

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 #

[OCLC](#) **1122799125** No holdings in ZBM - 4 other holdings

Type	a	ELvl	8	Src		Audn		Ctrl		Lang	eng
BLvl	m	Form		Conf	0	Biog		MRec		Ctry	cou
Desc	i	lls		GPub		LitF	0	Indx	1	Dates	2020

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	Finger, Alan , #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 Title (ti:)

AND Publisher (pb:)

AND ISBN (bn:)

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

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

☐ Apply Language of Cataloging Limiter

Search Results: English ☐ Display using GLIMIR clustering

Enter Diacritics... Expand/Collapse

Settings... **OK** Cancel Clear Search Help

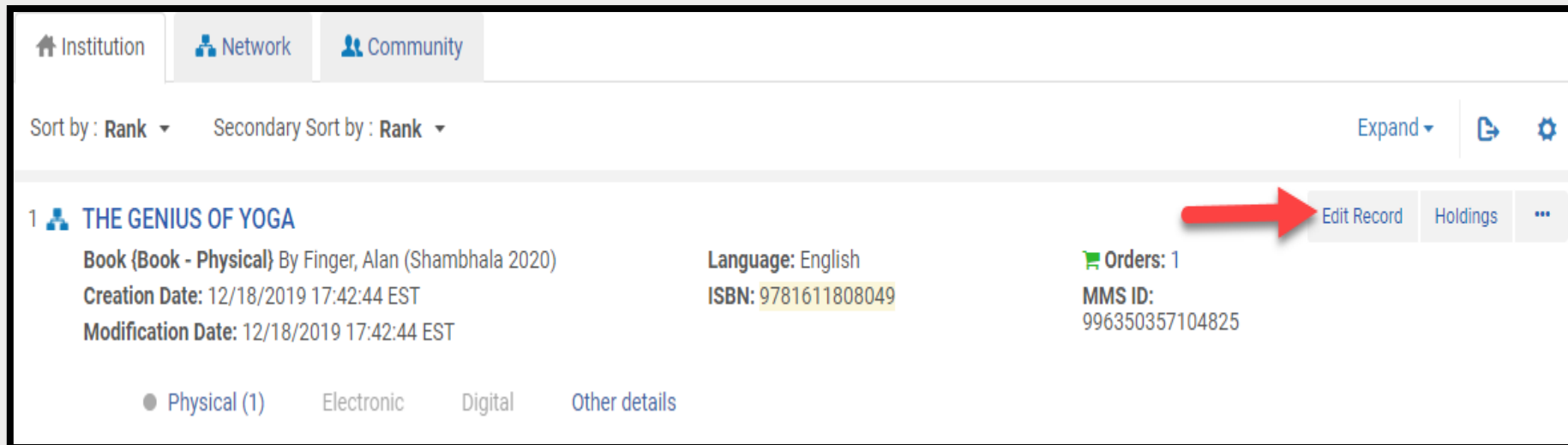
Updating a NZ brief bib when an OCLC master record Now Exists

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



A search bar from the Alma system. It features a dropdown menu on the left set to "All titles", followed by a search type dropdown set to "ISBN", and a text input field containing the ISBN "9781611808049". On the right side, there are icons for clearing the search (X), home (house), and a search button (magnifying glass).

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



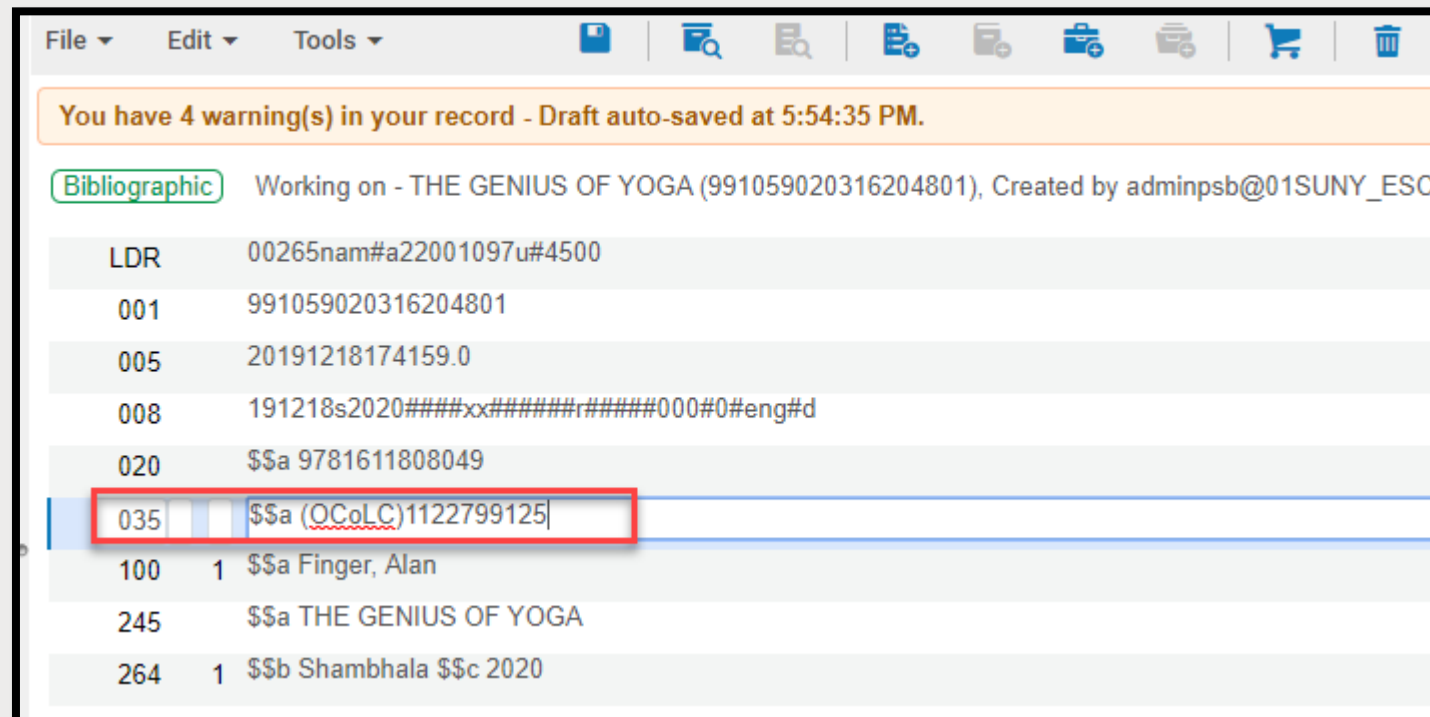
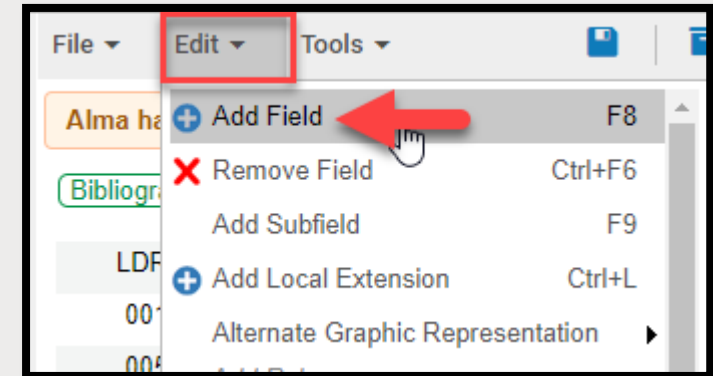
The screenshot shows the Alma record page for a book titled "THE GENIUS OF YOGA". At the top, there are tabs for "Institution", "Network", and "Community", with "Network" currently selected. Below the tabs, there are sorting options: "Sort by : Rank" and "Secondary Sort by : Rank". To the right of these are "Expand" and icons for sharing and settings. The record details are displayed in a table-like format:

