

Merging Records and Relinking Items

Do I merge or relink?

- You MERGE RECORDS when either of the following conditions apply:
 - You find duplicate bib records and want to keep the best one, moving all the items from the “bad” one over to the “good” one and getting rid of the “bad” one.
 - You bring a record in from OCLC using Z39.50 and later discover that there was already a record in the database for your title.

- You RELINK ITEMS when any of the following conditions apply:
 - You accidentally tag an item on to the wrong bib.
 - You are cleaning up old DRA “on the fly” records for your library.
 - You have accidentally overlaid a record with a batch import utility (such as Connexion), and you want to bring in the right record and move all the items back where they belong.

- FAST ADDS can fall into either category:
 - If you fast-add an item, then bring in a new OCLC record (you are the first one to add the record to the database), MERGE the records and mark the fast-added record as the dying bib. Be sure to also update the item record.
 - If you fast-add an item, then later find an existing record in the database (someone else has brought over the OCLC record ahead of you), it’s probably easier to RELINK ITEMS, moving your item to the new record. Be sure to delete your fast-added bib and update your item record.

Why not just delete the items and re-enter them on the right record?

- You make extra work for yourself that way.
- You lose the count of the number of times the item has circulated, as well as the original date the item was entered. Both of these figures can be useful at weeding time.

IF YOU ARE UNCERTAIN ABOUT WHAT TO DO, CALL FIRST!

Call Jo at RPLS, or contact any member of the Database Standards Committee for assistance in merging or relinking.

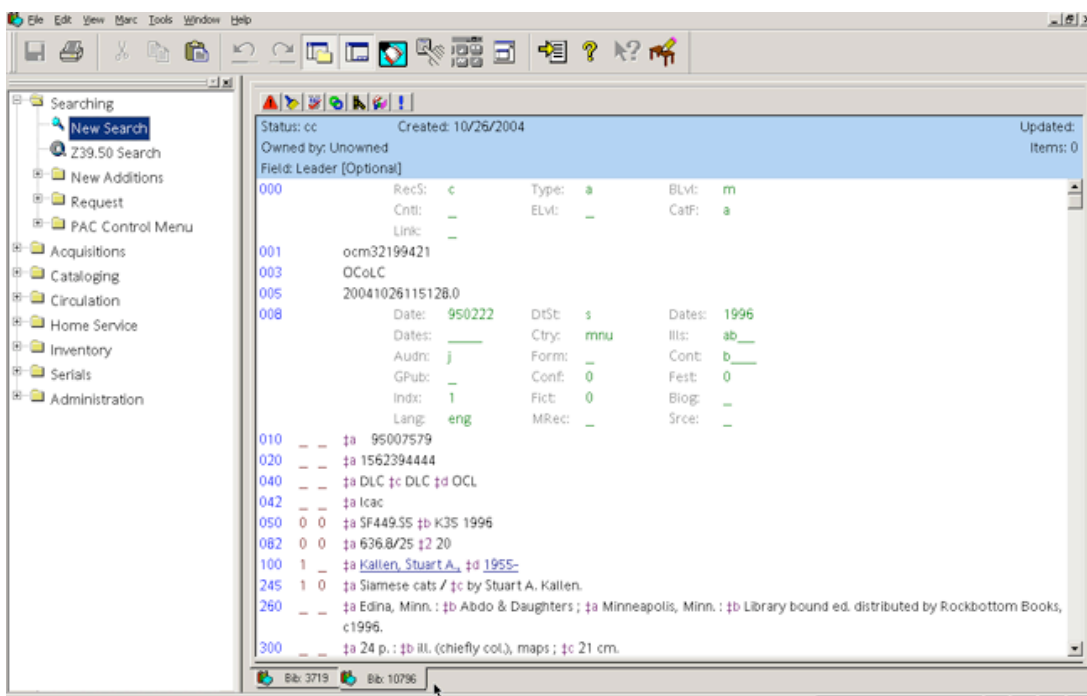
The following pages outline the steps in each process.

Merging Bibliographic Records

Note: If BOTH bibs to be merged have requests on them, do NOT merge before you transfer requests, or the requests won't be in date order and your patrons will be unhappy.

