

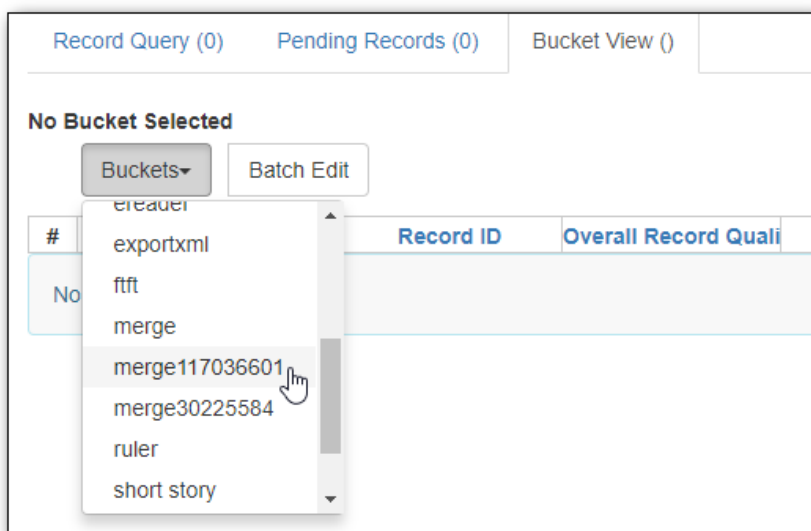
Merging records in Evergreen

Sitka goal - create one master MARC record for each discrete bibliographic title

We have lots of bibliographic records for the same book. 'Merging' records takes all of the holdings information (copy records) and attaches them to one 'lead' record. Generally, we will only merge bib records that have our own holdings. **Do not merge records that have holdings from other libraries attached.**

General process

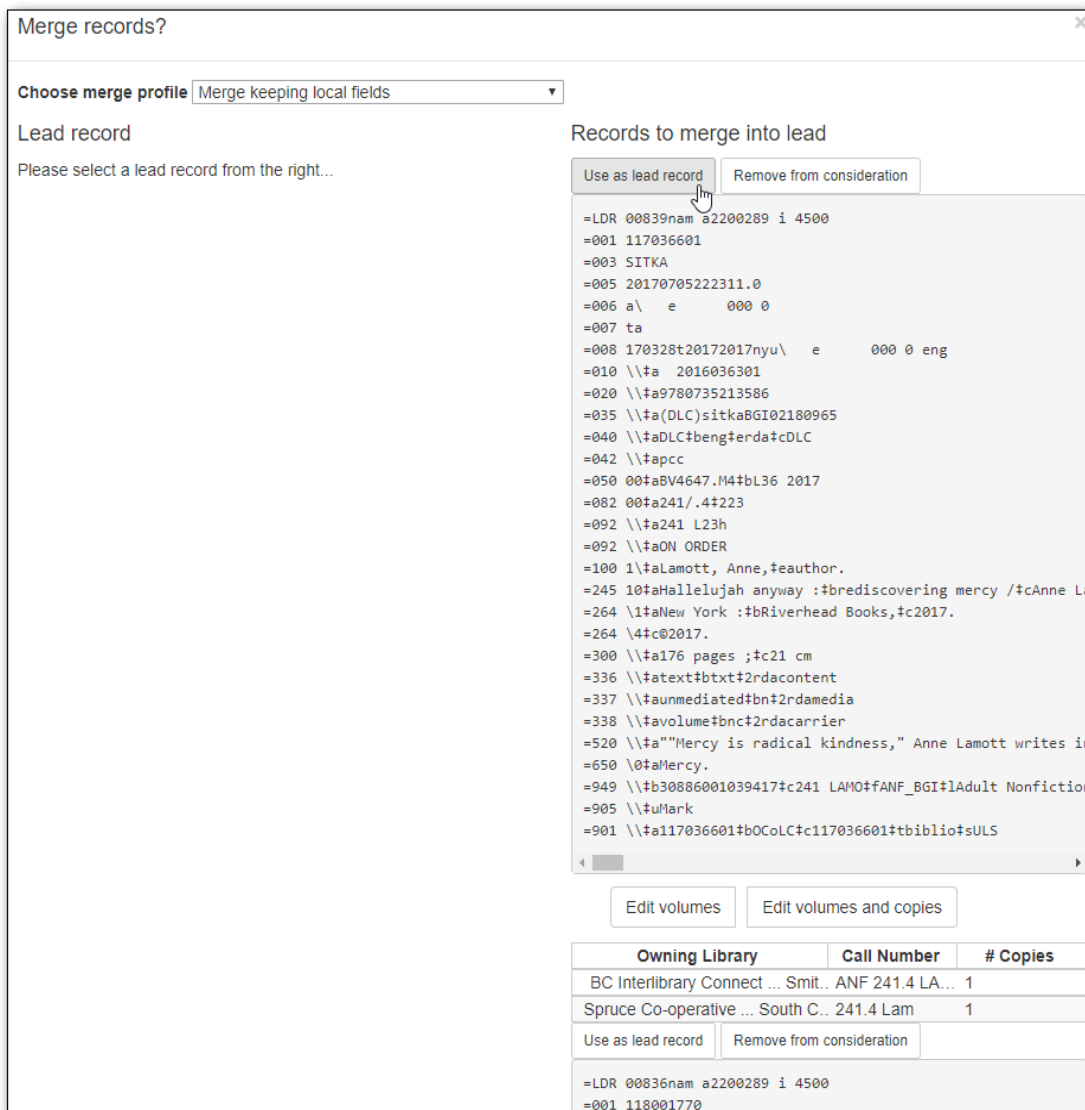
1. Make sure the records are for the same bibliographic title (same title, publisher, ISBN, publishing year, number of pages, etc.)
2. Add the records to a record bucket
3. Merge the records, making sure the 'lead' record includes all information from the other records (subject headings, notes, etc.)
4. Records are merged via a **Record Bucket**. You need to have a bucket for the records you wish to merge. Identify records to be merged and add them to the bucket.
5. Retrieve the bucket by selecting **Cataloguing** → **Record Buckets** on menu bar.
6. Click the drop down arrow beside **Buckets**, then select the bucket containing the records to be merged.



