



The State University of New York

# New MD Editor Series: Working with Bib Records Session 3

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[www.suny.edu](http://www.suny.edu)



# Matching Records in the MD Editor

## Matching Bib Records Basics:

- Bib records match on the OCLC number in MARC field 035 \$\$a
- Bib records cannot match on records in different zones
  - An IZ only record will not match on and NZ bib record
  - Bib records in the NZ will match on CZ bib records that are linked to the NZ if the OCLC number matches
- Matching bib records do not always require action
  - Best Practice is to view the matching record to determine if action is required
  - DO NOT merge an NZ linked bib record with a CZ bib record that is linked to the NZ



# Matching Bib Records in the MD Editor

- The NZ uses the OCLC number in MARC field 035 \$\$a to match bibliographic records
  - The unique OCLC number prevents duplicate bib records from being created in the NZ
- **The IZ and NZ serial and non-serial match profiles have been configured SUNY-Wide to match on the OCLC number in MARC field 035:**
  - Non\_Serial\_match\_profile: com.exlibris.repository.mms.match.OCLCMatchProfile
  - Serial\_match\_profile: com.exlibris.repository.mms.match.OCLCSerialMatchProfile
- **The IZ and NZ have also been configured SUNY-wide to not match on CZ records**
  - Ignore\_cz\_records: True



# Matching Bib Records in the MD Editor

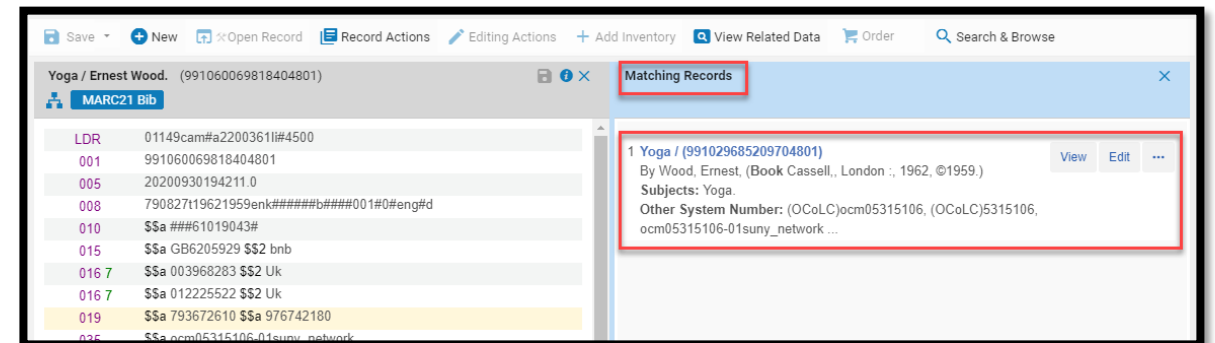
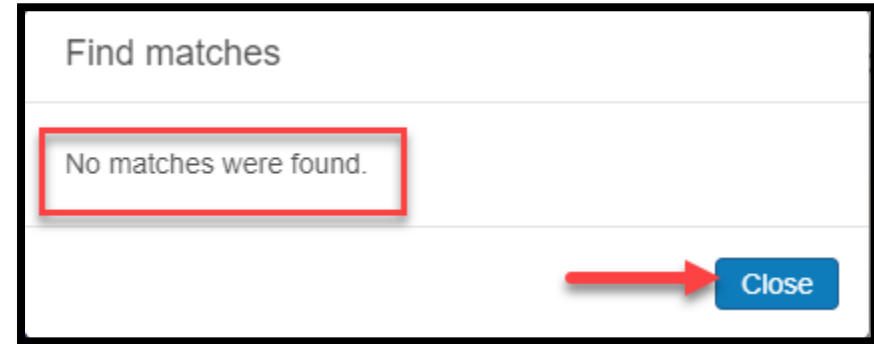
- Matching bib records can be found:
  - By selecting **Record Actions>Find Matches** (Ctrl+M)
  - Saving a bib record in the MD Editor can also find matching records
    - Click the **Save** icon OR
    - Click **Record Actions>Save and Release a Record** (Ctrl+Alt+R)
- The following Confirmation Required message appears if a matching bib record is found : "Matched record/s exist in the catalog, do you want to view them before saving?"
  - Click "**Yes**" to view the record



