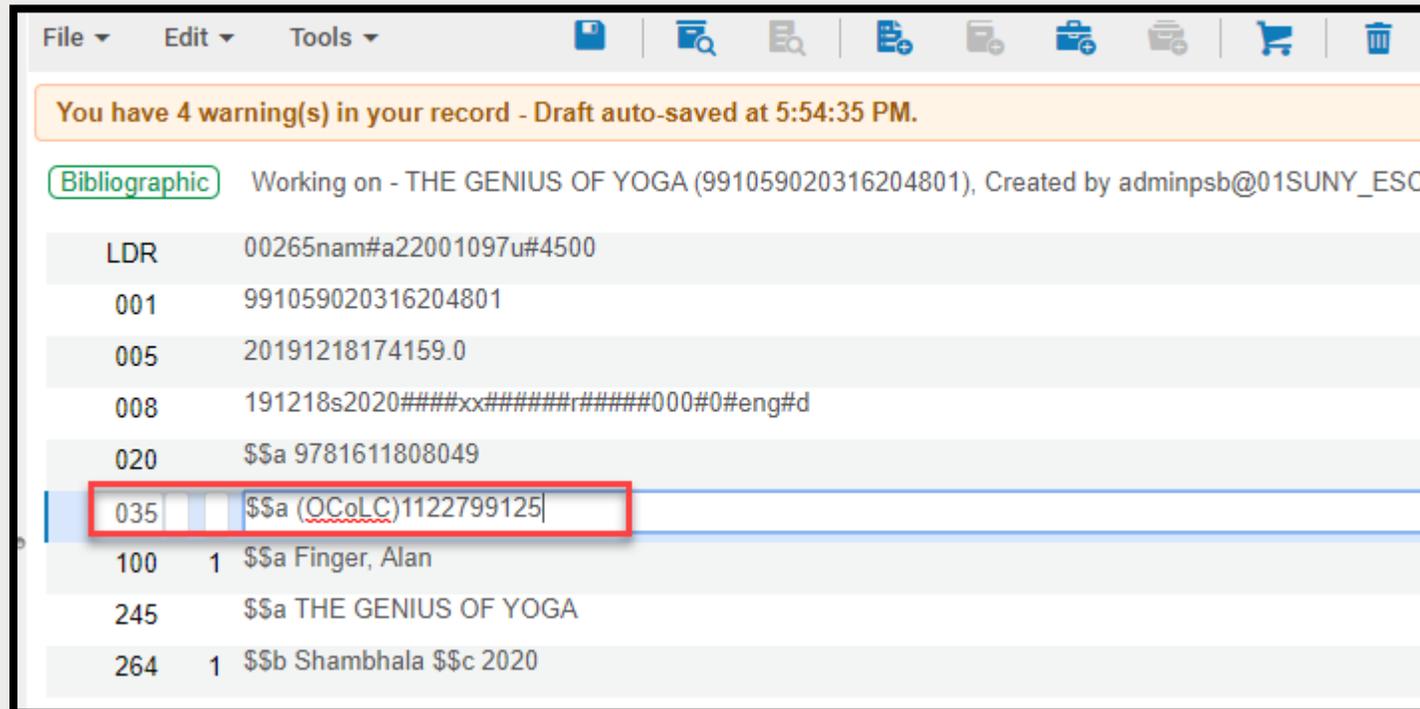
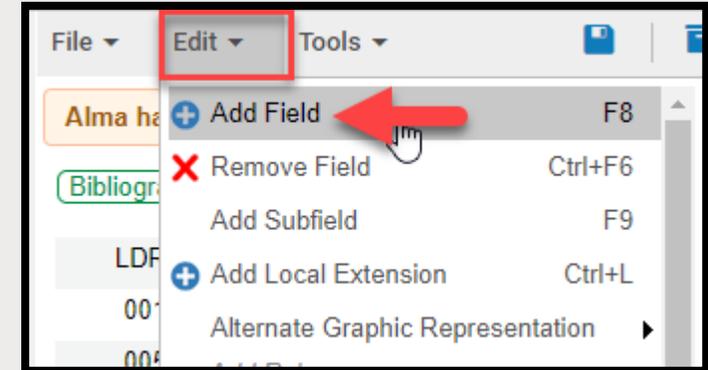


4. Click *Edit Record* from the brief bib record



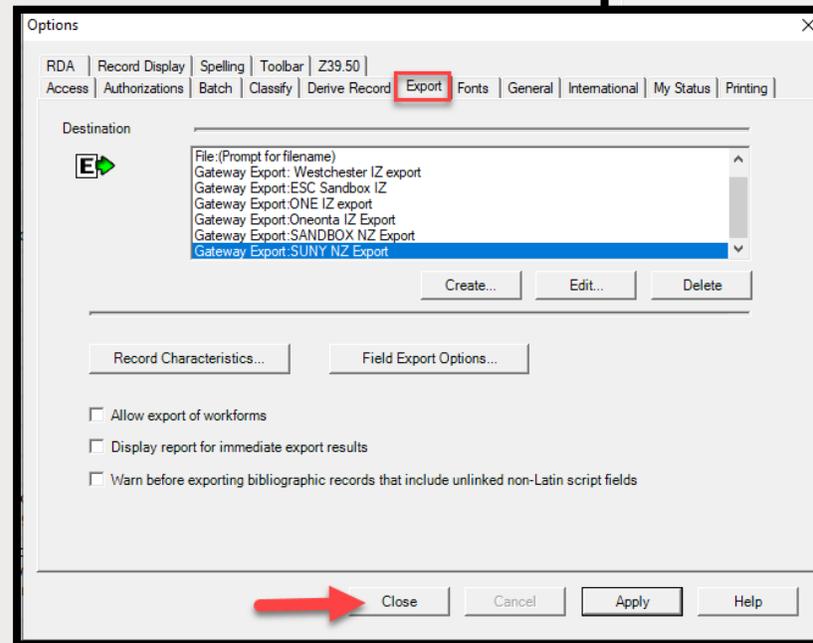
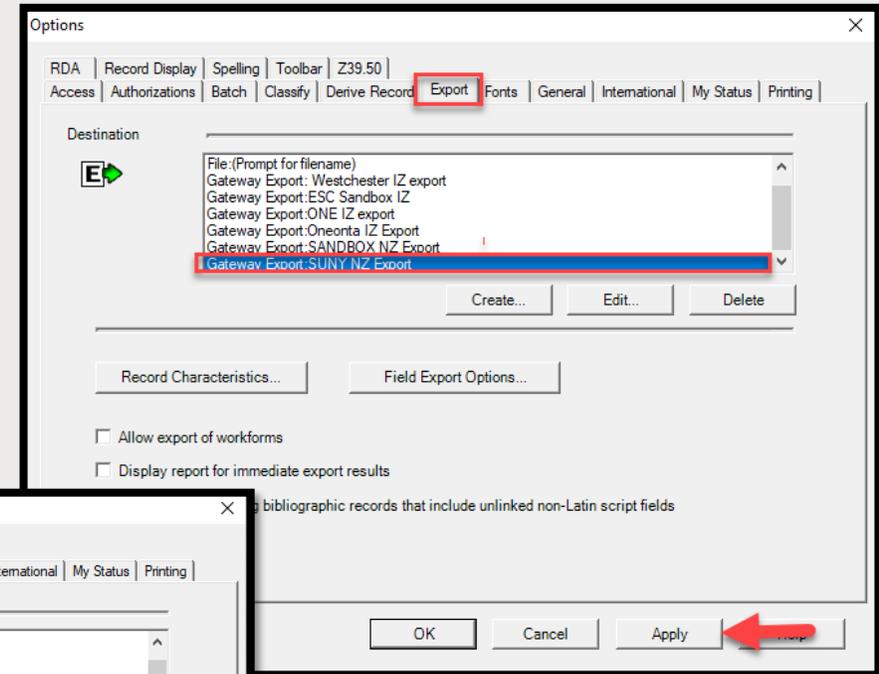
# Updating a NZ brief bib when an OCLC master record Now Exists

5. Click *Edit>Add Field*
6. Add MARC field 035 with the OCLC # as follow:
  - a) 035 \_\_ \$\$a (OCoLC)#####
7. Click *Save and Release* (Ctrl+Alt+R)



# Updating a NZ brief bib when an OCLC master record Now Exists

8. Return to OCLC and make sure the export is applied for the NZ (for campuses with an IZ and NZ export)
  - a) *Tools>Options*
  - b) Click on the **Export** tab
  - c) Click on the **NZ export**
  - d) Click *Apply*
  - e) Click *Close*



# Updating a NZ brief bib when an OCLC master record Now Exists

9. Click on *Action>Export* (F5) or click the **Export** icon

The screenshot shows the OCLC cataloging software interface. The menu bar includes File, Cataloging, Authorities, Edit, Action, Batch, View, Tools, Window, and Help. The toolbar contains various icons, with a red arrow pointing to the Export icon. The main window displays the record for OCLC 1122799125, which has no holdings in ZBM and 4 other holdings. The record details are as follows:

Books	Rec.stat	c	Entered	20191018	Replaced	20191107012222.2					
Type	a	ELvl	8	Srce		Ctrl		Lang	eng		
BLvl	m	Form		Conf	0	Biog		MRec		Ctry	cou
		Cont	b	GPub		LitF	0	Indx	1		
Desc	i	Ills		Fest	0	DtSt	s	Dates	2020	.	

