

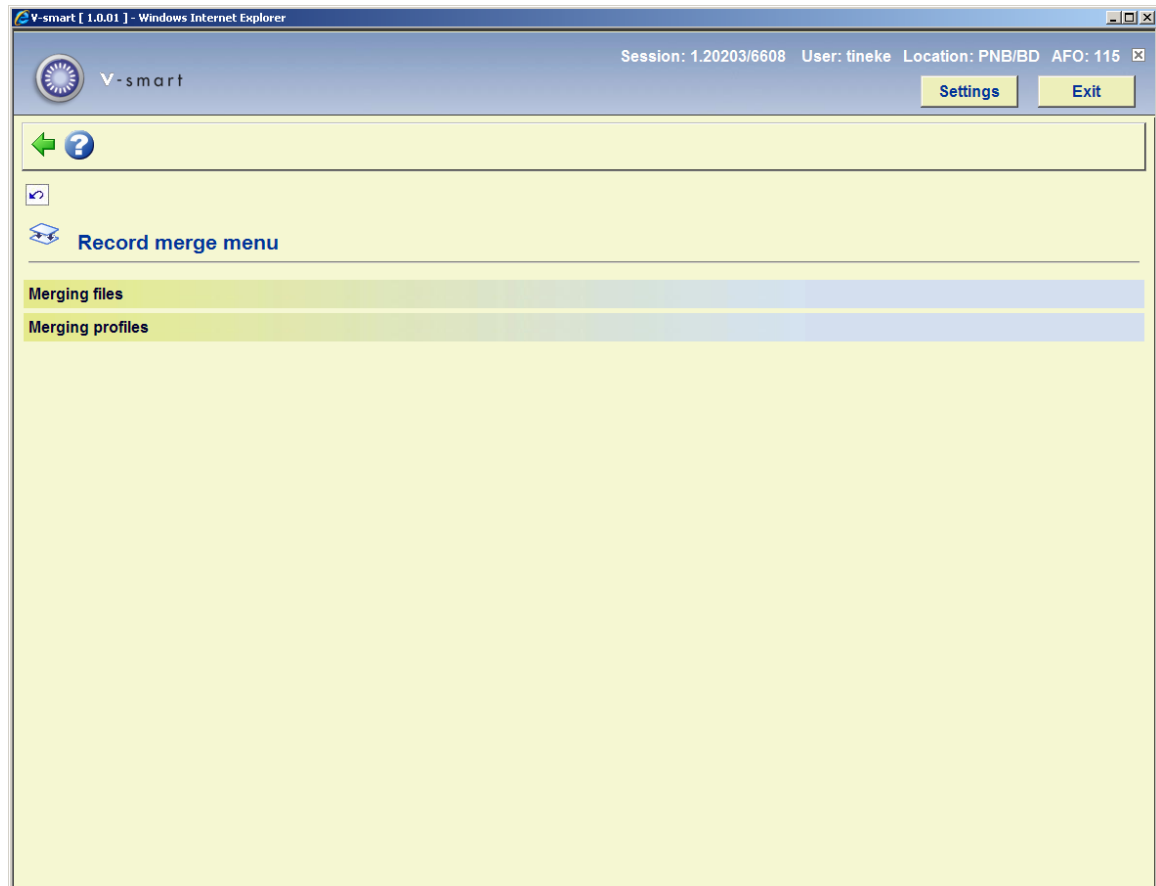
# AFO 115 – Record merging

## 115.1 Introduction

AFO 115 is used to merge records in various ways:

- based on files in AFO 114, when you have ticked the **Use for merge** box to make a matching file available when using AFO 115
- based on record selection, for instance via AFO 111

When you choose this AFO a menu is displayed:



The two options are for:

- Merging files: view files created in AFO 114

- Merging profiles: create a merging profile that can be used to merge two records.