# Matching Bib Records in the MD Editor

Find matching records using **Record Actions>Find Matches** (Ctrl+M):

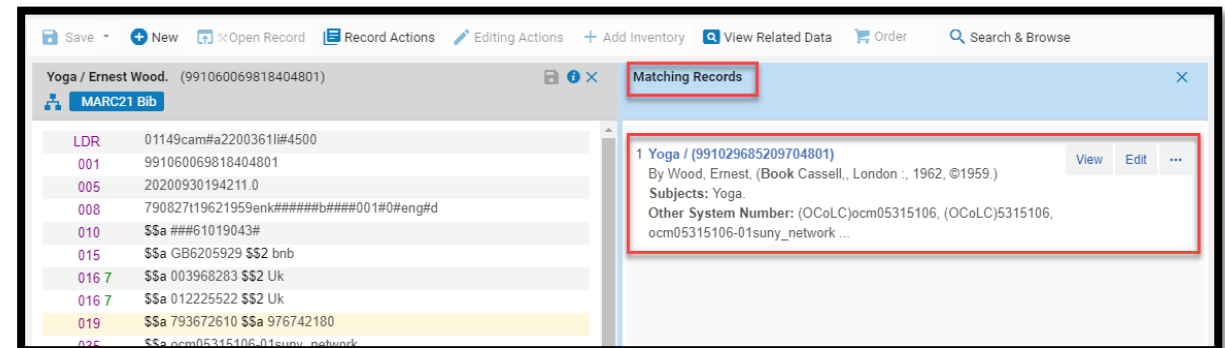
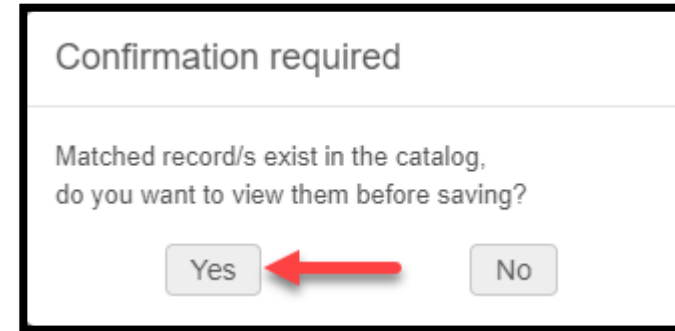
1. Open a bib record in the MD Editor
2. Click **Record Actions>Find Matches** (Ctrl+M)
  - No Match:
    1. Click **Close** from the pop-up message
  - Match:
    1. The matching record will display on the right-hand side of the split screen editor
      - Options to view, or edit
      - Click the “X” to close the match if no action needs to be taken



# Matching Bib Records in the MD Editor

Find matching records when saving:

1. Click the **“Save”** icon or click **Save>Save and Release Record** (Ctrl+Alt+R)
2. Click **“Yes”** when the pop-up message appears
3. The matching record(s) will display on the right-side of the split screen editor
  - Options to view or edit
  - Click the **“X”** to close the match if no action is being taken



# Merging Bib Records in the MD Editor

## Merging Bib Records Basics:

- Bib records must be in the same zone to be merged
- Bib records can be merged in the IZ or in the NZ
  - Bib records cannot be merged in the CZ
- There must be a primary and a secondary bib record to merge bib records
  - 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
- Bib records will merge based on the merge rule that is selected
  - Ex Libris out of the box merge rules
  - SUNY merge rules have been created
    - SUNY – Overlay All But Local Fields
  - Institutions can create their own merge rules when necessary for IZ only records



# New MD Editor Series: Merge & Combine Inventory

- “Merge & Combine” is used in the MD Editor to merge duplicate bib records and combine inventory and other associated entities in the IZ and the NZ.
- The following inventory and associated entities will be moved from the secondary record and merged with the primary record:
  - PO Line
  - Electronic Collections
  - Electronic Portfolios
  - Physical Items
  - Digital Representations
  - Loans
  - Requests
  - Reading Lists
  - Related Record Relationships





# New MD Editor Series: Merge & Combine Inventory

“Merge & Combine” use cases:

- Duplicate IZ only bib records are in the repository from migration
- Updating a brief bib for ordering and a record now exists in the NZ
- Duplicate bib records exist in the NZ
- Duplicate bib records linked to the NZ from migration\*