1	THE GENIUS OF YOGA	
Book (Book - Physical) By Finger, Alan (Shambhala 2020)		Language: English
Creation Date: 12/18/2019 17:42:44 EST		ISBN: 9781611808049
Modification Date: 12/18/2019 17:42:44 EST		Orders: 1
		MMS ID: 996350357104825

At the bottom, there are tabs for "Physical (1)", "Electronic", "Digital", and "Other details", with "Physical (1)" selected. On the right side of the record details, there are three buttons: "Edit Record", "Holdings", and a three-dot menu. A red arrow points to the "Edit Record" button.

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

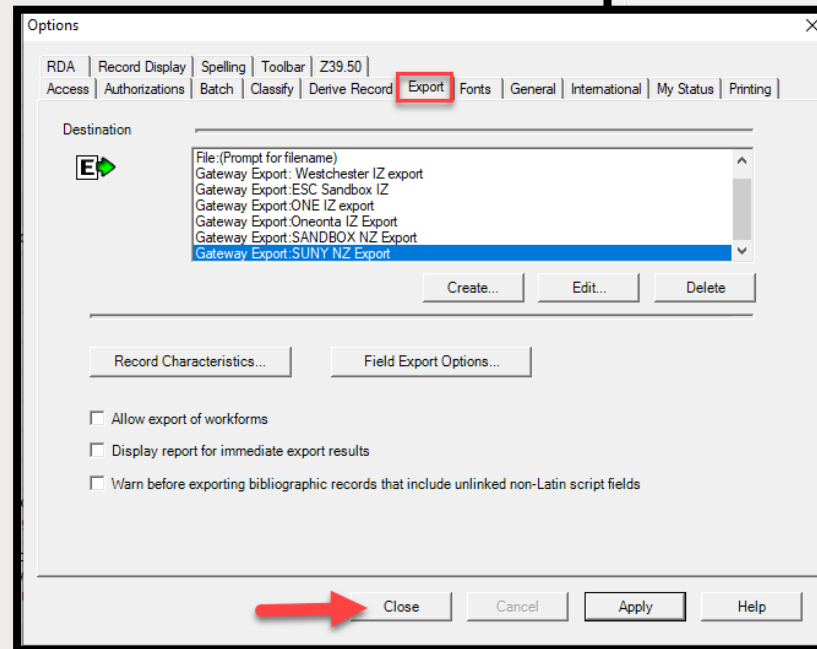
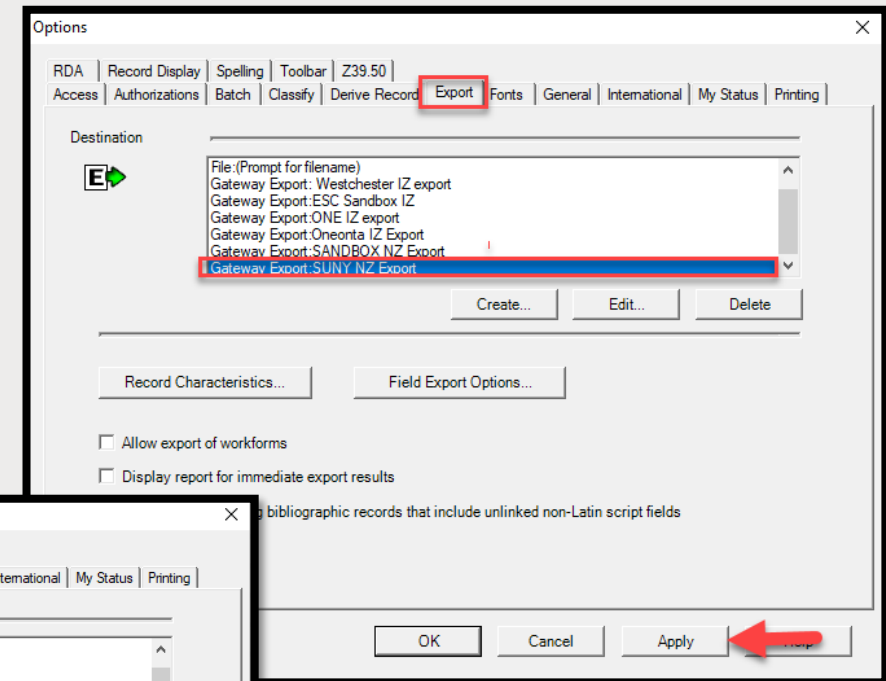
5. Click *Edit>Add Field*
6. Add MARC field 035 with the OCLC # as follow:
 - a) 035 __ \$a (OCoLC)#####
7. Click *Save and Release* (Ctrl+Alt+R)



