



SHARE

Merging and RDA Updates

SHARE Cataloger's Training Session

February 11, 2025

Sharing Heartland's Available Resources Equally

Merging in Polaris

Fields that **DO** have to match

- **035 System control number (specifically OCLC number)**
 - It is possible to have matching records without having matching OCLC numbers, but having matching OCLC numbers is very helpful. If two otherwise matching records have different OCLC numbers, check OCLC to see if the records have been merged there.
- **1xx Main entry – Personal, corporate, etc.**
 - Minor variations may be acceptable if clearly the same entity.
- **Title statement (245), Publication/copyright (260/264), Physical description (300)**
 - Correct matching is critical for these fields.
- **505 Contents (as applicable)**
 - This is most often relevant for audio/video media.

Fields that **DO NOT** have to match

- **Subject headings**

- Do see if the record to be superseded has subject headings that you might want to copy to the remaining record!

- **ISBN**

- Can be helpful for finding mergeable records, but is neither sufficient nor necessary to be a good match.

- **024/028 (Standard identifiers/publisher numbers)**

- These sometimes differ between otherwise identical items.

On Order Records

- **Check ISBN and format**
 - These are not always listed in on-order records, but when they are, use them to inform your judgment.
- **Use your cataloger's judgment**
 - Use your judgment to determine if the on-order record matches, or if it is for a different version of the work. Keep in mind that, for new releases, it is unlikely that there will be many different versions available at time of release.

Reminders

- **Update to RDA standards**
 - When necessary, please update records to meet RDA standards!
- **Incorrect merges can be undone**
 - If you realize you've made a bad merge, e-mail the SHARE Bibliographic Services team immediately! It's much easier to fix sooner rather than later.
- **Make the record look like one you'd want to use**
 - Whether it's ensuring that relevant ISBNs are present on the merged record, or checking that any useful subject headings are carried over, make sure the finished record looks as good as any other record you would catalog.

When in doubt, DON'T MERGE!

SHARE Duplicate Record Merge Request Form

<https://share.illinoisheartland.org/support/forms/353>

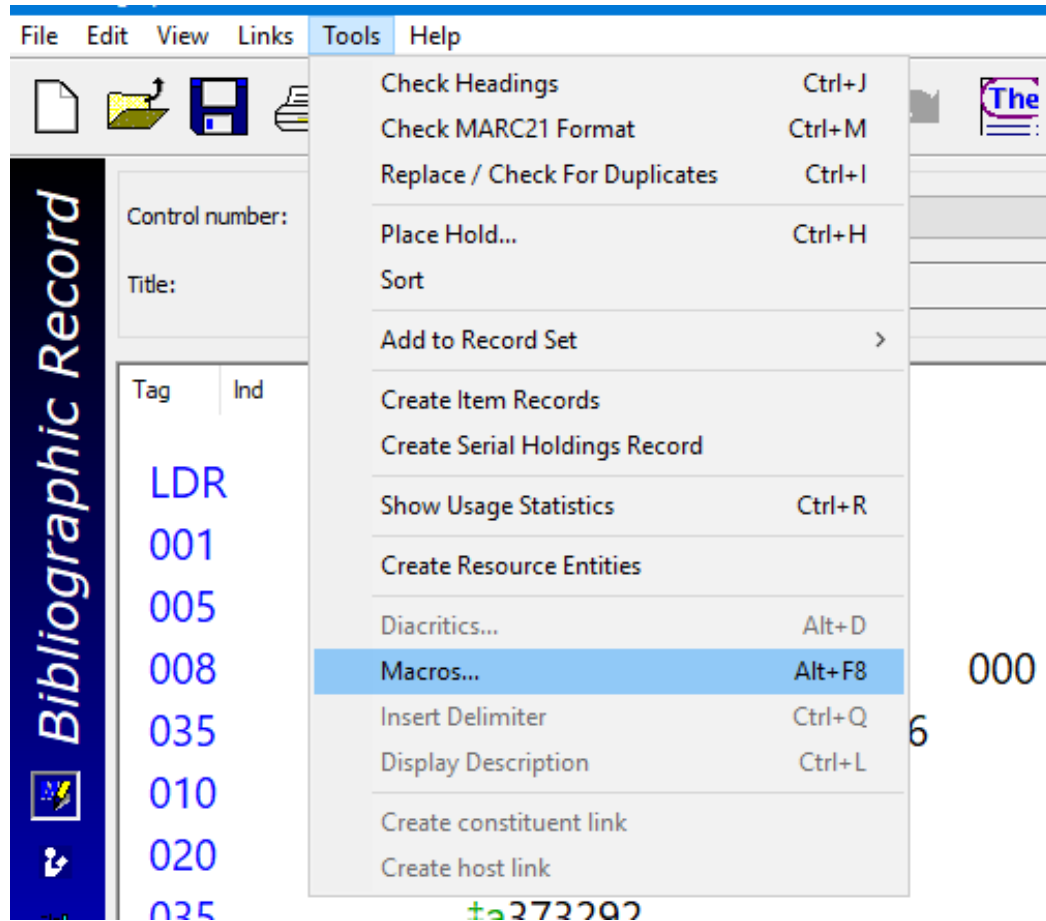
If you're unsure of a merge, we can do it for you! Submit this form, found on the SHARE website, and we will determine if your records are eligible for a merge.

