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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

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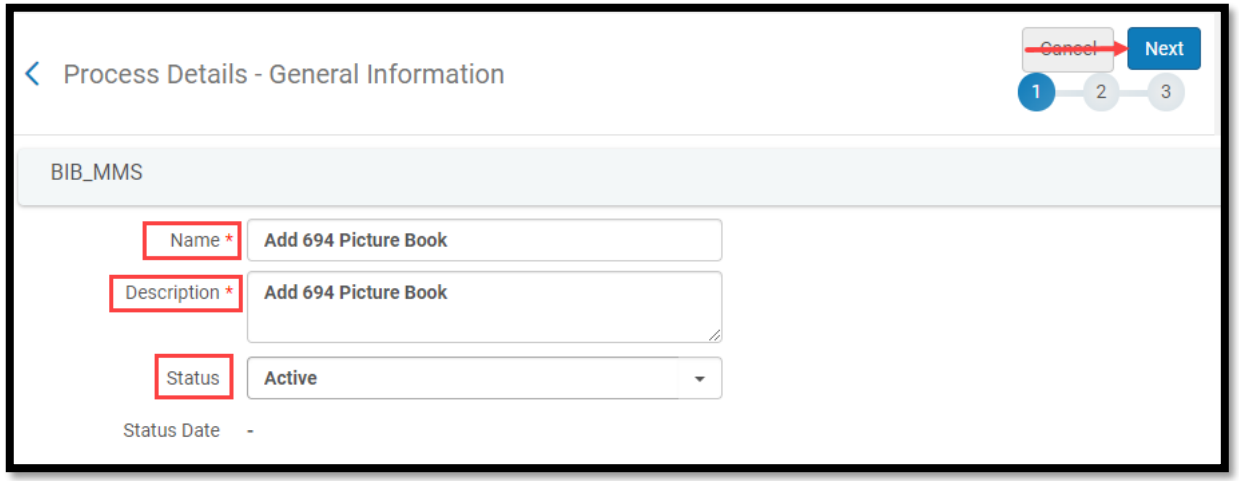
Creating a Normalization Process for MARC21 Bib Records

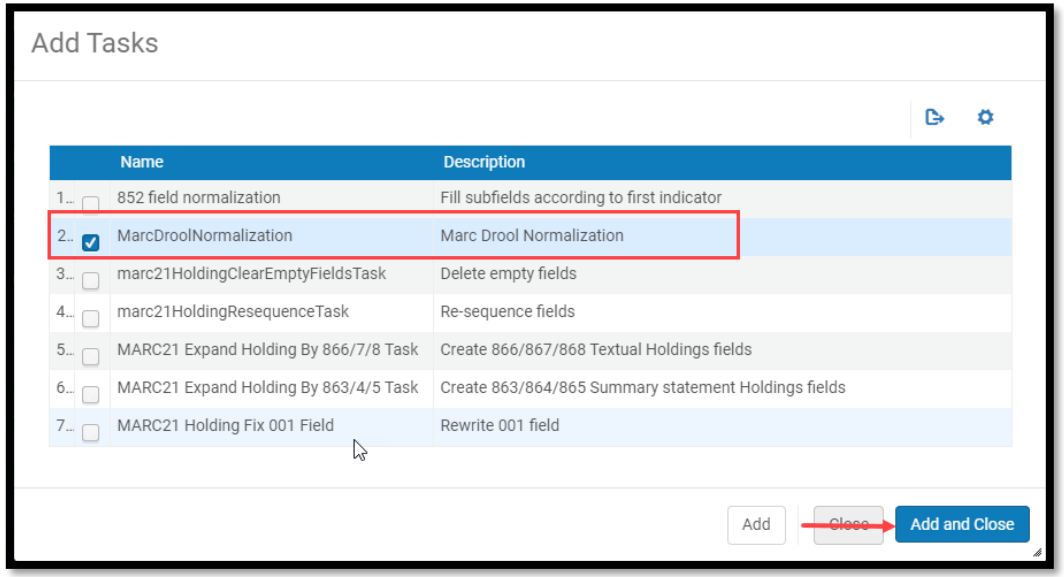
IMPORTANT! Test normalization rules in the MD Editor prior to running a normalization process on a set of records

