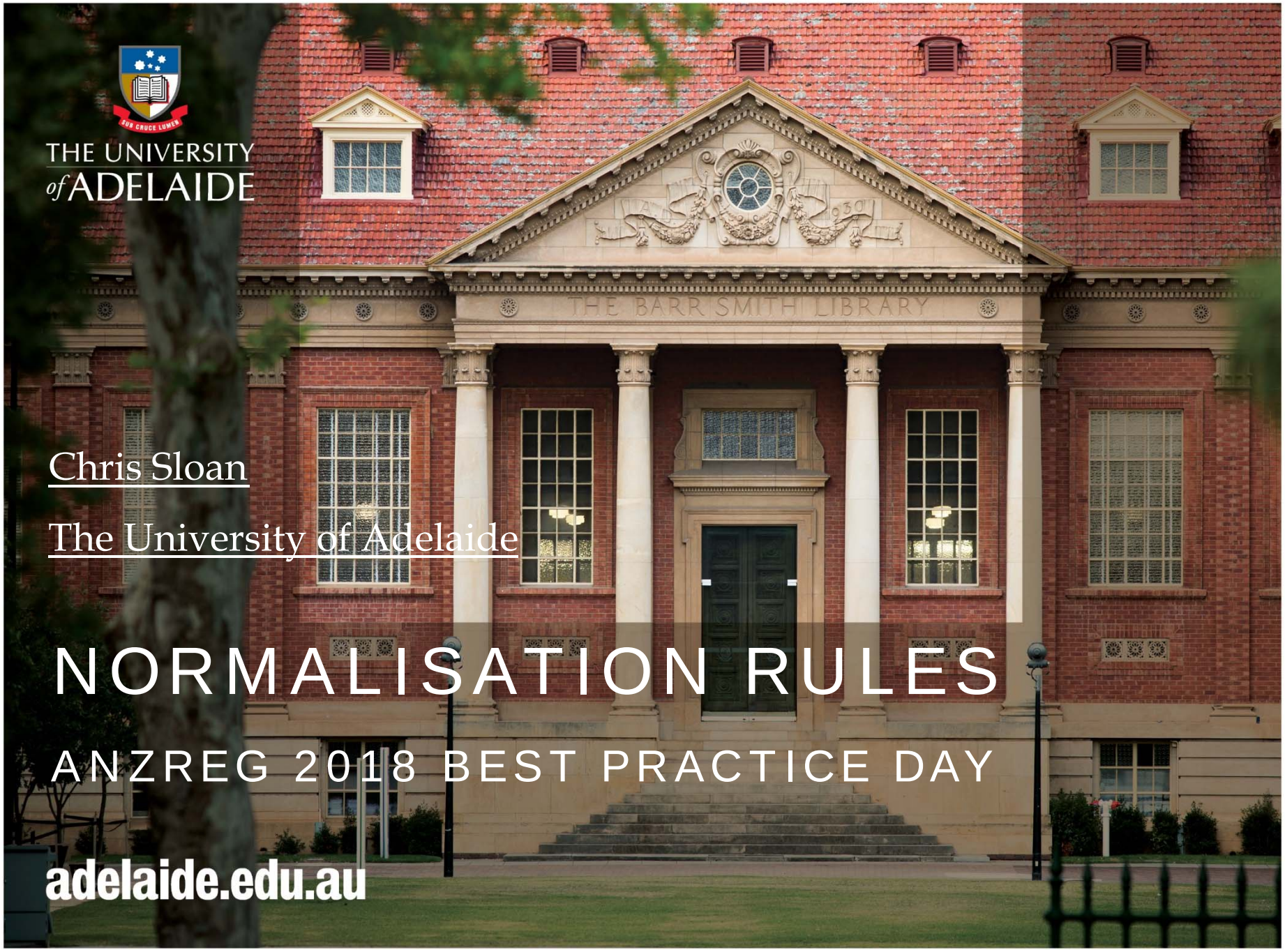

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NORMALISATION RULES

ANZREG 2018 BEST PRACTICE DAY

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Normalisation rules: Your Metadata toolkit

Normalisation rules are the tools Ex Libris provide for enhancing metadata records in Alma.

