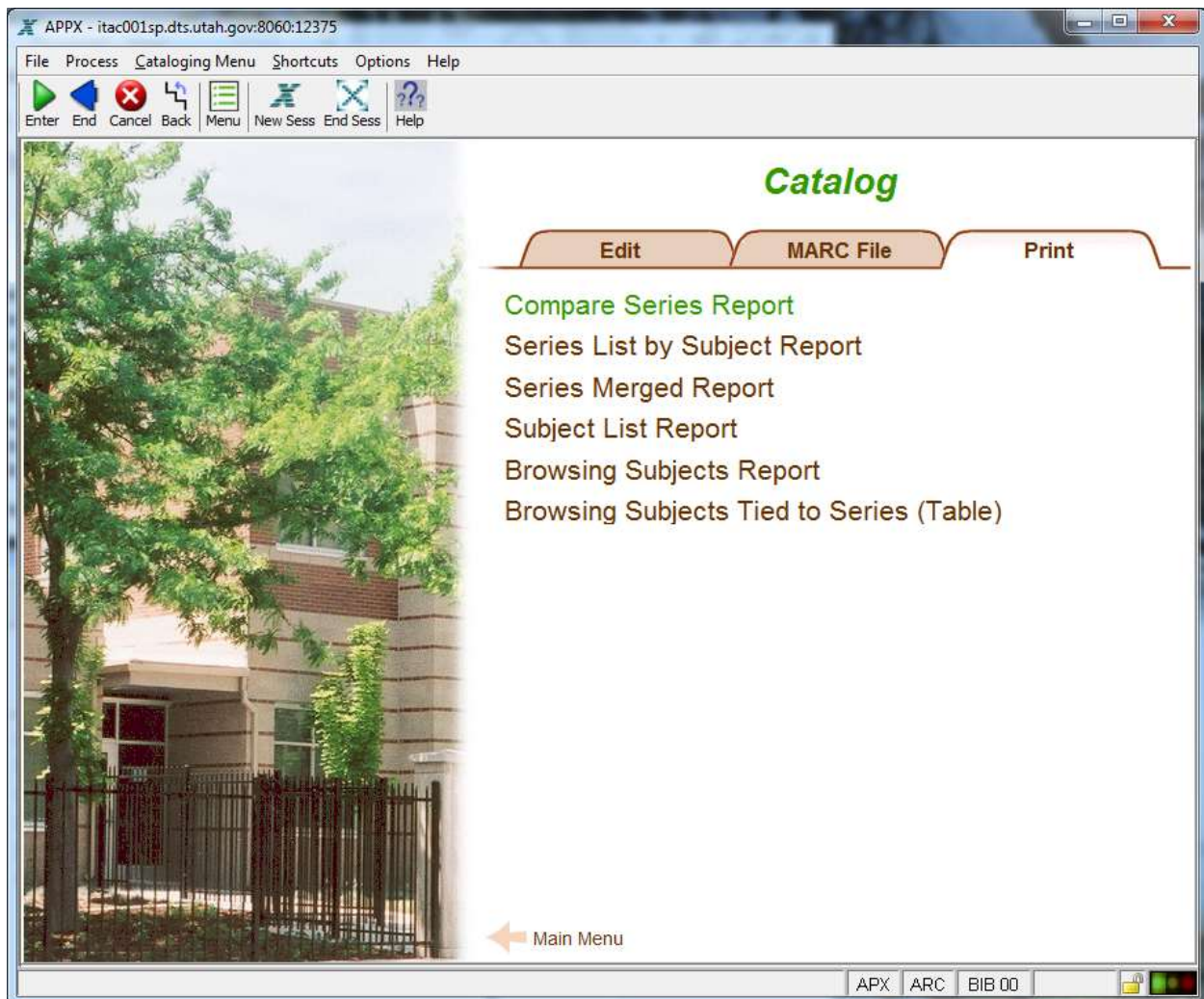


Merging Series

May 31, 2016

The purpose of merging two series together is to keep a metadata trail of the old record with the new record. Merges should only take place if two database records are duplicative of each other. If a series used to exist, but no longer does, it is end-dated but its identity as a series remains. Merging records that have a permanent/Archives disposition should only be done after careful thought and only with permission of Processing management and staff. On rare occasions, if an error has been made and a series record was added to the database but shouldn't have, it can be merged into series 2, which effectively deletes it. Deletion of a series should only occur if the series number was never in use by the agency or Archives to handle actual records.