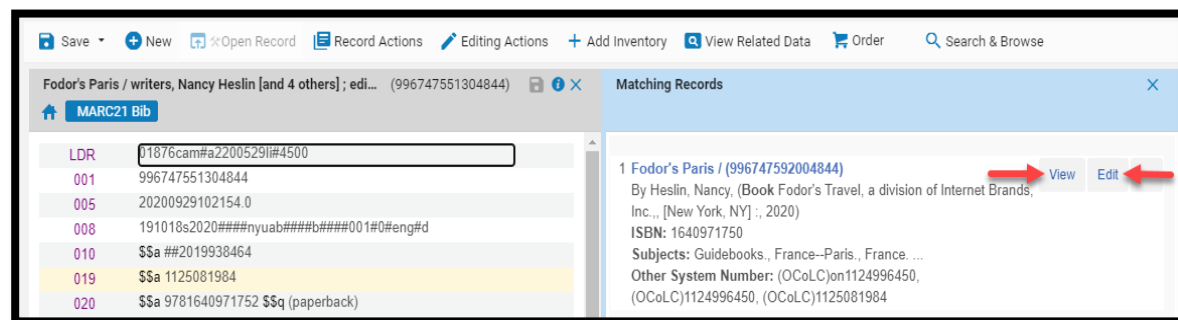
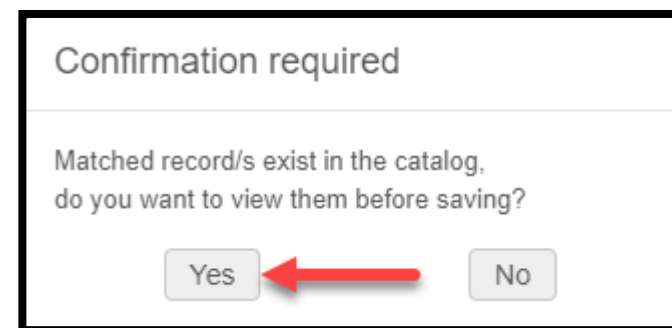
\* Requires a slightly different workflow not covered in this session



# New MD Editor Series: Merge & Combine Inventory

To “Merge & Combine” bib records:

1. Open a bib record in the MD Editor
2. Click the “**Save**” icon or click **Save>Save and Release Record** (Ctrl+Alt+R)
3. Click “**Yes**” when the confirmation message appears asking: “*Matched record/s exist in the catalog, do you want to view them before saving?*”
4. The matching record(s) will display on the right-side of the split screen editor
5. Click one of the following:
  1. **View**
  2. **Edit**
6. Click into the primary record (optional)
7. Click **Record Actions>Merge & Combine**



# New MD Editor Series: Merge & Combine Inventory

If “View” is selected:

1. Review the record to make sure it is the correct record
2. Determine which record will be the primary record
3. Click **Edit** from the drop-down menu at the bottom of the record
4. Click **Execute**
  - Clicking **Edit** and **Execute** will allow the bib record to remain open in the MD Editor
5. Click into the primary record (optional)
6. Click **Record Actions**>**Merge & Combine**

The screenshot displays the MD Editor interface with two panes. The left pane, titled 'MARC21 Bib', shows a list of MARC records with fields like LDR, 001, 005, 008, 010, 019, 020, 035, 040, 043, 049, 050, 082, 100, 245, 246, and 250. The right pane, titled 'Primary Record', shows a similar list of MARC records. At the bottom of the right pane, there is a 'Back to results' button, a dropdown menu labeled 'Edit', and an 'Execute' button. A red arrow points to the 'Execute' button.

# New MD Editor Series: Merge & Combine Inventory

If “View” is selected:

7. The Merge & Combine Inventory screen displays

1. Choose merge routine: [Select the appropriate merge routine]

2. Click “**Show Merge Preview**”

1. Preview how the record will merge

2. Click “**Ok**” to close the merge preview

3. Update holdings call number: [optional]

4. Secondary record: [**ALWAYS select Delete**]

5. Click “**Ok**”

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

Merge Records & Combine Inventory

You are about to merge record (MMS ID: 996747592004844) with the record (MMS ID: 996747551304844)

Choose merge routine: SUNY - Overlay All But Local Fields

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!

