MERGING BIBLIOGRAPHIC RECORDS

The Cataloger Extended role is required for merging bibliographic records.

This procedure outlines how to merge two existing bibliographic records (not linked to the Community Zone) in the MD Editor. This is especially helpful when catalogers identify duplicate bibliographic records in the catalog that they want to combine into one bibliographic record. The merge is handled by selecting one of the merge rules from a list of predefined merge routines. Merging two bibliographic records into one will also move the following entities to the merged record:

- PO line
- Electronic collections
- Electronic portfolios
- Physical items
- Digital representations
- Loans
- Requests
- Reading lists

**To merge two bibliographic records using the MD Editor:**

1. Using Repository Search, locate the two bibliographic records that you want to merge. The primary record will be updated with some or all of the information from the other (secondary) record.

2. Edit both records so that they both appear under the Records tab in the MD Editor.
3. From the list under the Records tab, click the primary record (i.e. the record you want to retain).

4. Click the **Split Editor** icon and click the secondary record so that it appears on the right (refer to the example below).

You should now have both bibliographic records open, with the primary on the left and secondary on the right.

**BEFORE CONTINUING TO STEP 5, MAKE SURE YOU HAVE YOUR PRIMARY RECORD SELECTED BY CLICKING ON IT.** Simply having the record on the left side of the screen does NOT make it the “primary record” – it needs to be selected.
5. Select **Tools > MARC Bibliographic > Merge Records & Combine Inventory.** The Merge Records and Combine Inventory dialog box appears.

![Image of the dialog box]

**Choose merge routine**: select **merge ALMA records**

To preview the merge results, click **Show merge preview**. Click **OK** to close the Merge Preview view.

**You are about to move the following:**

The system lists the changes that will occur after the merge. Holdings requests, loans, and reading lists attached to the secondary record will be updated. If there are any requests (more than 0), the number of requests appears. Due to a technical limitation, when there are no requests, the dialog box does not display "0 requests"; instead, the line about requests simply does not appear.

**Update holdings call number**: leave **unchecked**

**Secondary record**: select **Delete**

6. When you are ready to merge the two records, click **OK**. Save and RELEASE the record

If there is a constraint that prevents merging the two bibliographic records, such as if the primary record is linked to the Community Zone or there is a fulfillment issue with the secondary record, the system will not merge the bibliographic records and provide warning messages.