The record is displayed in a table format with the following fields:

010			2019042343
040			DLC #b eng #e rda #c DLC #d BDX #d OCLCO #d OCLCF
020			9781611808049 #q (trade paperback)
020			1611808049
042			pcc
050	0	0	B132.Y6 #b F559 2020
082	0	0	181/.45 #2.23
090			#b
049			ZBMM
100	1		<a href="#">Finger, Alan</a> , #d 1946- #e author.
245	1	4	The genius of yoga : #b how yogic meditation can unlock your innate brilliance / #c Alan Finger and Peter Ferko.

# Updating a NZ brief bib when an OCLC master record Now Exists

10. Return to Alma and perform a repository search for the updated brief bib record

The screenshot shows the Alma search interface. At the top, a search bar contains 'All titles' and 'ISBN 9781611808049', which is highlighted with a red box. Below the search bar, the results show 'All Titles (1 - 1 of 1)' for the same ISBN. The search is sorted by 'Rank'. The first result is '1 The genius of yoga : how yogic meditation can unlock your innate brilliance / Alan Finger and Peter Ferko.', with a red arrow pointing to the title. The record details include: Book (Book - Physical) text; unmediated; volume By Finger, Alan, (Boulder, Colorado : Shambhala, [2020]); Subject: Meditation. Mindfulness (Psychology) Yoga; Creation Date: 12/18/2019 17:42:44 EST; Modification Date: 12/18/2019 18:10:22 EST; Edition: First edition; Language: English; ISBN: 9781611808049 and others; Record number: (OCoLC)1122799125; Orders: 1; MMS ID: 996350357104825. At the bottom, there are tabs for 'Physical (1)', 'Electronic', 'Digital', and 'Other details'.

# MERGING A NZ BRIEF BIB WHEN AN EXISTING NZ MASTER BIB RECORD

# Merge Behavior and When to Merge NZ Brief Bib Records

- To merge bib records they must be in the same zone
- To merge bib records you need to have a primary and a secondary bib record
  - The primary bib record is the record that is opened first in the MD Editor and it displays on the left-side of the split screen of the MD Editor
  - The secondary bib record is the record that is opened second in the MD Editor and it displays on the right-side of the split screen of the MD Editor
- Merging occurs on the primary bib record
- When to merge a NZ brief bib record with a NZ full bib record:
  - If a matching master bib record exists in the NZ after a brief bib was created for ordering
  - A brief bib was accidentally created for ordering when a NZ full bib already exists in the NZ

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

## 1. Relink from POL

### Roles Required:

- Purchasing Operator
- Cataloger
- Cataloger Extended

### Pros:

- Moves the POL and associated inventory to the master record in the NZ

### Cons:

- Call number in the holdings record needs to be updated
- Brief bib record needs to be unlinked from the NZ
- Brief bib needs to be deleted in the IZ
- NZ bib record MMS ID/ Title needs to be reported to the NZ Coordinator to be deleted

## 2. Merge Record & Combine Inventory

### Roles Required:

- Cataloger
- Cataloger Extended

### Pros:

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

### Cons:

- Call number in the holdings record needs to be updated
- Change Bib Reference for the POL
- 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

## 3. 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

## 4. 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

# Copy & Overlay Example – DO NOT USE

The screenshot shows a library catalog interface with two records. The primary record on the left is for 'Working on - THE YOGA TEACHER MENTOR' with OCLC number 991059020318404801. The secondary record on the right is for 'The yoga teacher mentor' with OCLC number 991059020318504801. A red box highlights the OCLC number in the secondary record's title. A purple box labeled 'Primary Record' is over the primary record, and another purple box labeled 'Secondary Record' is over the secondary record. A red box highlights the 590 field of the primary record: '\$\$a TEST COPY & OVERLAY.' A message bar at the top left says 'Description was filed successfully.'

File Edit Tools

Description was filed successfully.

Bibliographic Working on - THE YOGA TEACHER MENTOR (991059020318404801) Created by adminpsb@01SUNY\_ESC (12/17/2019 12:34:03 EST), Modified by adminpsb@01SUNY\_ESC (12/17/2019 12:34:47 EST)

LDR 00289nam#a22001097u#4500

001 991059020318404801

005 20191217123447.0

008 191217s2020####xx#####r#####000#0#eng#d

020 \$\$a 9781787751262

035 \$\$a (OCoLC)1084631063

100 1 \$\$a GLENNY, JESS

245 \$\$a THE YOGA TEACHER MENTOR

264 1 \$\$b Jessica Kingsley Publishers, \$\$c 2020

590 \$\$a TEST COPY & OVERLAY.

Matches(1)

1 The yoga teacher mentor (991059020318504801) View Edit ...

By Glenny, Jess, (Book Jessica Kingsley Publishers., London :, 2020)  
ISBN: 1787751260  
Subjects: Yoga teachers., Yoga--Study and teaching.  
Other System Number: (OCoLC)on1084631063, (OCoLC)1084631063, (OCoLC)1097677622

The dialog box has a title bar 'Information' with a speech bubble icon. The text inside reads: 'The content of record (991059020317804801) has been updated with that of record (991059020318104801). Note that record (991059020318104801) has no holdings linked to it, so it can be deleted.' A red box highlights the text 'Misleading Info!' and a 'Close' button is at the bottom right.

Information

The content of record (991059020317804801) has been updated with that of record (991059020318104801). Note that record (991059020318104801) has no holdings linked to it, so it can be deleted.

Misleading Info! Close

# Copy & Overlay Example – DO NOT USE

Alma has attempted to link the bib headings to authority records while loading the record. Loading the re

Bibliographic Working on - The yoga teacher men (991059020318404801) Created by adminpsb@01SUNY\_

LDR	01105cam#a22003618i#4500
001	991059020318404801
005	20191217123857.0
008	190201s2020####enk#####000#0#eng##
010	\$\$a ##2019004539
019	\$\$a 1097677622
020	\$\$a 9781787751262
020	\$\$a 1787751260
020	\$\$z 9781787751279 (ebook)
035	\$\$a (OCoLC)1084631063 \$\$z (OCoLC)1097677622
035	\$\$a (OCoLC)on1084631063
040	\$\$a DLC \$\$b eng \$\$e rda \$\$c DLC \$\$d OCLCO \$\$d OCLCF \$\$d YDX \$\$d BDx
042	\$\$a pcc
049	\$\$a ZBMM
050 0 0	\$\$a RA781.7 \$\$b .G54 2020
082 0 0	\$\$a 613.7/046076 \$\$2 23
100 1	\$\$a Glenny, Jess, \$\$e author.
245 1 4	\$\$a The yoga teacher mentor / \$\$c Jess Glenny.
263	\$\$a 2001
264 1	\$\$a London ; \$\$a Philadelphia : \$\$b Jessica Kingsley Publishers, \$\$c 2020.
300	\$\$a pages cm
336	\$\$a text \$\$b txt \$\$2 rdacontent
337	\$\$a unmediated \$\$b n \$\$2 rdamedia
338	\$\$a volume \$\$b nc \$\$2 rdacarrier
650 0	\$\$a Yoga \$\$x Study and teaching.
650 0	\$\$a Yoga teachers.
650 7	\$\$a Yoga \$\$x Study and teaching. \$\$2 fast \$\$0 (OCoLC)fst01182879
650 7	\$\$a Yoga teachers. \$\$2 fast \$\$0 (OCoLC)fst01920756
994	\$\$a C0 \$\$b ZBM

Copy & Overlay

Local Note is not retained

# Copy & Overlay Example – DO NOT USE

**Copy & Overlay - Inventory Does Not Merge**

1 **The yoga teacher mentor / Jess Glenny.** Edit Record Order ...

**Book (Book - Physical) text; unmediated; volume** By Glenny, Jess, (London ; Jessica Kingsley Publishers, 2020.)

**Subject:** Yoga--Study and teaching. Yoga teachers.

**Creation Date:** 12/17/2019 12:34:03 EST

**Modification Date:** 12/17/2019 12:38:57 EST

Electronic Digital **Held by (1)** Other details

SUNY Geneseo

**Secondary Record - NZ Full Bib Record**

2 **The yoga teacher mentor / Jess Glenny.** Edit Record Order ...

**Book (Book - Physical) text; unmediated; volume** By Glenny, Jess, (London ; Jessica Kingsley Publishers, 2020.)

**Subject:** Yoga--Study and teaching. Yoga teachers.

**Creation Date:** 12/17/2019 13:03:57 EST

**Modification Date:** 12/17/2019 13:06:50 EST

Electronic Digital **Held by (1)** Other details

My Institution

**Primary Record - Former Brief Bib Record**

# Copy & Merge Example - DO NOT USE

The screenshot shows a library catalog interface with a 'Bibliographic' record on the left and a 'Matches(1)' record on the right. The 'Primary Record' is highlighted in yellow and contains the following fields:

LDR	00289nam#a22001097u#4500
001	991059020317804801
005	20191218143057.0
008	191218s2020####xx#####r#####000#0#eng#d
020	\$\$a 9781787751262
035	\$\$a (OCoLC)1084631063
100	1 \$\$a GLENNY, JESS
245	\$\$a THE YOGA TEACHER MENTOR
264	1 \$\$b Jessica Kingsley Publishers, \$\$c 2020
590	\$\$a LOCAL NOTES TO TEST COPY & MERGE

The 'Secondary Record' is titled '1 The yoga teacher mentor / (991059020318104801)' and includes the following details:

- By Glenn, Jess, (Book Jessica Kingsley Publishers, London ;, 2020)
- ISBN: 1787751260
- Subjects: Yoga teachers., Yoga--Study and teaching.
- Other System Number: (OCoLC)on1084631063, (OCoLC)1084631063, (OCoLC)1097677622

A context menu is open over the secondary record, with 'Copy & Merge' highlighted. A warning banner at the top of the interface reads: 'You have 4 warning(s) in your record - Draft saved at 2:32:33 PM.'

