

Overlaying (Merging) an Alma Record from via Search Resources

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Last revised 2023-07-21

Reformatted for accessibility

This procedure describes how to overlay (merge) an existing Alma record with a record found by searching WorldCat, Library of Congress, or the Catalog of U.S. Government Publications (CGP) using Alma's Search Resources feature. Alma offers two functions that offer similar behavior: Copy & Merge and Copy & Overlay. Always use the Copy & Merge function to overlay an existing record.

Process

1. Open the existing record in the Metadata Editor
2. Click **Search & Browse > Search Resources**
3. Search for a new record.
4. In the search results, find the record you want to overlay/merge the existing record with.
5. If you want to see what the record will look like after it is merged, select **Merge Preview**.
6. Select **Copy & Merge**. The existing Alma record will be overlaid, but fields containing local data will be retained according to the table below.

Copy & Merge vs. Copy & Overlay

Copy & Merge is the preferred function in all situations. Copy & Merge brings in the external record in its entirety, and retains only fields from the existing Alma record that contain local data. See below for a list of fields retained from the original Alma record.

Copy & Overlay completely replaces the existing Alma record, including local fields and previous system identifiers that should be retained. Use of the Copy & Overlay function is only acceptable when the existing Alma record contains no local data (for example, when overlaying a brief record created for ordering purposes). However, there is never a reason to prefer Copy & Overlay, as Copy & Merge works in all situations.

Fields retained in Copy & Merge

When you use Copy & Merge, the incoming record is treated as the preferred record. The following fields from the target Alma record will be retained and added to the incoming record:

Field Tag	Condition for retention
035	If subfield a contains "Aleph"
336/337/338	If not present in incoming record
5XX	If subfield 5 contains "MnU", "MnDuU", "MnMoU", "MnU-L", or "MnCrUm"
700/710/711	If subfield 5 contains "MnU", "MnDuU", "MnMoU", "MnU-L", or "MnCrUm"
773	Always retained
9XX (except 997, 998)	Always retained

Version History

Written by Stacie Traill, August 13, 2019

Approved by CMG, October 11, 2019

Revised by Jason Roy, July 2025: Grackle check