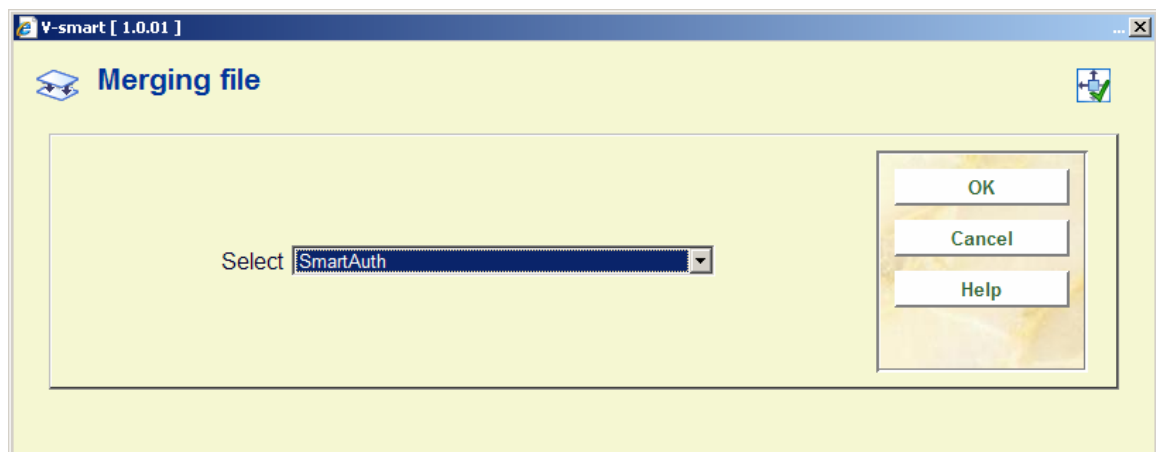
Both options are described in the following sections.

Merging records can be done in the following ways, within or outside AFO 115:

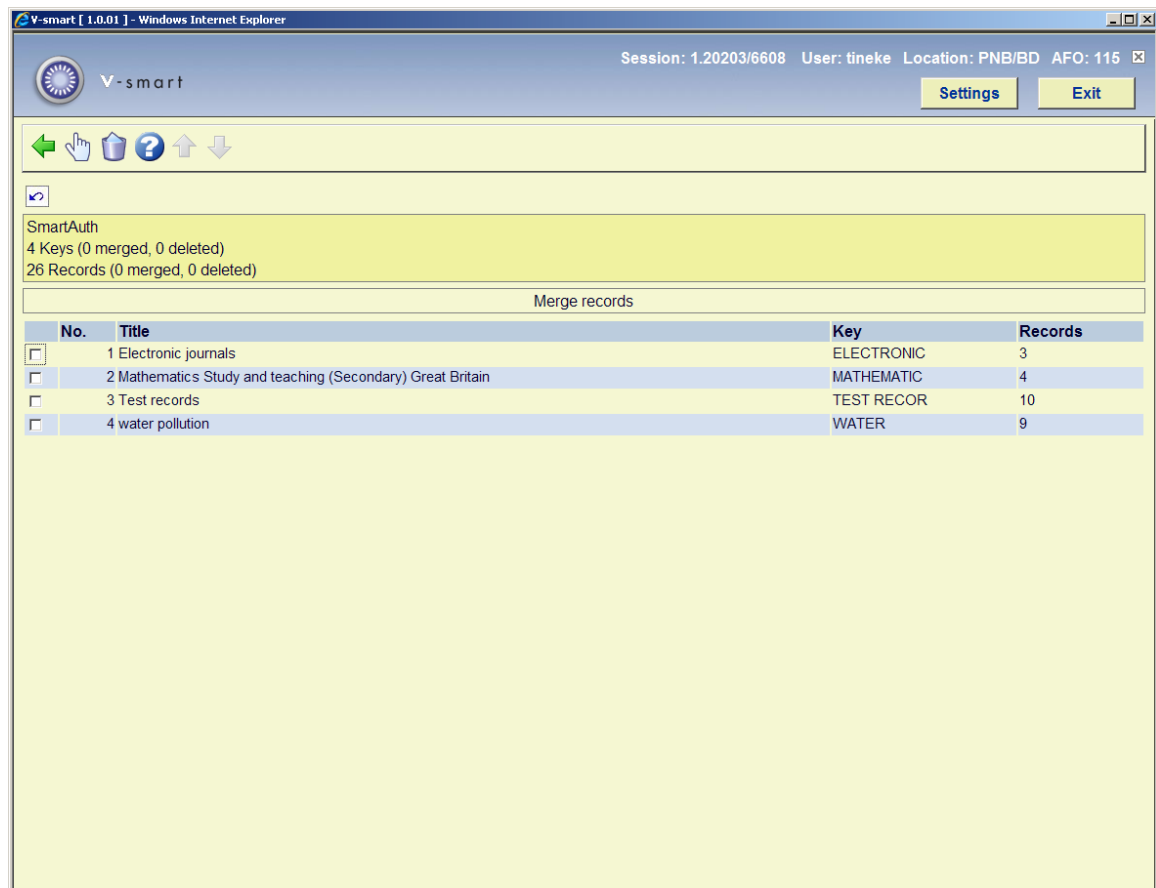
- A user retrieves two records in AFO 111 (or AFO 113) and decides to merge them.
- A user retrieves two records from a result list in AFO 111 (or AFO 113) and uses the Merge button to combine both titles.
- After creating a merge file the records are combined manually.
- An existing record is merged with an incoming new record (imported record).