**Information**

The content of record (991059020317804801) has been updated with that of record (991059020318104801). Note that record (991059020318104801) has no holdings linked to it, so it can be deleted.

**Misleading Info!** Close

# Copy & Merge Example - DO NOT USE

You have 6 warning(s) in your record

**Bibliographic** Working on - THE YOGA TEACHER MEN (991059020318804801), Created by adminpsb@01SUNY\_ESC (12/17/201

LDR	00289nam#a22001097u#4500
001	991059020318904801
005	20191217111653.0
008	191217s2020####xx#####r#####000#0#eng#d
010	\$\$a ##2019004539
019	\$\$a 1097677622
020	\$\$a 9781787751262
035	\$\$a (OCoLC)1084631063 \$\$z (OCoLC)1097677622
035	\$\$a (OCoLC)on1084631063
040	\$\$a DLC \$\$b eng \$\$e rda \$\$c DLC \$\$d OCLCO \$\$d OCLCF \$\$d YDX \$\$d BDX
042	\$\$a pcc
049	\$\$a ZBMM
050 0 0	\$\$a RA781.7 \$\$b .G54 2020
082 0 0	\$\$a 613.7/046076 \$\$2 23
100 1	\$\$a Glenny, Jess
245	\$\$a THE YOGA TEACHER MENTOR
263	\$\$a 2001
264 1	\$\$b Jessica Kingsley Publishers, \$\$c 2020
300	\$\$a pages cm
336	\$\$a text \$\$b txt \$\$2 rdacontent
337	\$\$a unmediated \$\$b n \$\$2 rdamedia
338	\$\$a volume \$\$b nc \$\$2 rdacarrier
590	\$\$a LOCAL NOTES TO TEST COPY & MERGE
650 0	\$\$a Yoga \$\$x Study and teaching.
650 0	\$\$a Yoga teachers.
650 7	\$\$a Yoga \$\$x Study and teaching. \$\$2 fast \$\$0 (OCoLC)fst01182879
650 7	\$\$a Yoga teachers. \$\$2 fast \$\$0 (OCoLC)fst01920756

**Copy & Merge**

**Retains MARC Fields from the Primary Record - Brief Bib**

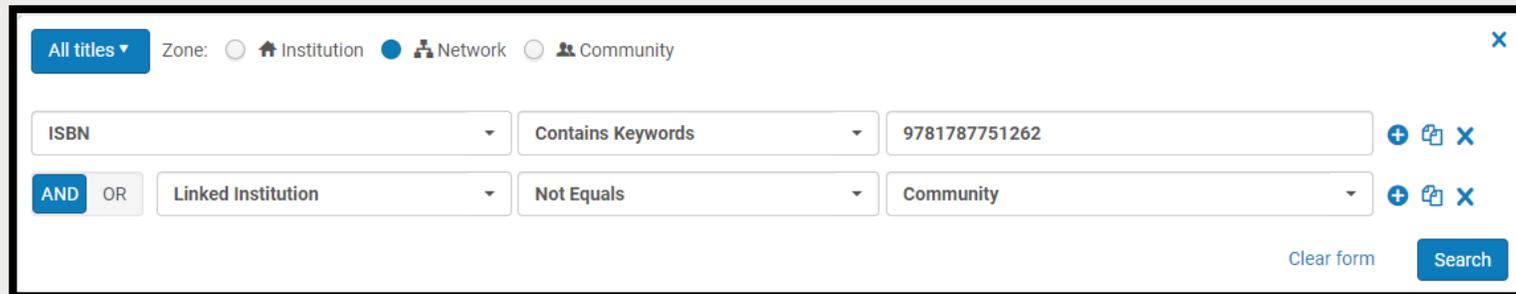
# Copy & Merge Example - DO NOT USE

1	<b>The yoga teacher mentor / Jess Glenny.</b> Book (Book - Physical) text; unmediated; volume By Glenny, Jess, (London ; Jessica Kingsley Publishers, 2020.) Subject: Yoga--Study and teaching. Yoga teachers. Creation Date: 12/17/2019 13:34:48 EST Modification Date: 12/17/2019 13:39:10 EST Electronic Digital Held by (1) Other details	<b>Copy &amp; Merge - Inventory Does Not Merge</b> ISBN: 9781787751262 and others Record number: (OCoLC)1084631063 MMS ID: 991059020318104801	Edit Record Order ...
<b>Secondary Record - NZ Master Record</b>			
2	<b>THE YOGA TEACHER MENTOR</b> Book (Book - Physical) text; unmediated; volume By GLENNY, JESS (Jessica Kingsley Publishers, 2020) Subject: Yoga--Study and teaching. Yoga teachers. Creation Date: 12/18/2019 10:40:56 EST Modification Date: 12/18/2019 14:35:19 EST Electronic Digital Held by (1) Other details	ISBN: 9781787751262 Record number: (OCoLC)1084631063	Language: English MMS ID: 991059020317804801
<b>Copy &amp; Merge Record</b>			

# MERGE RECORD & COMBINE INVENTORY FOR NZ BRIEF BIB RECORDS WORKFLOW

# Merge Record & Combine Inventory Workflow

1. Search OCLC for the bib record and copy the OCLC #
2. Perform a repository search for the brief bib:
  - a) Search by ISBN/Title/Author
  - b) Use an advanced search to limit the result to NZ physical records



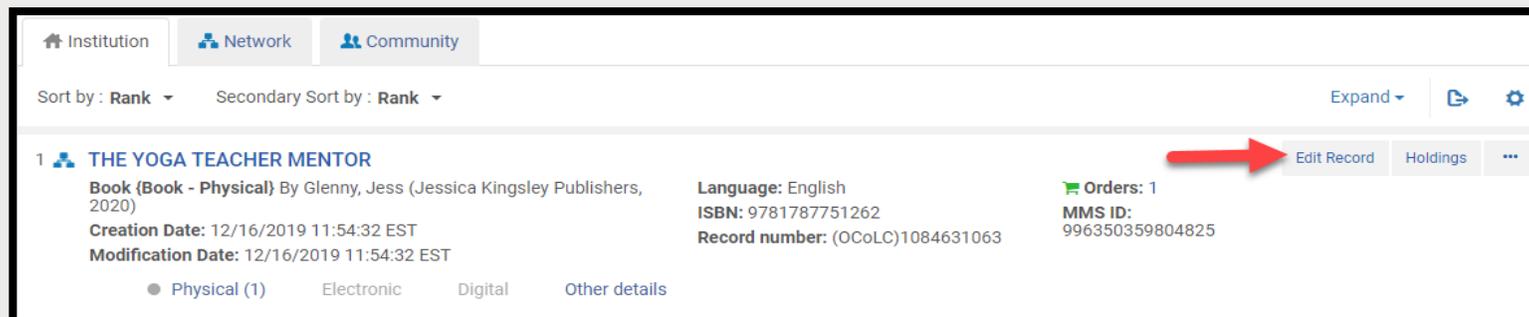
All titles ▾ Zone:  Institution  Network  Community

ISBN ▾ Contains Keywords ▾ 9781787751262 + 📄 ✕

AND OR Linked Institution ▾ Not Equals ▾ Community ▾ + 📄 ✕

Clear form

3. Click *Edit Record* to open the brief bib record in the MD Editor



Institution Network Community

Sort by: Rank ▾ Secondary Sort by: Rank ▾ Expand ▾ 📄 ⚙️

1 📄 **THE YOGA TEACHER MENTOR** [Edit Record](#) [Holdings](#) ⋮

**Book (Book - Physical)** By Glenn, Jess (Jessica Kingsley Publishers, 2020)  
**Creation Date:** 12/16/2019 11:54:32 EST  
**Modification Date:** 12/16/2019 11:54:32 EST

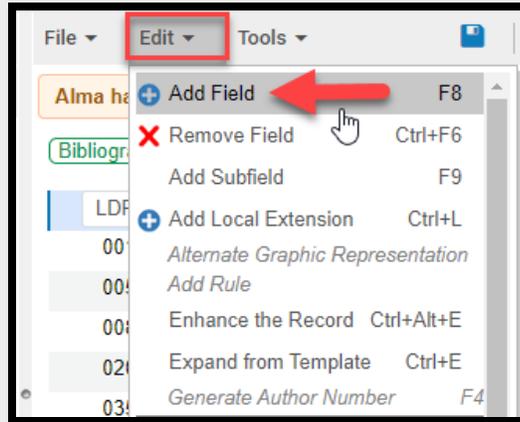
**Language:** English  
**ISBN:** 9781787751262  
**Record number:** (OCoLC)1084631063

**Orders:** 1  
**MMS ID:** 996350359804825

Physical (1)  Electronic  Digital [Other details](#)

