Designing and Using Normalization Rules

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a ProQuest Company

Session Objectives

- Session Description: Normalization rules are created and used to modify bibliographic or holdings metadata either individually or using batch processes

- By the end of this session you will know, understand and/or be able to:

  - Create normalization rules

  - Test normalization rules to ensure correct behaviour

  - Construct normalization processes

  - Run a job against a set of records

Agenda

1 Creating and Testing Normalization Rules

2 Creating Normalization Processes

3 Creating Sets and Running Jobs

4 Next Steps, Support Resources and Feedback

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Creating and Testing Normalization Rules

Normalization Rules

Written in a specific syntax, using the **drools** language, allowing cataloguing operators to create rules that enable Alma to

- Perform a batch update to sets of records by running a job,
- Relate a normalization process to an import profile
- Apply a normalization rule or process to an External Search resource

Operators may preview the outcome of applying a normalization rule to a bibliographic record

Normalization Rules

Alma operators may create rules to

- add fields and subfields
- remove fields and subfields
- modify text
- copy fields
- combine
- replace field tags
- change indicators

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Getting Help

Working with Normalization Rules

◀ Authority Priorities | Working with Merge Rules ▶

PERMISSIONS: To work with normalization rules, you must have the following role:

- Catalog Administrator
- Catalog Manager
- Cataloger

Normalization rules provide the building blocks for making enhancements to MARC 21 records. These enhancements can be made to individual records in the MD Editor (**Edit > Enhance the Record**) or to a group of records using sets.

In order to process record enhancements to an individual record, use the Enhance Record option (refer to the section MD Editor Menu and Toolbar Options and Enhance the Record) or **Apply Changes** to an individual record when you use the Preview normalization rule capability (see the procedure To preview the outcome of a rule file).

In order to process record enhancements to a set of records, you need to create a process using the MARC Drool Normalization process (see Working with Normalization Processes) and specify the normalization rule that you create with the MD Editor (refer to the procedure To create a new normalization rule file). Once you have created the process, you can, subsequently, run a job using that process (see Running Manual Jobs on Defined Sets).

Normalization rules are created by following a specific programming syntax and using the editing window provided in the MD Editor under the Rules tab.

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Creating a Normalization Rule Copying Syntax

Creating a Normalization Rule From Scratch

Testing Normalization Rules – Five Steps

1. Using the Repository Search, locate and open a record on which to test the rule in the Metadata Editor.

2. Switch to split editor mode with the record in the left pane.

3. Click on the blank right pane of the split editor.

4. Go to the Rules tab, select the normalization rule you want to test and click edit to open the rule in right pane.

5. Test the rule by clicking on the **Preview** button.
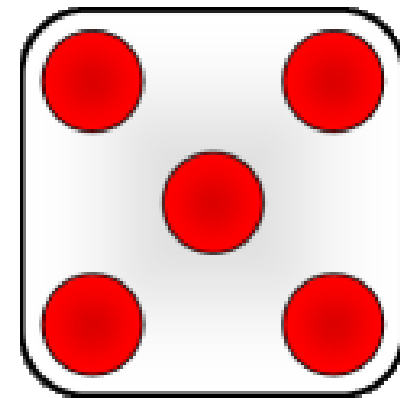
Creating Normalization Processes

Normalization Processes

- Normalization rules, created in the Metadata Editor, may be used in processes that focuses on global data change
- Normalization rule processes, configured by a Catalog Administrator, may include one or more normalization rules