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

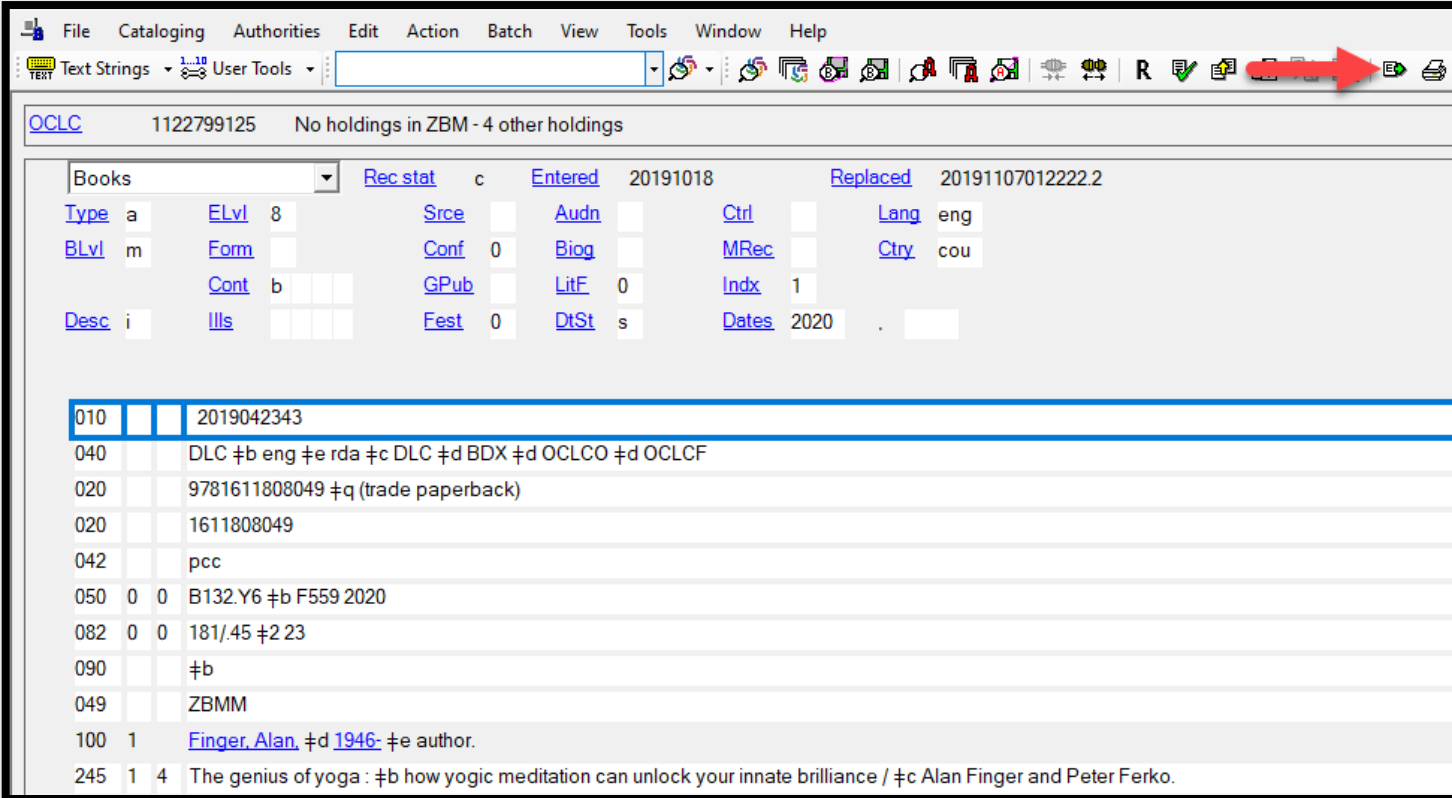
8. Return to OCLC and make sure the export is applied for the NZ (for campuses with an IZ and NZ export)

- 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 interface. The top menu bar includes File, Cataloging, Authorities, Edit, Action, Batch, View, Tools, Window, and Help. Below the menu is a toolbar with various icons. A red arrow points to the 'Export' icon, which is a green square with a white 'X' inside. The main area displays a record for OCLC 1122799125, which has no holdings in ZBM and 4 other holdings. The record is a book (Type a) with a level (ELvl) of 8. The record is entered on 20191018 and replaced on 20191107012222.2. The record is in English (Lang eng) and has a country (Ctry) of cou. The record is a monograph (BLvl m) with a form (Form) of b. The record is a description (Desc i) with a title (Title) of 'The genius of yoga : how yogic meditation can unlock your innate brilliance / Alan Finger and Peter Ferko.' The record is a brief bibliography (Bibliography) with a subject (Subject) of 'The genius of yoga'. The record is a monograph (Monograph) with a form (Form) of b. The record is a description (Description) with a title (Title) of 'The genius of yoga : how yogic meditation can unlock your innate brilliance / Alan Finger and Peter Ferko.' The record is a brief bibliography (Bibliography) with a subject (Subject) of 'The genius of yoga'.

Field	Value
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 Finger, Alan #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 library system interface. At the top, a search bar is highlighted with a red box, containing 'All titles', 'ISBN', and the value '9781611808049'. Below the search bar, the results show 'All Titles (1 - 1 of 1)' for the same ISBN. The interface includes tabs for 'Institution', 'Network', and 'Community'. Below these are sorting options: 'Sort by : Rank' and 'Secondary Sort by : Rank'. A red arrow points to the first search result, which is a book titled 'The genius of yoga : how yogic meditation can unlock your innate brilliance / Alan Finger and Peter Ferko.'. The book 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', and 'MMS ID: 996350357104825'. At the bottom, there are buttons for 'Edit Record', 'Holdings', and a menu icon. The 'Physical (1)' tab is selected.

All titles ▾ ISBN ▾ 9781611808049 X Home ▾ Q Advanced ▾

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

Home Institution Network Community

Sort by : Rank ▾ Secondary Sort by : Rank ▾ Expand ▾

1 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.
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

Physical (1) Electronic Digital Other details

Edit Record Holdings ...

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

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 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

Primary Record

Secondary Record

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

Institution

Network

Community

Sort by : Rank Secondary Sort by : Rank

Copy & Overlay - Inventory Does Not Merge

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: 12/17/2019 12:34:03 EST

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

Electronic Digital Held by (1) Other details

SUNY Geneseo

ISBN: 9781787751262 and others

Record number: (OCoLC)1084631063

Language: English

MMS ID: 991059020318404801

Secondary Record - NZ Full Bib Record

Edit Record

Order

2

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: 12/17/2019 13:03:57 EST

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

Electronic Digital Held by (1) Other details

My Institution

ISBN: 9781787751262 and others

Record number: (OCoLC)1084631063

Language: English

MMS ID: 991059020318304801

Primary Record - Former Brief Bib Record

Edit Record

Order

Copy & Merge Example - DO NOT USE

The screenshot shows a library catalog interface. On the left, a 'Primary Record' is displayed with a table of fields. On the right, a 'Secondary Record' is shown with a 'Matches(1)' tab. A context menu is open over the secondary record, showing options: 'Copy & Overlay', 'Copy & Merge' (highlighted), 'Merge Preview', and 'Records'.