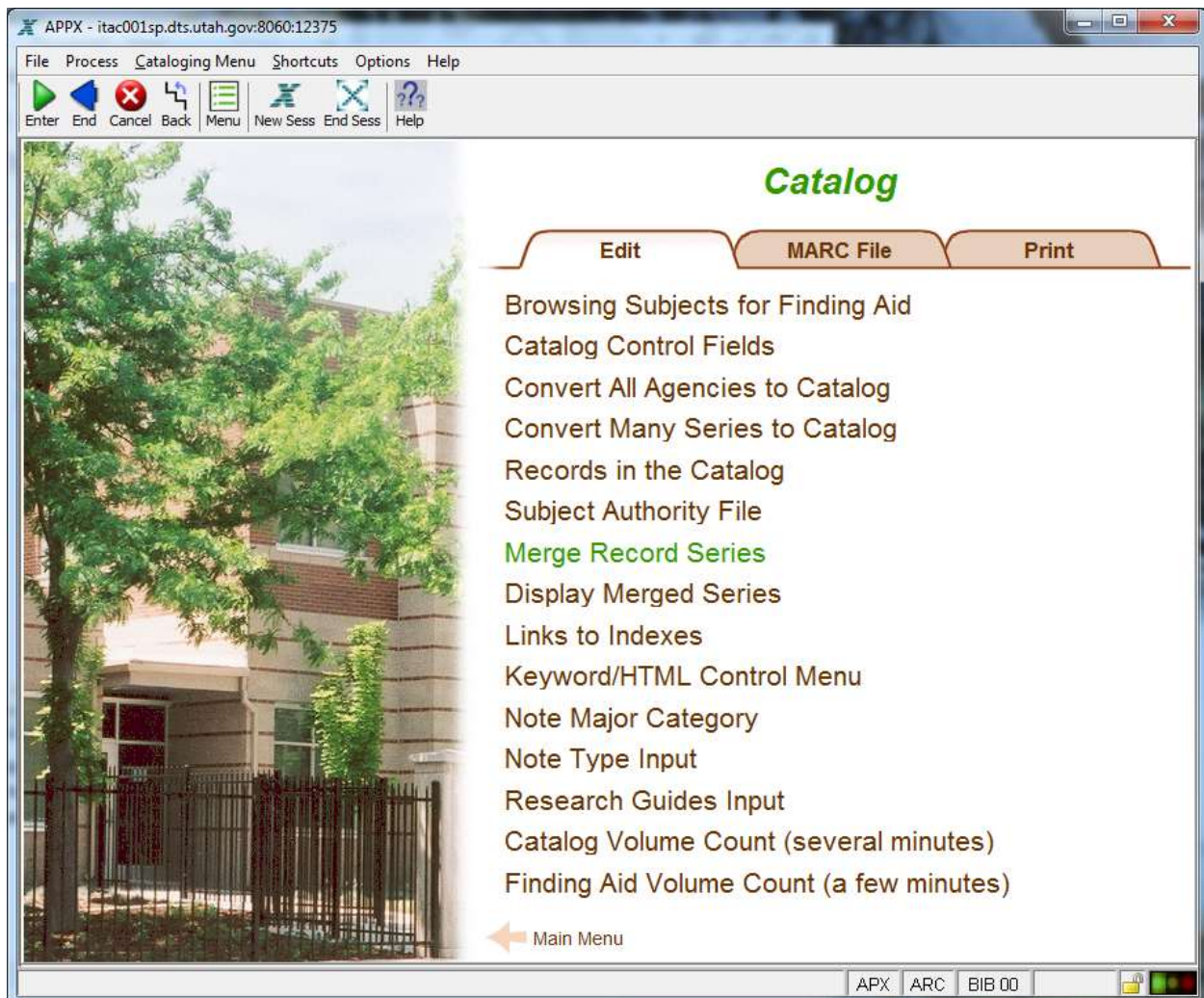
To merge a series, first run a Compare Series Report, as found on the Catalog Menu, Print Tab:



Make sure that the series you want to keep prints on the left side of the report, and the series you want removed is on the right side. Identify the metadata elements from each record that you want to remain with the new record. Go into the series that will be merged away and copy that information to the series

that is to stay. While some of this could be done through the merge process itself, it is always safer to check and make those changes by hand, and not all metadata is linked within the merge process, so some fields would not be copied across anyway.

When you are ready to merge the series, go into the Edit Tab of the Catalog Menu, and choose Merge Record Series:



Identify the two series to be merged together, and be sure that you indicate the one you want to keep first, at the top. Double-check for any typos of numbers, so you don't merge away the wrong one.