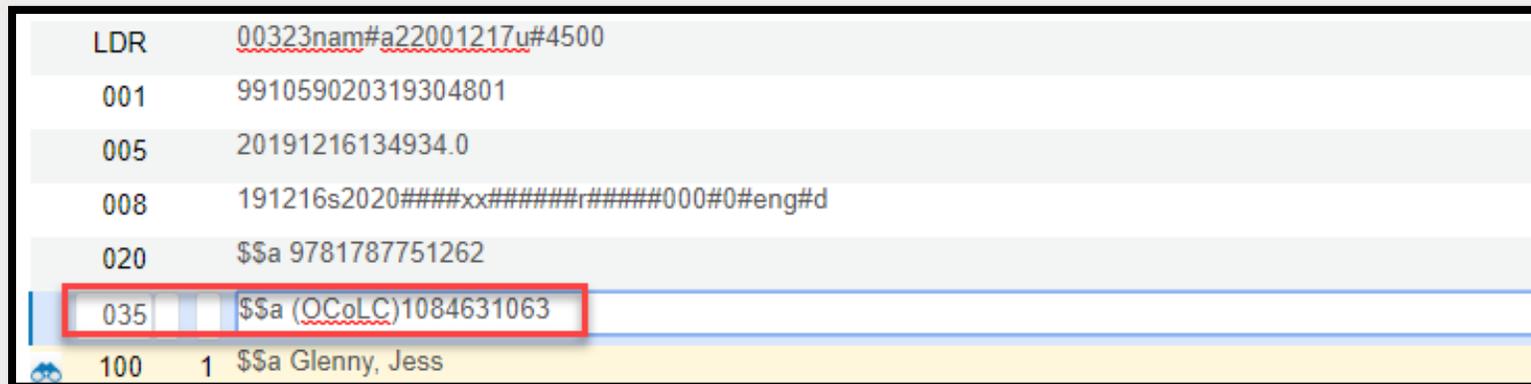
# Merge Record & Combine Inventory Workflow

4. Click *Edit>Add Field* (F8)



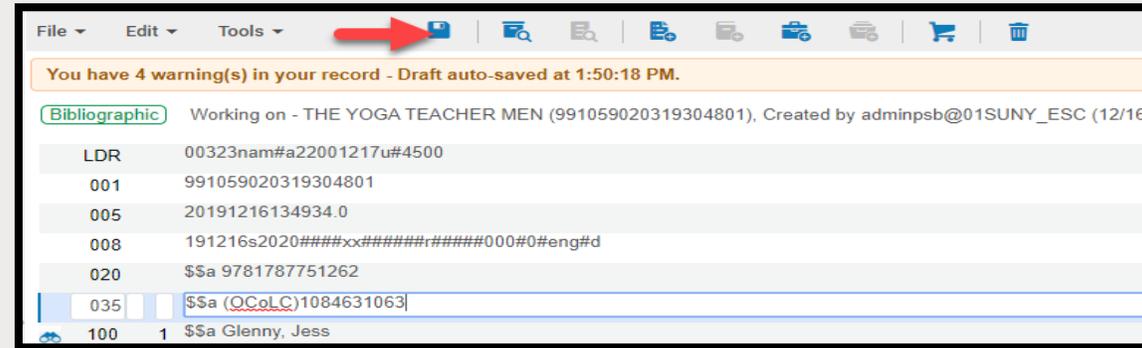
5. Add MARC field 035 with the OCLC # as follow:

a) 035 \_\_ \$\$a (OCoLC)#####

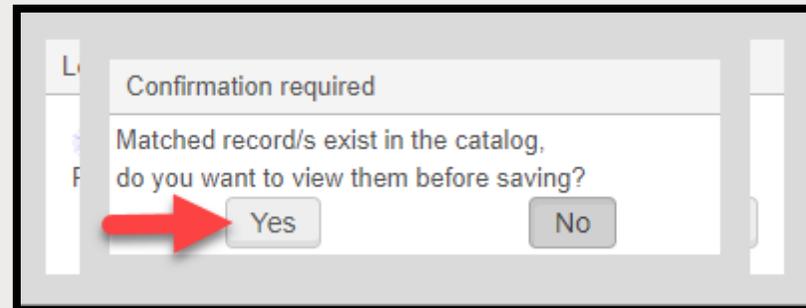


# Merge Record & Combine Inventory Workflow

6. Click on the **Save** icon (Ctrl+S)

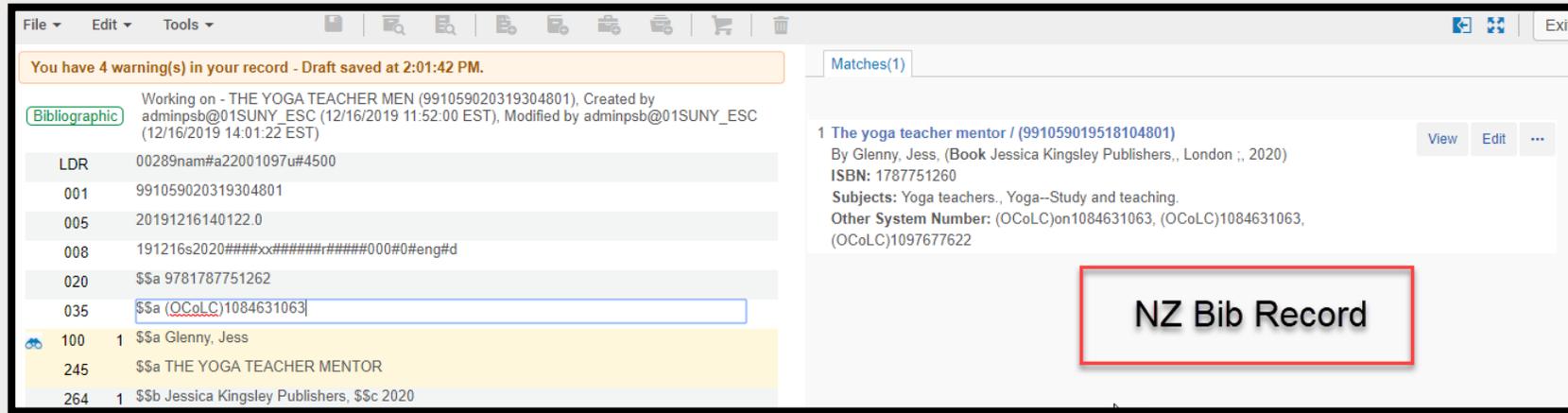


7. Click **Yes** when the Confirmation required pops up asking: *"Matched record/s exist in the catalog, do you want to view them before saving?"*

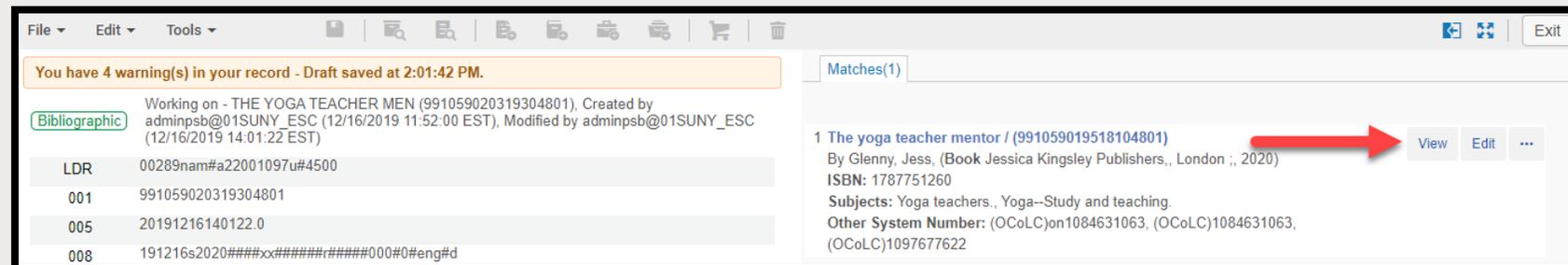


# Merge Record & Combine Inventory Workflow

8. The NZ bib record will open on the right-side of the MD editor

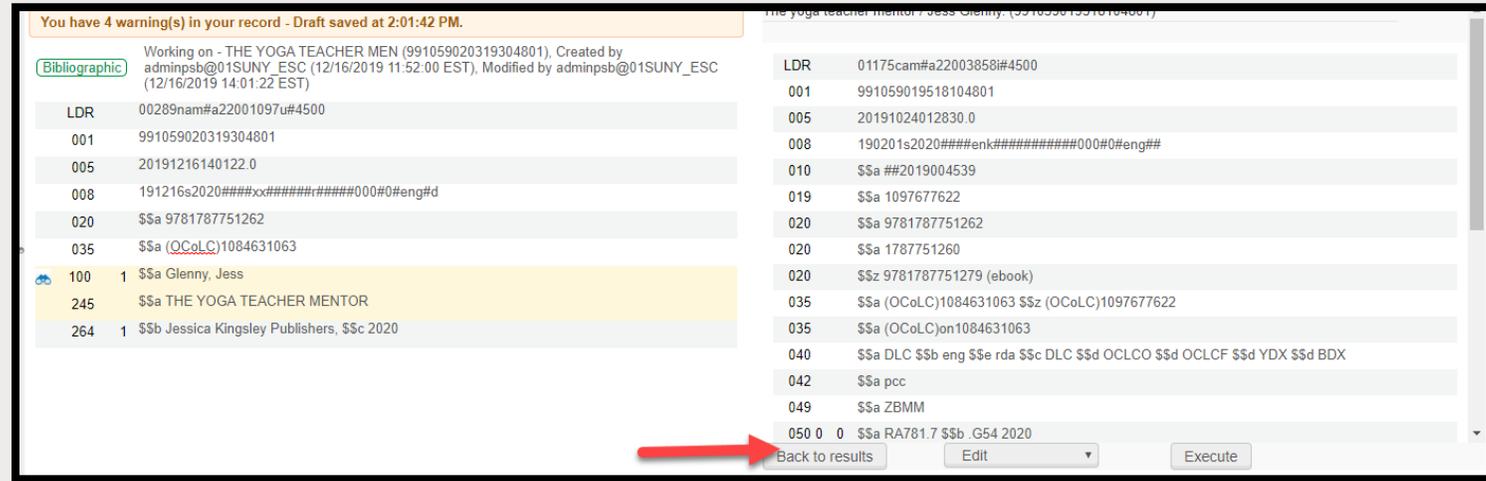


9. Click **View** from the NZ bib record on the right-side of the MD Editor to make sure it is the correct bib record



# Merge Record & Combine Inventory Workflow

## 10. Click *Back to results*



You have 4 warning(s) in your record - Draft saved at 2:01:42 PM.

