Merging in Evergreen

Merging duplicate records is a vital part of consortium cataloging. When we add an item to the catalog, we want to avoid duplicate records (see the SCLENDs “Avoiding Duplicate Records” document).

This document includes a step-by-step visual walkthrough. The brief text-only version is at the end of the document.

When you search for an item and find duplicate copies, you will see something like this:

The next step is to compare the MARC records. You are evaluating which record is stronger. Look for overall completeness, adequate subject headings, presence of RDA 3xx fields, and complete and correct information in the 300 (physical description) line. You will be using your trained cataloging eye to select the stronger record.

It may be a situation where both records require enrichment: in that case, simply choose the one that requires the least time investment on your part.
Here is one of the records:

Notes about this record:

- Has an invalid character in 264 that needs to be changed to a copyright symbol.
- Lacks RDA 3xx fields.
- Lacks a 520 line containing a summary.
- Lacks genre terms (655 field).
The other possible record meets SCLENDs cataloging standards:

### Fixed Fields -- Record type: BKS

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**Notes about this record:**
- Includes RDA 3xx fields.
- Has ample subject headings (650) and genre terms (655).

To avoid duplicate records in the system, we will merge these records. The stronger record will overwrite the weaker record. When merging, choose the best record with the most information and access points.
To merge to records, you will want to add both records to a **record bucket** (not a copy bucket). You can add to a bucket from the “**Actions for this Record**” drop-down:

Repeat this process for both records: they should both be in the bucket. It is helpful to have a record bucket simply called “merging” for on-the-fly merges.
From the Record Buckets screen, choose the bucket you’re working with:

![Record Buckets screen](image1)

Important side note: at the bottom right of the screen, there is an option to “Delete All Records.” Do not choose this unless you truly wish to delete the records entirely.

In that same bar at the bottom, there is an option to “Merge All Records.” This is the option you want to select.

![Batch options](image2)

At this point, you will be asked to select a “Lead Record.” Choose the strongest record as lead record by clicking in the circle (as shown below):

![Lead Record](image3)
At this point, look to the top left of the screen, where you will see the option to merge. Select that button.

You have successfully merged the two records. Any holdings attached to either record are now condensed onto the single record: no holdings are lost during a merge.

The Quick Version:

1. Identify two or more duplicate records.
2. Evaluate the MARC records to identify the strongest record.
3. Place all records in a record bucket.
4. Choose the lead record, which is the strongest record (based on your evaluation).
5. Select “merge all records.”
6. The lead record becomes the new single record. All holdings move onto it.