Cancel Ok

# New MD Editor Series: Merge & Combine Inventory

If “Edit” is selected:

1. Review the record to make sure it is the correct record
2. Determine which record will be the primary record
3. Click into the primary record (optional)
4. Click **Record Actions>Merge & Combine**
5. The Merge & Combine Inventory screen displays
  1. Choose merge routine: [Select the appropriate merge routine]
  2. Click “**Show Merge Preview**”
    1. Preview how the record will merge
    2. Click “**Ok**” to close the merge preview
  3. Update holdings call number: [optional]
  4. Secondary record: [**ALWAYS select Delete**]
  5. Click “**Ok**”
6. Click **Save>Save and Release Record** (Ctrl+Alt+R)

Merge Records & Combine Inventory

You are about to merge record (MMS ID: 996747592004844) with the record (MMS ID: 996747551304844)

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Update holdings call number

Secondary record:  Delete  Suppress  Keep it

Note: this operation is non-reversible!

Cancel Ok

# Merge & Combine Inventory Screen

Merge Records & Combine Inventory

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- 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!

Cancel Ok

## Merge routine:

- NZ records use “SUNY – Overlay All But Local Fields”
- IZ records can use a merge rule that meets the needs of the institution

## Update holdings call number:

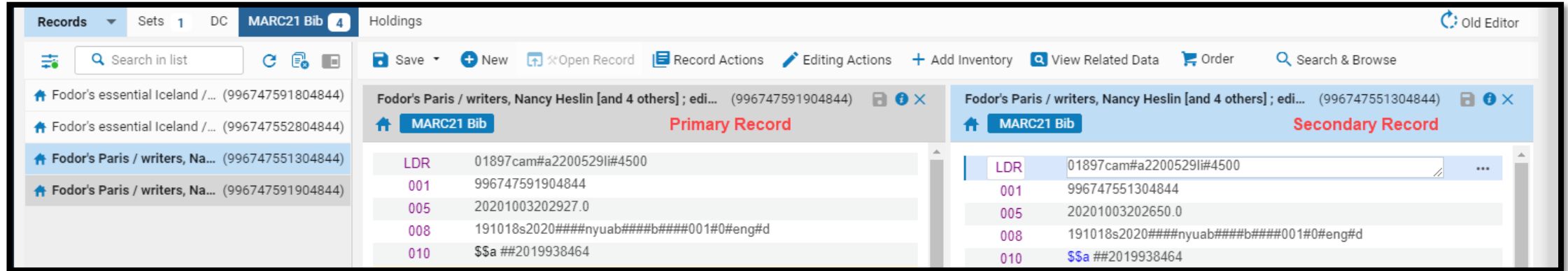
- The call number in the holdings associated with the primary record will be updated with the call number from the secondary record

## Secondary record:

- Always select “Delete” or the bib record will remain in the repository and continue to cause a match when saving the bib record with the same OCLC number

# How to Change the Primary Record

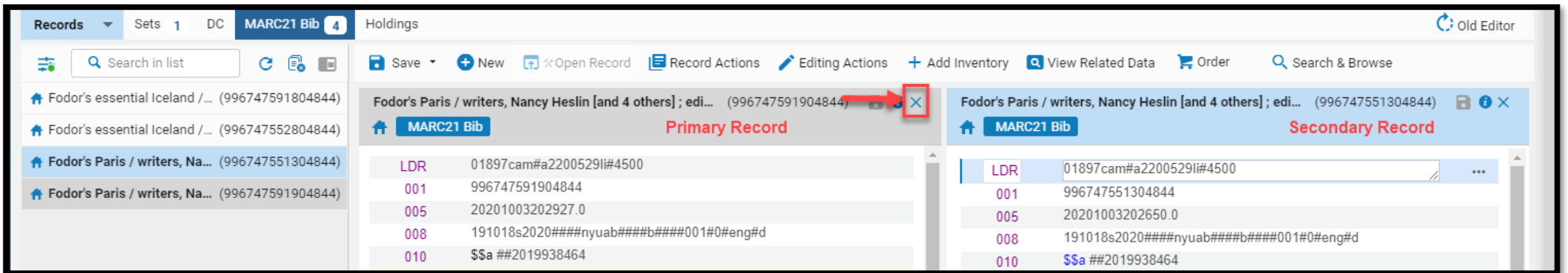
1. The primary record is the first record open in the MD Editor



The screenshot shows the MD Editor interface with two records open. The first record is labeled "Primary Record" and the second is labeled "Secondary Record". Both records have MARC21 Bib fields and LDR fields.

