Linking brief records in the IZ to NZ records

This document is for items with records that:
Exist in the IZ
Exist in the NZ
Are not linked to each other

Brief records that did not have OCLC numbers at the time of migration will exist only in the IZ. These records will not appear in the NZ or be linked to any existing NZ record. This document outlines the steps to take when inventory in the IZ needs to be linked to a record that exists in the NZ.

Here is an example of an order record that appears in the IZ. We can tell that this record is not linked to the NZ because the icon of the person with the blue head does not appear next to the title.

Note that there is not an OCLC number in any 035 in this record.
We can check to see if a record exists in the NZ by clicking the Network tab on the Repository Search page. Even if no results appear when you click on this tab, be sure to search the NZ thoroughly using various methods (OCLC number, title, etc.) before importing a record from Connexion.

In our case, we see that a matching record does exist for our piece in the NZ.
Since a good record exists in the NZ, we want to link our holdings to that record rather than importing another record from Connexion. We can view our holdings record by selecting “Holdings” in the IZ.

The screen will look like this. From here, we can see the Holdings ID number and the number of items attached to this record, as well as some other details. From this screen, we will select Actions>View.
Now we can see the holdings record in MARC format. Also on this screen is a button that says “Relink.”

Clicking this button will open the MD Editor and take us to a split screen that looks like this. On the left we see our MFHD, and on the right we see a screen where we can select the Zone we want to search and enter our search information.
Select “Network” and enter your search.

The NZ record appears. Notice the options to View and Relink.
Select “Relink.” The MFHD will appear.

Select File>Save, or use hotkey Ctrl+S. Notice that the call number is automatically added upon save.
From here, we can view the inventory using the clipboard button or Ctrl+I. Complete the MFHD and item records as appropriate, then save and release.

Now when we search for our title, we see that there is a bib record with holdings linked to the NZ as well as a second bib record (our old order record) with no holdings attached.
When we search in the NZ, we can see that our institution’s holdings are now linked to the NZ record.

From here, you can suppress (Tools> Set Management Tags>Suppress from Discovery) or delete the old IZ record, as appropriate.
Remember: If there is an order attached to the old record, be sure to follow the correct procedures for relinking items with orders attached. We can see that the old record has been suppressed because the icon of the eye with the red line through it appears next to that record.

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