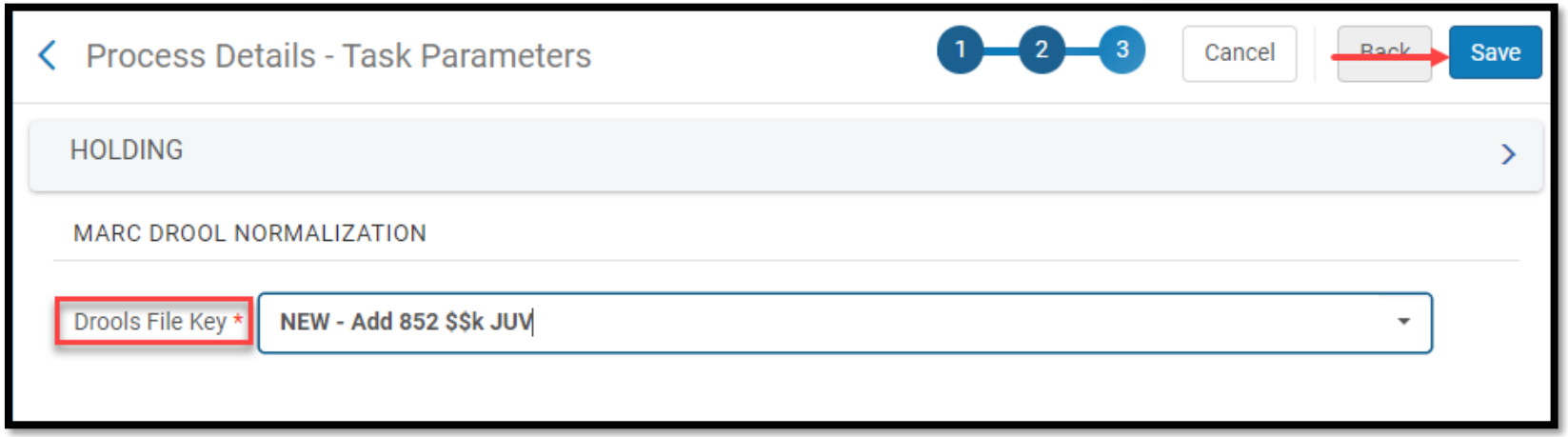
1. Go to ***Configuration>Resources>Cataloging>Metadata Configuration***
2. Click on ***MARC21 Bibliographic***
3. Click on the **Normalization Process** tab
4. Click ***Add Process***
5. Process Details – General Information screen opens
    1. Name*: [Name the Process]
    2. Description*: [Add a description]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