Primary Record

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

Secondary Record

Matches(1)

1 The yoga teacher mentor (991059020318104801)
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

View Edit ...

- Copy & Overlay
- Copy & Merge
- Merge Preview
- Records

The dialog box is titled 'Information' and contains the following text:

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

File Edit Tools

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

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: 12/17/2019 13:34:48 EST

Modification Date: 12/17/2019 13:39:10 EST

Electronic

Digital

Held by (1)

Other details

Copy & Merge - Inventory Does Not Merge

Edit Record

Order

...

ISBN: 9781787751262 and others


Record number: (OCoLC)1084631063

Language: English

MMS ID: 991059020318104801

Secondary Record - NZ Master Record

2

 THE YOGA TEACHER MENTOR

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

Copy & Merge Record

Edit Record

Order

...

ISBN: 9781787751262

Record number: (OCoLC)1084631063

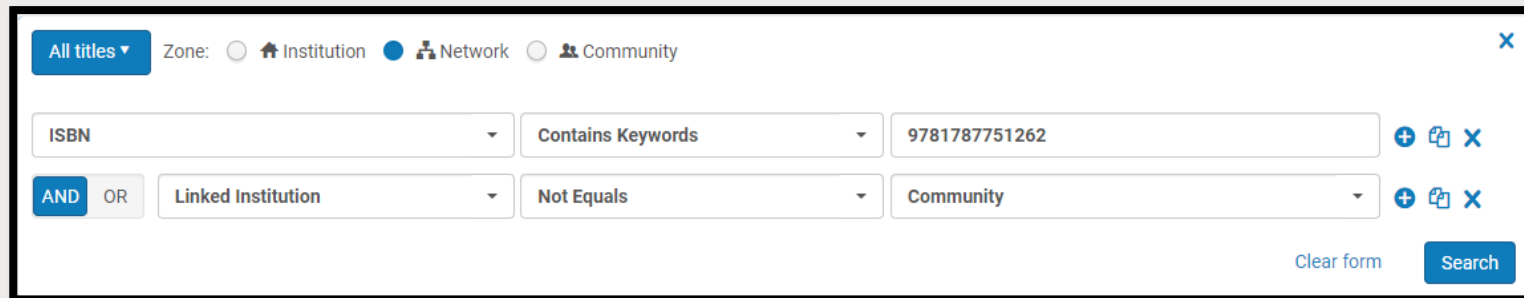
Language: English

MMS ID: 991059020317804801

MERGE RECORD & COMBINE INVENTORY FOR NZ BRIEF BIB RECORDS WORKFLOW

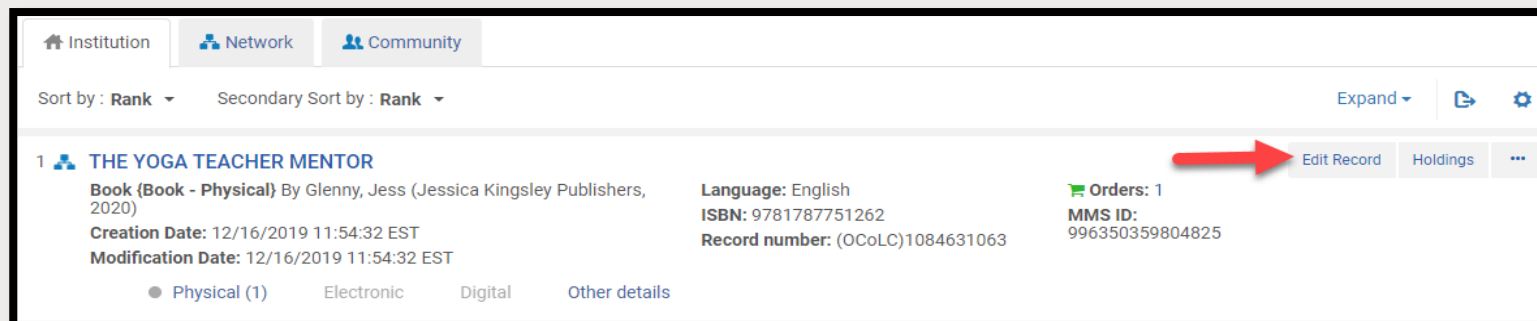
Merge Record & Combine Inventory Workflow

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



The screenshot shows the OCLC search interface. At the top, there's a 'Zone' selector with options: Institution (selected), Network, and Community. Below this, there are two search rows. The first row has a dropdown menu set to 'ISBN', a dropdown menu set to 'Contains Keywords', and a text input field containing '9781787751262'. The second row has a dropdown menu set to 'Linked Institution', a dropdown menu set to 'Not Equals', and a dropdown menu set to 'Community'. There are buttons for 'AND' and 'OR' between the two rows. At the bottom right, there are 'Clear form' and 'Search' buttons.

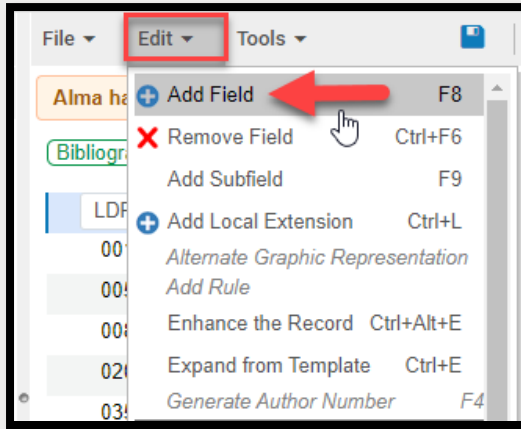
3. Click ***Edit Record*** to open the brief bib record in the MD Editor



The screenshot shows the OCLC record page for 'THE YOGA TEACHER MENTOR'. The page has tabs for 'Institution', 'Network', and 'Community'. Below the tabs, there are sort options: 'Sort by: Rank' and 'Secondary Sort by: Rank'. The record details include: 'Book {Book - Physical} By Glenn, Jess (Jessica Kingsley Publishers, 2020)', 'Language: English', 'ISBN: 9781787751262', 'Creation Date: 12/16/2019 11:54:32 EST', 'Modification Date: 12/16/2019 11:54:32 EST', 'Record number: (OCoLC)1084631063', 'Orders: 1', and 'MMS ID: 996350359804825'. At the bottom, there are links for 'Physical (1)', 'Electronic', 'Digital', and 'Other details'. A red arrow points to the 'Edit Record' button in the top right corner.