Normalization Processes

Normalization Processes – Adding Tasks

Normalization Processes – Adding Tasks

Normalization Processes – Task Parameters

Normalization Processes

Creating Sets and Running Jobs Using Normalization Processes

Running Normalization Processes

Normalization processes may be run…
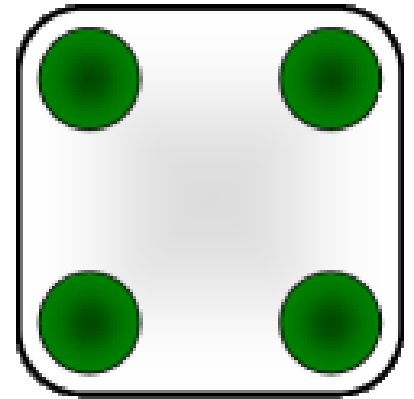
1. Via **Enhance the record** option in Metadata editor
2. For a set of records assembled via **Manage Sets** function
3. When adding a file of records via **Import** function
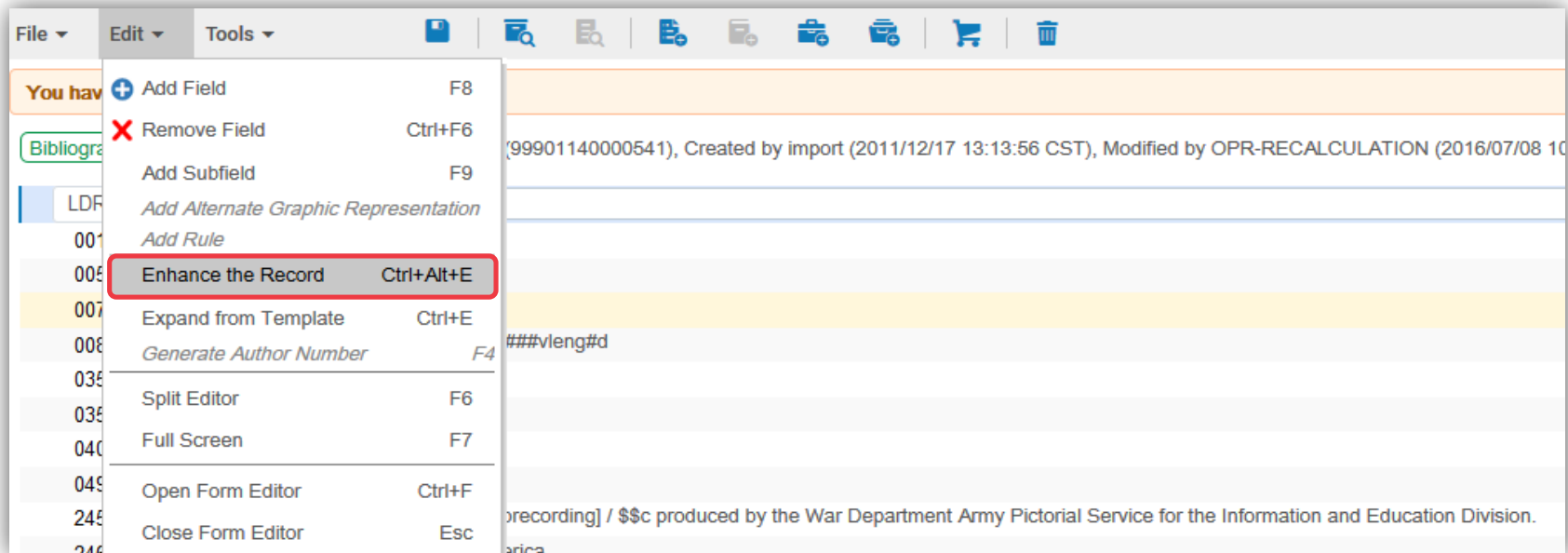4. While importing individual records via **External Search**

Enhance the Record

Bibliographic		Working on - War comes to America (99901140000541), Created by import (2011/12/17 13:13:56 CST), Modified by OPR-RECALCULATION (2016/07/08 1

LDR			01402ngm#a2200301Ia#4500
001			99901140000541
005			20160708100405.0
007			vf-bbaho-
008			870119s1986####nyu066#e##########vleng#d
035			$$a ocm15087874
035			$$a (TrN)43369-train20072_c2db
040			$$a VFC $$c VFC $$d SHC
049			$$a SHCl
245	0	0	$$a War comes to America $$h [videorecording] / $$c produced by the War Department Army Pictorial Service for the Information and Education Division.
246	3	3	$$a Frank Capra's War comes to America.
260			$$a New York : $$b Goodtimes Home Video Corp., $$c 1986.
300			$$a 1 videocassette (VHS) (66 min.) : $$b sd., b& $$c 1/2 in.
490	0		$$a Why we fight
500			$$a VGT-2005
500			$$a "Special Service Division information film #7."
500			$$a Originally produced as a motion picture in 1945 under the direction of Frank Capra.
500			$$a This videocassette produced as part of Goodtimes Movie Classics' World War II, Collector's edition series.

Enhance the Record

Enhance the Record

Enhance the Record

Enhance the Record

Choose
Normalization
Type:

remove 245 $$h [videorecording]

Ok   Cancel

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Enhance the Record

Bibliographic		Working on - War comes to America (99901140000541), Created by import (2011/12/17 13:13:56 CST), Modified by connie.braun (201
LDR		01384ngm#a2200301Ia#4500
001		99901140000541
005		20180413124154.0
007		vf-bbaho-
008		870119s1986####nyu066#e##########vleng#d
035		$$a ocm15087874
035		$$a (TrN)43369-train20072_c2db
040		$$a VFC $$c VFC $$d SHC
049		$$a SHCI
245 0 0		$$a War comes to America / $$c produced by the War Department Army Pictorial Service for the Information and Education Division.
246 3 3		$$a Frank Capra's War comes to America.
260		$$a New York : $$b Goodtimes Home Video Corp., $$c 1986.
300		$$a 1 videocassette (VHS) (66 min.) : $$b sd., b& $$c 1/2 in.
490 0		$$a Why we fight
500		$$a VGT-2005
500		$$a "Special Service Division information film #7."
500		$$a Originally produced as a motion picture in 1945 under the direction of Frank Capra.
500		$$a This videocassette produced as part of Goodtimes Movie Classics' World War II, Collector's edition series.