## 115.2 Merging files

After choosing this option, an input form will be displayed:



After choosing a file from the dropdown list, the contents of the file are shown:



### Columns on the screen

**Title:** The titles of the matching records

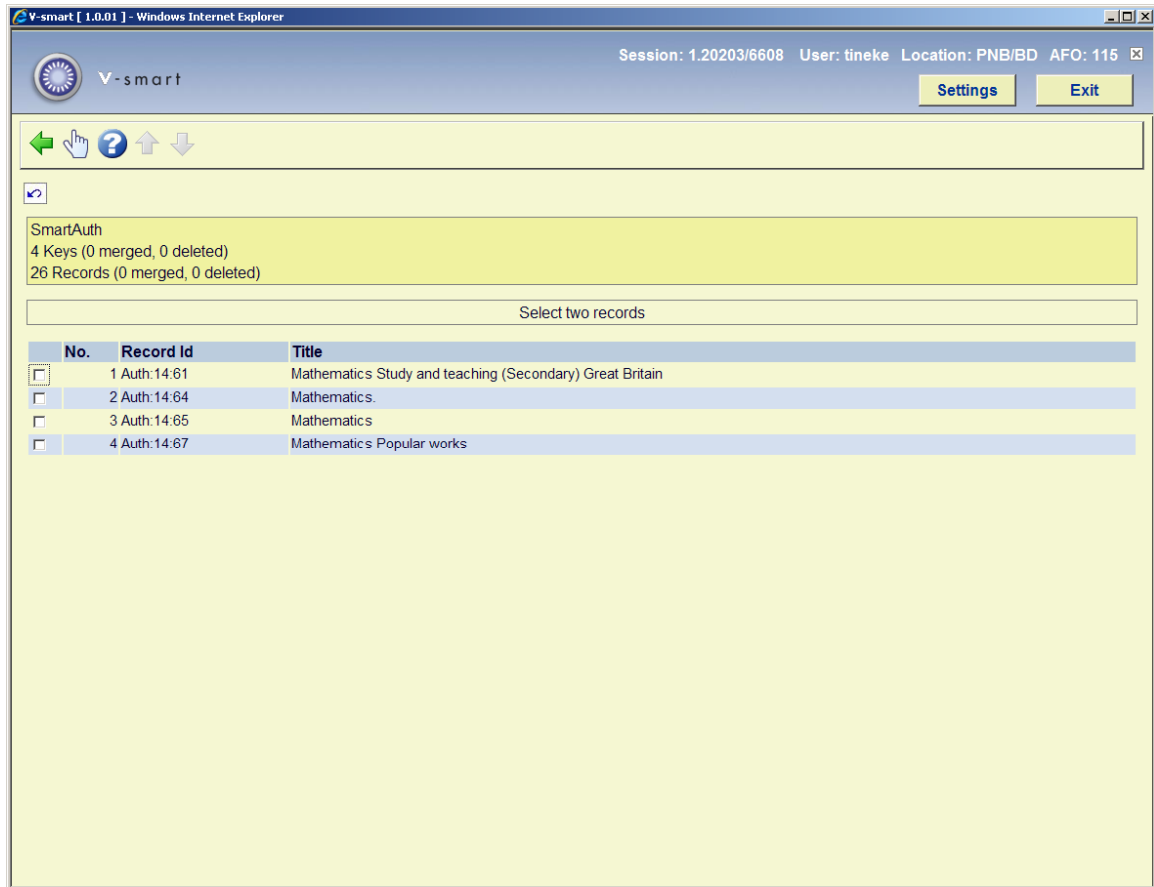
**Key:** The key created

**Records:** The number of matching records

### Options on the screen

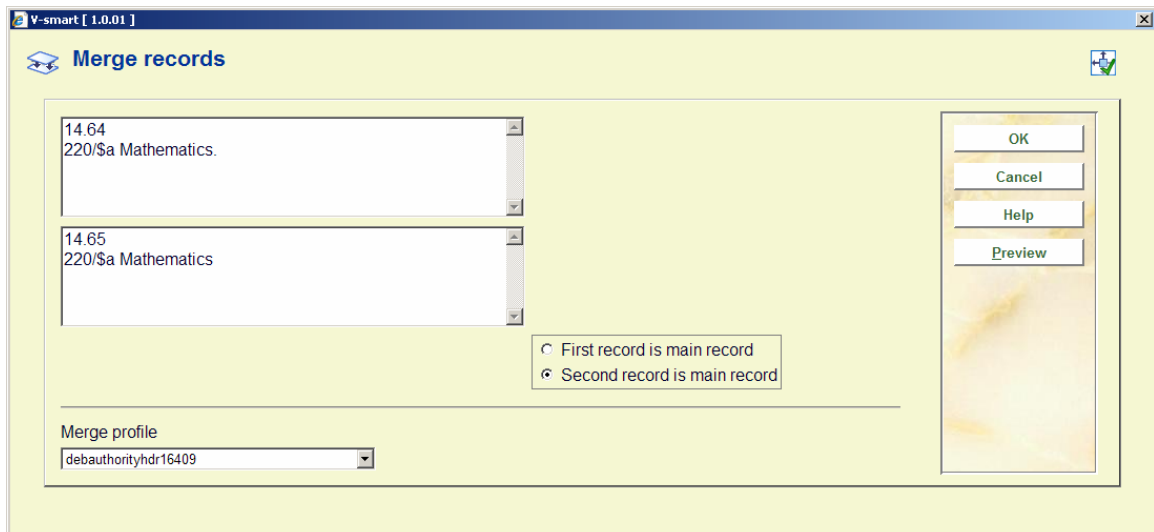