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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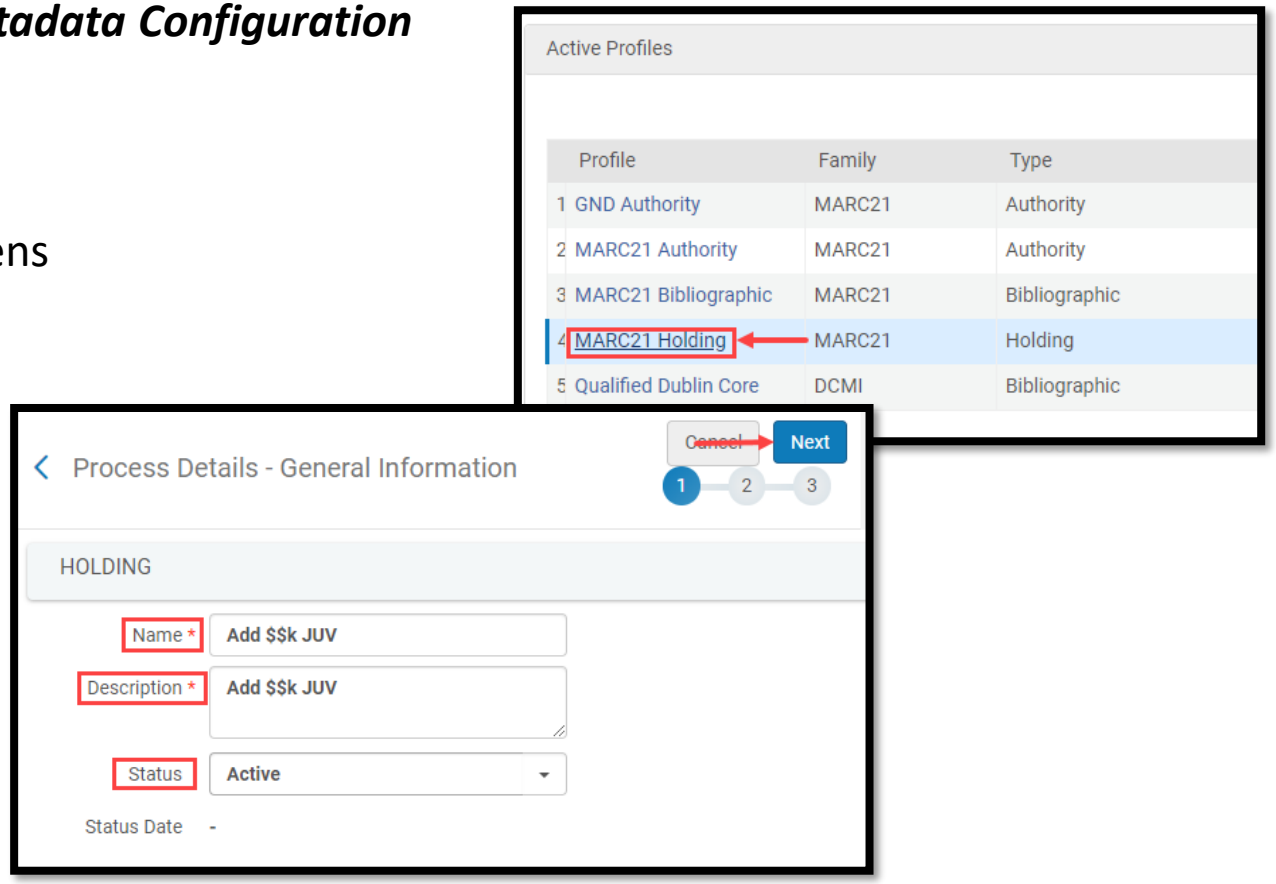
Creating a Normalization Process for MARC21 Holdings Records

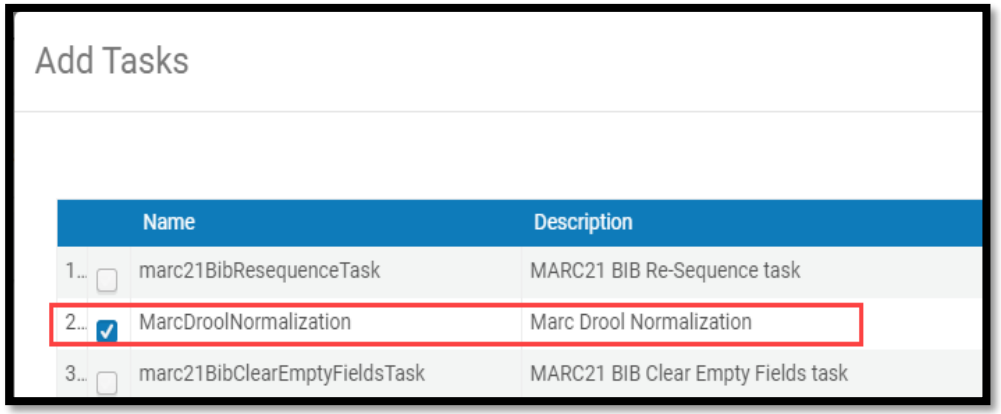
IMPORTANT! Test normalization rules in the MD Editor prior to running a normalization process on a set of records

