



To Merge, Or Not To Merge?: Merging Bibliographic Records in Polaris


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

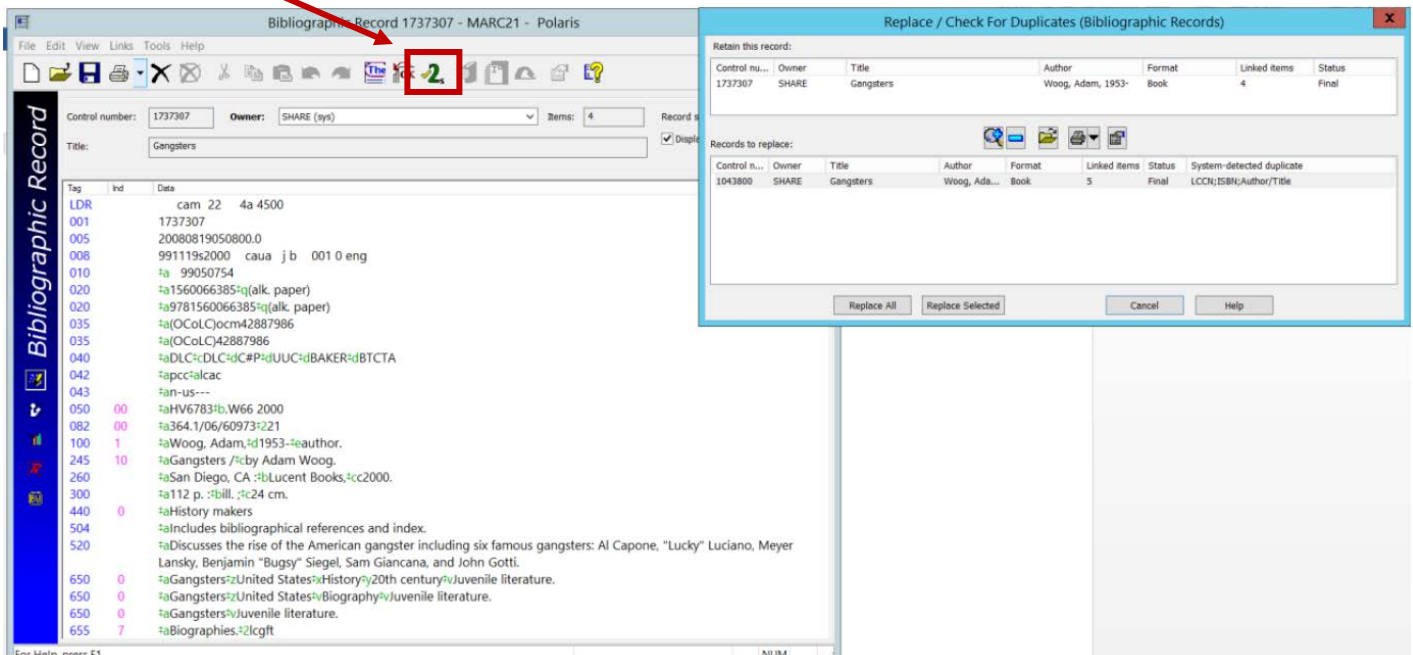
Records that are identified as possible duplicates must be examined very carefully. For example, Polaris will identify a record as a duplicate if the title is the same, even if the author is different, so be careful. Do not merge records unless you're certain they truly are duplicates.

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 the online form.

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 interface with a bibliographic record for 'Gangsters' (control number 1737307) and a 'Replace / Check For Duplicates' dialog box. The dialog box displays a table of records to replace:

Control n...	Owner	Title	Author	Format	Linked items	Status	System-detected duplicate
1043800	SHARE	Gangsters	Woog, Ada...	Book	5	Final	LCCH;ISBN;Author/Title

The dialog box also includes buttons for 'Replace All', 'Replace Selected', 'Cancel', and 'Help'. A red arrow points from the 'Replace/Check for Duplicates' icon in the Polaris toolbar to the dialog box.

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 highlighting and then clicking the blue minus sign icon. This is optional but could help prevent an accidental bad merge.

The screenshot shows the 'Bibliographic Record 2225144 - MARC21 - Polaris' window. The 'Replace / Check For Duplicates (Bibliographic Records)' dialog box is open, displaying a table of records to be replaced. A red arrow points to a blue minus sign icon in the dialog box, which is used to remove records from the list.

