

Normalization Rules

Hello, in this session we will learn about normalization rules, including how to add, edit, and test them, and how to create a normalization process.

Normalization rules help you manage bibliographic records and the metadata they contain. They are used to edit bibliographic or holding records according to predefined rules and conditions.

You can use Normalization Rules to add, remove or replace fields, subfields and indicators. You can apply them to a single record or to a set of records.

Normalization Rules are created and edited in the Metadata Editor. You can learn more about how to use the Metadata editor in the designated sessions in this series.

Keep in mind that in order to create or edit Normalization Rules, you must have the Catalog Administrator role.

From the Alma home page, click on Resources and open the metadata editor. Click on Rules to open the rules tab within the existing Rule files.

Click on File>New, to create a new normalization rule. You can choose the normalization rules option to create one for MARC records,

or choose the XSL transformers for example, for a Dublin core rule . Let's create a MARC record rule.

Enter the name and description

and choose whether it is a private or shared rule. A private rule will only let you see and work on it, while shared will allow it to be used by others at your institution.

Check the Enable box when you're done working on it and you want to start using it.

Once you click save, a text box will appear for you to enter the rule into, and the rule is added to the list.

You can define the rule using the normalization rule syntax in the online help. You can also use existing rule syntax, by clicking Edit>Add rule. You can also copy and paste your own syntax. Let's do that.

Rule files contain one or more rules, and each contains a condition and one or more actions to be applied to records.

This rule file, for example, will add a local 920 subfield a with the text "Gift to the library" to any record.

When you're done, click save and the rule will be updated.

To work with an existing rule file, go to the normalization rules folder and choose a rule file.

You can either Edit or Delete each existing rule file. You can duplicate it – which enables you to save and modify it as a new rule file, or modify it's properties.

Note that if two or more people have the rule open for editing, a warning message will appear.

To test if your rule has the effect you were aiming for, open and locate a bibliographic record that your rule should affect.

Hit the split editor icon and choose edit the rule from the shared folder. Now you can see both the rule file and the bib record.

Select preview.

The rule in the file is applied to the record and the outcome appears. In this example, you can see that the note was added to the record

Now you can select apply changes to save the modifications to the record. You can also select back to normalization rules if you wish to make additional changes.

Let's apply the changes and see how the record has changed.

Note, that an institution cannot update records in the network zone. Therefore, the normalization rule will be applied only to the local fields.

To update network zone records, the normalization rule must be run by the networks' institution.

To apply this rule on a set of records, you need to create a Normalization process.

Normalization processes are used to correct or update metadata records, removing empty fields, or stripping out fields containing order information for example.

Go to the Configuration Menu, choose Resources, and under Cataloging choose the Metadata Configuration.

Choose one of the profile links such as MARC21 Bibliographic and Add a Normalization Process.

Complete the Process Details and add a Task.

Choose MarcDroolsNormalization process from the process list.

This will allow you to choose the rule that you defined, or any of the rules that were defined and saved in the MetaData Editor.

Note that you can add multiple tasks to the process, applying several rules in one process.

After creating the normalization process, the process can be applied while cataloging in the MetaData Editor or by running a job that uses this process.

You can learn more about sets and jobs in designated sessions in the Knowledge Center.

Thank you for joining!