

Merging Duplicate Bibliographic Records in Polaris

Polaris duplicate detection criteria will identify bibliographic records as possible duplicates and allow those records to be merged.


Records that are identified as possible duplicates must be examined very carefully. For example, Polaris will identify a record as a duplicate if the title is the same, even if the author is different, so be careful. Do not merge records unless you're certain they truly are duplicates.

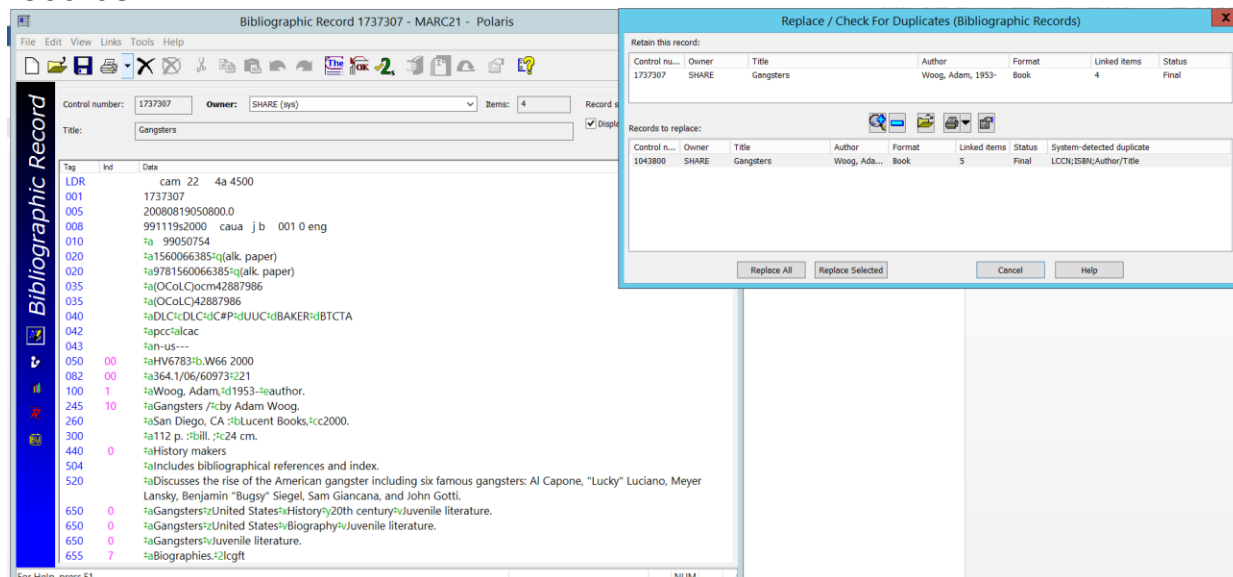
The first rule of merging: When in doubt, don't!

If you're not sure, report the records to SHARE Bibliographic Services staff through a Help Desk ticket or by submitting a **Duplicate Record Merge Request** form on the SHARE website (available under **Support>Forms**).

Comparing bibliographic records

During the save process, or when you click the **Replace/Check for**

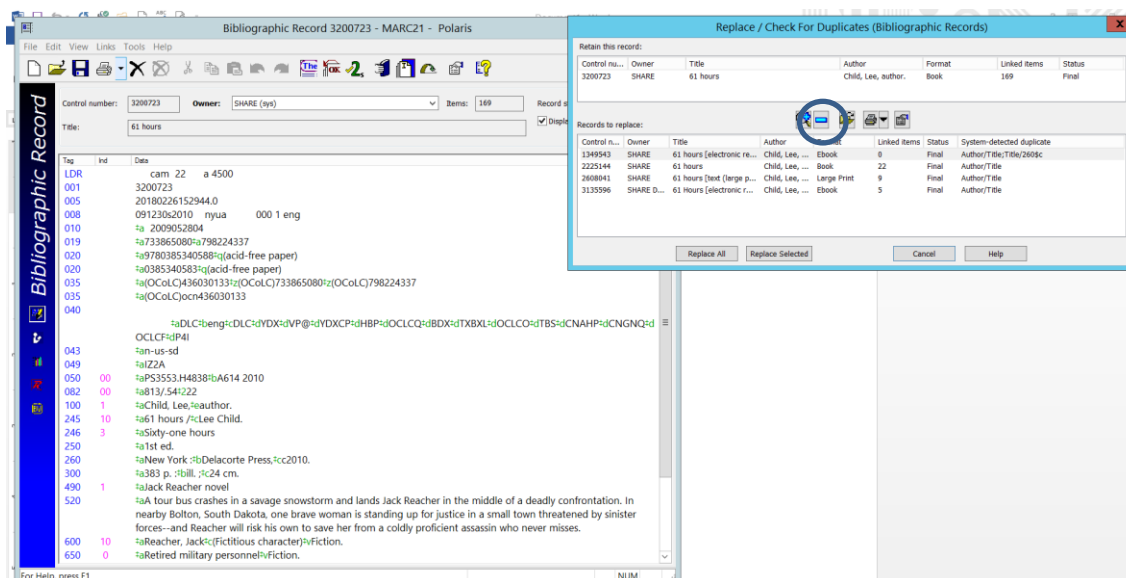
Duplicates icon , Polaris will bring up a screen with potential duplicate records:



The screenshot shows the Polaris software interface. On the left, a 'Bibliographic Record' window displays a MARC21 record for 'Gangsters' by Adam Woog. The record includes fields for control number, title, author, and various tags. On the right, a 'Replace / Check For Duplicates (Bibliographic Records)' dialog box is open. This dialog box contains two tables: 'Retain this record:' and 'Records to replace:'. The 'Retain this record:' table shows the current record (Control number: 1737307, Owner: SHARE, Title: Gangsters, Author: Woog, Adam, 1953-, Format: Book, Linked items: 4, Status: Final). The 'Records to replace:' table shows a potential duplicate (Control number: 1043800, Owner: SHARE, Title: Gangsters, Author: Woog, Ada..., Format: Book, Linked items: 5, Status: Final, System-detected duplicate: LCCN;ISBN;Author/Title). At the bottom of the dialog box are buttons for 'Replace All', 'Replace Selected', 'Cancel', and 'Help'.

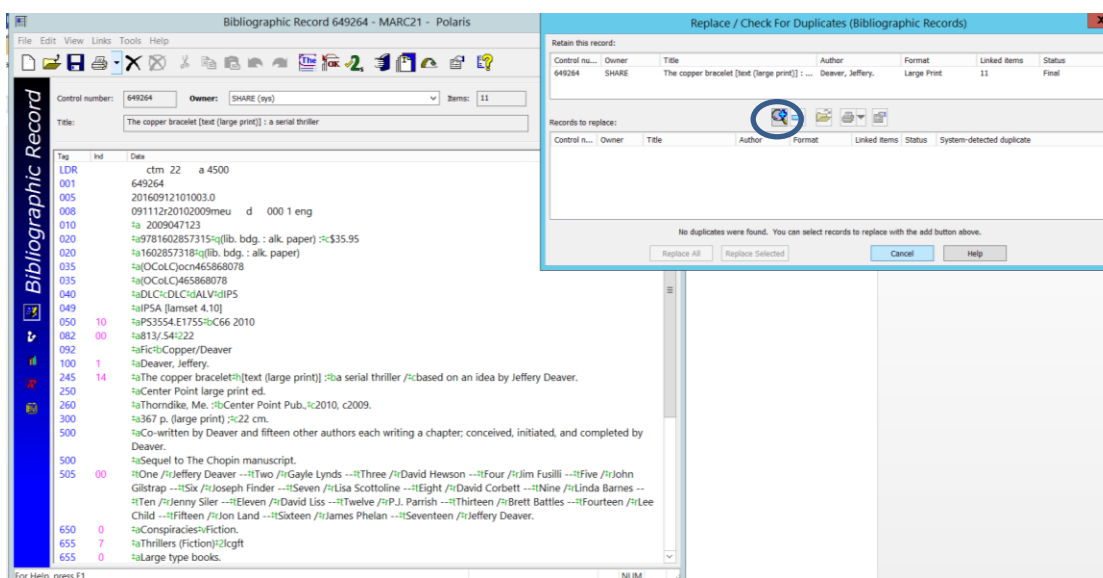
Click and drag the **Replace/Check for Duplicates (Bibliographic Records)** box to the side to give you a better view of the record.

If desired, records that are obviously not duplicates can be highlighted and removed from the list by clicking the blue minus sign icon. This is optional but could help prevent an inadvertent bad merge.