Can insert portions of a field, entire field, or multiple fields.

Great to use when editing Polaris bibliographic records.

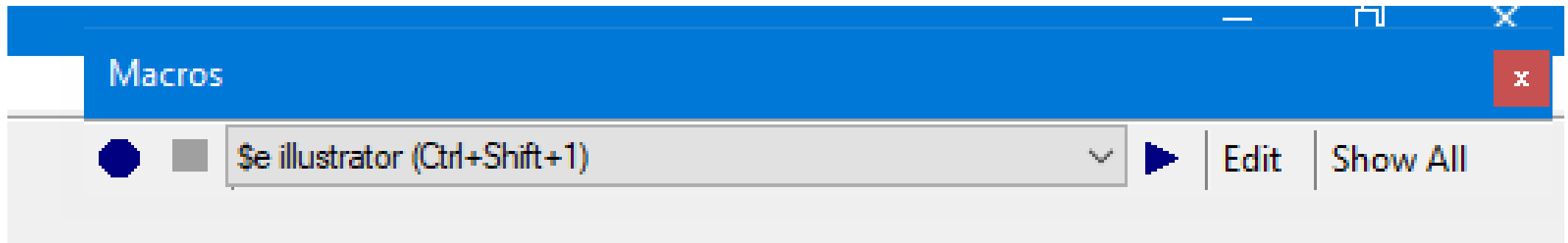
Macros in Polaris

How to find macros

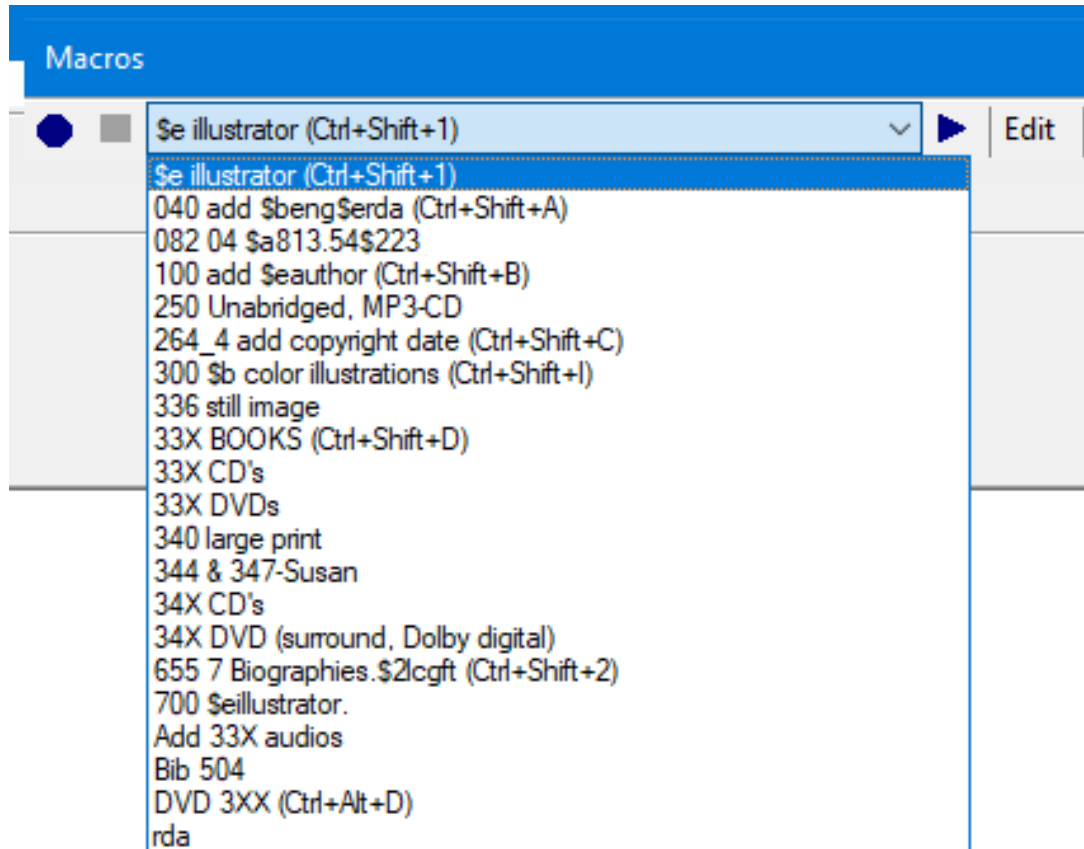


- Use the drop-down menu
- Keyboard shortcut Alt+F8

The macro box will pop up in the upper right corner of the screen.



Drop-down menu



- Contains macros created by you
- Contains macros saved from the list created by other Polaris users
- Notice some have, for example, (Ctrl+Shift+A) after the title, these are the keyboard shortcuts

Show all brings up this screen and has macros created by all Polaris users and that can be used by anyone. Chose the ones you would like to use by highlighting them and click Save As.

The image shows two screenshots from a software interface. The top screenshot is a 'Macros' window with a dropdown menu showing '\$e illustrator (Ctrl+Shift+1)' and buttons for 'Edit', 'Show All', and 'Show all'. The bottom screenshot is a 'Macro Selection' dialog box containing a table of macros.