Working on - THE YOGA TEACHER MEN (991059020319304801), Created by adminpsb@01SUNY\_ESC (12/16/2019 11:52:00 EST), Modified by adminpsb@01SUNY\_ESC (12/16/2019 14:01:22 EST)

**Bibliographic**

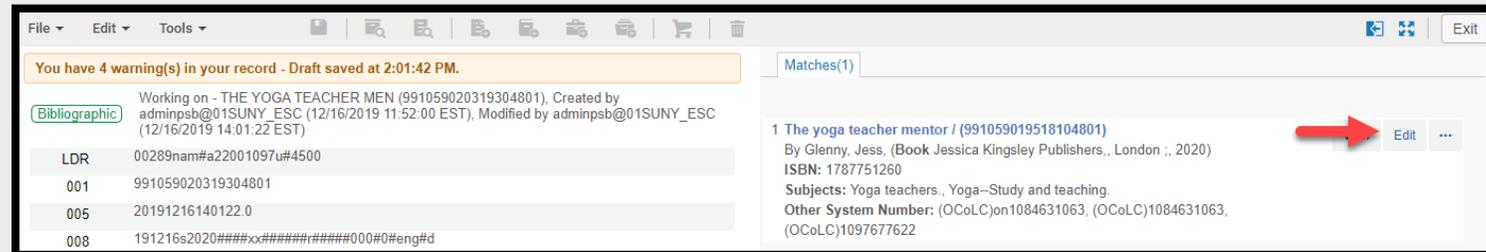
LDR	00289nam#a22001097u#4500
001	991059020319304801
005	20191216140122.0
008	191216s2020####xx#####r#####000#0#eng#d
020	\$\$a 9781787751262
035	\$\$a (OCoLC)1084631063
100	1 \$\$a Glenny, Jess
245	\$\$a THE YOGA TEACHER MENTOR
264	1 \$\$b Jessica Kingsley Publishers, \$\$c 2020

The yoga teacher mentor / Jess Glenny (991059019518104801)

LDR	01175cam#a22003858#4500
001	991059019518104801
005	20191024012830.0
008	190201s2020####enk#####000#0#eng##
010	\$\$a ##2019004539
019	\$\$a 1097677622
020	\$\$a 9781787751262
020	\$\$a 1787751260
020	\$\$z 9781787751279 (ebook)
035	\$\$a (OCoLC)1084631063 \$\$z (OCoLC)1097677622
035	\$\$a (OCoLC)on1084631063
040	\$\$a DLC \$\$b eng \$\$e rda \$\$c DLC \$\$d OCLCO \$\$d OCLCF \$\$d YDX \$\$d BDX
042	\$\$a pcc
049	\$\$a ZBMM
050	0 0 \$\$a RA781.7 \$\$b .G54 2020

Back to results Edit Execute

## 11. Click *Edit* from the NZ bib record on the right-side of the MD Editor



You have 4 warning(s) in your record - Draft saved at 2:01:42 PM.

Working on - THE YOGA TEACHER MEN (991059020319304801), Created by adminpsb@01SUNY\_ESC (12/16/2019 11:52:00 EST), Modified by adminpsb@01SUNY\_ESC (12/16/2019 14:01:22 EST)

**Bibliographic**

LDR	00289nam#a22001097u#4500
001	991059020319304801
005	20191216140122.0
008	191216s2020####xx#####r#####000#0#eng#d

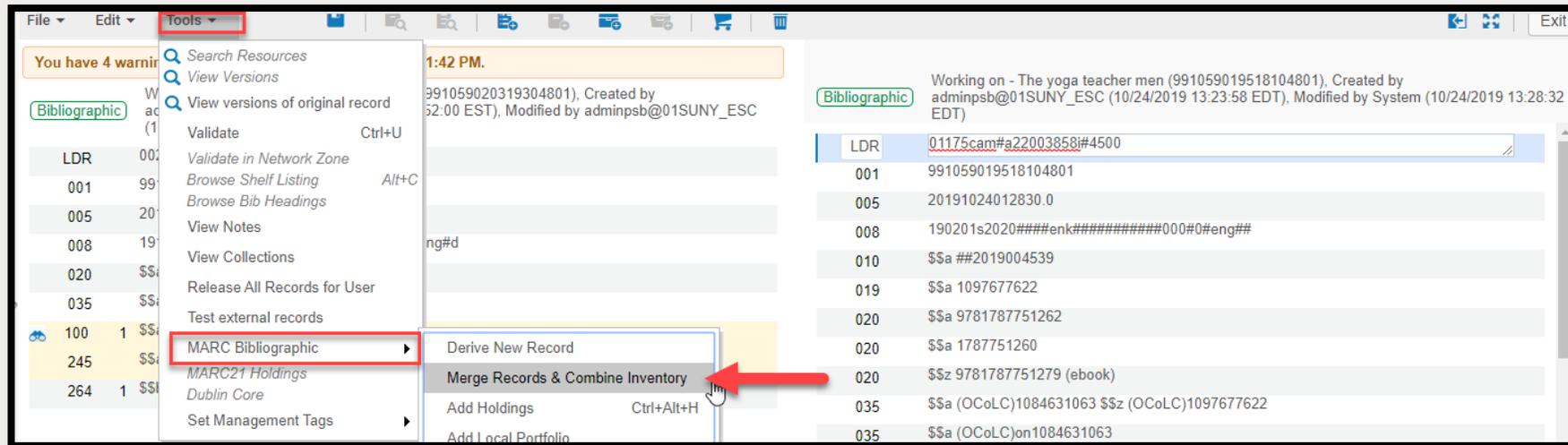
Matches(1)

1 The yoga teacher mentor / (991059019518104801)  
By Glenny, Jess, (Book Jessica Kingsley Publishers., London :, 2020)  
ISBN: 1787751260  
Subjects: Yoga teachers., Yoga--Study and teaching.  
Other System Number: (OCoLC)on1084631063, (OCoLC)1084631063, (OCoLC)1097677622

Edit ...

# Merge Record & Combine Inventory Workflow

12. Click *Tools>MARC Bibliographic>Merge Record & Combine Inventory*



# Merge Record & Combine Inventory Workflow

## 13. Merge Records & Combine Inventory screen opens

- Choose merge routine: [select Overlay all fields but local]
- Click Show merge preview
- Update Holdings call number: [DO NOT CHECK]
- Secondary record: [select Delete]
- Click **Ok**

**NOTE:** Campus holdings from the secondary record will be moved to the primary record (former brief bib)

Merge Records & Combine Inventory

You are about to merge record (MMS ID: 991059020316804801) with the record (MMS ID: 991059020316704801).

Choose merge routine: Overlay all fields but local

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 that inventory of the following member institutions will be moved to the primary record: SUNY Geneseo.