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Normalization Job for a Set
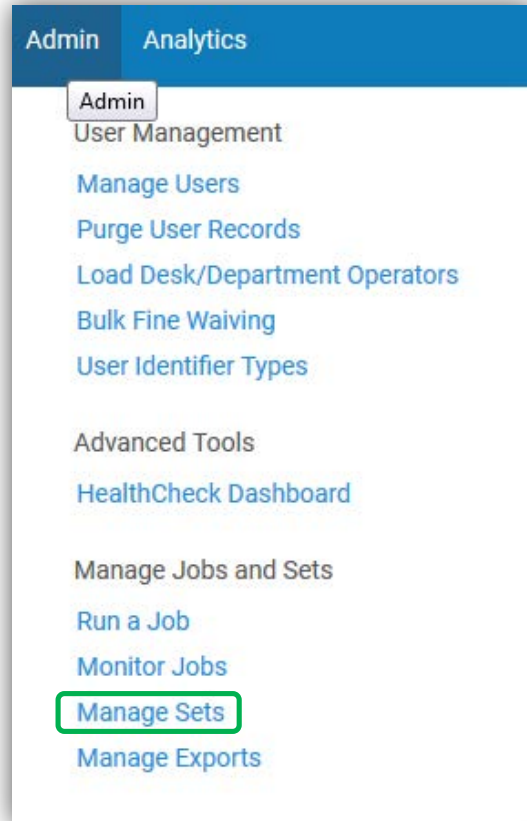
- Each process may be run on a set of records
- Assumes processes have been created
- Choose "Run Process" from within Resource Configuration menu

Normalization During Import

Processes we configure may also be used with an import profile to *Correct the data* of records in the file

Normalization During Import

```
=LDR  01238cam a22003258i 4500
=001  19726588
=005  20170628150859.0
=008  170619s2017\\\\ctu\\\\\\\\\\\000\0\eng\\
=906  \\$a7$bcbc$corignew$d1$eecip$f20$gy-gencatlg
=925  0\$aacquire$b1 shelf copy$xpolicy default
=955  \\$brl12 2017-06-19$irl12 2017-06-19 to Dewey$wxm08 2017-06-23 (telework)
=010  \\$a  2017012830
=020  \\$a9781493027552 (hardcover : alk. paper)
=020  \\$z9781493027569 (ebook)
=040  \\$aDLC$beng$erda$cDLC
=042  \\$apcc
=050  00$aTR729.D6$bD692 2017
=082  00$a779/.32977$223
=100  1\$aDratfield, Jim,$eauthor.
=245  10$aDay of the dachshund /$cJim Dratfield.
=263  \\$a1710
=264  \1$aGuilford, Connecticut :$bLyons Press,$c[2017]
=300  \\$apages cm
=336  \\$atext$btxt$2rdacontent
=337  \\$aunmediated$bn$2rdamedia
=338  \\$avolume$bnc$2rdacarrier
=650  \0$aPhotography of dogs.
=650  \0$aDachshunds$vPictorial works.
=776  08$iOnline version:$aDratfield, Jim, author.$tDay of the dachshund$dGuilford, Connecticut : Lyons Press, [2017]$z9781493027569$w(DLC) 2017030604
=963  \\$aCaroline McManus; phone: 203-4584557; email: cmcmanus@rowman.com; bc: mmcclellan@rowman.com
```