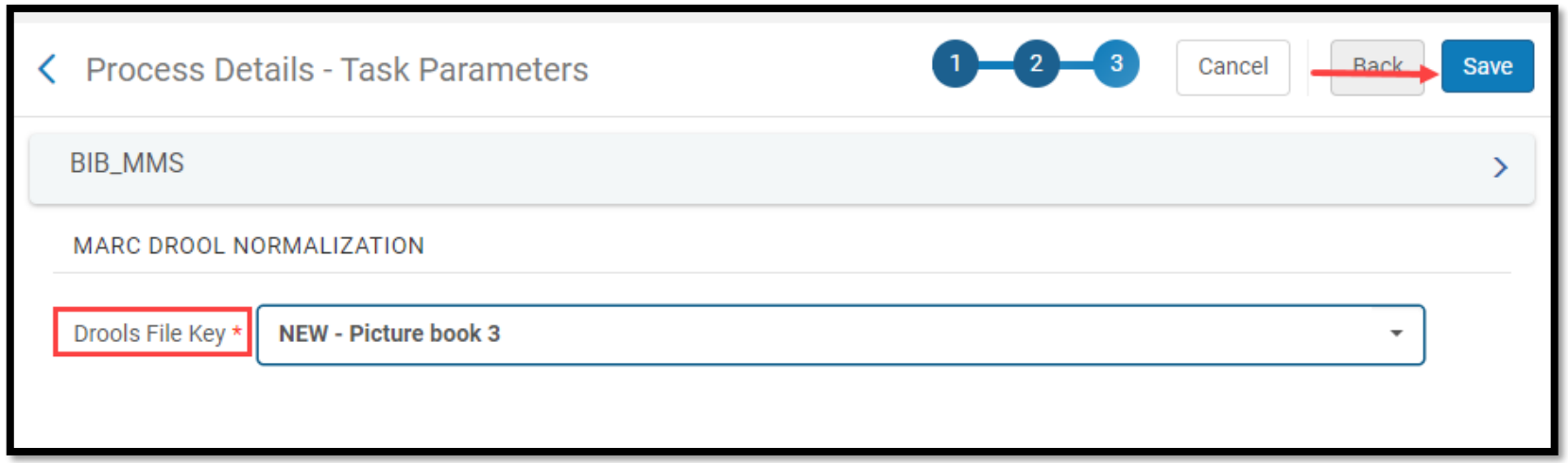
1. Go to ***Configuration>Resources>Cataloging>Metadata Configuration***
2. Click on ***MARC21 Holding***
3. Click on the **Normalization Process** tab
4. Click ***Add Process***
5. Process Details – General Information screen opens
    1. Name*: [Name the Process]
    2. Description*: [Add a description]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



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

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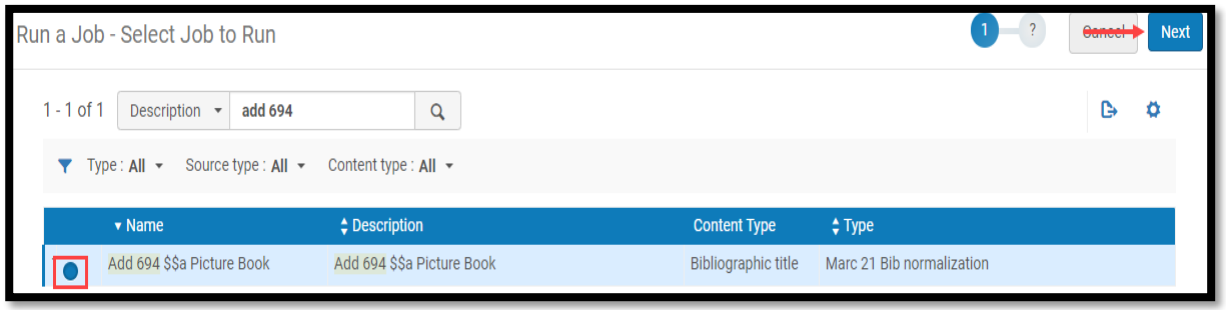
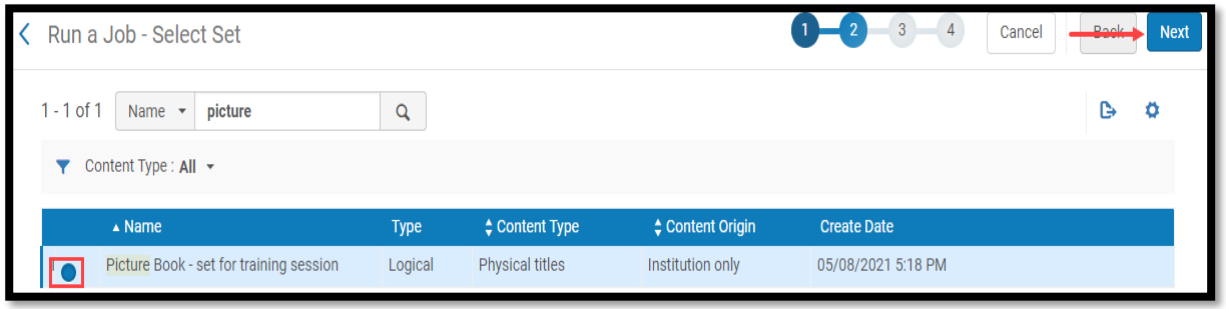
Running a Normalization Process for MARC21 Bib Records