- Previously only available for MARC21 records
- June release adds functionality for Dublin Core format
- Can be used on Bibliographic and Holdings records

Why normalisation rules for MARC holdings records?

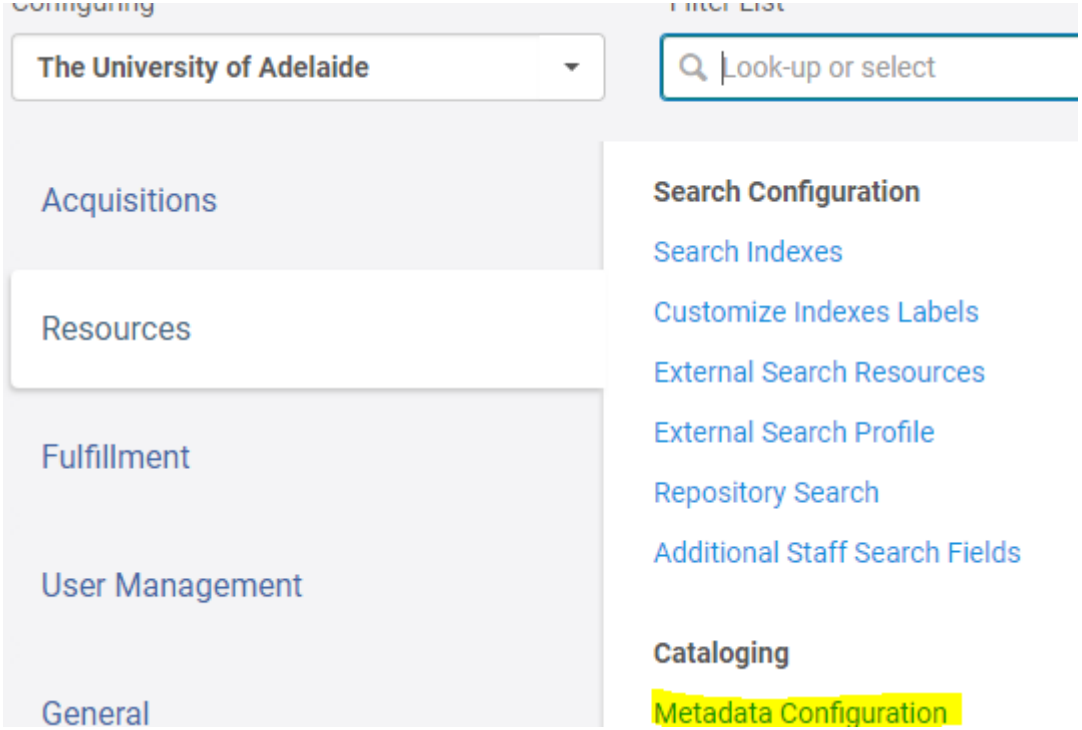
- During 2017, the library undertook a large scale weeding project
- Unexpected results from migration and Alma bulk change processes needed fixing
- Normalisation processes are the only option to fix, especially when there are no item records
- Run through Change holding information job on **Physical titles** or **Physical items** sets for batch changes