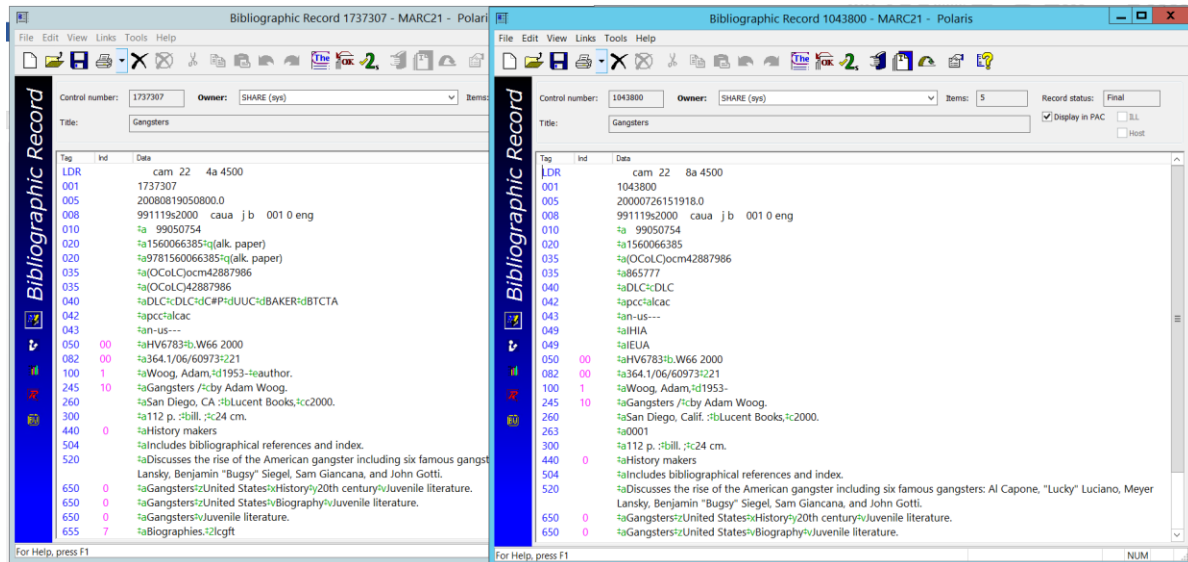


In the example above, records for ebooks and large print have been identified as possible duplicates of the record for a regular print book.

If no duplicates are automatically identified, you can search for possible duplicates by clicking the **Add by Searching** icon. This brings up a bibliographic record Find Tool. Search as usual. If you find a record that you think might be a duplicate, highlight and double-click or click Enter, and the record will be added to the **Records to replace** screen.



To compare records, highlight and open the desired record in the **Records to replace** screen. Click and drag the opened record until the two records are side-by-side.

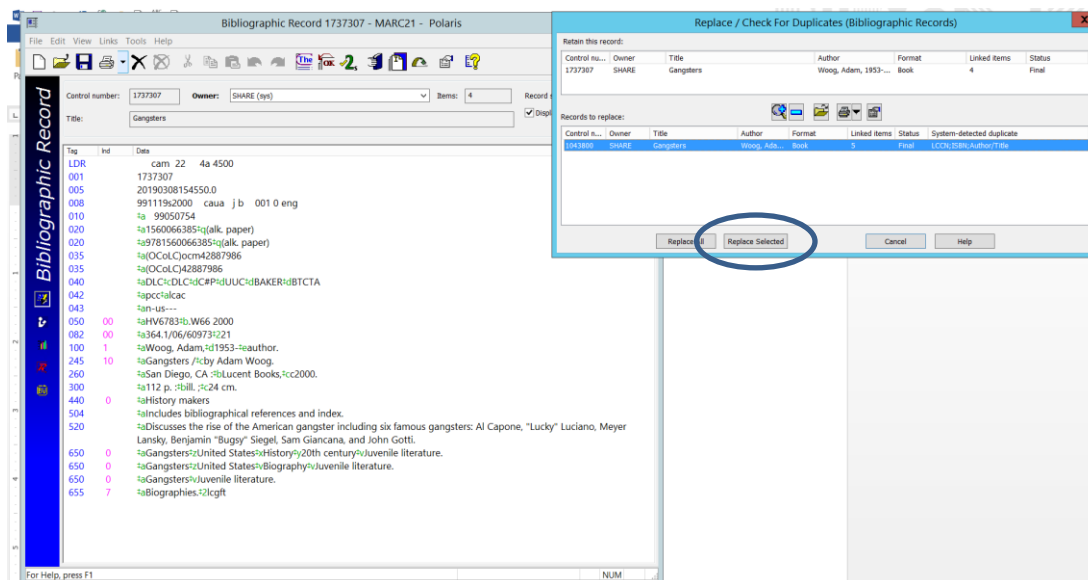


Compare the records carefully, including title, author, publication information, physical description, series, standard numbers, etc. When comparing records for videos, also be sure to look at languages and special features, etc.

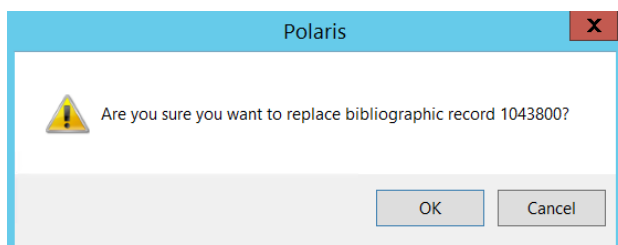
You may compare records and decide identified records are not duplicates. In that case, click the **Cancel** button, or the **Continue Saving** button, if you're saving a record.

To merge records

If you determine records are truly duplicates and you're ready to merge, close the record that you will not be keeping. With the record highlighted in the **Records to replace** screen, click the **Replace Selected** button.



You'll see a dialog box asking you to confirm that you want to merge the records. Click **OK** if you're sure or **Cancel** if you're not.



When you click **OK**, all linked item records and holds will be transferred to the bibliographic record being retained. The record being merged will be put in Deleted status.

When records are merged, all MARC tags 035 and 690 will be transferred to the record being retained. Please delete 035 fields that are moved from the record being merged. Also delete any 690s that don't meet SHARE cataloging local policies and make any other appropriate edits.

Repeat this process with any other records that you determine are duplicates.

Bad merges

If you merge records incorrectly, please contact Bibliographic Services staff as soon as possible.

The last rule of merging: When in doubt, don't!