See "A Special Case" at the end of this section

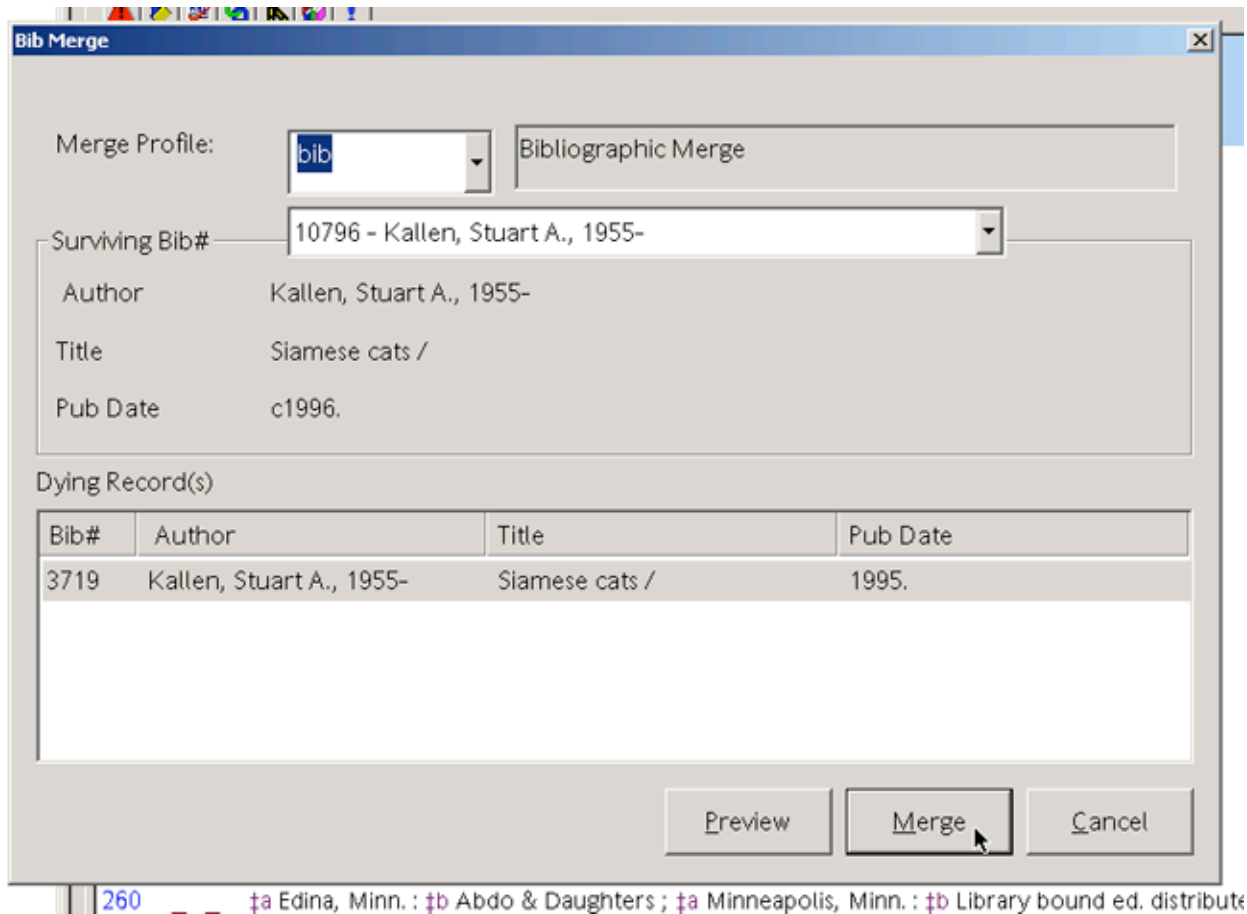
- Start with a clean slate. Don't have any Horizon windows open but the main screen (no checkin, checkout, or search windows). This will avoid confusion.
- Do a search for each record you want to involve in the merge process. As you find the records, send them to the MARC Editor. Maximize your screen. Make sure the "tabs" are visible at the bottom of the screen (if they are not, go to the View menu and make sure "Workbook" is checked). You will need to see the bib numbers of all the records.
- Carefully note which bib number is the "good" record and which bib number(s) is/are the "bad" record(s). Also note the number of items currently listed for each record. BE SURE you don't have any records displayed in the MARC Editor that you don't want involved in the merge process.