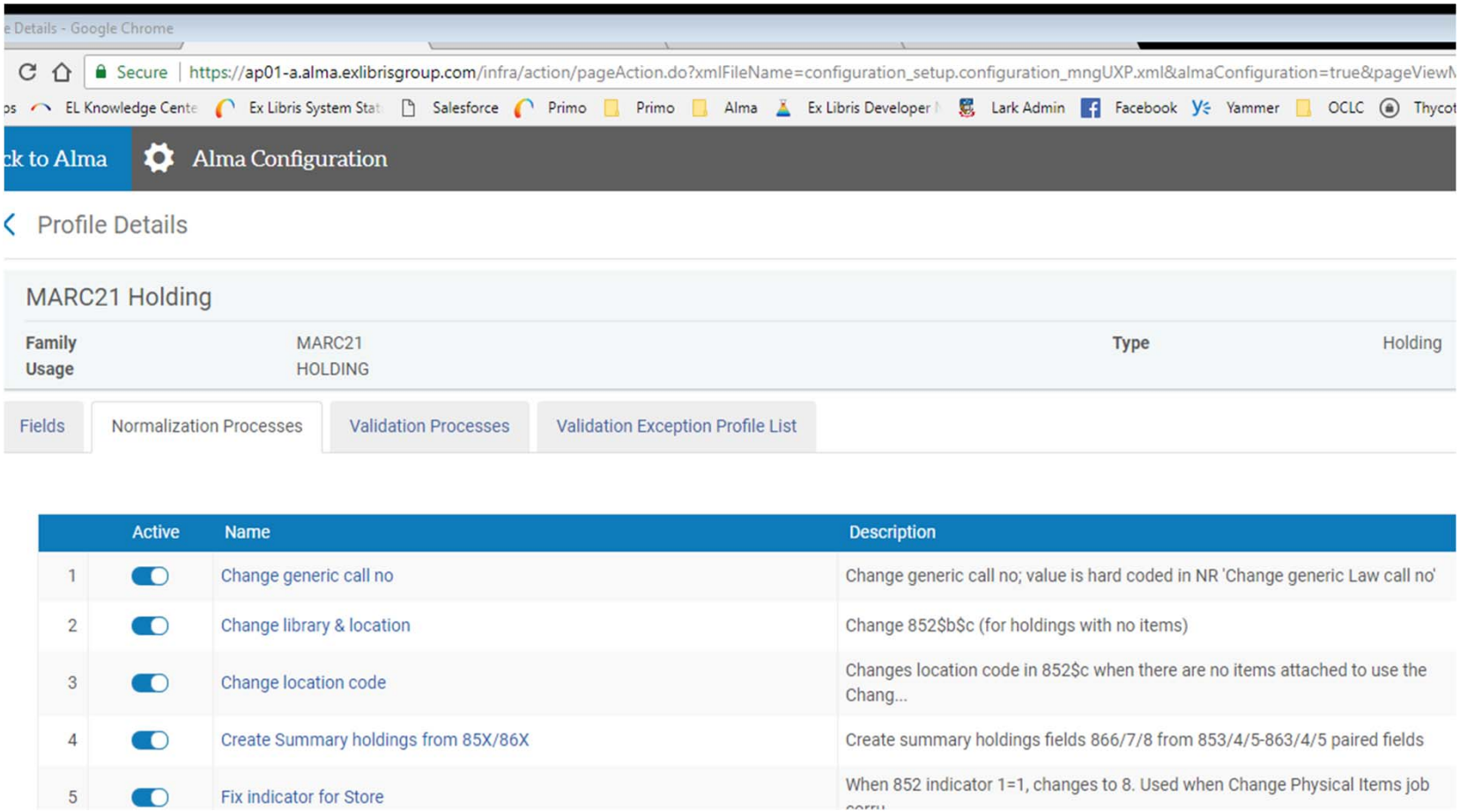
Normalisation processes for MARC holdings records

Processes for holdings are slightly different:

- Rules are still created in the Metadata Editor
- Processes do not appear and cannot be created in the Process List code table in Resources configuration
- They must be added to the MARC21 Holding Metadata Configuration, on the Normalization Processes tab
- To be added to a process, rules must be Shared and Enabled