7. Select the records you wish to merge. Click **Actions** → **Merge Selected Records**.



- Merge screen opens in a pop-up window. Records are listed in the right column. You can scroll down to view each record and its holdings, if any. Once decided on a lead record, click **Use as Lead Record**. You can remove a record if you decide not to merge it by clicking **Remove from Consideration**.



- The lead record is moved to the left column. Compare the records. Edit the lead record if necessary. Click **Edit** to edit in the current window. Once done, click **Save**. You can also click **Edit using full editor** to open the record in a pop-up window. Once done editing, click **Save** on top, then **Done** at the bottom to go back to the merge screen.

Merge records?

Choose merge profile **Merge keeping local fields**

Lead record

Edit Edit using full editor

```
=LDR 00839nam a2200289 i 4500
=001 117036601
=003 SITKA
=005 20170705222311.0
=006 a\ e 000 0
=007 ta
=008 170328t20172017nyu\ e 000 0 eng
=010 \\\$a 2016036301
=020 \\\$a9780735213586
=035 \\\$a(DLC)sitkaBGI02180965
=040 \\\$aDLC$beng$erda$cDLC
=042 \\\$apcc
=050 00$aBV4647.M4$bL36 2017
=082 00$a241/.4$223
=092 \\\$a241 L23h
=092 \\\$aON ORDER
=100 1\\$aLamott, Anne,$eauthor.
=245 10$aHallelujah anyway :$brediscovering mercy /$cAnne L
=264 1$aNew York :$bRiverhead Books,$c2017.
=264 4$c@2017.
=300 \\\$a176 pages ;$c21 cm
=336 \\\$atext$btxt$2rdacontent
=337 \\\$aunmediated$bnc$2rdamedia
=338 \\\$avolume$bnc$2rdacarrier
=520 \\\$a"Mercy is radical kindness," Anne Lamott writes in
=650 0$aMercy.
=949 \\\$b30886001039417$c241 LAM0$fANF_BGI$1Adult Nonfiction
=905 \\\$uMark
=901 \\\$a117036601$b0CoLc$c117036601$tbiblio$sULS
```

Edit volumes Edit volumes and copies

Owning Library	Call Number	# Copies
BC Interlibrary Connect ... Smit.. ANF 241.4 LA...		1
Spruce Co-operative ... South C.. 241.4 Lam		1

Records to merge into lead

Use as lead record Remove from consideration

```
=LDR 00836nam a2200289 i 4500
=001 118001770
=003 SITKA
=005 20180313230931.0
=006 a\ e 000 0
=007 ta
=008 170328t20172017nyu\ e 000 0 eng
=010 \\\$a 2016036301-large
=020 \\\$a9780735213586
=035 \\\$a(DLC)sitkaB502146500
=100 1\\$aLamott, Anne,$eauthor.
=245 10$aHallelujah anyway :$brediscovering mercy /$cAnne L
=264 1$aNew York :$bRiverhead Books,$c2017.
=264 4$c@2017.
=300 \\\$a176 pages ;$c21 cm
=336 \\\$atext$btxt$2rdacontent
=337 \\\$aunmediated$bnc$2rdamedia
=338 \\\$avolume$bnc$2rdacarrier
=901 \\\$a118001770$b$c118001770$tbiblio$sULS
```

Edit volumes Edit volumes and copies

Owning Library	Call Number	# Copies
		0

Merge Cancel

10. Select a merge profile. We use "Merge Keeping Local Fields".
11. Once ready, click **Merge**. The lead record is displayed in the catalogue.