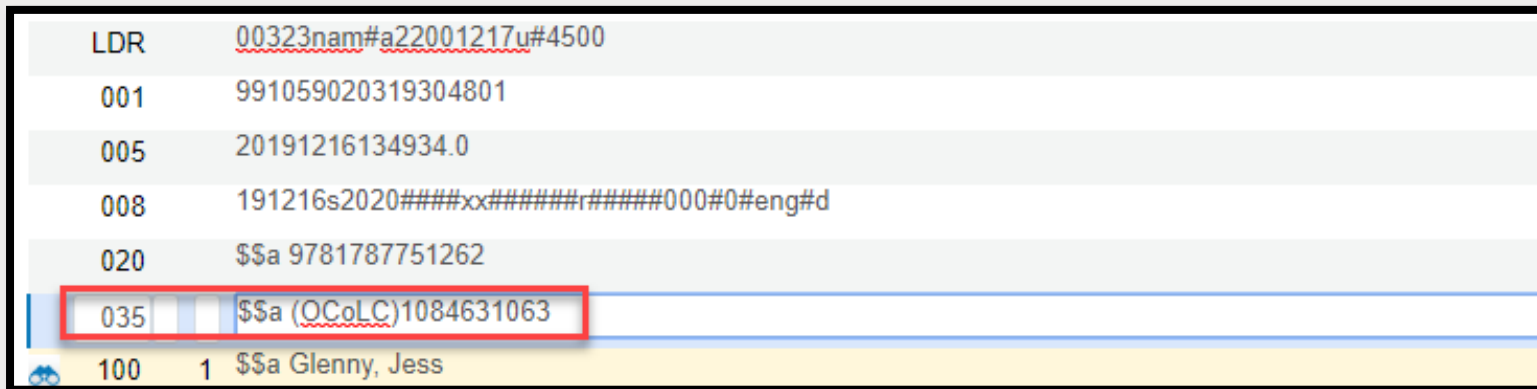
Merge Record & Combine Inventory Workflow

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



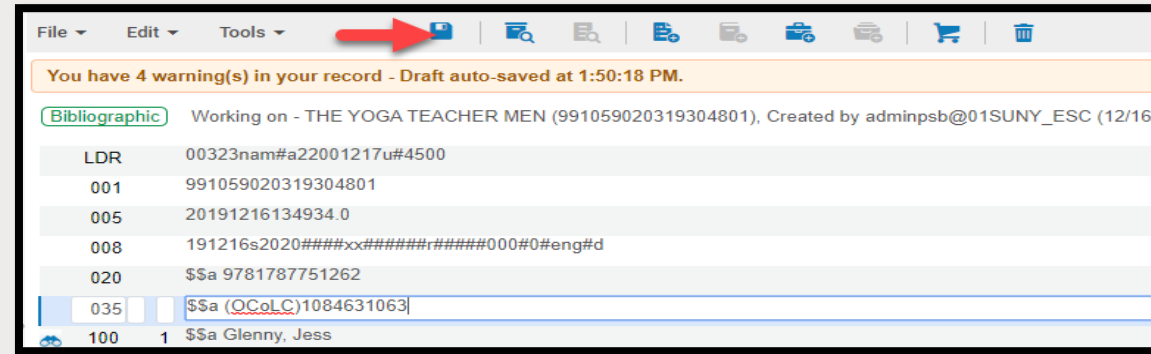
5. Add MARC field 035 with the OCLC # as follow:

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

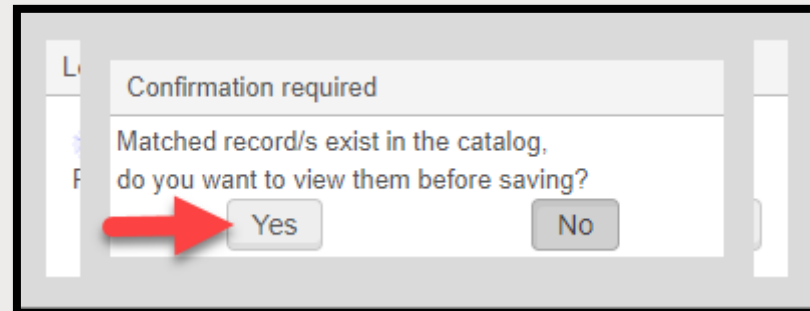


Merge Record & Combine Inventory Workflow

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

The screenshot shows the MD Editor interface. On the left, a bibliographic record is displayed with fields like LDR, 001, 005, 008, 020, 035, 100, 245, and 264. A warning message at the top states: "You have 4 warning(s) in your record - Draft saved at 2:01:42 PM." On the right, a panel titled "Matches(1)" shows a single match: "1 The yoga teacher mentor / (991059019518104801)". Below this, details for the record are listed: "By Glenn, Jess, (Book Jessica Kingsley Publishers,, London :, 2020)", "ISBN: 1787751260", "Subjects: Yoga teachers., Yoga--Study and teaching.", and "Other System Number: (OCoLC)on1084631063, (OCoLC)1084631063, (OCoLC)1097677622". A red box highlights the text "NZ Bib Record" in the center of the right panel.

