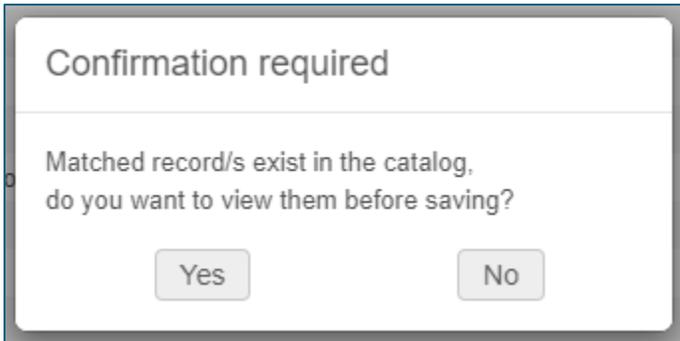


Merge and Combine Inventory in the Metadata Editor

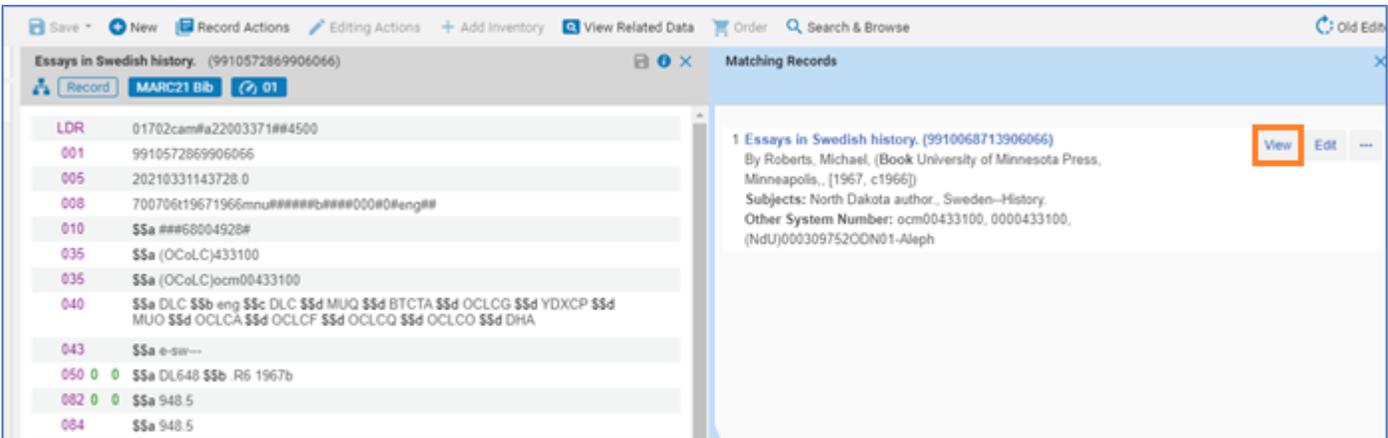
What to do when the Metadata Editor finds matching items on save

When you save the bibliographic record, sometimes Alma gives you this message:



Option 1: You can click No, and Alma will continue saving.

Option 2: Click Yes to view the matched records. The matched records are listed on the right.



Click View to see the records side-by-side. The record on the left is the one we started with, the one on the right is the matched record.

The image shows two side-by-side windows of a metadata editor. Both windows are titled "Essays in Swedish history. (9910572869906066)". The left window has a "Record" button and a "01" indicator. The right window has a "View Only" button. Both windows display a list of fields and their values, including LDR, 001, 005, 008, 010, 035, 040, 043, 050, 082, 084, 100, 245, 260, 300, 336, 337, 338, 504, 505, 651, and 655. The left window has a warning bar at the bottom: "You have 1 warning(s) in your record - 2:42:54 PM." The right window has a "Back to results" button and "Edit" and "Execute" buttons.

Leave the blue Edit menu button set to Edit and click the Execute button.

Now both records are loaded into the metadata editor.

The record on the left is your “primary” record. The primary record will be updated with information from the secondary record.

Under the Record Actions menu, select Merge & Combine.

The image shows a close-up of the metadata editor interface. The "Record Actions" menu is open, and the "Merge & Combine" option is highlighted with a red box. Other options in the menu include "Release Record", "Reload Original Record", "Duplicate Record", "Derive New Record", "Validate", "Find Matches", "Show Linkage Information", "Add Note", and "Assign Record to Another Cataloger". The background shows a list of records with fields like LDR, 001, 005, 008, 010, 019, 035, 040, 043, and 050.

The Merge Records & Combine Inventory dialog box comes up.

The screenshot shows a dialog box titled "Merge Records & Combine Inventory". At the top, it states: "You are about to merge record (MMS ID: 9910068713906066) with the record (MMS ID: 9914851683806066)." Below this is a dropdown menu labeled "Choose merge routine" with a downward arrow. A button labeled "Show merge preview" is positioned below the dropdown. The next section lists items to be moved: "You are about to move the following:" followed by "1 physical item(s)", "0 digital remote representations(s)", "0 digital representations(s)", "0 PO line(s)", "0 electronic portfolio(s)", and "0 electronic collection(s)". Below this list is a note: "0 Record(s) related to the secondary record might get affected by the process". There is a checkbox labeled "Update holdings call number". The "Secondary record:" section has three radio button options: "Delete" (which is selected), "Suppress", and "Keep it". A note at the bottom states: "Note that inventory of the following member institutions will be moved to the primary record: North Dakota State University." and "Note: this operation is non-reversible!". The dialog box has a scrollbar on the right and a horizontal scrollbar at the bottom.