Alma Configuration




Details - Google Chrome
Secure | https://ap01-a.alma.exlibrisgroup.com/infra/action/pageAction.do?xmlFileName=configuration_setup.configuration_mngUXP.xml&almaConfiguration=true&pageView
EL Knowledge Cente
Ex Libris System Stat
Salesforce
Primo
Primo
Alma
Ex Libris Developer
Lark Admin
Facebook
Yammer
OCLC
Thycot
ck to Alma
Alma Configuration
Profile Details
MARC21 Holding
Family MARC21
Usage HOLDING
Type Holding
Fields
Normalization Processes
Validation Processes
Validation Exception Profile List
Active
Name
Description
1 Change generic call no Change generic call no; value is hard coded in NR 'Change generic Law call no'
2 Change library & location Change 852bc (for holdings with no items)
3 Change location code Changes location code in 852$c when there are no items attached to use the Chang...
4 Create Summary holdings from 85X/86X Create summary holdings fields 866/7/8 from 853/4/5-863/4/5 paired fields
5 Fix indicator for Store When 852 indicator 1=1, changes to 8. Used when Change Physical Items job

Problem: Change generic call no.

Large journal collection merged into another collection, located on another floor. Call no. is physical location.

Change generic call no. from “International journals (Ground Floor)” to “Journals (Lower Ground Floor)”

Cannot use Change physical items job to change call nos. in bulk

```
rule "text change 852h"
    when
        (TRUE)
    then
        replaceContents "852.h.International journals (Ground Floor)" with
"Journals (Lower Ground Floor)"
end
```

Problem: Change library and location codes

Resources physically relocated to another library

Many holdings with no attached items-cannot use Change physical items job

Change Library & Location codes from “B, BAFHZJ” to “L,LBAFHZJ”

```
rule "Change library location code"

    when

        (exists "852.c.BAFHZJ")

    then

        replaceContents "852.b.B" with "L"

        replaceContents "852.c.BAFHZJ" with "LBAFHZJ"

end
```

Problem: Fix indicator corrupted by Change physical items job

Change physical items job creates a new holding using the default template

Default template has 852 ind. 1 set to Dewey Decimal Classification

These items had 852 ind. 1 set to Other Classification until the job ran. Alma!

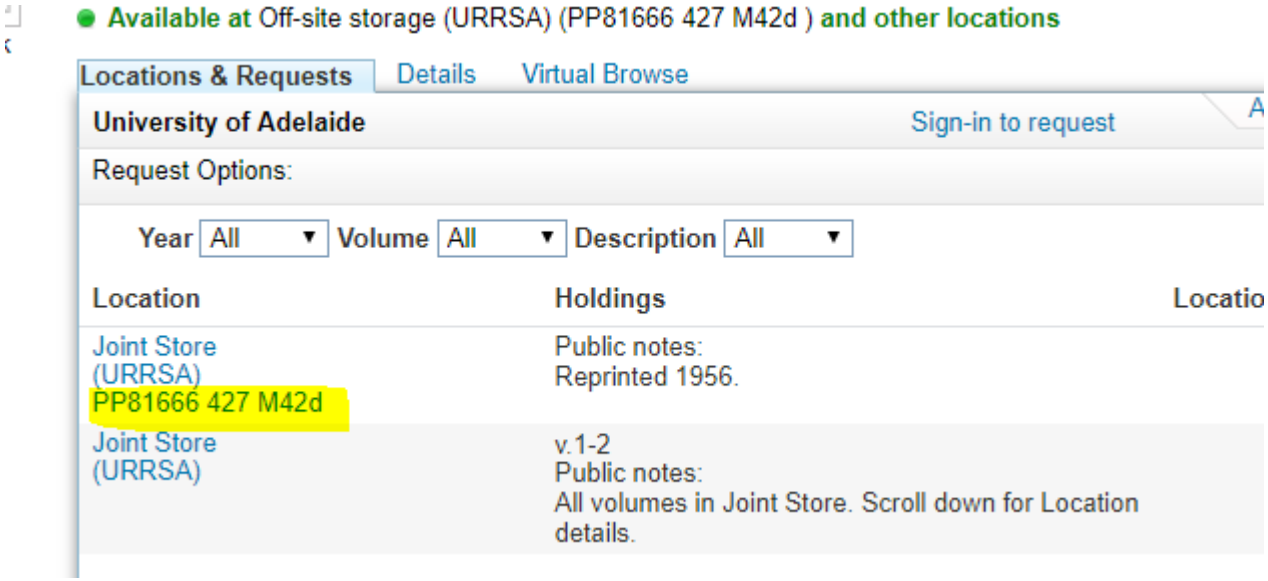
```
rule "Change first indicator of field 852 to 8 if the value is 1"

when

(TRUE)

then

changeFirstIndicator "852" to "8" if (exists "852.{1,*}")

end
```