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

This screenshot is similar to the previous one, showing the MD Editor interface. The bibliographic record on the left is the same. The right panel shows the same match. A red arrow points to the "View" button next to the match details, indicating the action to be taken to verify the 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####x#####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

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####x#####r#####000#0#eng#d

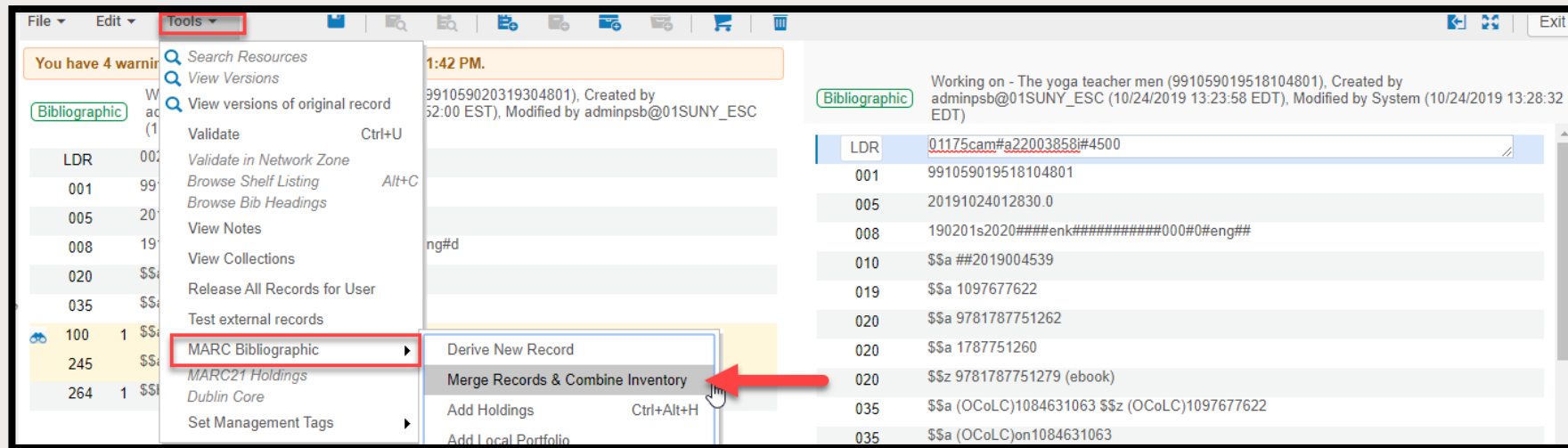
Matches(1)

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.

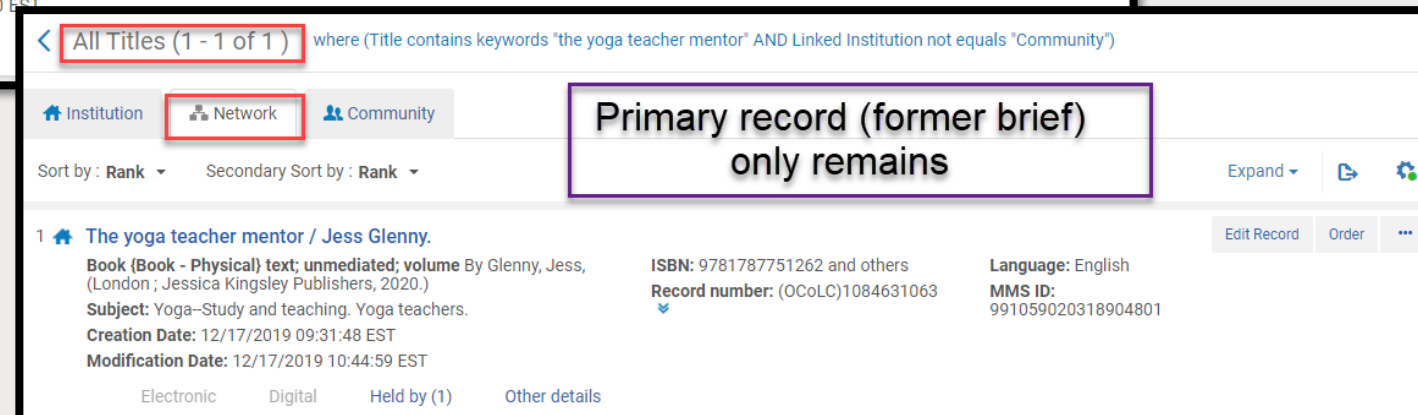
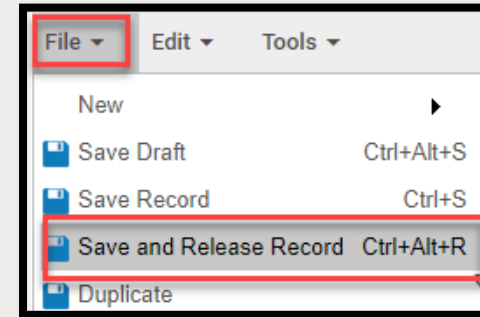
Note: this operation is non-reversible!

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.**
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 22:15:22 EST

Language: English
ISBN: 9781787751262 and others
Record number: (OCoLC)1084631063

 **Orders: 1**
MMS ID:
996350356404825

[Edit Record](#) [Holdings](#) [...](#)

▼

☒ Physical (1)


Electronic

Digital

Other details

b) Click *Change Bib Reference*

1

 **THE YOGA TEACHER MENTOR, Jessica Kingsley Publishers,, 2020, 9781787751262, ISBN**
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

[Edit](#) [Change Bib Reference](#) [...](#)

▼

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

Confirmation Message

PO Line 'POL-2487' will change the link to the bibliographic record - this change will not impact the inventory and will only update the PO Line's description - Are you sure you want to perform this action?

 **Confirm**

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

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)

Back Save Query

All

1

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

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)
Physical One Time (1)

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

Edit Change Bib Reference

e) Click **Back** (<)

