Transfer data for merged serial titles

Last updated: Fri, 23 Jul 2021 17:40:43 GMT

Discover how to transfer serials data from a serial title that has been merged to the new serial title in WorldShare Acquisitions.

You can transfer serials data (e.g., most recent issue, publication pattern, receiving status, etc.) from a merged serial title to a new serial title. Transferring the data allows you to keep receiving the new record using information from the merged record.

Transfer data from a merged serial to a new record

1. On the left navigation, click Discover Items and search for the serial title.
   Note: If you select the OCLC Number index and search by the merged record’s OCLC number, the new record will be returned in the search results.

2. From the results list, click the serial title to view the Issues screen. At the top of the Issues screen, you will see the following message: This serial record may have replaced another record that contained important receiving and/or prediction data. To transfer the data, click the Transfer Data button.

3. Click Transfer Data. The Transfer Serials Data dialog opens. If multiple serials records have been merged into the new record, you will see a drop-down list in the OCLC Number section. Select the OCLC number of the merged records from which you want to transfer data. You can repeat this process for additional OCLC numbers if needed.

4. In the Data to Transfer section, select how you would like to transfer the merged data to the new record.
   a. Most recent issue
      • If the new record has no issues, you can transfer the most recent issue from the merged record to the new record.
      • If the new record has no issues, you must transfer the most recent issue before you can transfer the prediction pattern or receiving status.
   b. Prediction pattern
      • If the new record has no prediction pattern, you can transfer the prediction pattern from the merged record to the new record.
      • The new record must already have at least one issue, or you must select to transfer the most recent issue in order to transfer the pattern. If there are no issues on the new record, you must first select to transfer the most recent issue before the prediction pattern option is enabled.
   c. Receiving status
      • This data determines whether issues of this title appear on your Missing Issues screen.
      • The new record must already have at least one issue, or you must select to transfer the most recent issue in order to transfer the receiving status.
        • If the Receipt Status of the most recent issue is Received, the issue can be transferred from the old record to the new record, but the Receipt Status of the issue itself will be set to unreceived.
        • If the Receipt Status of the most recent issue is Received, the Receipt Status will not transfer from the old record to the new record.
      • If the old record contains any issues with a Receipt Status of Not Received, they will remain on the
Missing Issues screen until you stop claiming them.

5. Click **Transfer Data** to transfer the data to the new serial record. Any changes you want to make after the data is transferred must be completed manually.