Hit Enter to bring up the title of the series associated with the numbers. Then hit Enter again to view the first set of metadata to be merged:

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File Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess

Merge Series

Series to Keep: 2 Data entry testing files Oracle ?
Series to Delete: 3 Invoices (test) more

Check if the fields from just one or both of these series should be kept:

	Series Kept	Series Deleted
Agency	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE
Title	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE
Date Range	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE or BOTH
Arrangement	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE
Volume Appraised	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE or BOTH
Appraiser	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE
Primary Location	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE
Who Added	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE
SRC Information	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE
RLIN Entered Date	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE
Modify	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE
Classif. Public	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE or BOTH
Classif. Private	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE or BOTH
Classif. Confidential	<input checked="" type="checkbox"/>	<input type="checkbox"/> ONE or BOTH

< Exit OK Cancel

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For some fields, it allows you to keep metadata from both records, and for others, you have to choose which series' metadata to keep. If the to-be-merged series was cleaned up and data copied to the to-be-kept record prior to running this process, then there are no decisions to make here, just hit Enter to go to the next screen.

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File Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess

Keep: 2 Data entry testing files Oracle ?
Delete: 3 Invoices (test) more

Description:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	One or Both
Appraisal:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	One or Both
Personal Data Elements:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	One
Related Records:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	One or Both
Location:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Both
RC List:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Both
Work Orders:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Both
Cataloged Film:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Both
Custody History:	<input type="checkbox"/>	<input type="checkbox"/>	One or Both
Access Points:	<input type="checkbox"/>	<input type="checkbox"/>	One or Both, No Duplication
Variant Titles:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	One or Both, No Duplication
Finding Aids:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	One or Both
Prior Owners:	<input type="checkbox"/>	<input type="checkbox"/>	One or Both, No Duplication


< Exit OK Cancel

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File Options Help

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 **Keep:** 2 Data entry testing files Oracle ?
Delete: 3 Invoices (test) more

Log Entries: ☒ ☐ **One or Both, No Duplication**
Retention Notes: ☐ ☐ **One**
Accessions: ☐ ☐ **Both**
Cataloging Notes: ☒ ☐ **One**

Go to Prior Entries

< Exit **OK** **Cancel**

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If you forgot to edit something of a prior screen, click Go to Prior Entries to access it. Click OK when ready to move on.

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File Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess

Keep: 2 Data entry testing files Oracle ?
Delete: 9802 Case files

Merge Format Management

Series To Keep				Merge Keep With	Series To Delete				
Delete	Formats	Work Order	Loc Rec		Delete	Formats	Work Order	Loc Rec	Will Be
<input type="checkbox"/> N	1 PAP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0	<input type="checkbox"/> N	1 PAP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	2 MCR D	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0	<input type="checkbox"/> N	2 MCR M	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	3 MCR M	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 0	<input type="checkbox"/>	3 MCR D	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	4 PAP	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> ?		<input type="checkbox"/> ?	<input type="checkbox"/> ?	
<input type="checkbox"/> ?		<input type="checkbox"/> ?	<input type="checkbox"/> ?		<input type="checkbox"/> ?		<input type="checkbox"/> ?	<input type="checkbox"/> ?	
<input type="checkbox"/> ?		<input type="checkbox"/> ?	<input type="checkbox"/> ?		<input type="checkbox"/> ?		<input type="checkbox"/> ?	<input type="checkbox"/> ?	
<input type="checkbox"/> ?		<input type="checkbox"/> ?	<input type="checkbox"/> ?		<input type="checkbox"/> ?		<input type="checkbox"/> ?	<input type="checkbox"/> ?	
<input type="checkbox"/> ?		<input type="checkbox"/> ?	<input type="checkbox"/> ?		<input type="checkbox"/> ?		<input type="checkbox"/> ?	<input type="checkbox"/> ?	
<input type="checkbox"/> ?		<input type="checkbox"/> ?	<input type="checkbox"/> ?		<input type="checkbox"/> ?		<input type="checkbox"/> ?	<input type="checkbox"/> ?	

< Exit OK Cancel

APX ARC BIB 00 Add

On the Format Management screen, the default is to not delete formats from the series being merged. However, if the series remaining already has those formats identified, there's no reason to duplicate them. On the Delete column on the right-hand side, change the N to Y

Click OK until a question comes up at the bottom asking if you really want to do this:

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File Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess

Keep: 2 Data entry testing files Oracle ?
Delete: 3 Invoices (test) more

Merge Format Management

Series To Keep				Keep	Merge With	Series To Delete				
Delete	Formats	Work Order	Loc Rec			Delete	Formats	Work Order	Loc Rec	Will Be
<input checked="" type="checkbox"/>	1 PAP	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	
<input type="checkbox"/>	2 MCR D	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	
<input type="checkbox"/>	3 MCR M	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	
<input type="checkbox"/>	4 PAP	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	

Are you really sure you want to do this? ☐

< Exit OK Cancel

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If you leave the checkbox blank, the merge will not take place. If you check it yes, then click OK, the merge will take place. Sometimes it takes a minute for the merge to run. No one can be in that series while it's running.