- In this example, the rightmost tab, bib 10796, is the "good" bib – the one that will survive the merge process. The other bib, 3719, is the one we want to eliminate – the one that will "die" in the merge process.
- Click on the tab for the surviving bib, so that it is on top and visible on your screen. This automatically places that record in the "surviving" field for the merge process.
- On the menu bar, choose "Marc." Select "Merge record..."



- You will see a screen that summarizes the merge choices you are about to make. Double-check carefully as to which is the surviving and which is/are the dying record(s). THIS PROCESS CANNOT BE UNDONE ONCE YOU CLICK ON “MERGE.” If the wrong record is listed as the Surviving Bib#, you may click on the drop-down arrow and select the correct record. The Dying Record(s) will adjust accordingly.



- Once you are certain you have what you want, click “Merge.” The dying bib will disappear, and you will be left with the surviving bib in the MARC Editor on your screen. You will not be warned, nor will you have to click on “OK” to confirm your choice. The process will simply happen.
- Check the number of items listed for the newly merged record. It should be the same as the sum of the numbers of items for all the records you were merging. If it is not, call Jo at RPLS right away.
- Save the record and close.

A Special Case: Merging Bibs When Both Records Have Requests On Them

Occasionally, you will want to merge bibs where both records already have requests placed on them. To preserve the date order of the requests, the requests **MUST** be transferred from the dying bib to the surviving bib **BEFORE** the bibs are merged. Follow the transfer process on the following pages, then merge the bibs.

The following section is taken from the Horizon Circulation Guide.

Transferring a Hold Request from One Title to Another

When you transfer requests from one title to another, Horizon lets you load both the title that has the requests you want to transfer and the destination title. Then Horizon displays the information about the titles that you specified when you set up the Transfer Request Queue Bib Display. This lets you verify that Horizon transfers the request to the correct bib record. You can choose whether to transfer item-specific requests.

Effects

Horizon changes item-level requests to bib-level requests.

Constraints

Horizon can only transfer requests between items of the same item type. (For example, you cannot transfer requests from a video to a book of the same title.)

You can only transfer requests from a video to another video or a book to another book of the same title.)

To transfer a hold request from one title to another

1. Start the Transfer Request Queue process. The default location of this process is the Circulation\Circulation Control Menu folder on the navigation bar.
2. Horizon displays the Transfer Request Queue window:

The screenshot shows the 'Transfer Request Queue' window. At the top, there are two input fields for 'Merge From Bib#' and 'Merge To Bib#', each followed by a 'Load' button. Below these are two 'Request List' sections, each with a table header: 'Request Date', 'Request Status', and 'Request Level'. At the bottom, there is a checkbox labeled 'Transfer item level requests to bib level requests' and two buttons: 'Transfer Requests' and 'Cancel'.

3. In the Merge From Bib# field, enter the bib number of the title whose requests you want to transfer.
4. Click Load.

Horizon displays the bib information and the request queue for the bib record number that you entered in the left hand Request List window:

Horizon disables the Load button until you enter a new bib number.

Horizon displays the bib information you chose when you set up the Transfer Request Queue display.

Horizon displays the requests for this title in the Request List.

Transfer Request Queue

Merge From Bib#: 1244624 Load Merge To Bib#: Load

Title Tom Stoppard, Rosenkrantz and Guildenstern are dead /

Author(s) Salle, Roger.

Publisher Penguin,

Pub. Date 1988.

Request List:

Request Date	Request Status	Request Level
6/8/2003	Request	Item
6/8/2003	Request	Item

Request List:

Request Date	Request Status	Request Level
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Transfer item level requests to bib level requests

