



The State University of New York

New MD Editor Series: Creating and Using a Normalization Process

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Creating and Using a Normalization Process

This session will cover:

1. Creating a normalization (norm) process:
 1. MARC21 bib records
 2. MARC21 holdings records
2. Running a normalization (norm) process on a Set of Records in Alma:
 1. MARC21 bib records
 2. MARC21 holdings records
3. Deleting a Normalization (norm) Process

Pre-requisites:

1. Normalization rule
2. Testing the normalization rule on records in the MD Editor



Required Roles

Role required to create a normalization process:

- Catalog Administrator

One of the following roles is required to run a manual job in Alma:

- Acquisitions Administrator
- Catalog Administrator
- Catalog Manager
- Digital Inventory Operator
- Digital Inventory Operator Extended
- Fulfillment Administrator
- General System Administrator
- Purchasing Manager
- Purchasing Operator
- Repository Administrator
- Repository Manager
- Requests Operator
- User Administrator
- User Manager



CREATING A NORMALIZATION PROCESS FOR MARC21 BIB RECORDS

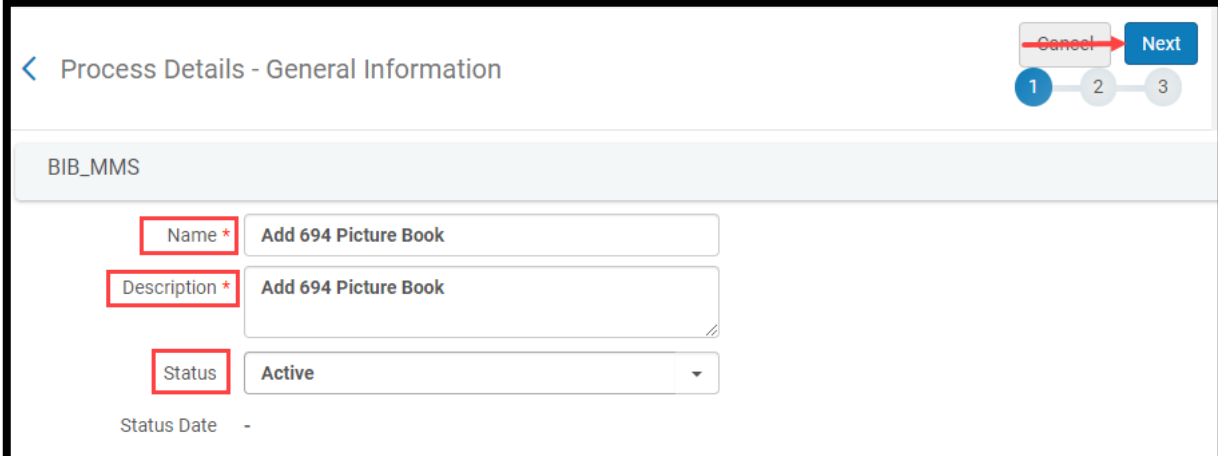
Creating a Normalization Process for MARC21 Bib Records

IMPORTANT! Test normalization rules in the MD Editor prior to running a normalization process on a set of records

1. Go to **Configuration>Resources>Cataloging>Metadata Configuration**
2. Click on **MARC21 Bibliographic**
3. Click on the **Normalization Process** tab
4. Click **Add Process**
5. Process Details – General Information screen opens
 1. Name*: [Name the Process]
 2. Description*: [Add a description]
 3. Status: [Keep Active]
 4. Click **Next**



Profile	Family	Type
1 GND Authority	MARC21	Authority
2 MARC21 Authority	MARC21	Authority
3 MARC21 Bibliographic	MARC21	Bibliographic
4 MARC21 Holding	MARC21	Holding
5 Qualified Dublin Core	DCMI	Bibliographic