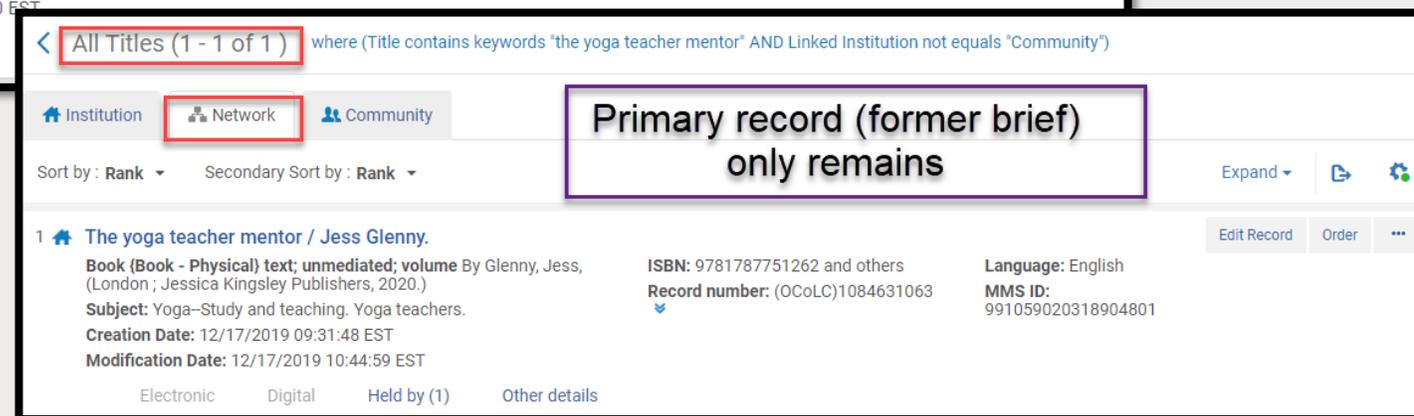
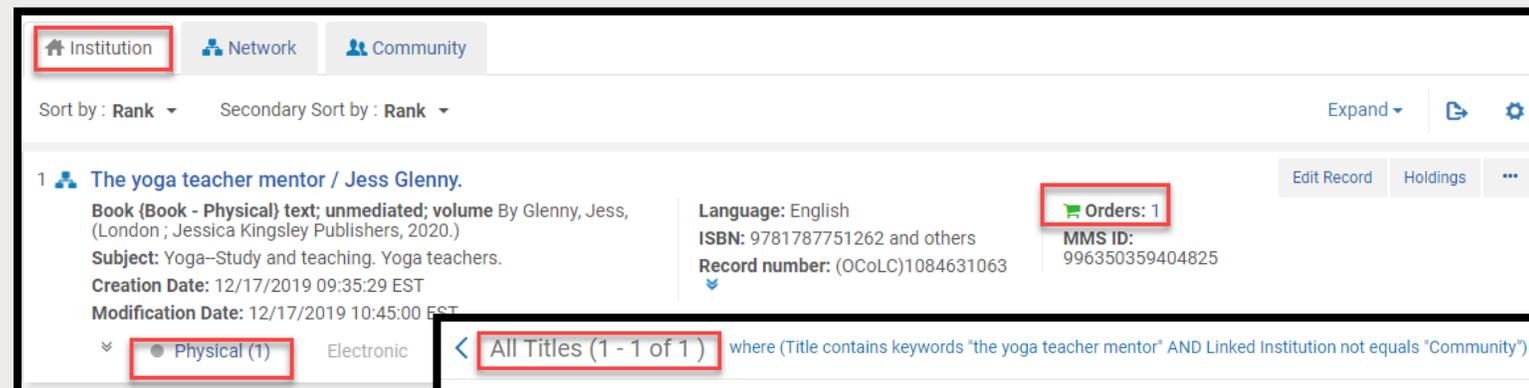
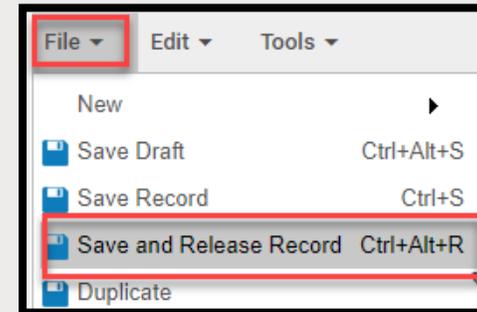
Note: this operation is non-reversible!

Ok Cancel

# Merge Record & Combine Inventory Workflow

14. Click *File>Save and Release Record*

15. Click *Back* (<)



# Merge Record & Combine Inventory Workflow

## 16) Change Bib Reference for the POL

- a) Click on the number next to Orders

1 **The yoga teacher mentor / Jess Glenny.** Edit Record Holdings ...

**Book** (Book - Physical) text; unmediated; volume By Glenny, Jess, (London ; Jessica Kingsley Publishers, 2020.)

**Language:** English

**ISBN:** 9781787751262 and others

**Subject:** Yoga--Study and teaching. Yoga teachers.

**Record number:** (OCoLC)1084631063

**Orders:** 1

**MMS ID:** 996350356404825

**Creation Date:** 12/18/2019 21:59:20 EST

**Modification Date:** 12/18/2019 22:15:22 EST

Physical (1)  Electronic  Digital [Other details](#)

- b) Click *Change Bib Reference*

1 **THE YOGA TEACHER MENTOR, Jessica Kingsley Publishers,, 2020, 9781787751262, ISBN** Edit Change Bib Reference ...

**MMS ID:** 996350356404825

**Assigned to:** -

**Type:** Print Book - One Time

**PO line owner:** Library and Learning Resource

**Standard number:** 9781787751262

**PO:** PO-769 / (Sent)

**PO line:** POL-2487 / (Sent)

**Copies:** Library and Learning Resource - On Order (1)

**Total price:** 0.00 USD

**Funds:** -

**Vendor/Account:** EBSCO / EBSCO EBSCO

**Vendor reference ID:** -

**Expected delivery:** 12/18/2019

**Receiving note:** -

**Sent date:** 12/18/2019

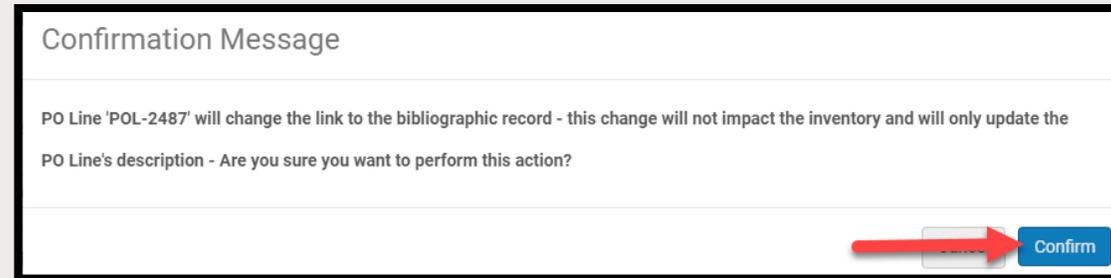
At least one of the reporting codes is missing

Physical One Time (1)

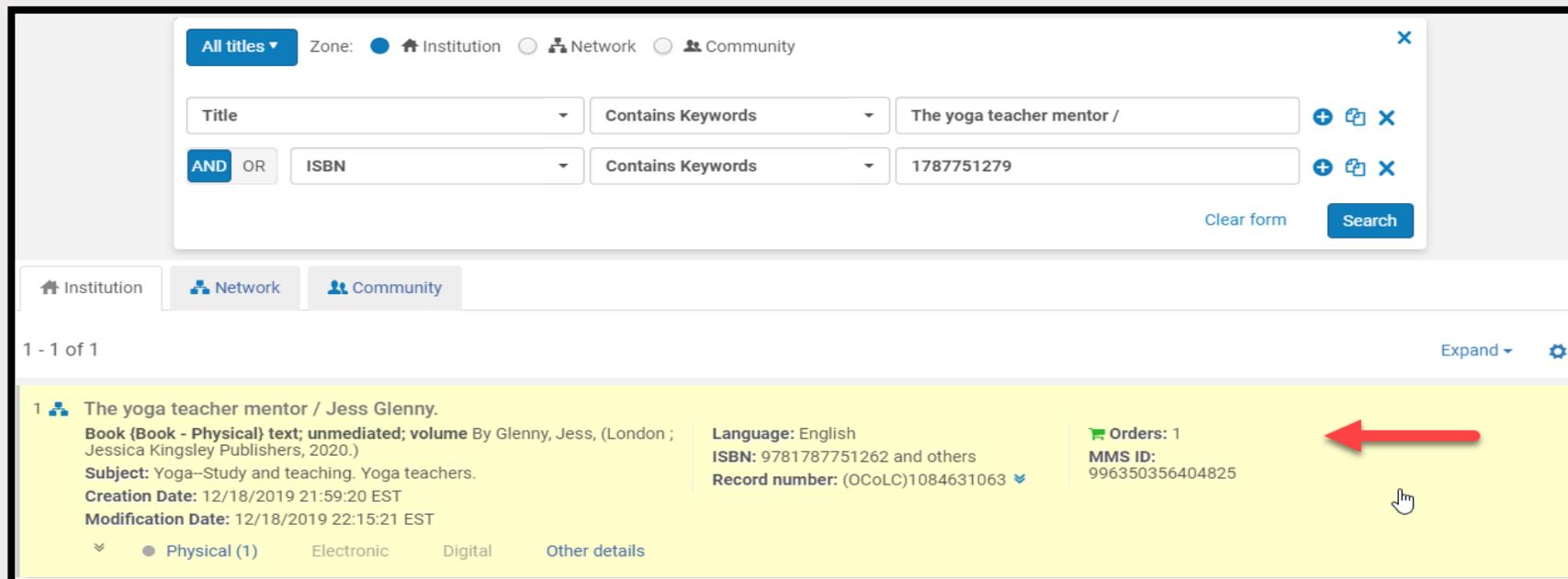
# Merge Record & Combine Inventory Workflow

## 16) Change Bib Reference for the POL

- c) Click **Confirm** when the Confirmation Message pops-up



- d) Click on the bib record that displays



All titles ▾ Zone:  Institution  Network  Community

Title ▾ Contains Keywords ▾ The yoga teacher mentor /

AND OR ISBN ▾ Contains Keywords ▾ 1787751279

Clear form Search

Institution Network Community

1 - 1 of 1 Expand ▾ ⚙️

1 The yoga teacher mentor / Jess Glenny.

Book {Book - Physical} text; unmediated; volume By Glenny, Jess, (London ; Jessica Kingsley Publishers, 2020.)

Subject: Yoga--Study and teaching. Yoga teachers.

Creation Date: 12/18/2019 21:59:20 EST

Modification Date: 12/18/2019 22:15:21 EST

Language: English

ISBN: 9781787751262 and others

Record number: (OCoLC)1084631063

Orders: 1

MMS ID: 996350356404825

Physical (1) Electronic Digital Other details

A red arrow points to the record title.