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Normalization During Import

	LDR		01238cam#a22003258i#4500
	001		99210541500521
	005		20170628150859.0
	008		170619s2017####ctu############000#0#eng##
	010		$$a ##2017012830
	020		$$a 9781493027552 (hardcover : alk. paper)
	020		$$z 9781493027569 (ebook)
	040		$$a DLC $$b eng $$e rda $$c DLC
	042		$$a pcc
	050 0	0	$$a TR729.D6 $$b D692 2017
	082 0	0	$$a 779/.32977 $$2 23
👓	100 1		$$a Dratfield, Jim, $$e author.
	245 1	0	$$a Day of the dachshund / $$c Jim Dratfield.
	263		$$a 1710
	264	1	$$a Guilford, Connecticut : $$b Lyons Press, $$c [2017]
	300		$$a pages cm
	336		$$a text $$b txt $$2 rdacontent
	337		$$a unmediated $$b n $$2 rdamedia
	338		$$a volume $$b nc $$2 rdacarrier
👓	650	0	$$a Photography of dogs.
👓	650	0	$$a Dachshunds $$v Pictorial works.
	776 0	8	$$i Online version: $$a Dratfield, Jim, author. $$t Day of the dachshund $$d Guilford, Connecticut : Lyons Press, [2017] $$z 9781493027569 $$w (DLC) 2017030604

Import via External Search

Copied from WorldCat

```
rule "Add data field 900 with subfield a = Copied from WorldCat if it doesnt exist"
when
( not exists "900.a.Copied from WorldCat" )
then
addField "900.a.Copied from WorldCat"
end
```

BIB_MMS

Business Entity	Bibliographic title		Type	Marc 21 Bib normalization
Name	Add 900 copied from worldcat			

General Information	Task List	Task Parameters

MARC DROOL NORMALIZATION

Drools File Key * | **Copied from WorldCat**

Import via External Search

Import via External Search

Import via External Search

Search External Resource Setup

	Resource Name
1	British Library Public Catalog
2	COPAC
3	DNB - Deutsche Nationalbibliothek
4	Libraries Australia
5	Library of Congress (United States Library of Congress (LOC))
6	WorldCat

1 - 6 of 6   Resource Name ▾   🔍   ⊕ Add External Resource

Import via External Search

Search External Resource Setup

WorldCat

Resource ID	XXX02510	**Creator**	OCLC / FirstSearch
Publisher	OCLC	**Resource Type**	Index
Free/By Subscription	By Subscription	**Description**	OCLC WorldCat database is the OCLC online catalo
Search Hints	-	**URL Site**	http://www.oclc.org/support/documentation/firstse

Institution Details

Resource Name	WorldCat	Normalization Process	🔍 Look-up or select
Merge Method	Overlay all fields but local ▼	Credentials	Add 245 sf h [Video]
			Add 900 copied from worldcat

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Import via External Search

Import via External Search

Bibliographic			Working on - Unlikely diplomats : (99152582339603941)
610	1	0	$$a Canada. $$b Canadian Armed Forces $$x History $$y 20th century.
610	2	0	$$a North Atlantic Treaty Organization $$x Armed Forces $$z Germany.
651		0	$$a Canada $$x Military policy.
651		0	$$a Canada $$x Military relations $$z Germany.
651		0	$$a Germany $$x Military relations $$z Canada.
610	1	7	$$a Canada. $$b Canadian Armed Forces. $$2 fast $$0 (OCoLC)fst00531186
610	2	7	$$a North Atlantic Treaty Organization. $$2 fast $$0 (OCoLC)fst00529467
650		7	$$a Armed Forces. $$2 fast $$0 (OCoLC)fst00814586
650		7	$$a Military policy. $$2 fast $$0 (OCoLC)fst01021386
650		7	$$a Military relations. $$2 fast $$0 (OCoLC)fst01353799
651		7	$$a Canada. $$2 fast $$0 (OCoLC)fst01204310
651		7	$$a Germany. $$2 fast $$0 (OCoLC)fst01210272
650		7	$$a Militär $$2 gnd
611	2	7	$$a BMBF-Statusseminar $$2 gnd
600	0	7	$$a Kanada $$2 gnd
648		7	$$a 1900-1999 $$2 fast
655		7	$$a History. $$2 fast $$0 (OCoLC)fst01411628
775	1		$$a Campbell, Isabel, 1957- $$t Unlikely diplomats. $$k Studies in Canadian military history $$k Studies in Canadian military history $$w (CaOONL)20139051880
776	1		$$a Campbell, Isabel, 1957- $$t Unlikely diplomats. $$k Studies in Canadian military history $$k Studies in Canadian military history $$w (CaOONL)20139051880
830		0	$$a Studies in Canadian military history.
900			$$a Copied from WorldCat

Next Steps, Support Resources and Feedback

Next Steps and Resources

- Include documentation links in the CKC relative to your topic:

  - [Working with Normalization Rules](#)

- Additional support resources within the ExLibris Ecosystem:

  - [Idea Exchange](#)

  - [Developer Network](#)

- [2018 Technical Seminar Presentations](#)(Cross-Product section of CKC)

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Any Final Questions?

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Thank You!