Process Details - General Information

BIB_MMS

Name * Add 694 Picture Book

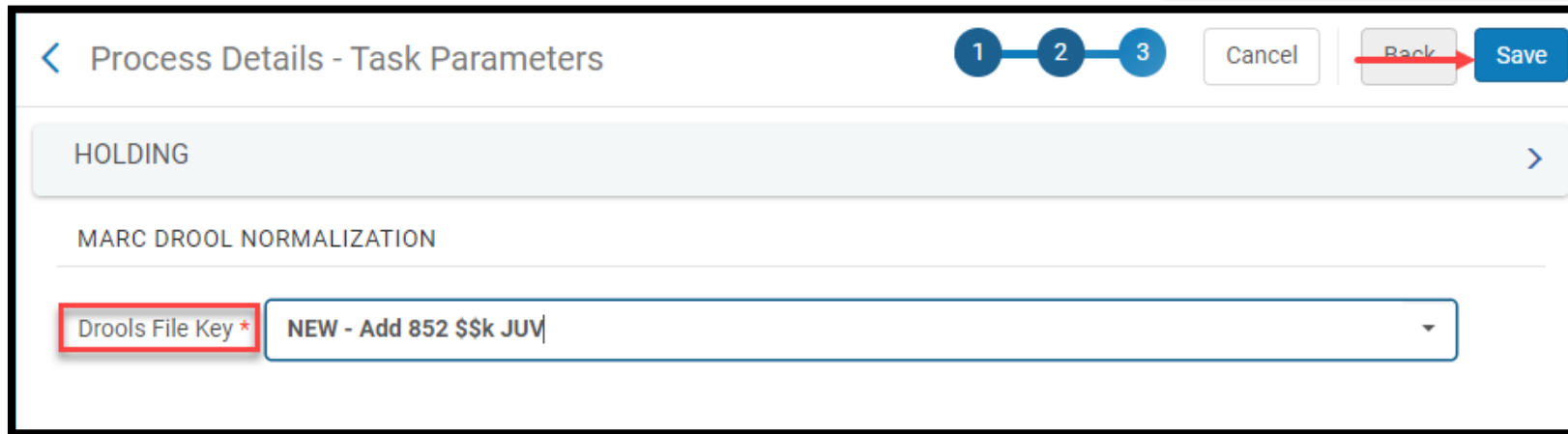
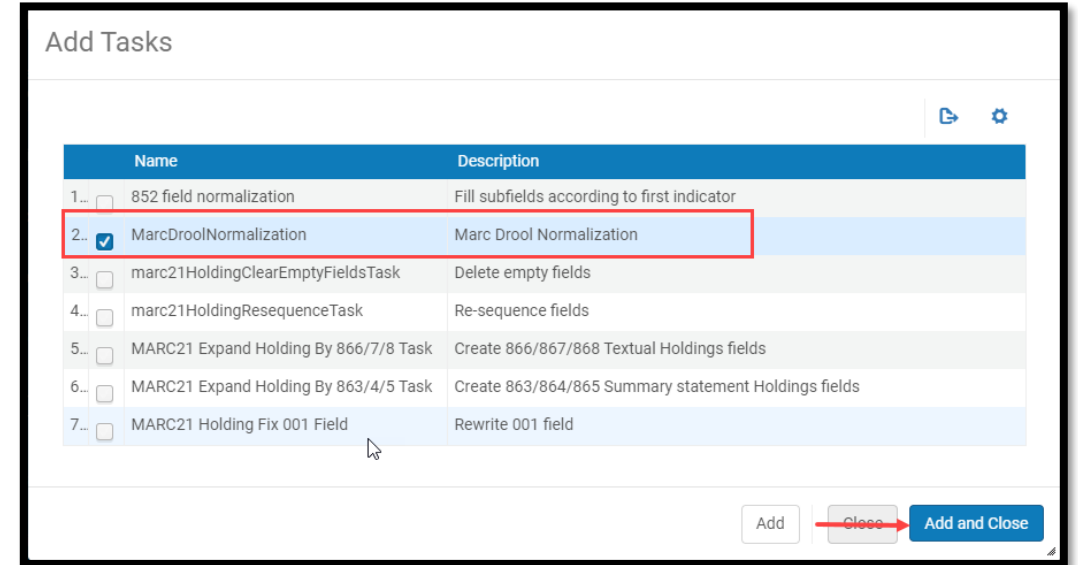
Description * Add 694 Picture Book