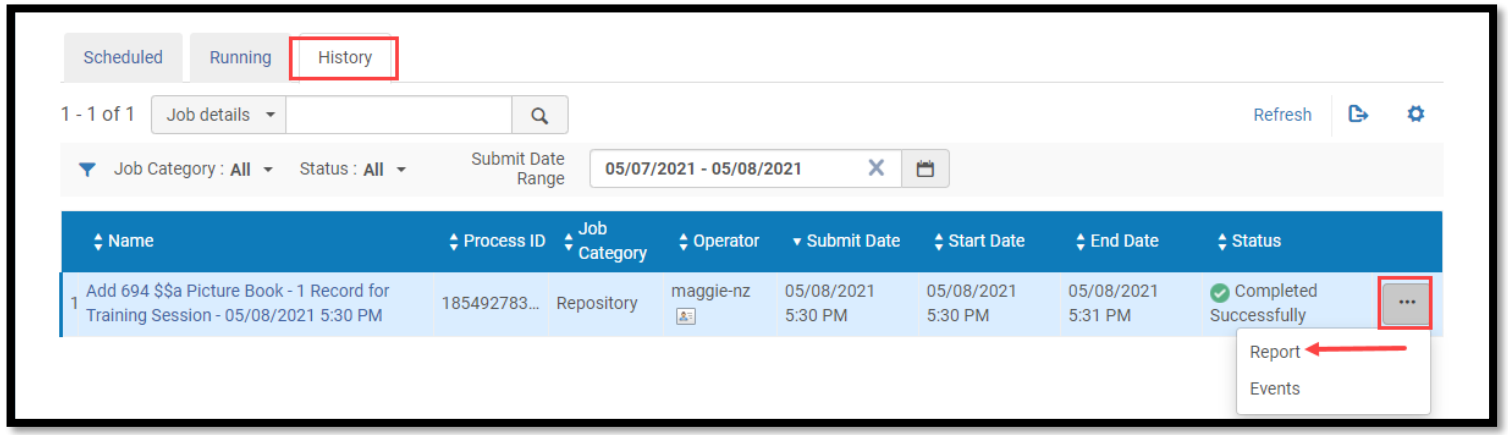
1. Go to ***Admin>Manage Jobs and Sets>Run a Job***
2. Search for the normalization process by name or description
3. Click the radio button next to the name of the Normalization Process
4. Click ***Next***
5. Click the radio button for the set the normalization process will be run on
6. Click ***Next***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