# Merge Record & Combine Inventory Workflow

16) Change Bib Reference for the POL

e) The POL title has changed to match the bib record

Purchase Order Lines (1 - 1 of 1)

All

1  **The yoga teacher mentor / Jess Glenny, London ; Jessica Kingsley Publishers,, 2020, 9781787751262, ISBN**

<b>MMS ID:</b> 996350356404825	<b>Copies:</b> Library and Learning Resource - On Order (1)	<b>Receiving note:</b> -
<b>Assigned to:</b> -	<b>Total price:</b> 0.00 USD	<b>Sent date:</b> 12/18/2019
<b>Type:</b> Print Book - One Time	<b>Funds:</b> -	At least one of the reporting codes is missing
<b>PO line owner:</b> Library and Learning Resource	<b>Vendor/Account:</b> EBSCO / EBSCO EBSCO	
<b>Standard number:</b> 9781787751262	<b>Vendor reference ID:</b> -	
<b>PO:</b> PO-769 / (Sent)	<b>Expected delivery:</b> 12/18/2019	
<b>PO line:</b> POL-2487 / (Sent)		

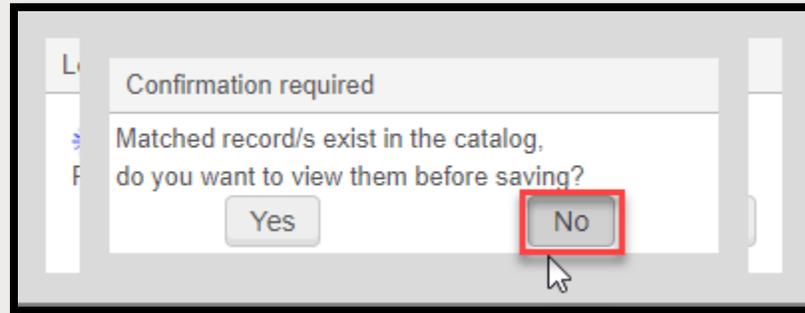
Physical One Time (1)

e) Click **Back** (<)

# TROUBLESHOOTING: WHAT TO DO IF A DUPLICATE BIB RECORD IS CREATED IN THE NZ

# Troubleshooting

- A duplicate bib record will be created after adding the OCLC # and saving the brief bib record if **No** is clicked when the Confirmation required box appears asking: *“Matched record(s) exist in the catalog, do you want to view them before saving”*

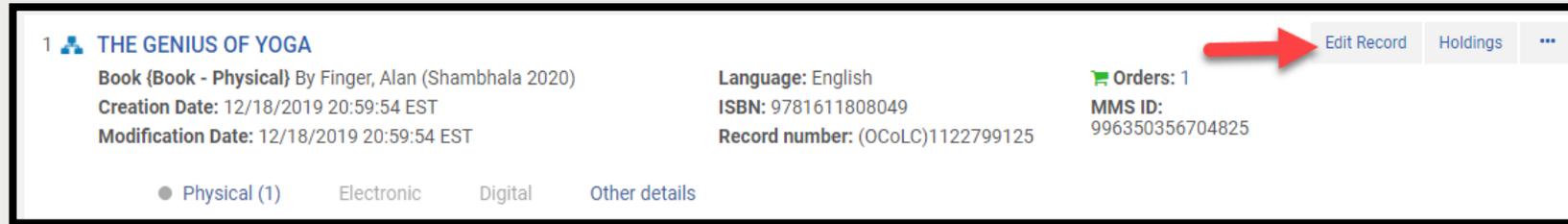


If you accidentally create a duplicate bib record in the NZ after updating a NZ brief bib record you can either:

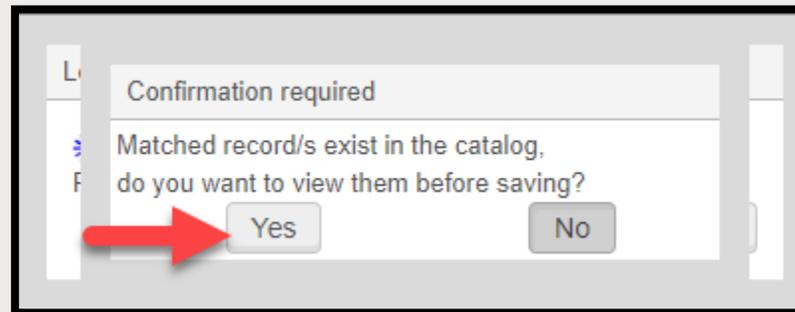
1. Merge Record & Combine Inventory
2. Relink from the POL

# Troubleshooting – Merge Records & Combine Inventory

1. Click *Edit Record* from the brief bib record



2. Click on the **Save** icon (Ctrl+S)
3. Click **Yes** when the Confirmation Required message appear asking if you want to view matched records before saving



4. Follow steps 9-15 under “Merge Record & Combine Inventory for NZ Brief Bib Records Workflow” above

# Troubleshooting – Relink from the POL

1. Perform an IZ repository search for the brief bib
2. Click the number next to Orders

The screenshot shows a library catalog search results page. At the top, a search bar contains 'All titles' and 'ISBN 9781611808049'. Below the search bar, the results are displayed for 'All Titles (1 - 1 of 1)'. The search criteria are 'Institution', 'Network', and 'Community'. The results are sorted by 'Rank' with a secondary sort by 'Rank'. The first result is '1 THE GENIUS OF YOGA' by Finger, Alan (Shambhala 2020). The record details include: Language: English, ISBN: 9781611808049, Record number: (OCoLC)1122799125, and MMS ID: 996350357004825. A red arrow points to the 'Orders: 1' link. The record is currently set to 'Physical (1)'.

All titles ▾ ISBN ▾ 9781611808049 X Home Search Advanced ▾

< All Titles (1 - 1 of 1) | 9781611808049 Save Query

Home Institution Network Community

Sort by: Rank ▾ Secondary Sort by: Rank ▾ Expand ▾ Share Settings

1 THE GENIUS OF YOGA Edit Record Holdings ...

Book (Book - Physical) By Finger, Alan (Shambhala 2020)  
Creation Date: 12/18/2019 20:00:40 EST  
Modification Date: 12/18/2019 20:02:34 EST

Language: English  
ISBN: 9781611808049  
Record number: (OCoLC)1122799125

Orders: 1  
MMS ID:  
996350357004825

Physical (1) Electronic Digital Other details

# Troubleshooting – Relink from the POL

## 3. Click *Edit*

1  **THE GENIUS OF YOGA, Shambhala, 2020, 9781611808049, ISBN** [Edit](#) [Change Bib Reference](#) [...](#)

**MMS ID:** 996350357004825      **Copies:** Library and Learning Resource - On Order (1)  
**Assigned to:** -      **Total price:** 0.00 USD  
**Type:** Print Book - One Time      **Funds:** -  
**PO line owner:** Library and Learning Resource      **Vendor/Account:** EBSCO / EBSCO EBSCO  
**Standard number:** 9781611808049      **Vendor reference ID:** -  
**PO:** PO-764 / (Sent)      **Expected delivery:** 12/18/2019  
**PO line:** POL-2483 / (Sent)

Physical One Time (1)

*Receiving note:* -  
**Sent date:** 12/18/2019  
At least one of the reporting codes is missing

## 4. Click *Relink*

[← Purchase Order Line Details](#)      [Save as template](#)      [Replace \(only\) Vendor](#)      [Change Bib Reference](#)      [Change vendor](#)      [Relink](#)      [Back](#)      [Save](#)

**THE GENIUS OF YOGA, Shambhala, 2020, 9781611808049, ISBN** [i](#) [v](#)

<b>PO line</b>	POL-2483	<b>PO</b>	PO-764	<b>Status</b>	Sent (2019-12-19)
<b>PO line type</b>	Print Book - One Time	<b>PO line owner</b>	Library and Learning Resource	<b>Sent date</b>	12/18/2019

# Troubleshooting – Relink from the POL

5. Click on the **Network** tab
6. Click on the title to relink the POL and associated inventory

The screenshot displays the 'Repository Search' interface. At the top, there are search filters: 'All titles' (dropdown), 'Zone' (radio buttons for Institution, Network, Community), and search criteria for 'Title' (THE GENIUS OF YOGA) and 'ISBN' (1611808049). Below the search bar, there are tabs for 'Institution', 'Network', and 'Community'. The 'Network' tab is selected and highlighted with a red box. Below the tabs, there are sorting options: 'Sort by: Rank', 'Secondary Sort by: Rank', and '1 - 2 of 2'. The search results are listed below, with two entries. The first entry is 'THE GENIUS OF YOGA' by Alan Finger, Alan (Shambhala 2020). The second entry is 'The genius of yoga : how yogic meditation can unlock your innate brilliance / Alan Finger and Peter Ferko.' by Alan Finger, Alan, (Boulder, Colorado : Shambhala, [2020]). The second entry's 'MMS ID' (991059020316204801) is highlighted with a red arrow.