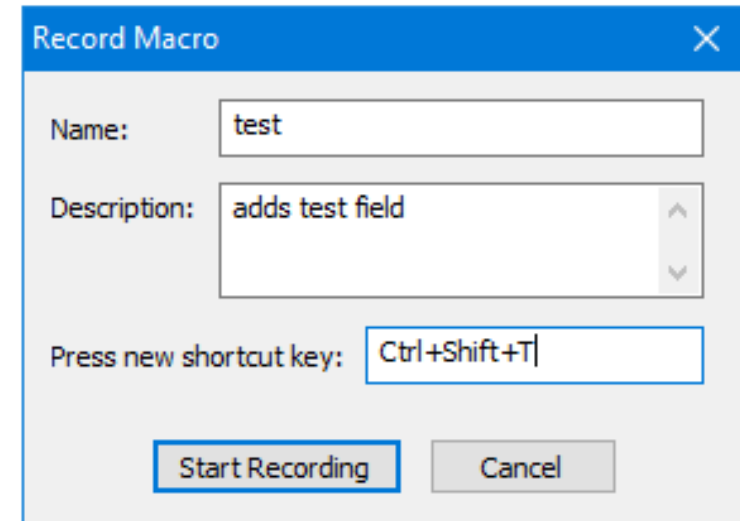
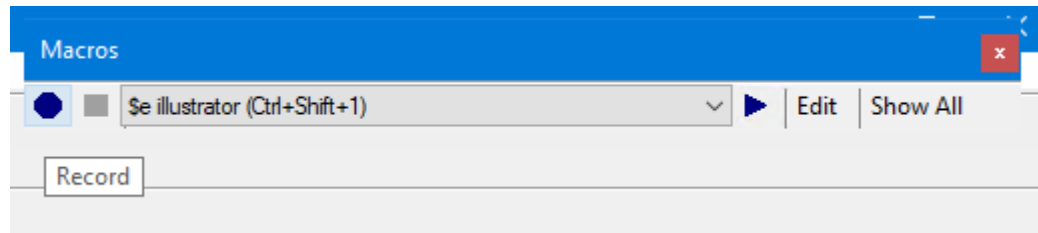
Macro Name	Author	Creation Date	Description
Add 33X books	Traci.Sipes	1/14/2019 11:32:10 AM	336, 337, 338 for books
add 340	Karen.Williams	10/16/2018 3:50:49 PM	Adding 340 in large print
illustrator	Tara.Mouser	6/19/2018 8:44:21 AM	add e illustrator
33x CD	Karen.Williams	5/23/2018 4:13:44 PM	adds 33x fields for CD
phonogram	Esther.Curry	4/5/2018 11:30:29 AM	phonogram copyright symbol
RDA book	lperkins	10/11/2017 2:15:20 PM	336, 337, 338
33X dvd	Shawna.Maki	10/2/2017 10:32:34 AM	tdi
3xx	Shawna.Maki	10/2/2017 10:31:26 AM	336, 337, 338
add DVD in 250 tag	Tammy.Caputo	9/22/2017 5:01:32 PM	creates the entire 250 tag
add copyright date to 264 ...	Tammy.Caputo	9/22/2017 4:49:40 PM	add the entire 264 tag

The image shows a 'Copy Macro' dialog box with the following fields: Name (phonogram), Description (phonogram copyright symbol), and Press new shortcut key (empty). There are 'Save' and 'Cancel' buttons at the bottom.

