SNAC School 4.0

Module 5: Merge

Updated February 2022
Merge allows SNAC editors to merge together multiple, duplicative records for the same entity by searching, selecting, and automatically combining all the elements from all the records designated for the merge action.

Here are a number of duplicates, and/or near duplicates, for Gloria Steinem. These varying forms result from the ingest of varying name entries from finding aids and other resources during SNAC’s research and development phase.
The SNAC **Browse** search allows you to see duplicates and/or near duplicates positioned close to one another in alphabetical order. We are going to be looking at the example of the musician **Buffy Sainte-Marie**.
Step 1:

Locate the “main record”, or the record into which you will merge other records. This will take time as editors must make all efforts to identify the correct record to retain, and which ones to remove during the merge.

For this example Buffy Sainte-Marie’s “main record” is the only one that will be in correct order under browse. In many other instances they might be next to each other.
It’s important to know that during SNAC Research and Development, ingest, data resulted from a large number of finding aids, and in some cases, may have been uncontrolled. You may find one entity’s name presented in a number of configurations.

A good example is a person name in “First name Last name” configuration. Make sure to search “Buffy Sainte-Marie” as well as “Sainte-Marie, Buffy.” Be aware sometimes the names might even be spelled incorrectly (“Buffy St. Marie” or “Buffy Sainte Marie”).
In some cases it’s a good idea to do an advanced search to make sure you find all the variations of a name. It’s a good way to also find honorifics and titles.
If a heading appears vague, follow the links to Archival Collections, Related Resources and Related Names in SNAC to confirm a match. You may have to scan linked archival finding aids and CPF links to finalize your merge decision.

Here, we know it's the correct Buffy Sainte-Marie by looking at the collection of Mary Ellen Hillaire.

Mary Ellen Hillaire Papers, 1950-1983

Overview of the Collection

Creator  Hillaire, Mary Ellen
Title     Mary Ellen Hillaire Papers
Dates     1950-1983 (inclusive)
          1970-1982 (bulk)
Quantity  9.038 cubic feet and 56.92 linear feet : 2142 audiotapes, 44 audiotapes, 64 videos, various formats, and 148 artifacts.
Holding Repository  The Evergreen State College Archives and Special Collections

- Silverman, Binswanger (speaker)
- Smith, Shirley (speaker)
- St. Marie, Buffy (speaker)
- Stewart, Damon H. (speaker)
- Stewart, Dr. (speaker)
Step 2: Designate the records to merge by checking the box to the left of the names.

Note: the records don’t have to be on the same “page” to select.
Once you’ve decided on the records to merge, click the **Auto Merge** button at the top right.

Please note ... you don’t have to merge them all at once. You can choose just two or three at a time as you pare down the list of duplicates.
Step 3: Once the merge is done, SNAC will create a brand new entity with a new permalink and SNAC ID

Start editing!

Please note that ALL of the headings from ALL of the merged records are now in the new main record. Editors should remember to edit away, or Trash any duplicate Name Entries from the Core Data tab of the new record. Remember to check other Tabs, History, Demographics, etc., for other duplicate entries

When done, Send for Review as usual.
When editing, make sure to parse and edit the names and variants; sent preference.

Trash incorrect name forms.
Also remember that any Exist Date and Place name data from all the merged records are now combined into one.

Editors should remember to “edit away”, or “Trash” any duplicate entries from all tabs of the record: History, Demographic, etc. In this example of dates you can see an incomplete date that needs to be trashed.
Note also that when you merge, if there are duplicate resources or relations they will be repeated. If there is time, go through and trash those duplicates.
What happens to the old SNAC IDs after the merge is complete?

When two or more records are merged, their IDs are kept in the system and are given a sort of "forwarding address" to the new merged record. The old record IDs are kept so we can point users to the new records, and so we can track where merged constellations came from. If you click a bookmark to an old ID, it will look up the new one and send you there.

When this occurs, SNAC provides a notice like this one ...

Notice: Please update your bookmarks. The Constellation you requested has been merged into a new identifier. http://n2t.net/ark:/99166/w6h0157t, displayed below.

United States. Department of State  Variant names
Things to be aware of when merging:

- If another person has a record checked out on their dashboard you will NOT be able to merge. You will get an error message. Go back and see what might be checked out (even on YOUR dashboard) and message the editor to release the record. (This is another good reason to merge a few records at a time)

- When in doubt, leave it out! If you’re not 100% sure if the constellations should be merged, err on the side of caution

- During the initial ingest there might have been honorifics ingested (Mrs., Lord, etc.). Do a search or if you think the person might have an honorific attached, do a browse there.