Repository Search ⓘ

All titles ▾ Zone:  Institution  Network  Community ✕

Title ▾ Contains Keywords ▾ THE GENIUS OF YOGA + 📄 ✕

AND OR ISBN ▾ Contains Keywords ▾ 1611808049 + 📄 ✕

Clear form Search

Institution  Network  Community

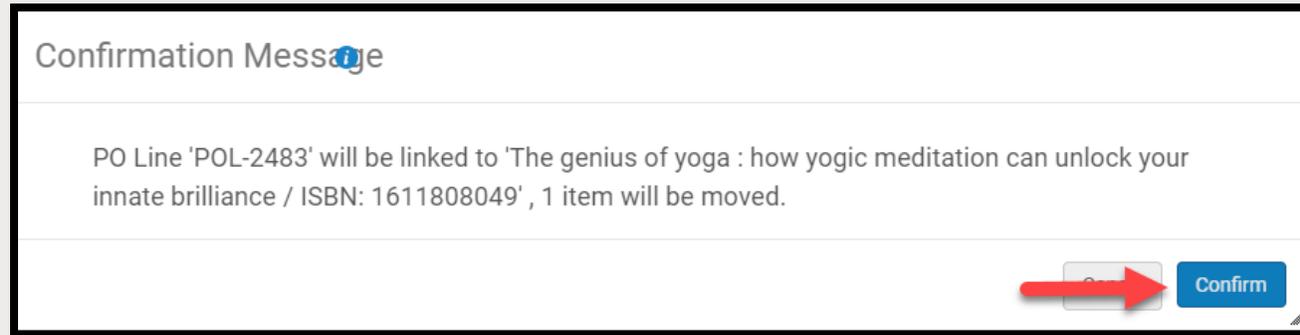
Sort by : Rank ▾ Secondary Sort by : Rank ▾ 1 - 2 of 2 Expand ⌵ ⚙️

1 🏠 THE GENIUS OF YOGA  
Book (Book - Physical) By Finger, Alan (Shambhala 2020)  
Creation Date: 12/18/2019 19:58:08 EST  
Modification Date: 12/18/2019 20:02:34 EST  
ISBN: 9781611808049  
Record number: (OCoLC)1122799125  
Language: English  
MMS ID: 991059020316004801  
Electronic Digital Held by (1) Other details

2 The genius of yoga : how yogic meditation can unlock your innate brilliance / Alan Finger and Peter Ferko.  
Book (Book - Physical) text; unmediated; volume By Finger, Alan, (Boulder, Colorado : Shambhala, [2020])  
Subject: Meditation. Mindfulness (Psychology) Yoga.  
Edition: First edition.  
Creation Date: 12/18/2019 17:41:59 EST  
Modification Date: 12/18/2019 18:10:22 EST  
ISBN: 9781611808049 and others  
Record number: (OCoLC)1122799125 ⌵  
Language: English  
MMS ID: 991059020316204801  
Electronic Digital Held by Other details

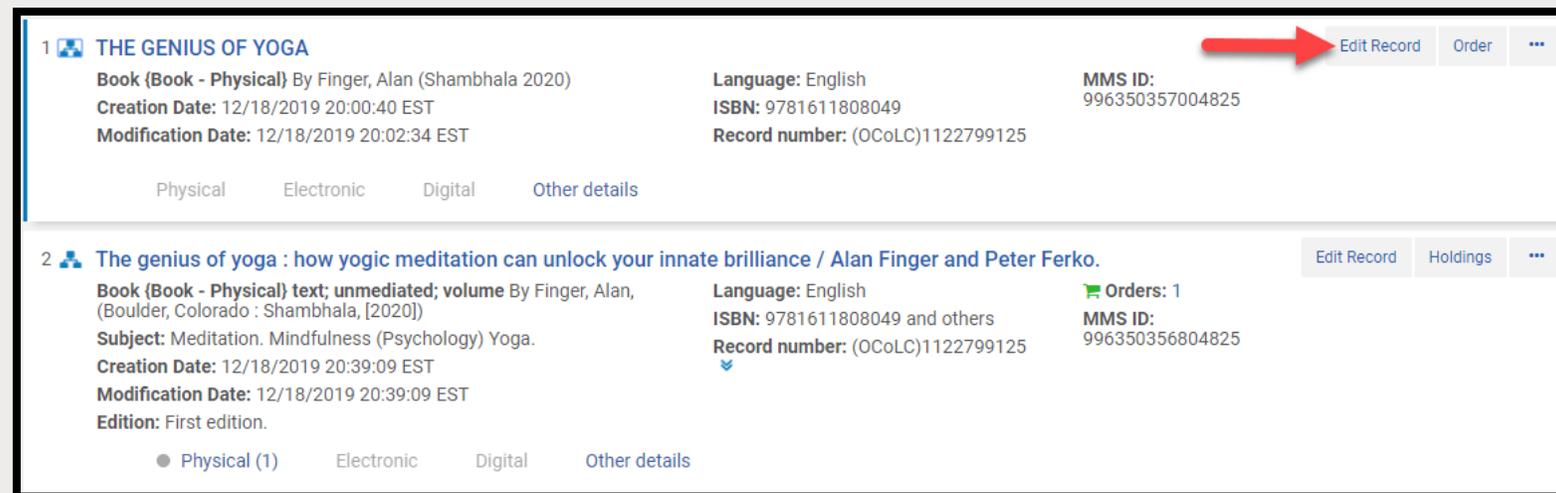
# Troubleshooting – Relink from the POL

7. Click **Confirm** when the pop-up confirmation message appears



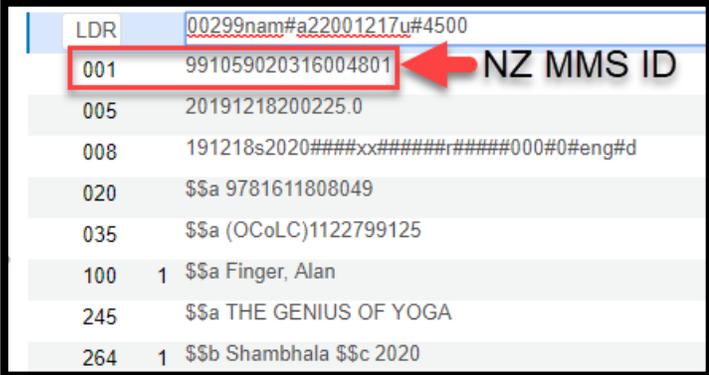
8. Click **Back**

9. Click **Edit Record** from the NZ brief bib record

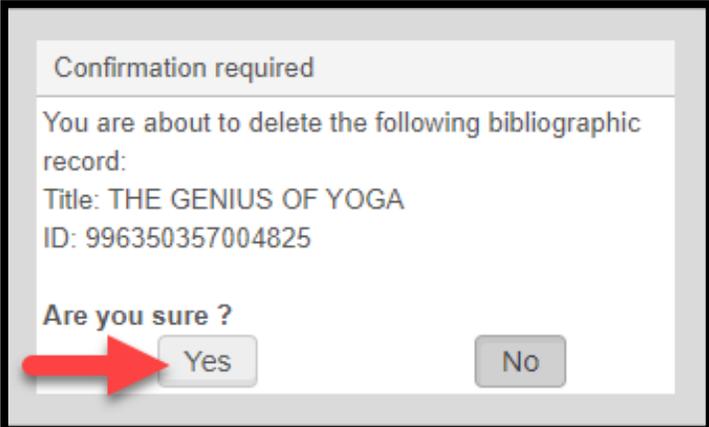


# Troubleshooting – Relink from the POL

10. Copy the NZ MMS ID from MARC field 001
  - a) The NZ MMS ID will be used to report the bib record for deletion
11. Click **File>Copy to Catalog** –
  - a) This unlinks the bib record from the NZ and creates and IZ bib record
12. Click on the **Save** icon (Ctrl+S)
13. Click **File>Delete Record**
  - a) This deletes the IZ bib record only
14. Click Save when the Confirmation required message asking if you are sure you want to delete the record
15. Click **Back (<)**



LDR	00299nam#a22001217u#4500
001	991059020316004801
005	20191218200225.0
008	191218s2020####xx#####r#####000#0#eng#d
020	\$\$a 9781611808049
035	\$\$a (OCoLC)1122799125
100	1 \$\$a Finger, Alan
245	\$\$a THE GENIUS OF YOGA
264	1 \$\$b Shambhala \$\$c 2020



Confirmation required

You are about to delete the following bibliographic record:

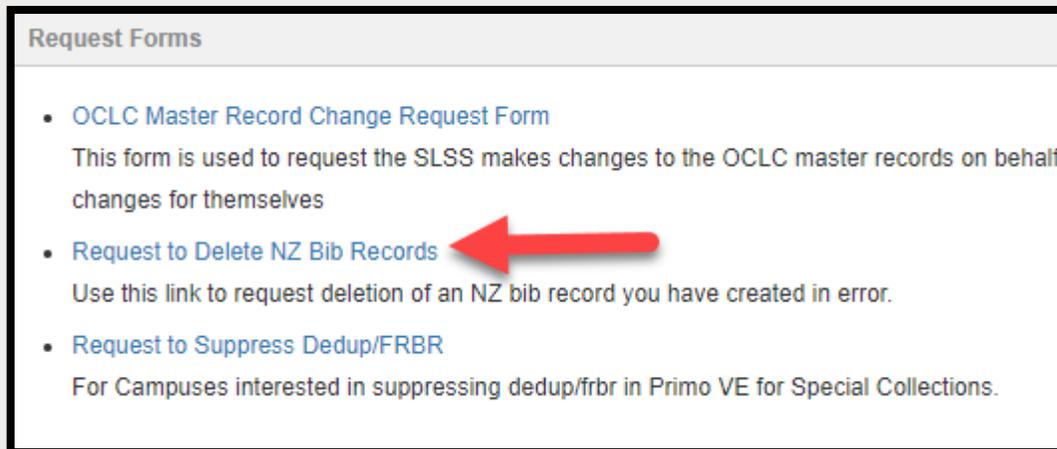
Title: THE GENIUS OF YOGA  
ID: 996350357004825

Are you sure ?

# Troubleshooting – Relink from the POL

16. Report the NZ brief bib record to be deleted to the NZ Coordinator

- a) Go to libguides:  
<https://slcny.libguides.com/overview>
- b) Click on *Communication Channels*
- c) Click *Forms and Contacts for SLSS*
- d) Click on *Request to Deleted NZ Bib Records*



# SUPPORTING DOCUMENTATION

# Supporting Documentation

- [Relinking Bib Records Session](#) by Maggie McGee 7/30/2019
- Ex Libris Documentation: [Merging Bibliographic Records](#)