- If you want to add shortcut keys add them now before you click save.
- Shortcut keys are entered by pressing the keys you wish to use, not typing.
- After saving, this macro will now be added to your user profile.

To create your own macro

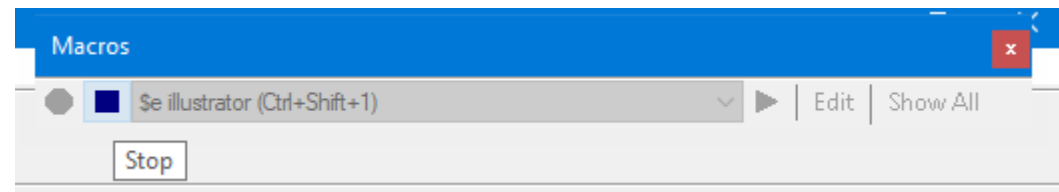
- Select the octagon shape button on the left to begin recording your macro.



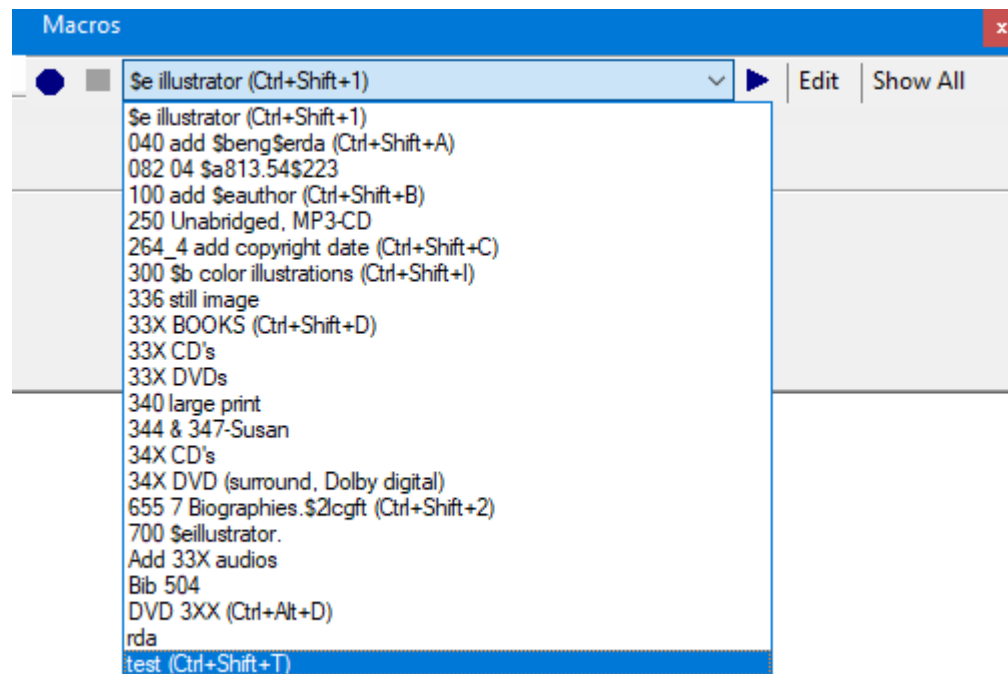
- Add name, description, shortcut keys if desired then click Start recording.
- Shortcut keys are entered by pressing the keys you wish to use, not typing.

- Place your cursor where in the bib record you would like to start.
- Type in your information.

490 1 #aNancy Drew mystery stories
 500 #aTest field.
 520 #aThe jewels Emily was to inherit disappear

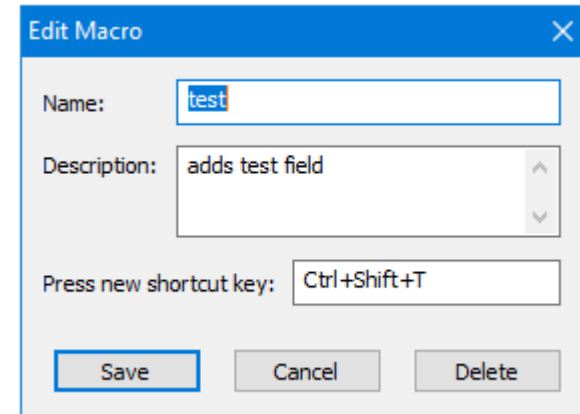


Click the square stop button on the macro tool bar to save.