Problem: Stray display data in migrated holdings

Used 852$j in previous LMS to store suppressed call no. for items with sequential numbering (non-standard use)

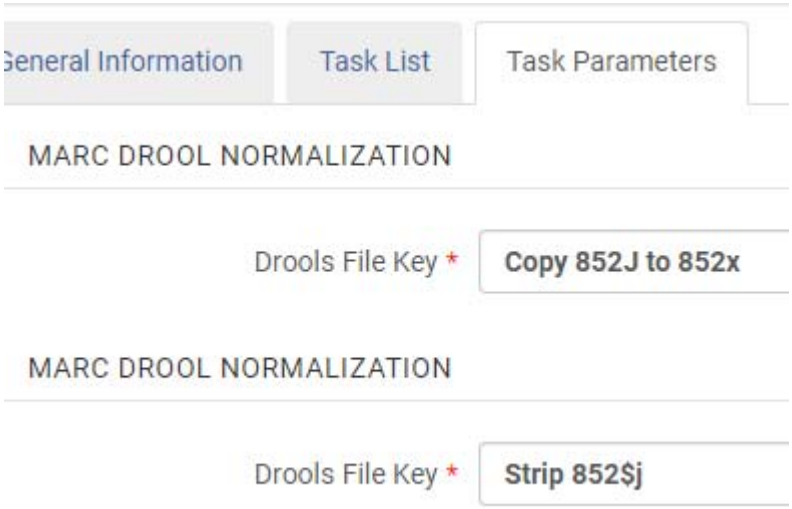
Alma considers 852$j part of call no. and displays it in Primo

Displaying sequential number and Dewey confusing to users:



Problem: Stray display data (cont.)

Use a process with 2 rules to copy data to $x and delete $j in a defined order



Alma processes from top to bottom

Problem: Stray display data (cont.)

```
rule "change 852j to 852x if not exists"
    when
        (TRUE)
    then
        changeSubField "852.j" to "x" if (not exists "852.x")
end
```

```
rule "remove subfield 852j"
    when
     (TRUE)
    then
        removeSubField  "852.j" if (exists "852.x")
end
```

Tips

- Be careful when naming rules – names cannot be edited
- Use meaningful names for rules and processes - these display in the Metadata Editor under Edit>Enhance the Record
- Add a full description – helps to record why the rule was created
- Use generic processes by type for one-off jobs, and edit the Normalisation rule to change parameters like text, codes or tag details
- OOTB normalisation resequencing rules only sort tags 500-899 into numerical order at the hundreds level. This is by design
- Always check the proper escape character needed (\ or \\ or \\\\)
- Full stops must be escaped in values that contain tag information:

```
replaceContents “650.a.Man\\\\.” with “Human beings.”
```

Some Bibliographic rules

- Import processing for PDA/EOD titles (ProQuest, JSTOR)
- Strip unwanted data from External Search Resources (OCLC/LibAus)
- Add constant data for Projects (digitisation, University of Adelaide Press, Unique holdings @ LibAus)
- Clean up old System numbers: (atABN), (ABN), no prefix, (OCLC)ocm, (AMICUS)
- Replace 008/21 space or | with p (proof of concept only)
- Add common RDA fields (most common 336, 337 and 338 values)

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