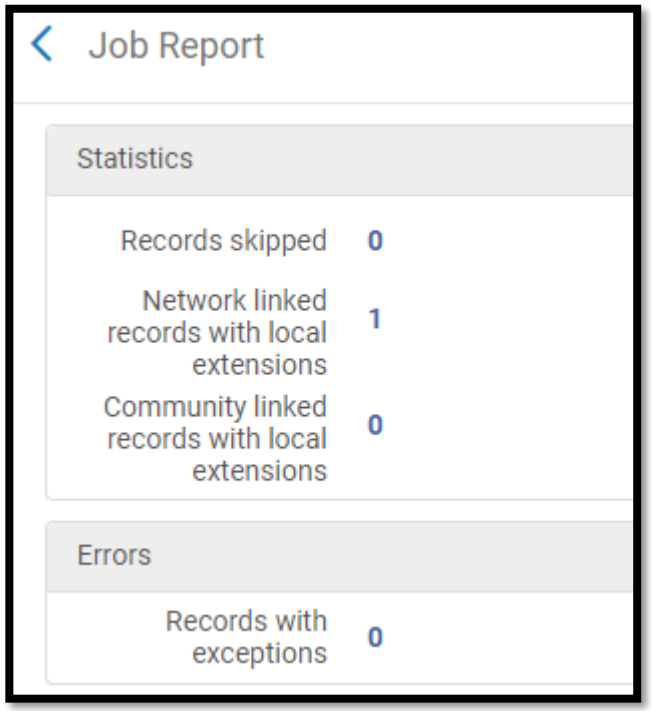




Review the Job

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





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

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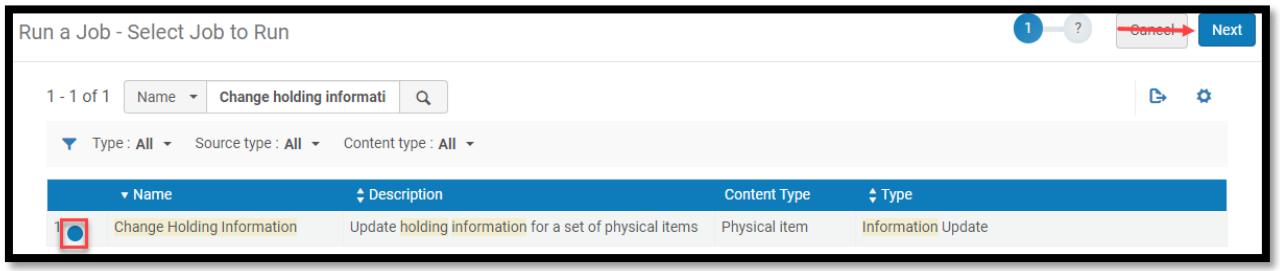
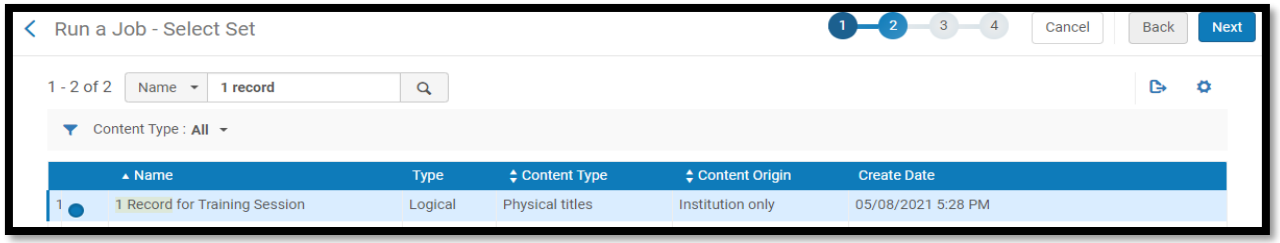
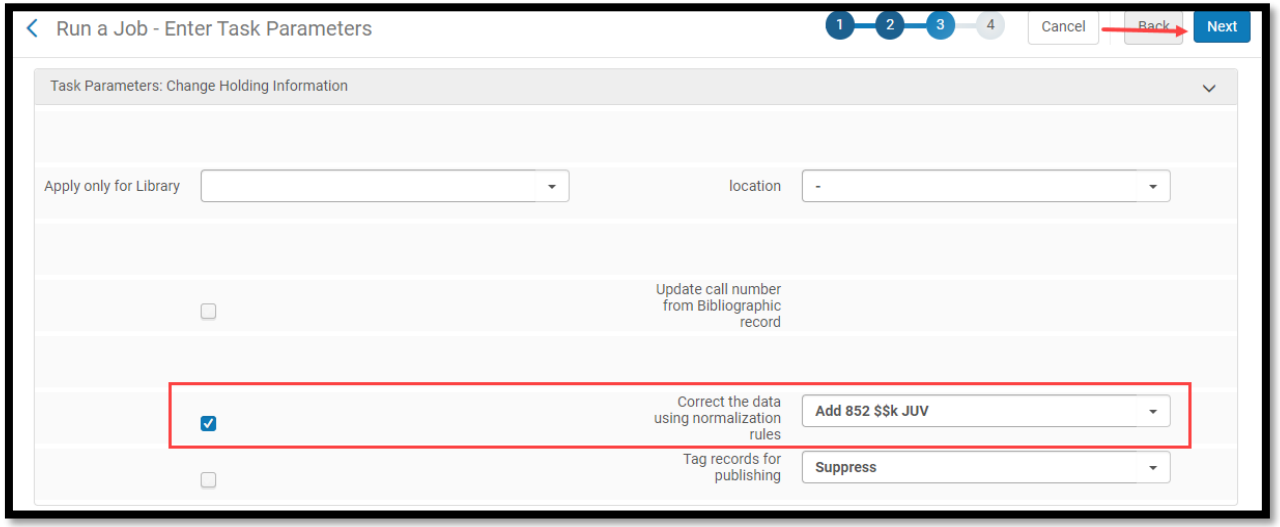
Running a Normalization Process for MARC21 Holdings Records