At the top of the box you can select the merge routine. You can preview the merge results. To do this, select Show merge preview. For this example, the fuller record is in the left pane of the metadata editor, and I want to keep that record, but move all the inventory from the other record to it. To do that select “Keep only old value” as the merge routine.

However, if the fuller record is in the right pane, selecting the merge routine “ODINA bib overlay” will update the left record with fields from the record on the right.

So, to keep the record on the left select “Keep only old value” for the merge routine and click Show merge preview.

Merge Records & Combine Inventory

You are about to merge record (MMS ID: 9910068713906066) with the record (MMS ID: 9914851683806066).

Choose merge routine Keep only old value

Show merge preview

You are about to move the following:

- 1 physical item(s)
- 0 digital remote representations(s)
- 0 digital representations(s)
- 0 PO line(s)
- 0 electronic portfolio(s)
- 0 electronic collection(s)
- 0 Record(s) related to the secondary record might get affected by the process
- Update holdings call number

Secondary record: Delete Suppress Keep it

Note that inventory of the following member institutions will be moved to the primary record: North Dakota State University.

Note: this operation is non-reversible!

Cancel

Ok

Merge Preview

050 0 0 \$\$a DL648 \$\$b .R6 1967b
082 0 0 \$\$a 948.5
084 \$\$a 948.5
100 1 \$\$a Roberts, Michael, \$\$d 1908-1996.
245 1 0 \$\$a Essays in Swedish history.
260 \$\$a Minneapolis, \$\$b University of Minnesota Press \$\$c [1967, ©1966]
300 \$\$a ix, 358 pages \$\$c 22 cm
336 \$\$a text \$\$b txt \$\$2 rdacontent
337 \$\$a unmediated \$\$b n \$\$2 rdamedia
338 \$\$a volume \$\$b nc \$\$2 rdacarrier
504 \$\$a Includes bibliographical references.
\$\$a On Swedish history in general (1955) -- On aristocratic constitutionalism in Swedish history, 1520-1720 (1965) -
- Gustav Adolf and the art of war (1955) -- The political objectives of Gustav Adolf in Germany, 1630-2 (1956) --
505 0 Queen Christina and the general crisis of the seventeenth century (1962) -- Cromwell and the Baltic (1960) -- The
military revolution, 1560-1660 (1956) -- Charles XI (1965) -- The Swedish aristocracy in the eighteenth century
(1953) -- Great Britain and the Swedish revolution, 1772-3 (1963).
651 0 \$\$a Sweden \$\$x History.
651 6 \$\$a Suède \$\$x Histoire.
651 7 \$\$a Sweden. \$\$2 fast \$\$0 (OCoLC)fst01204537
655 7 \$\$a History. \$\$2 fast \$\$0 (OCoLC)fst01411628
776 0 8 \$\$i Online version: \$\$a Roberts, Michael, 1908-1996. \$\$t Essays in Swedish history. \$\$d Minneapolis, University of
Minnesota Press [1967, ©1966] \$\$w (OCoLC)1019876583
994 \$\$a Z0 \$\$b NDS

Ok

Click OK to close the preview.

Note that the dialog box shows a list of everything that will be moved to the primary record:

Merge Records & Combine Inventory

You are about to merge record (MMS ID: 9910068713906066) with the record (MMS ID: 9914851683806066).

Choose merge routine **Keep only old value**

Show merge preview

You are about to move the following:

- 1 physical item(s)
- 0 digital remote representations(s)
- 0 digital representations(s)
- 0 PO line(s)
- 0 electronic portfolio(s)
- 0 electronic collection(s)
- 0 Record(s) related to the secondary record might get affected by the process

Update holdings call number

Secondary record: Delete Suppress Keep it

Note that inventory of the following member institutions will be moved to the primary record: North Dakota State University.

Note: this operation is non-reversible!

Cancel Ok

Do NOT select update holdings call number.

You can select to keep the secondary record or suppress it. It will have no inventory after this change, so leave it at the default “Delete.”

The bibliographic record stays the same, and now all institutions are linked to the same record.

5 **Essays in Swedish history.** Edit Record Push to MDE

Book (Book - Physical) text; unmediated; volume By Roberts, Michael, (Minneapolis, University of Minnesota Press [1967, ©1966]) **Record number:** (OCoLC)433100 **Language:** English **MMS ID:** 9910572869906066

Subject: Sweden--History. Suède--Histoire. Sweden. and others

Creation Date: 03/31/2021 02:37:28 PM, CDT

Modification Date: 03/31/2021 03:11:49 PM, CDT

Electronic Digital **Held by (3)** Other details

My Institution North Dakota State University University of North Dakota Chester Fritz Library

*Note: local extensions from both records will be preserved in the new record since they reside at the institution level.