Edit macros in your profile

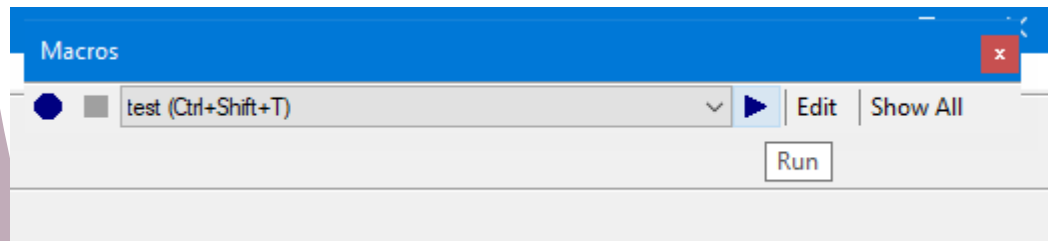
- Chose the macro you wish to edit from the drop-down menu
- Click edit
- Make your changes and save



Insert macros

Drop-down menu

- Open macro toolbar
- Place your cursor in the bib record where you want the information entered
- Chose your macro from the list
- Click the triangle to the right
- Info automatically populates



Shortcut keys

- My favorite way to use macros
- Place your cursor in the bib record where you want the information entered
- Use the assigned shortcut keys
- Info automatically populates
- Con: you have to remember the keyboard shortcuts!

If in doubt, do not make changes!

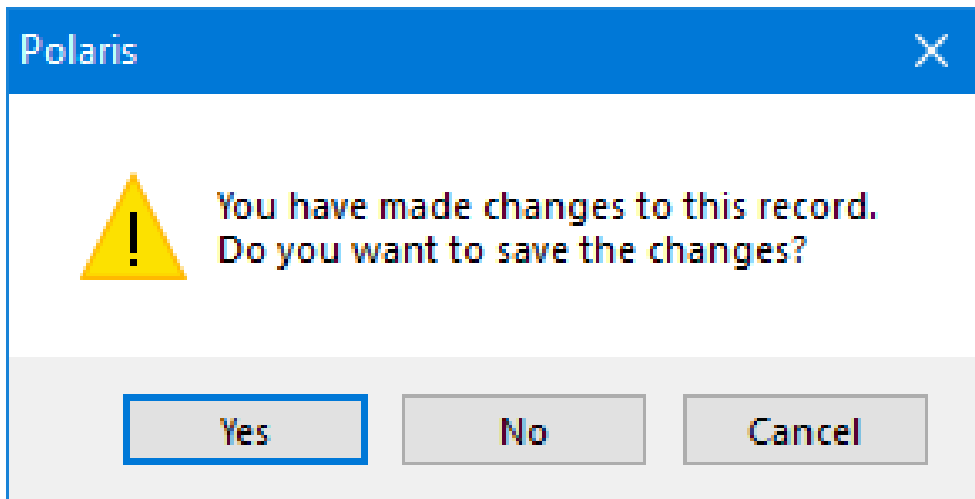
Send a help desk ticket or email a SHARE cataloger.

Updating records in Polaris

- We are updating formatting, not changing any of the key match points in the record.
- If you do not have the item in hand, you can't make some changes. That is ok, just make the ones you can.

Updating records in Polaris

Updating records in Polaris



- Any changes you make are not permanent until you hit the save button.
- If you decide you don't want to save the changes just close out the record and this box will pop up.
- Click No, the record closes and all the changes are gone.

Fields that should not have the information changed, with exceptions:

- 020 – remove \$c with pricing; add \$q in front of qualifying information, example: \$q(paperback)
- 035
- 040 – exception: add \$b eng \$e rda
- 100 – exception: add the \$e relator term
- 245 - exception: correct ISBD punctuation errors

Fields that should not have the information changed, with exceptions:

- 260/264 – exceptions:
 - Change 260 to 264 with correct indicators
 - \$a Spell out any abbreviations in square brackets.
[Edwardsville, IL] to [Edwardsville, Illinois]
 - \$c Change †cc1973 or †c©1973 to †c[1973] then add
264_4 †c©1973
 - Correct ISBD punctuation errors
- 300 – exceptions: correct ISBD punctuation errors, use RDA terms
- 945__ \$aOCLC DO NOT SET – Retain this field

Fields that can be updated, added, or deleted

- LDR - update
- 008 - update
- Add appropriate 3XX fields
- Delete all other 9XX fields