

Merging Bibliographic Records in Evergreen

To merge bibliographic records, the records first need to be added to a Record Bucket. There are two ways to add a record to a Record Bucket in Evergreen: you can add a record to a bucket from the catalog or you can search within the Record Bucket interface to find records to add to the bucket. Below are instructions for adding a record to a bucket from the catalog. This method will allow catalogers to verify that the records are duplicates before putting them in the bucket.

Add a record to a Record Bucket from the catalog:

- 1) Set the search scope in the catalog to **SPARK Library System** to search all libraries.
- 2) Search the catalog for the suspected duplicate records .
- 3) Examine the bibliographic records to ensure that they are true duplicates.
 - a) Check for matching ISBNs
 - b) Check for matching format (book, audiobook, DVD)
 - c) Check for Large Print
- 4) If you have determined that a record is part of a duplicate set, go to **Actions for this Record** and select **Add to Bucket**.
- 5) A small window will pop up that asks you to add the record to a bucket.
 - a) You can add this record to an existing bucket by selecting a bucket name and clicking **Add to Selected Bucket**.
 - b) You can add this record to a new bucket by clicking **Add to New Bucket**. In the next window, type in the name of your bucket and click **OK**.
- 6) The record will be added to your record bucket.
- 7) Repeat steps 4-5 for each record in the duplicate set.

Now that the duplicate records are in a Record Bucket, you want to retrieve the bucket and merge the records:

- 1) Go to **Cataloging -> Manage Record Buckets**.
- 2) Select the bucket containing the records you want to merge from the **Choose a bucket...** drop down menu. The titles in the bucket will populate the screen.
- 3) At the bottom of the screen, click **Merge All Records**. A new tab will open that contains a side-by-side comparison view of the records in the bucket.
 - a. The **Record Summary** for each bib record appears at the top of the screen. Below that there are radio buttons that allow you to **View Bib** (a view of the MARC records), **Edit Bib** (you can edit the bib records in this interface), and **Holdings** (a view of the holdings attached to the bib record).



- b. Use these views to compare the bib records to ensure that they are duplicate records.
- 4) Select the bib record that you would like to remain in your catalog by selecting the **Lead Record?** radio button in the upper left hand corner of the **Record Summary**.
 - a. If there are local notes in a bib record that should be preserved, use the Edit Bib option to add the local notes to the Lead Record.
- 5) Click **Merge** to merge the records. **NOTE:** There is no “are you sure?” button, so make sure you want to merge the records before you click **Merge**.
- 6) After you click **Merge**, Evergreen will bring you to the newly merged bib record in the catalog. All items from the duplicate set records should now be attached to this single bib record.

A note on Record Buckets

Record Buckets are linked to your staff client log in. When you look at Record Buckets in the staff client, you will only see buckets that you have created. If you would like to share your buckets with another staff member, tell them the number of the bucket you want to share. To find a bucket number, select a bucket from the drop down menu. The bucket number will appear in blue below the drop down menu.