Status Active

Status Date -

Creating a Normalization Process for MARC21 Bib Records

6. Process Details – Add Tasks screen opens
 1. Click **Add Task**
 2. Check the box next to “MarcDroolNormalization”
 3. Click **Add and Close**
 4. Click **Next**
7. Process Details – Task Parameters screen opens
 1. Drools file key: [Select the norm rule]
 2. Click **Save**



CREATING A NORMALIZATION PROCESS FOR MARC21 HOLDINGS RECORDS



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Creating a Normalization Process for MARC21 Holdings Records

IMPORTANT! Test normalization rules in the MD Editor prior to running a normalization process on a set of records

1. Go to **Configuration>Resources>Cataloging>Metadata Configuration**
2. Click on **MARC21 Holding**
3. Click on the **Normalization Process** tab
4. Click **Add Process**
5. Process Details – General Information screen opens
 1. Name*: [Name the Process]
 2. Description*: [Add a description]
 3. Status: [Keep Active]
 4. Click **Next**

Profile	Family	Type
1 GND Authority	MARC21	Authority
2 MARC21 Authority	MARC21	Authority
3 MARC21 Bibliographic	MARC21	Bibliographic
4 MARC21 Holding	MARC21	Holding
5 Qualified Dublin Core	DCMI	Bibliographic

Process Details - General Information

HOLDING

Name * Add \$\$k JUV

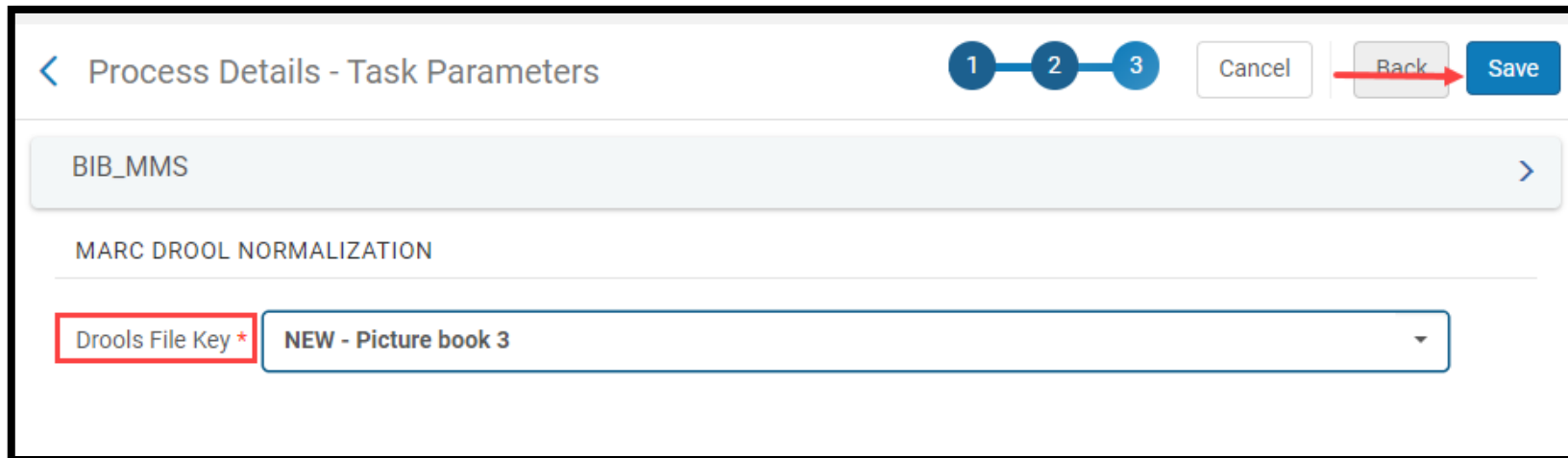
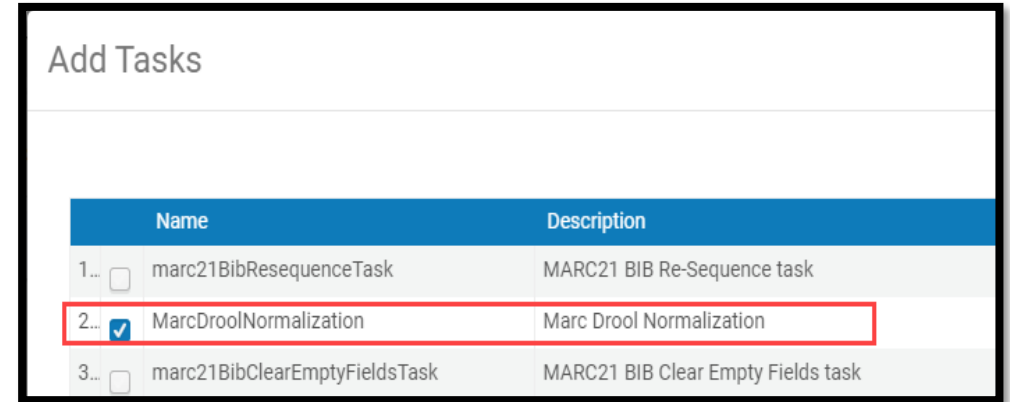
Description * Add \$\$k JUV