Field	Value
LDR	01897cam#a2200529li#4500
001	996747591904844
005	20201003202927.0
008	191018s2020####nyuab####b####001#0#eng#d
010	\$\$a ##2019938464

2. To change the primary record by clicking the "X" of the current primary record

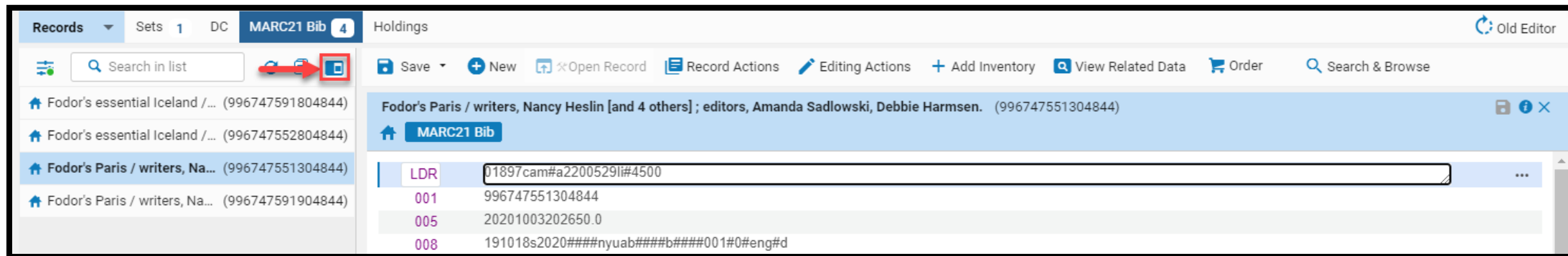


The screenshot shows the MD Editor interface with two records open. The first record is labeled "Primary Record" and the second is labeled "Secondary Record". A red box highlights the "X" icon next to the Primary Record, indicating it should be closed to change the primary record.

Field	Value
LDR	01897cam#a2200529li#4500
001	996747591904844
005	20201003202927.0
008	191018s2020####nyuab####b####001#0#eng#d
010	\$\$a ##2019938464

# How to Change the Primary Record

3. Click the split screen editor icon



4. Click on the matching record (original primary record) in the records list to open it in the MD Editor





# Merging a Brief Bib Record with a Full Bib Record

To merge a brief bib record with a full MARC record in the NZ:

1. Open the brief bib record in the MD Editor
2. Place the cursor in the field above where you want to add MARC 035
3. Click **Editing Actions>Add Field**
4. Add MARC 035 and type in the OCLC number
  - example; 035 \_\_ \$\$a (OCoLC)1144727940
5. Click **Save** or **Save and Release Record**
6. Click “**Yes**” when the Confirmation box with the following message appears: Matched record/s exist in the catalog, do you want to view them before saving?

HYPERMOBILITY ON THE MAT (991060300719504801)

MARC21 Bib

LDR	00311nam#a22001097u#4500
001	991060300719504801
005	20201004184146.0
008	201004s2019####xx#####r#####000#0#eng#d
020	\$\$a 9781787754652
035	\$\$a (OCoLC)1147961685
100	1 \$\$a Glenny, Jess
245	\$\$a HYPERMOBILITY ON THE MAT
264	1 \$\$a Philadelphia, PA : \$\$b Jessica Kingsley Publishers, \$\$c 2021.