**Delete item:** Select a line and then this option to delete the line.

**View/modify item properties:** Select a line and then this option to display a list of the records:



## Options on the screen

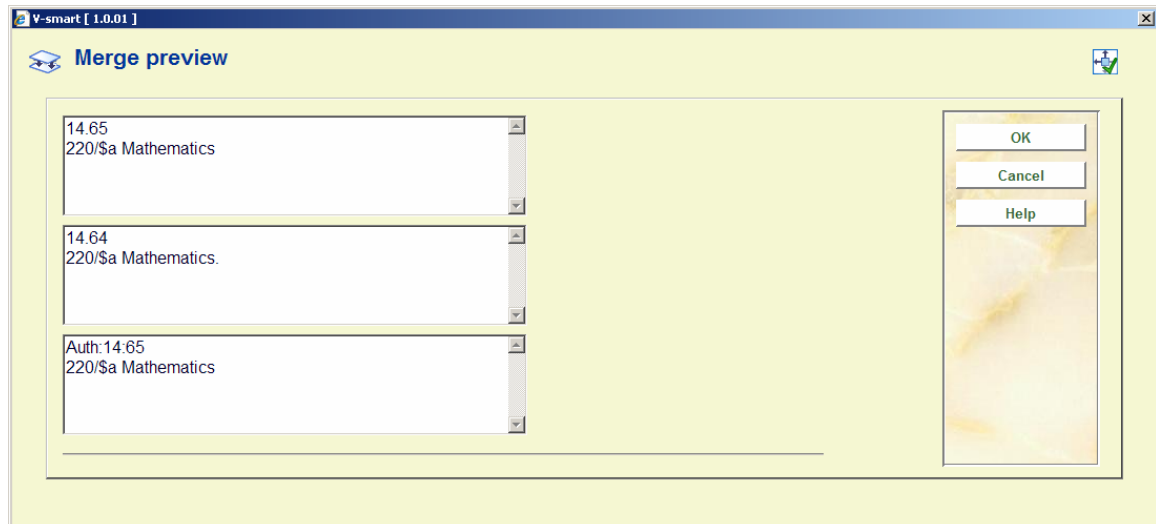
**Merge the records:** Choose two records and then this option to merge them. The record merge screen will be displayed:



Select which of the two is the **Main record**. In this example we have record 22 and 23 and database 14. Usually a higher record number is the more recent one, so we decide to make the second one the main record. The contents of record 22 will be merged into record 23 and

that one will remain. How this is done exactly is determined by the **Merge profile** you have chosen from the dropdown list. This profile is created via the other menu option of AFO 115.

Select the **Preview** option to look at what the result of the merge action will be:



The merged record preview is displayed in the bottom display pane.

#### Note

When there are more than 2 identical records, you must treat them one by one. When there are three records, you first merge one with two and then the result of that with three.

## 115.3 Merging profiles

The resultant record is called the main record, the record that is merged with it the merge record.

There are various ways to merge two records. The fields in these records are weighed one by one and can be processed in four ways:

- **Overwrite** - If the field exists in the merge record, then the equivalent field in the main record will be discarded and replaced (overwritten), by the field from the merge record.
- **Discard** - If the field exists in the merge record, then the merge record field will be discarded with the merge record. The equivalent field in the main record will be saved without changes. Discard is the default action for all fields without a specified merge profile rule.

- **Add** - If the field exists in the merge record, then the merge record field will be added to the main record, if the equivalent field does not yet exist in the main record.
- **Combine** - If the field exists in the merge record, then the merge record field will replace the equivalent field in the main record. If the field exists in the merge record without an equivalent field in the main record, then the merge record field will be added as new field to the main record. Note: when combining fields, the field contents are compared using the subfields specified in the Subfields for comparison field in the Merge profile rule window.

#### **Note**

Comparison of the fields is done based on their contents.

For some actions a comparison of field content must be made. For this you can specify which subfields must be compared. The fields for comparison are normalised first (converted to uppercase and stripped of punctuation).

Fields will not be added when a field is not repeatable or when the maximum number permitted has been reached.

When you select this menu option an overview screen with profiles already defined will be displayed:

Session: 1.20203/6608 User: tineke Location: PNB/BD AFO: 115

Settings Exit

Merging profiles

No.	Name	Application	Format	Comment
<input type="checkbox"/>	1 HDR18394	Bib	Smart	combine 300/\$a; combine 702/\$3; overwrite *
<input type="checkbox"/>	2 Liliane	Bib	Smart	alle velden behouden
<input type="checkbox"/>	3 M21ISSN	Bib	MARC21/B	<b>ISSN MERGING</b>
<input type="checkbox"/>	4 M21Overwrite	Bib	MARC21/B	Overwrite base with incoming record
<input type="checkbox"/>	5 Serials	Bib	Unimarc/B	Evelyne's test for serials module
<input type="checkbox"/>	6 SmartAuth	Auth	SmartAuthorities	merge keywords
<input type="checkbox"/>	7 SmartAuthPhil	Auth	SmartAuthorities	Overwrite all
<input type="checkbox"/>	8 SmartAuthPhil2	Auth	SmartAuthorities	Keep 200
<input type="checkbox"/>	9 SmartOverwrite	Bib	Smart	
<input type="checkbox"/>	10 Testmix	Auth	MARC21/A	
<input type="checkbox"/>	11 UMnames	Auth	Unimarc/A	
<input type="checkbox"/>	12 UnimarcAuth	Auth	Unimarc/A	
<input type="checkbox"/>	13 combine410	Bib	Unimarc/B	
<input type="checkbox"/>	14 combine900s	Bib	Smart	
<input type="checkbox"/>	15 debauthorityhdr16409	Auth	SmartAuthorities	
<input type="checkbox"/>	16 debs	Bib	Smart	debsmerge 2.1 M2 B1
<input type="checkbox"/>	17 frances	Bib	Smart	merging profile for database 2
<input type="checkbox"/>	18 keep090	Bib	MARC21/B	
<input type="checkbox"/>	19 mrc21subjects	Auth	MARC21/A	
<input type="checkbox"/>	20 phil1	Bib	Smart	test combine 700
<input type="checkbox"/>	21 phil2	Bib	Smart	Combine all
<input type="checkbox"/>	22 phil3	Bib	Smart	Overwrite all
<input type="checkbox"/>	23 track	Bib	Smart	
<input type="checkbox"/>	24 umsubjects	Auth	Unimarc/A	
<input type="checkbox"/>	25 uniphil1	Bib	Unimarc/B	Add all exc. 200