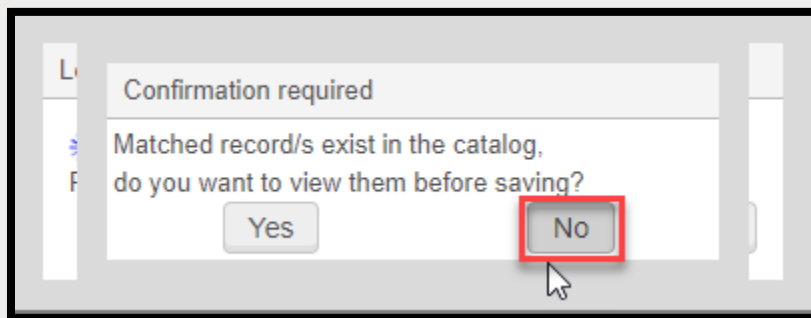
TROUBLESHOOTING: WHAT TO DO IF A DUPLICATE BIB RECORD IS CREATED IN THE NZ



The State University
of New York

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”*

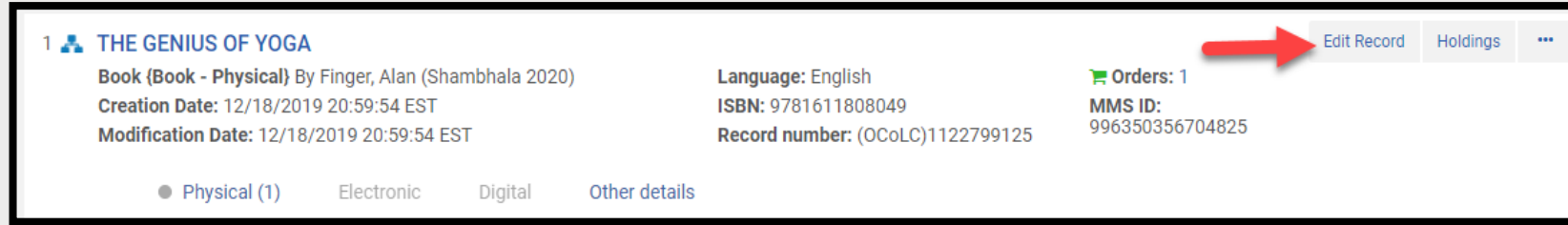


If you accidentally create a duplicate bib record in the NZ after updating a NZ brief bib record you can either:

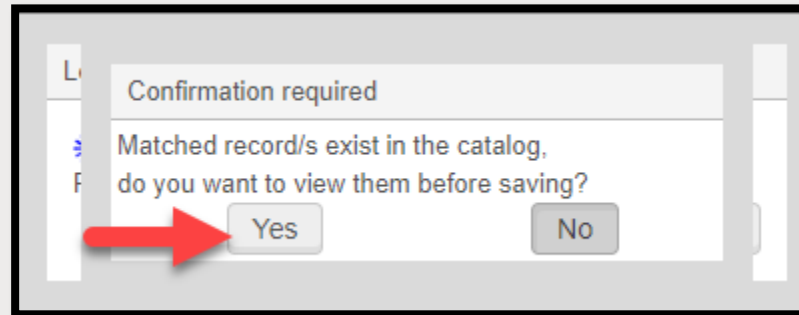
1. Merge Record & Combine Inventory
2. Relink from the POL

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 first result is '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, which is highlighted in green. The interface also includes tabs for 'Institution', 'Network', and 'Community', and buttons for 'Edit Record', 'Holdings', and 'Save Query'.

Search results for ISBN 9781611808049:

- 1 THE GENIUS OF YOGA**
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
MMS ID: 996350357004825
Orders: 1

Physical (1) Electronic Digital Other details

Troubleshooting – Relink from the POL

3. Click *Edit*

1



THE GENIUS OF YOGA, Shambhala, 2020, 9781611808049, ISBN
MMS ID: 996350357004825
Assigned to: -
Type: Print Book - One Time
PO line owner: Library and Learning Resource
Standard number: 9781611808049
PO: PO-764 / (Sent)
PO line: POL-2483 / (Sent)

Physical One Time (1)

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

[Edit](#) [Change Bib Reference](#) [...](#)

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](#)

PO line	POL-2483	PO	PO-764	Status	Sent (2019-12-19)
PO line type	Print Book - One Time	PO line owner	Library and Learning Resource	Sent date	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's a search bar with a dropdown menu set to 'All titles'. Below this, the 'Zone' is set to 'Network' (highlighted with a red box). The search criteria include 'Title' (THE GENIUS OF YOGA) and 'ISBN' (1611808049). The 'Network' tab is also highlighted with a red box. The search results are sorted by 'Rank' and show two entries. The first entry is 'THE GENIUS OF YOGA' by 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.' with a red arrow pointing to its MMS ID: 991059020316204801.

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

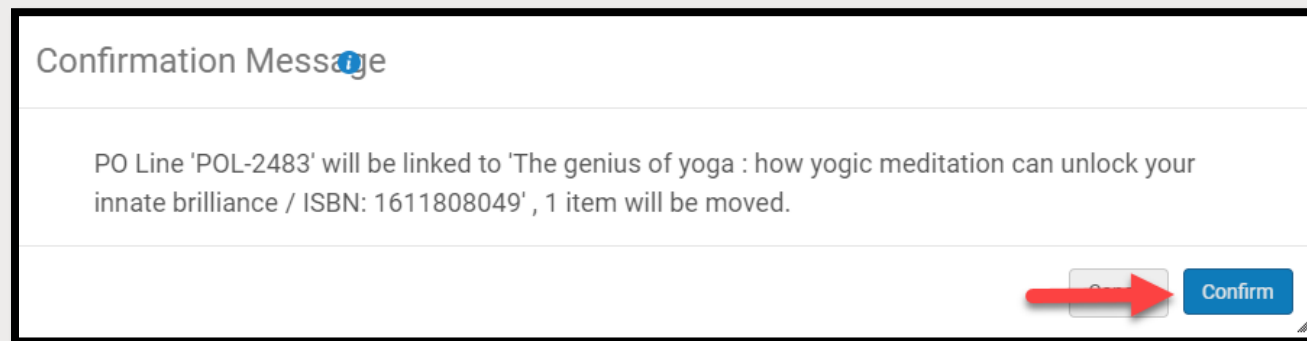
Sort by : Rank ▾ Secondary Sort by : Rank ▾ 1 - 2 of 2 Expand ⌵ ⚙️