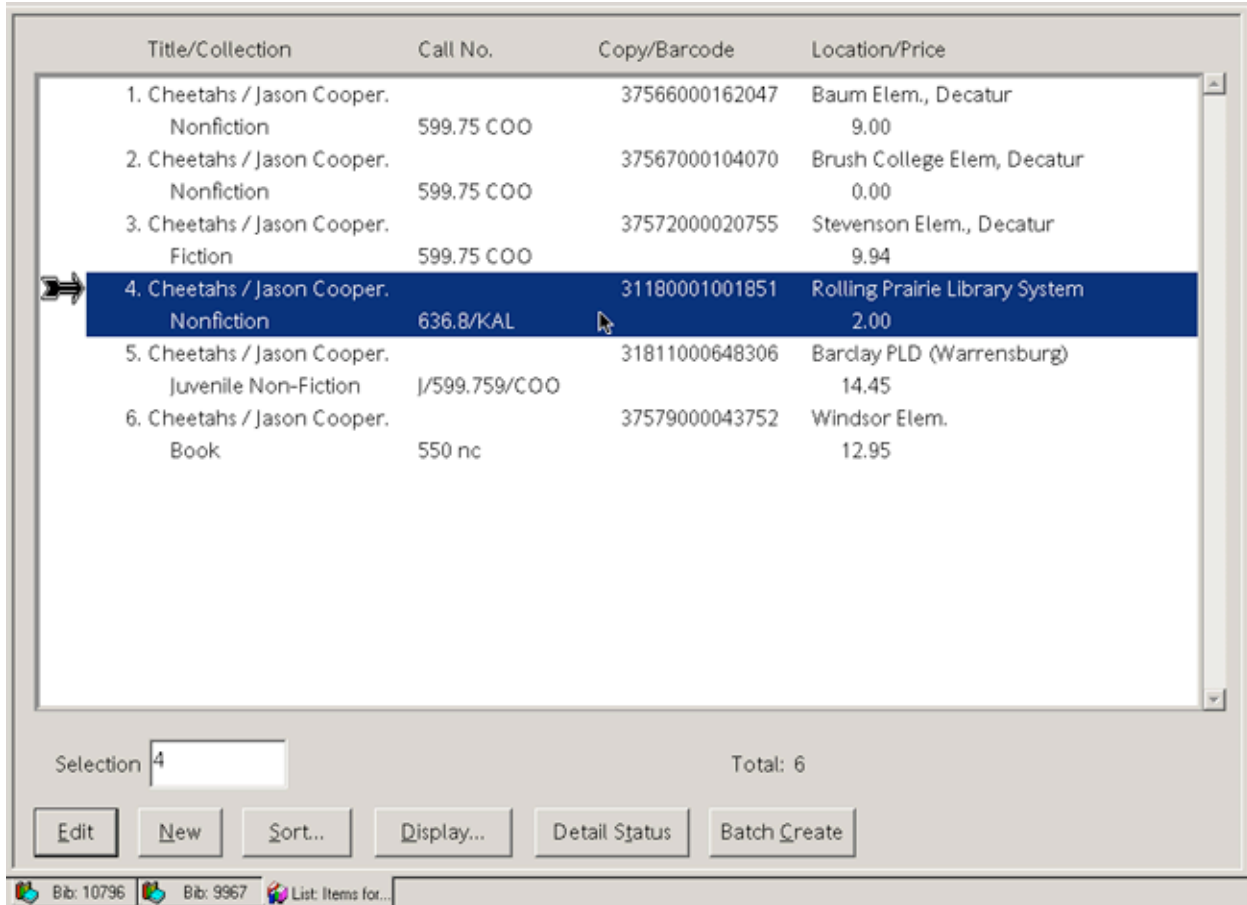
Transfer Requests Cancel

5. If you want to transfer item-specific requests and make them bib-level requests, mark the Transfer item level requests to bib level requests box.
6. Click Transfer Requests.
Horizon transfers the requests and displays them in the destination Request List, sorted by date. If Horizon could not transfer all of the requests, it displays a message saying, "Transfer is complete. Only requests with a status of "Request" and which can be filled on the destination bib were transferred."
7. Repeat steps 2 through 7 if you want to transfer more requests.
8. Click Cancel to close the Transfer Request Queue process.

Relinking Items

- Bring up the item in MARC Editor using one of these methods:
 - Go to Cataloging > Item Record > Item Barcode Lookup; double-click, enter or scan the item barcode. Send to (F10 or “send to” icon on toolbar) MARC Editor.
 - Perform a search for the bib record that the item is currently attached to. Send to (F10 or “send to” icon on toolbar) MARC Editor.
- Once in MARC Editor, bring up the copy/item list for all items attached to the bib record (“pink books” icon on the MARC toolbar, or F5, or MARC > Show Items). *Note: You must go through the MARC Editor for the relinking process to work. You cannot use the item list generated by Item Barcode Lookup.*
- Highlight the item that you want to relink to a different bib record.
- Perform a search for the bib record where the item belongs. Send that record to the MARC Editor as well, but do not bring up a copy/item list for it.

