

Standards for Merging Bibliographic Records on LANCE: a draft updated 3/1/01

Whenever a cataloging center chooses to merge bibliographic records, it should do so without degrading bibliographic access. Therefore, when merging bibliographic records, catalogers must take care to preserve at least the following fields from both records:

- All indexed fields (24Xs, 4XXs, 6XXs, 7XXs)
 - All local data (590s)
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1. OCLC records having the same OCLC number (field 001) may be merged without consulting the other cataloging center.
2. OCLC records having different OCLC numbers (field 001) which have since merged on OCLC may be merged in LANCE without consulting the other cataloging center.
3. An OCLC record may be merged with a non-OCLC record (including approval vendor records and brief records) without notifying the other cataloging center if and only if all of the following information, when present in the non-OCLC record, matches the corresponding fields in the OCLC record:
 - Standard numbers
 - Author
 - Title
 - Publisher
 - Publication date (Printing date may differ)
 - Pagination

In all other cases, the other cataloging center should be contacted before merging an OCLC with a non-OCLC record.

4. When comparing multiple monograph records, choose as the record to be retained the one which exhibits the following characteristics in this order of preference:
 1. The national level record (e.g., DLC, NLM, NSD)
 2. The record with DLC|cDLC, DLC/XXX|cDLC, or DXXX/DLC|cDLC in the 040
 3. The record with pcc, lccopcat, core, or lcnccp [obs.] in the 042
 4. The record with DLC|cXXX in the 040
 5. The AACR2 record (Desc: a)
 6. The record which can most easily be modified to result in the most complete and accurate record.

Note: this rule is virtually identical to MERLIN's rule 3.1.1.6, from which it was quite shamelessly stolen.
5. When transferring another library's item records from a bibliographic record to which that library also has a checkin record(s) attached,
 1. When transferring all item records, also transfer the checkin record(s)
 2. When transferring only some item records, notify the other library so that checkin records can be updated.