## Options on the screen

**New item:** Select this option to add a new profile. See section 115.3.1.

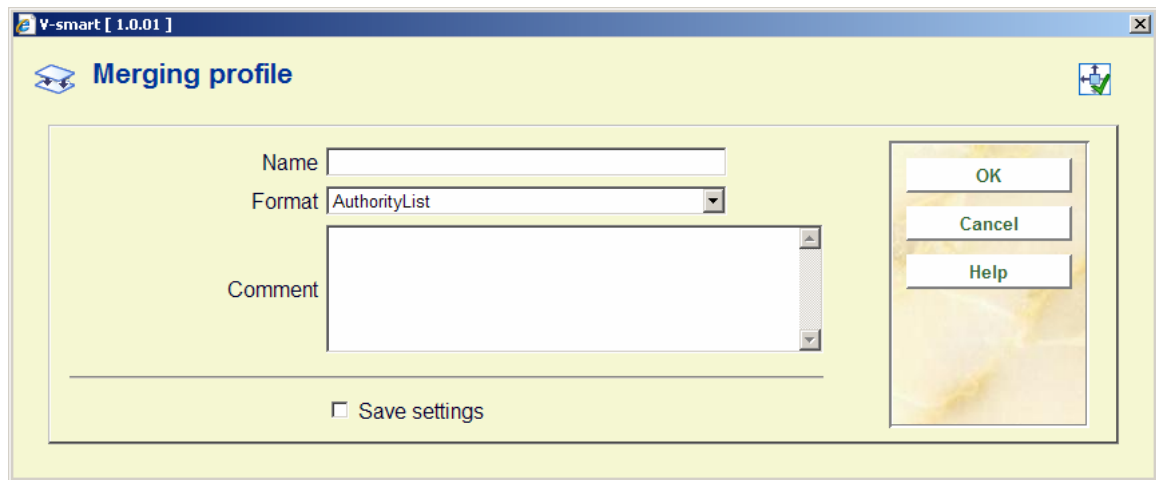
**View/modify item rules:** Select a line and then this option to modify the rules. See section 115.3.1.