Status Active

Status Date -

Creating a Normalization Process for MARC21 Holdings Records

6. Process Details – Add Tasks screen opens
 1. Click **Add Task**
 2. Check the box next to “MarcDroolNormalization”
 3. Click **Add and Close**
 4. Click **Next**
7. Process Details – Task Parameters screen opens
 1. Drools file key: [Select the norm rule]
 2. Click **Save**



RUNNING A NORMALIZATION PROCESS FOR MARC21 BIB RECORDS

Running a Normalization Process for MARC21 Bib Records

1. Go to **Admin>Manage Jobs and Sets>Run a Job**
2. Search for the normalization process by name or description
3. Click the radio button next to the name of the Normalization Process
4. Click **Next**
5. Click the radio button for the set the normalization process will be run on
6. Click **Next**
7. Click **Next**
8. Review the job
9. Click **Submit**
10. Click **Confirm**

Run a Job - Select Job to Run

1 - 1 of 1 Description add 694

Type: All Source type: All Content type: All

Name	Description	Content Type	Type
<input checked="" type="radio"/> Add 694 \$\$a Picture Book	Add 694 \$\$a Picture Book	Bibliographic title	Marc 21 Bib normalization

Run a Job - Select Set

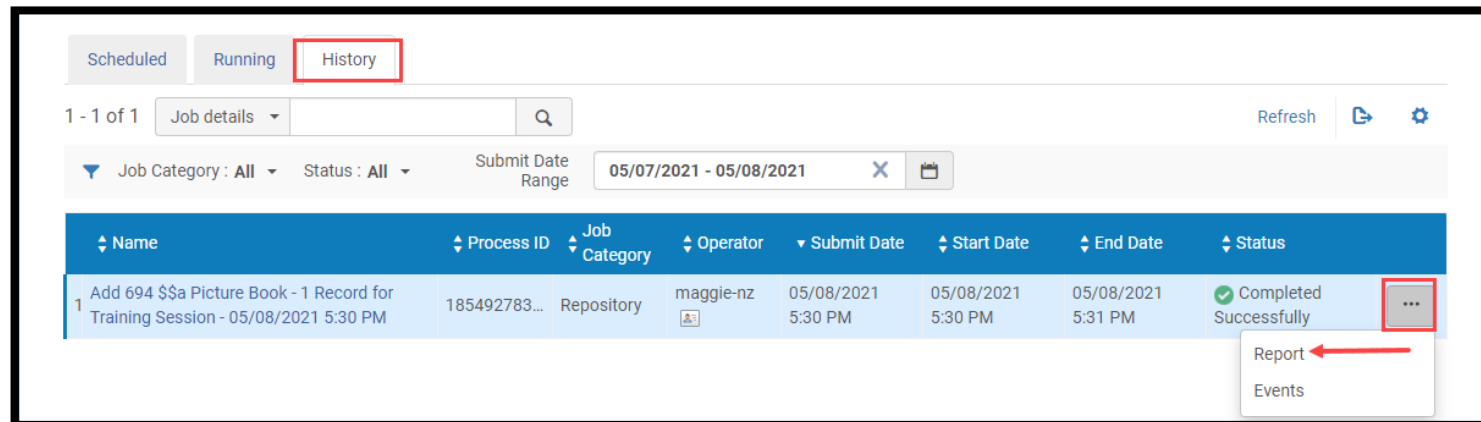
1 - 1 of 1 Name picture

Content Type: All

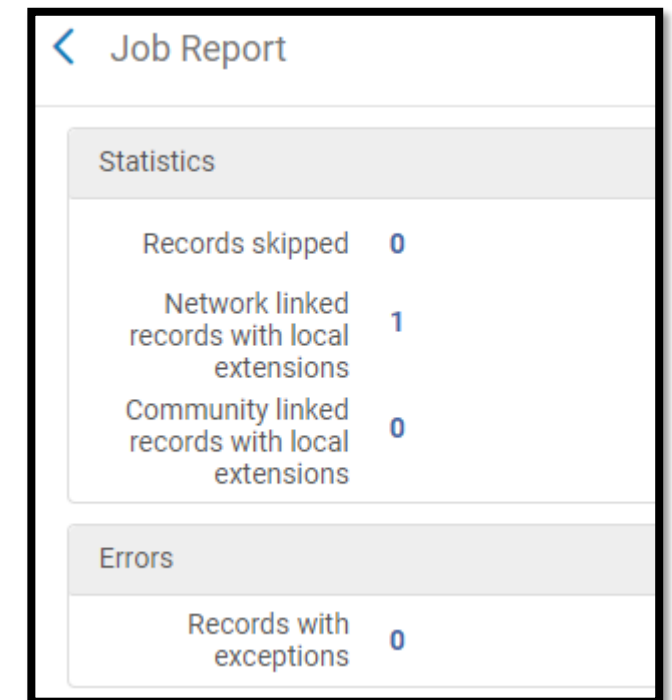
Name	Type	Content Type	Content Origin	Create Date
<input checked="" type="radio"/> Picture Book - set for training session	Logical	Physical titles	Institution only	05/08/2021 5:18 PM

Review the Job

1. Go to **Admin>Manage Jobs and Sets>Monitor Jobs**
2. Click on the **History** tab
3. Click **Report** from the ellipses of the job
4. Report displays with the following information:
 - Records skipped
 - Network linked record with local extensions
 - Community linked records with local extensions
 - Records with exceptions
5. Click **Back** or navigate away when done



Name	Process ID	Job Category	Operator	Submit Date	Start Date	End Date	Status
1 Add 694 \$\$a Picture Book - 1 Record for Training Session - 05/08/2021 5:30 PM	185492783...	Repository	maggie-nz	05/08/2021 5:30 PM	05/08/2021 5:30 PM	05/08/2021 5:31 PM	Completed Successfully



Statistics	
Records skipped	0
Network linked records with local extensions	1
Community linked records with local extensions	0

Errors	
Records with exceptions	0

Use an Indication Rule to Review (Optional)

1. Create an indication
 1. Go to the MD Editor
 2. Check the “Placement of new rules” is set to local
 3. Click on **Rules**
 4. Click **New>Indication**
 5. Write the indication rule
 6. **Save** the indication rule
 7. Test the indication rule on a set of records
2. Filter the set of record the norm process was run on
 1. Go to **Admin>Manage Jobs and Sets>Manage Sets**
 2. Search for the set the norm process was run on
 3. Select **Filter set** from the ellipses of the Set
 1. Rename the set to make it identifiable
 2. Select the indication rule
 3. Click **Submit**
 4. Click **Confirm**
3. Review the filtered set
 1. Go to **Admin>Manage Jobs and Sets>Manage Sets**
 2. Select **Members** from the ellipses of the filtered set
 - Ideally there would be no members in the set
 - Delete the set if there are no members
 - Review records if there are members in the set
 - Test the norm rule in the MD Editor on a record to test
 - Adjust the rule if necessary