Control n...	Owner	Title	Author	Format	Linked items	Status	System-detected duplicate
2225144	SHARE	61 hours	Child, Lee, author.	Book	17	Final	
1349543	SHARE	61 hours [electronic r...	Child, Lee, a...	Ebook	0	Final	Author/Title
2608041	SHARE	61 hours [text (large ...	Child, Lee, a...	Large Print	8	Final	Author/Title
3135596	SHARE	61 Hours [electronic r...	Child, Lee, a...	Ebook	5	Final	Author/Title
3200723	SHARE	61 hours	Child, Lee, a...	Book	158	Final	Author/Title
3360268	SHARE	61 hours : a Reacher ...	Child, Lee, a...	Book	3	Final	ISBN

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

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.

The image displays two side-by-side screenshots of the Polaris Bibliographic Record software interface. Both windows show a record with the following details:

- Control number: 2225144 (left) / 3200723 (right)
- Owner: SHARE (sys)
- Title: 61 hours

Below the metadata is a table of tags and data:

Tag	Ind	Data
082	14	#a[Fic]#214
100	1	#aChild, Lee, #eauthor.
245	10	#a61 hours /#cLee Child.
246	3	#aSixty-one hours
250		#a2010 Dell mass market ed.
260		#aNew York :#bDell, #c2010, c2009.
300		#a494 p. :#bill. ;#c20 cm.
490	1	#aJack Reacher novel
520		#aReacher arrives in a small South Dakota town to protect a lone witness who local police hope can identify the killer. Reacher, Jack #c(Fictitious character)#vFiction.
600	10	#aReacher, Jack #c(Fictitious character)#vFiction.
650	0	#aRetired military personnel#vFiction.
650	0	#aWitnesses#xProtection#vFiction.
650	0	#aAssassins#vFiction.
650	0	#aWinter storms#vFiction.
651	0	#aSouth Dakota#vFiction.
655	7	#aThrillers (Fiction)#2lcgft
655	7	#aDetective and mystery fiction.#2lcgft
800	1	#aChild, Lee, #tJack Reacher novel.

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.

After comparing records you may decide the identified records are not duplicates. In that case, click the **Cancel** button, or the **Continue Saving** button (if in the process of saving a record).

Important Matching Points

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.

Things to Remember When Merging

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 ...

- Submit a duplicate record merge request!
 - ✓ <https://share.illinoisheartland.org/support/forms/353>
 - ✓ SHARE website --> Support --> Forms
 - ✓ Enter a helpdesk ticket at: <https://help.illinoisheartland.org/>

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 on the **Records to replace** screen, click the **Replace Selected** button.

The screenshot shows the 'Bibliographic Record' software interface. The main window displays a list of records with columns for Tag, Ind, and Data. A dialog box titled 'Replace / Check For Duplicates (Bibliographic Records)' is open, showing a table of records to be replaced. The 'Replace Selected' button is highlighted with a red box and a red arrow.

Control number: 94819 Owner: SHARE (sys) Items: 15 Record status: Final

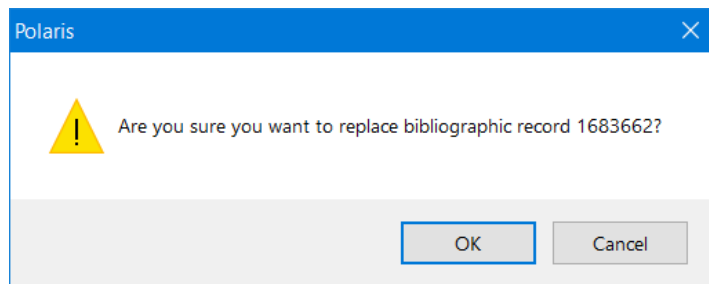
Title: The Midnight Club : a novel Display in PAC ILL Host

Control nu...	Owner	Title	Author	Format	Linked items	Status
94819	SHARE	The Midnight Club : a novel	Patterson, James, 1...	Book	15	Final

Control nu...	Owner	Title	Author	Format	Linked Items	Status	System-detected duplicate
1683662	SHARE	The Midnight Club	Patterson, Ja...	Book	19	Final	Author/Title

Buttons: Replace All, **Replace Selected**, Cancel, Help

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

You may also have some edits to make to bring the record up to RDA standards and SHARE local policies.

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