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

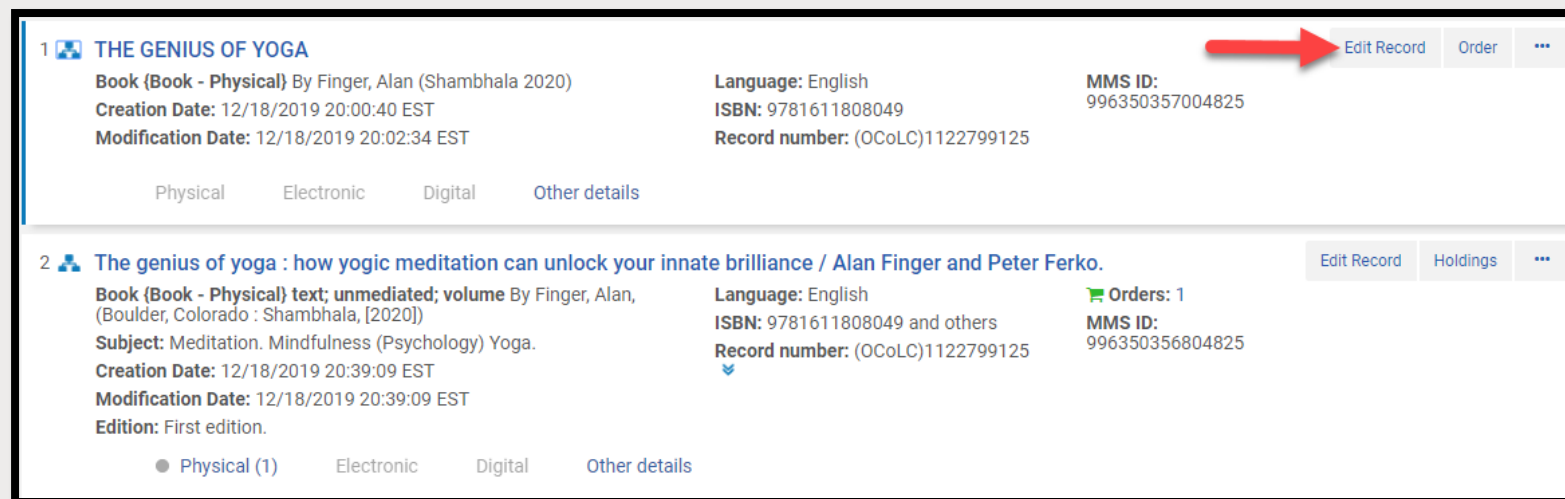
Troubleshooting – Relink from the POL

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



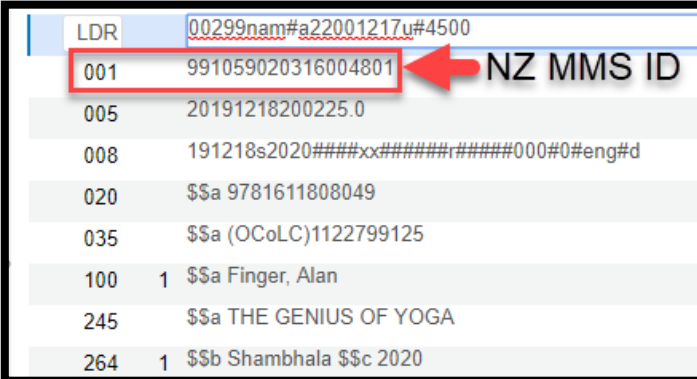
- Click **Back**

- Click **Edit Record** from the NZ brief bib record

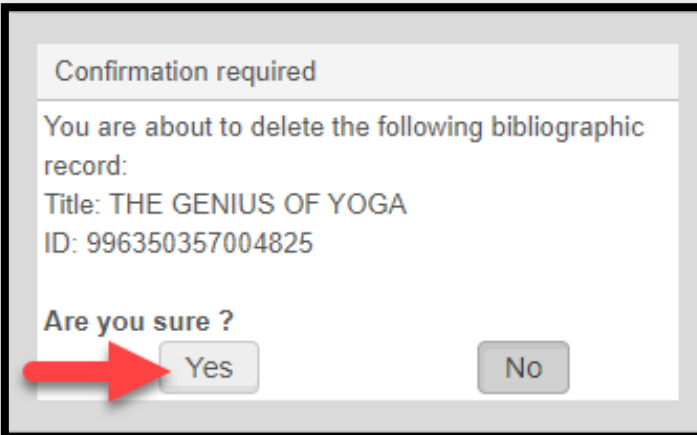


Troubleshooting – Relink from the POL

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 an 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

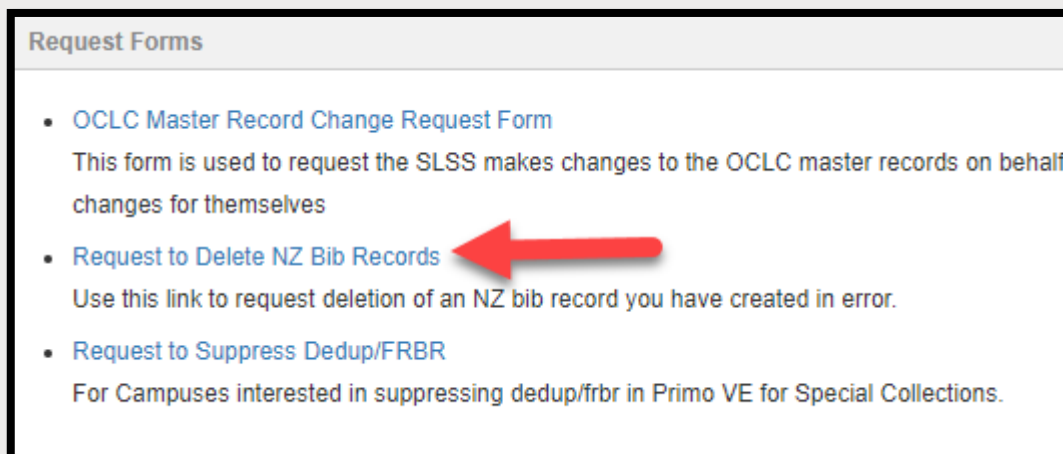
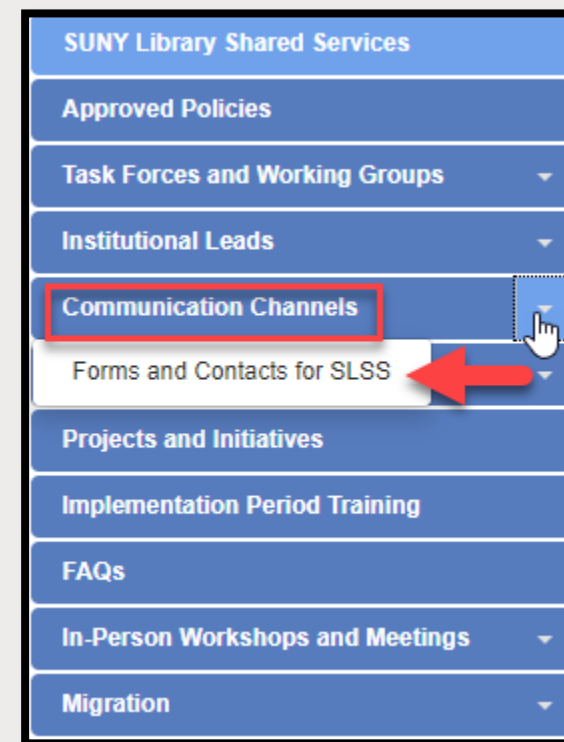
Are you sure ?

Yes No

Troubleshooting – Relink from the POL

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

- a) Go to libguides:
<https://slcnny.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



The State University
of New York

Supporting Documentation

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