RUNNING A NORMALIZATION PROCESS FOR MARC21 HOLDINGS RECORDS

Running a Normalization Process for MARC21 Holdings Records

1. Go to **Admin>Manage Jobs and Sets>Run a Job**
2. Search for the “Change Holding Information” job
3. Click the radio button next to the “Change Holding Information” job
4. Click **Next**
5. Click on the radio button next to the set
6. Click **Next**
7. Click on the box across from “Correct the data using normalization rules”
8. Select the normalization rule
9. Click **Next**
10. Review the job
11. Click **Submit**
12. Click **Confirm**

Run a Job - Select Job to Run

1 - 1 of 1

Name Change holding informati

Type: All Source type: All Content type: All

Name	Description	Content Type	Type
<input checked="" type="radio"/> Change Holding Information	Update holding information for a set of physical items	Physical Item	Information Update

Run a Job - Select Set

1 - 2 of 2

Name 1 record

Content Type: All

Name	Type	Content Type	Content Origin	Create Date
<input checked="" type="radio"/> 1 Record for Training Session	Logical	Physical titles	Institution only	05/08/2021 5:28 PM

Run a Job - Enter Task Parameters

Task Parameters: Change Holding Information

Apply only for Library location

Update call number from Bibliographic record

Correct the data using normalization rules Add 852 \$\$k JUV

Tag records for publishing Suppress

Review the Job

1. Go to **Admin>Manage Jobs and Sets>Monitor Jobs**
2. Click on the **History** tab
3. Click **Report** from the ellipses of the job
4. Report displays with the following information:
 - Total Number of Holdings records
 - Number of Holdings records changed by normalization
5. Click **Back** or navigate away when done

◆ Name	◆ Process ID	◆ Job Category	◆ Operator	▼ Submit Date	◆ Start Date	◆ End Date	◆ Status
1 Change Holding Information - 1 Record for Training Session - 05/08/2021 6:04 PM	185492948...	Repository	maggie-nz	05/08/2021 6:07 PM	05/08/2021 6:07 PM	05/08/2021 6:07 PM	✓ Completed Successfully
2 Filter set by indication	185492857...	Repository	maggie-nz	05/08/2021 5:48 PM	05/08/2021 5:48 PM	05/08/2021 5:48 PM	✓ Suc

Counters	
Total Number of Holdings records	1
Number of Holdings records changed by normalization	0

Reviewing the Records

- Currently Indication rules cannot be run on holdings records
- Ex Libris is working on adding the following functionality for holdings records:
 - Adding more holdings records search indexes
 - Allow sets to be created for holdings records
 - Allows indication rules to be run on a set of holdings records
- Spot check holdings records after running a normalization process on a set of records to make sure the desired changes have taken place



DELETING A NORMALIZATION PROCESS

Deleting a Normalization Process

- Normalization (norm) rules cannot be deleted if they are associated with a norm process
- The norm process a norm rule is associated with must be deleted first before deleting the norm rule

To delete a norm process:

1. Go to **Configuration>Resources>Cataloging>Metadata Configuration**
2. Click on one:
 1. MARC21 Bibliographic
 2. MARC21 Holding
3. Click on the **Normalization Process** tab
4. Click **Delete** from the ellipses of the norm process being deleted
5. Click **Confirm**
6. Exit from Configuration



SUPPORTING DOCUMENTATION

Supporting Documentation

SLS:

- [Creating a Normalization Process](#)
- [Running a Normalization Process on a Set of Records](#)
- [Deleting a Normalization Process](#)

Ex Libris:

- [How to implement a normalization rule in Alma Metadata Editor](#)
- [Working with Normalization Processes](#)
- [Working with Normalization Rules](#)
- [Running Manual Jobs on Defined Sets](#)