**Delete item:** Select a line and then this option to delete it.

**Properties:** Select a line and then this option to add, delete or modify the comments for this profile.

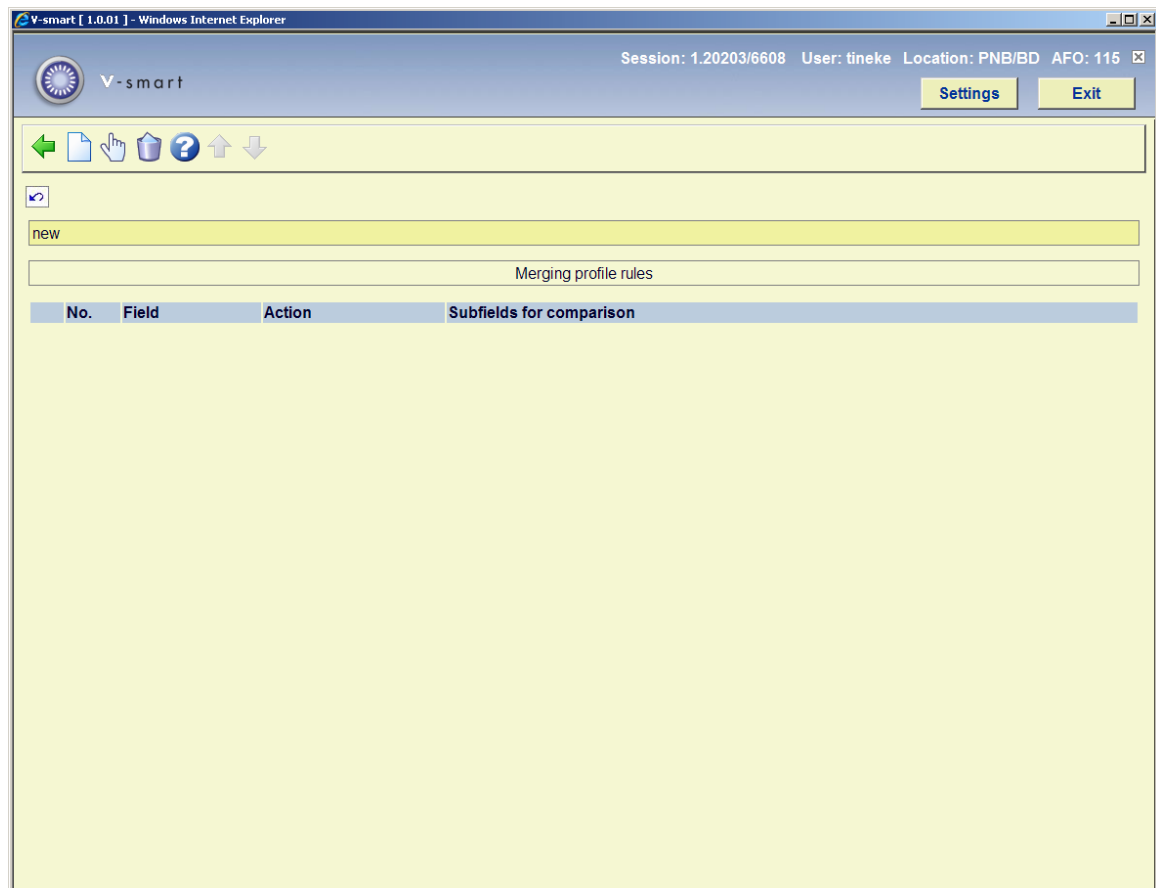
## 115.3.1 New profile

**New item:** Select this option to add a new profile. An input form is displayed:



Give the profile a name, choose the correct format from the dropdown list and optionally add comments.

After filling this, you must select the new profile from the overview list to start adding rules to it:



