



# Fall 2016 Cataloging Roundtable

Merging & Transferring

# Merging Records

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# Merging Records

- ▶ “The merge function allows you to eliminate duplicate bibliographic records. You select the best record and the holdings and any patron holds from the other records are transferred to the lead record selected. The merged records which were not selected as the lead are deleted from the catalog.”  
(Evergreen Indiana Cataloging Training Manual, Chapter 19)
- ▶ Pros:
  - ▶ The catalog is less congested.
  - ▶ Holds are more likely to be fulfilled in a timely manner.
- ▶ Cons:
  - ▶ It can cost the consortium money!
  - ▶ If done incorrectly, items will be on the wrong record and they will have to be moved.
- ▶ To merge records, we use the Record Buckets. These are virtual containers used for batch processing of bibliographic records.

Choose a bucket... ▾

Bucket Actions ▾

 Remove Selected from Bucket Add Selected to Pending Records

#	Author	Edition	ISBN	Publication Date	Publisher	TCN	Title	
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List Actions ▾

**Batch:** Show All in Catalog Transfer Title Holds Delete All Records Merge All Records MARC Batch Edit Export All Records ▾

WHEN IN DOUBT...

DO NOT MERGE!

# Rules

- ▶ Use the same criteria for matching records to be merged that you would use to catalog an item:

<b>Field</b>	<b>Description</b>
010	LC Control Number
020/022	ISBN/ISSN
024	UPI/UPC code
028	Publisher Number
245	Title Statement
250	Edition Statement
260  b	Publication, Distribution, etc.
300	Physical Description
505	Contents

# Rules

## ► Matching details for each field:

010	LC Control Number if present in the record.
020/022	ISBN or ISSN if present in the record and on the material. See sections 3.1.1, 3.16 and 4.5 for exceptions.
024	UPI number if present in the record and on the material.
028	Publisher number if present in the record and on the material.
245 \$a	Must match, especially for books. For AV materials, check 500 notes on sources of title information if titles in 245 fields don't quite match your item in hand.
245 \$b	May match; matching information could be in a note.
245 \$c	May match; matching information could be in a note.
250 \$a	Must match, except for following cases. If there is a 1 <sup>st</sup> edition statement in the record but not in the book or vice versa, the item may still be considered a match. A book club edition statement may be ignored (see 3.1.3). A library edition statement on audiobooks may be ignored. (See 4.5)
260 \$a	Should match in most cases, but allow for variations within the same country between printings of the same edition as well as variation in items with more than one place of publication. If more than one place of publication is involved, the first place on your piece should match the first place in the record.
260 \$b	Should match in most cases, but variations may occur if you are matching a multipart item or an item with more than one publisher. If

	the publisher on your item is part of the same organization as the publisher on the record, consider it a match. (See Sections 3.1.4 and 3.16 above.)
260 \$c	Must match unless the date is in brackets or with question marks.
300 \$a	Must match, but allow for varying styles of entry.
300 \$b	Must match, but there may be slightly varying styles of entry.
300 \$c	Must match for AV materials. For books, if the dimension varies by a few centimeters, and that is the only difference, consider it a match.
490/8xx	Must match if present, but tracing can differ. Be aware of non-standard series statements.
500	For DVDs, Blu-rays, and VHS all special/bonus features listed in the record must be included in your item. The list in the record does not need to be comprehensive.
501	"With note." Must match.
511	Performers, narrators, presenters, etc. must be same for AV materials. This information could also be in a 500 note.
505	Contents must be same; but be aware of partial or incomplete contents by examining the first indicator of this formatted note field.
533	Reproduction note: Must match if present.
538	For Audiovisual materials, formats must be the same: CD is not cassette; DVD is not videocassette or Blu-ray. For electronic resources, system requirements should match.
546/041	Language note/code must be the same.

# Exceptions

- ▶ **Scholastic Books:**
  - ▶ Often identical to original version (same pagination, publication and/or ©)
  - ▶ Add to original record if pub date and 300 fields match
- ▶ **Library and Trade Audiobooks:**
  - ▶ Usually identical except for ISBN, publisher/distributor, and packaging
  - ▶ Add to original record if everything else matches (add 028 and 020 for your edition!)
- ▶ **Variations in Publisher's Names:**
  - ▶ Can be republished under subsidiaries
  - ▶ Add to original record if there's a known connection and the records match

All Copy Cataloging Procedures can be found here:

<https://goo.gl/HZTMb5>



# Tips

- ▶ When merging many records into one, adding records to the buckets from the bucket manager will allow you to highlight and add a lot of records to your bucket at once, rather than searching and viewing each record individually in the catalog.
- ▶ Have the Bucket Manager open in one tab, and keep a separate tab open for searching bib records and adding them to your bucket. You'll likely find it useful going back and forth between your search screen, record screens, and bucket screens when merging.
- ▶ When you search for a title or author, try alternate spellings!
- ▶ Searching by title and/or author will yield more results.

# Adding to Record Buckets

Using the Catalog and Record Buckets module

# Mismerge Etiquette

- ▶ Monitor the Cataloging Listserv
  - ▶ If your library is affected by a mismerge, please make corrections!
- ▶ Contact libraries directly if a mismerge only affects a few
  - ▶ Use the EI Cataloging Contact List
- ▶ “When you identify a mismerge, check to see if the mismerge was caused by duplicate ISBNs or UPCs in the record” (2016, p. 1)
  - ▶ Use subfield |z when necessary
- ▶ If holdings contain multiple formats on one record, but the majority is one type, edit the record to match.
  - ▶ Alert the libraries using the listserv or Contact List
- ▶ It is possible to un-merge items as long as it’s caught within a certain time frame.

# Helpful Links

- ▶ Evergreen Indiana Blog
  - ▶ <http://blog.evergreen.lib.in.us>
- ▶ Evergreen Policies and Procedures
  - ▶ [https://blog.evergreen.lib.in.us/?page\\_id=2770](https://blog.evergreen.lib.in.us/?page_id=2770)
- ▶ EI Cataloging Contact List
  - ▶ <https://goo.gl/61JdTI>
- ▶ EI Cataloging Listserv
  - ▶ [http://lists.in.gov/mailman/listinfo/evergreen\\_indiana-catalog](http://lists.in.gov/mailman/listinfo/evergreen_indiana-catalog)
- ▶ EI Committees Contact List
  - ▶ <https://goo.gl/uqbJBR>
- ▶ Typo of the Day Blog
  - ▶ <http://www.terryballard.org/typos/typoscomplete.html>

Questions? Comments?

# Transferring Volumes & Items

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# Transferring Volumes & Items

- ▶ Transferring (moving volumes or items from one record or branch to another) is useful when dealing with the following types of items:
  - ▶ Items attached to incorrect records during migration
  - ▶ Items attached to mismerged records
  - ▶ Items that will be moved to a different branch within your library system permanently

# Transferring Volumes & Items

- ▶ Transferring a **VOLUME**: moving a volume & its associated call number & all items attached to that volume, all at once, to another bibliographic record or another library branch
- ▶ Transferring an **ITEM**: moving a single specific item (without the call number) to a different volume/call number on the same or different bibliographic record; allows the transfer of only a single item from a volume that has many items attached to it

# Transferring Volumes & Items

**NEVER** move an item  
to another bibliographic record or branch  
by deleting it from its current one  
& then adding it to the desired one.



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- ▶ EI Cataloging Contact List
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- ▶ EI Cataloging Listserv
  - ▶ [http://lists.in.gov/mailman/listinfo/evergreen\\_indiana-catalog](http://lists.in.gov/mailman/listinfo/evergreen_indiana-catalog)
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