Monograph Record Merge Procedure and Policy Statement

1. DTS can only perform record merges on monographic records.
2. Only Serials Cataloging performs serial record merges.
3. DTS is also not allowed to merge records because of format changes (e.g. an item if found in paper, but we also have a cataloging record for the item in microform). These format merges must be sent to Monograph Cataloging/Database Maintenance for merging (the process is called updating to root record).
4. First you must confirm that the two records really are for the same material. Compare the as many of these fields as you have….010, 020, 022, 100, 245, 250, 260, 300. When checking the 300 field, the size can vary + or – 2 cms.
5. If these fields do match, then you may perform a record merge. The first thing you need to do is determine which is the better record. A fully cataloged record will have subject tracings, and none of the important tags will be labeled [UNAUTHORIZED]. This label means that no authority work has been done on this title. If both records are exactly the same, choose OCLC over all, followed by RLIN, UTLAS, and NJRG with an LC number. Most of the time it is very apparent which is the superior record. One will be a brief or circulation record, and the other will be much better.
6. You will use the transfer function to move all of the barcoded item lines to the superior record. However, it is very important that you do not remove a cataloging record loaded from our utilities (e.g. OCLC or RLIN) by accident. If you cannot tell if a record was cataloged, check the Control folder in the IRIS record. If the record was never cataloged, the date cataloged field will say NEVER. If this is the case, you can remove all of the item lines from this record, and delete the record with no problems. If there is a date in this field, you must use the last copy withdrawal procedure (i.e. Change the current location to DISCARD). If necessary, put in a generic item line with an auto-generated barcode for the last copy withdrawal, and transfer the barcoded copy to the better record.

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