Transfer data for merged serial titles

Last updated: Tue, 09 Aug 2022 14:39:44 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.
      - You must transfer the most recent issue before you can transfer the prediction pattern or receiving status.
      - The Receipt Status of the most recent issue determines if you can move it to the new record:
        - If the Receipt Status of the most recent issue is Not Received, you will have the option to transfer it to the new record with the same Not Received status.
        - If the Receipt Status of the most recent issue is Received, you will not have the option to transfer the issue to the new record.
   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 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 to transfer the receiving status.
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.