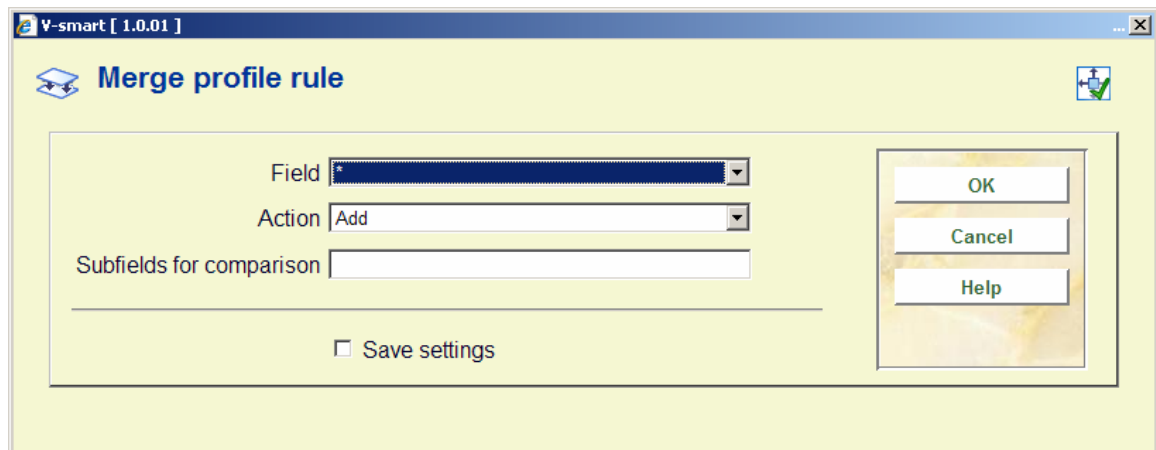
**Options on the screen**



**View/modify item properties:** Select a rule and then this option to modify its properties. See section 115.3.2.

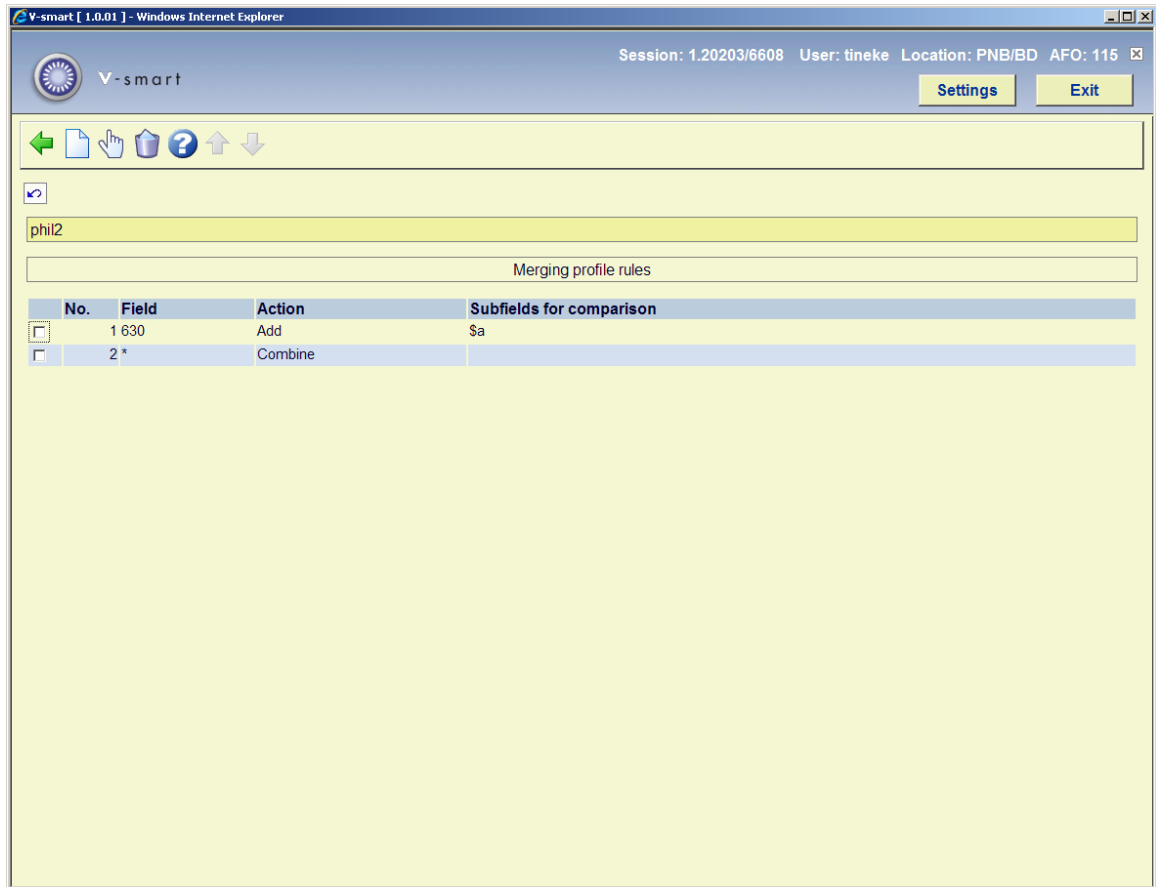
**Delete item:** Select a rule and then this option to delete it.

**New item:** Select this option to add a new rule. An input form will be displayed:



- Select a field number from the dropdown list. An asterisk means the rule applies to all fields.
- Then choose an action (see the introduction to section 115.3 for an explanation of action types).
- If you have specified a field number, you must specify the subfields that need to be compared.

### Example



In this example you see a simple profile. All fields (denoted by the \*) except 630 (listed separately with its own rule) will be added. So all fields of the merge record except 630 will overwrite the corresponding fields in the main record. Field 630 will be added to the main record.

For ease of creating a profile you determine the common factor and denote this with an asterisk. Then add the fields for which you make an exception, because they must be treated differently.

- **Document control - Change History**

<b>Version</b>	<b>Date</b>	<b>Change description</b>	<b>Author</b>
<b>1.0</b>	<b>April 2008</b>	<b>creation</b>	