Confirmation required

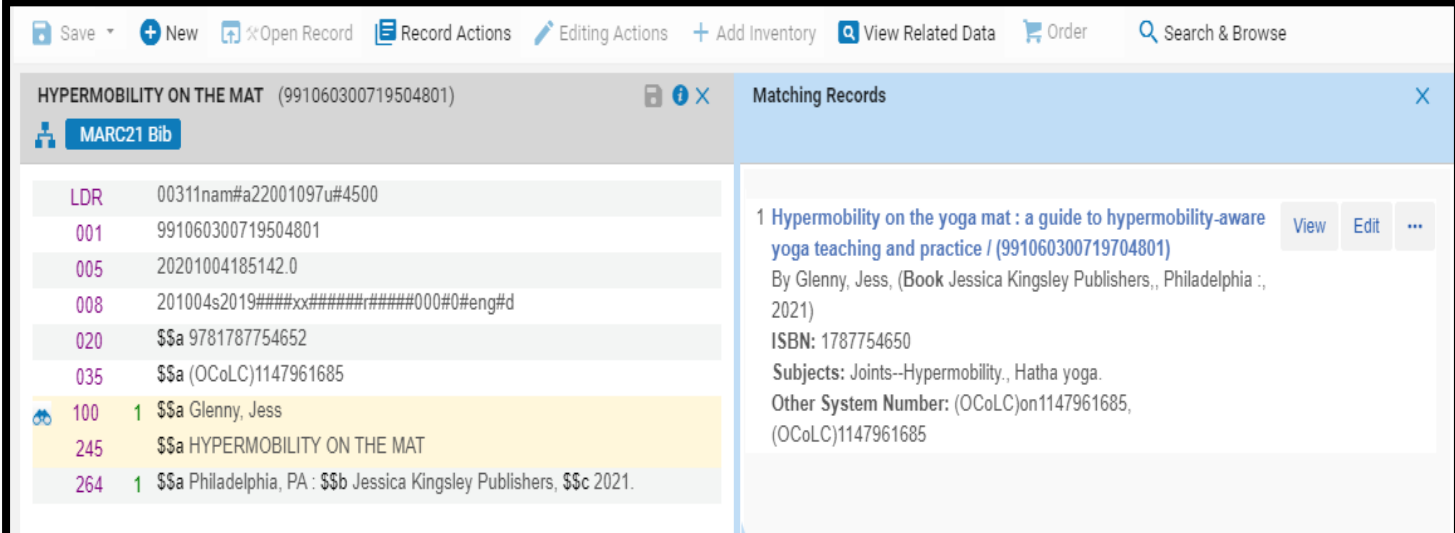
Matched record/s exist in the catalog,  
do you want to view them before saving?

Yes No

# Merging a Brief Bib Record with a Full Bib Record

To merge a brief bib record with a full MARC record in the NZ:

7. The matching record will appear on the right side of the split screen of the MD editor
8. Click **View** or **Edit**
  - If View is selected, make sure to select “**Edit**” from the drop-down menu and click **Execute**
9. Click into the primary record (optional)
10. Click **Record Actions>Merge & Combine**



The screenshot displays a library catalog interface. The main record is titled "HYPERMOBILITY ON THE MAT (991060300719504801)" and is identified as a "MARC21 Bib". The record details are as follows:

Field	Value
LDR	00311nam#a22001097u#4500
001	991060300719504801
005	20201004185142.0
008	201004s2019####xx#####r#####000#0#eng#d
020	\$\$a 9781787754652
035	\$\$a (OCoLC)1147961685
100	1 \$\$a Glenny, Jess
245	\$\$a HYPERMOBILITY ON THE MAT
264	1 \$\$a Philadelphia, PA : \$\$b Jessica Kingsley Publishers, \$\$c 2021.

On the right side, the "Matching Records" panel shows a single record:

1 [Hypermobility on the yoga mat : a guide to hypermobility-aware yoga teaching and practice / \(991060300719704801\)](#) [View](#) [Edit](#) [...](#)

By Glenny, Jess, (Book Jessica Kingsley Publishers., Philadelphia :, 2021)  
ISBN: 1787754650  
Subjects: Joints--Hypermobility., Hatha yoga.  
Other System Number: (OCoLC)on1147961685, (OCoLC)1147961685

# Merging a Brief Bib Record with a Full Bib Record

To merge a brief bib record with a full MARC record in the NZ:

10. The Merge & Combine Inventory screen displays
  1. Under Choose Merge Routine, select **"SUNY - Overlay All But Local Fields"**
  2. Click **"*Show Merge Preview*"**
    1. Review the record merge looks correct
    2. Click ***Ok*** to close the preview screen
  3. Update holdings call number: [Leave unchecked]
  4. Secondary Record: [ALWAYS select delete]
  5. Click ***Ok***
11. Click ***Save>Save and Release Record*** (Ctrl+Alt+R)

Merge Records & Combine Inventory

You are about to merge record (MMS ID: 996747592004844) with the record (MMS ID: 996747551304844)

Choose merge routine: **SUNY - Overlay All But Local Fields**

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!

Cancel **Ok**

# Supporting Documentation

SUNY:

- [Matching & Merging Records Libguide](#)

Ex Libris:

- [Merging Bib Records](#)





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# Questions? Comments?

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