Your screen at this point will look something like this:

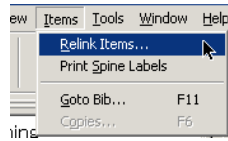


Title/Collection	Call No.	Copy/Barcode	Location/Price
1. Cheetahs / Jason Cooper. Nonfiction	599.75 COO	37566000162047	Baum Elem., Decatur 9.00
2. Cheetahs / Jason Cooper. Nonfiction	599.75 COO	37567000104070	Brush College Elem, Decatur 0.00
3. Cheetahs / Jason Cooper. Fiction	599.75 COO	37572000020755	Stevenson Elem., Decatur 9.94
4. Cheetahs / Jason Cooper. Nonfiction	636.8/KAL	31180001001851	Rolling Prairie Library System 2.00
5. Cheetahs / Jason Cooper. Juvenile Non-Fiction	J/599.759/COO	31811000648306	Bardlay PLD (Warrensburg) 14.45
6. Cheetahs / Jason Cooper. Book	550 nc	37579000043752	Windsor Elem. 12.95

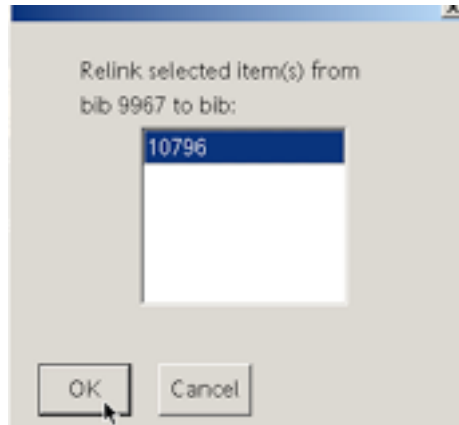
Selection: Total: 6

In this example, item #4 is currently attached to “Cheetahs,” which is bib # 9667. The item should be attached to “Siamese Cats,” bib # 10796 (also in the MARC Editor, as shown in the leftmost tab). Note that the item to be relinked is highlighted, and the two bib records are the only two that have been pulled up in the MARC Editor. Close all unnecessary records in order to lessen the chances for error.

- From the menu bar, select Items > Relink Items...



- A window will open, indicating the bib number to which the highlighted item will be attached. Confirm that this bib is the one you want.



- Click on OK. The item will disappear from the list. Close the list. Click on the tab for the bib you were relinking to (in this case, # 10796), and show the items for that bib record. Your item should be in the list. The title will automatically change to reflect the relinking (as shown here, where the item now belongs to the title “Siamese Cats”).

Title/Collection	Call No.	Copy/Barcode	Location/Price
1. Siamese cats / by Stuart A. Kallen. Nonfiction	636.8/KAL	31804000431807	Marrowbone PLD (Bethany) 2.00
2. Siamese cats / by Stuart A. Kallen. Nonfiction	636.8 KAL	37544000154652	South Shores Elem., Decatur 14.72
3. Siamese cats / by Stuart A. Kallen. Nonfiction	636.8/KAL	31180001001851	Rolling Prairie Library System 2.00
4. Siamese cats / by Stuart A. Kallen. Reserve	moore	37545000253204	Lincoln College Reserve Book 14.76
5. Siamese cats / by Stuart A. Kallen. Juvenile Non-Fiction	J636.8/KAL	37525000065162	South Macon PLD 12.00
6. Siamese cats / by Stuart A. Kallen. Nonfiction	636.8/Kal	37620000027732	Mt. Zion Elem. 0.00
7. Siamese cats / by Stuart A. Kallen. Book	SF449.S5 K35	37564000142515	Main Street Elem., Shelbyville 50.00
8. Siamese cats / by Stuart A. Kallen. Nonfiction	636.8 Kal	37595000080115	Williamsville/Sherman Elem., 0.00
9. Siamese cats / by Stuart A. Kallen. Book	af	37521000174518	Windsor Storm Memorial PLD 0.00

Selection Total: 9

Bib: 10796 List: Items for...