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***

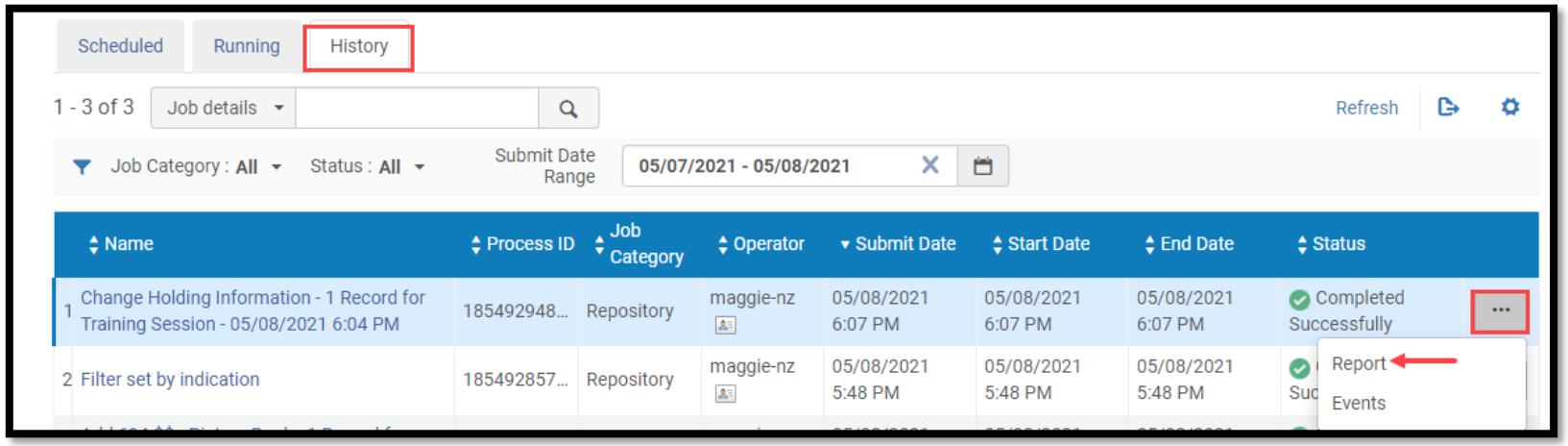


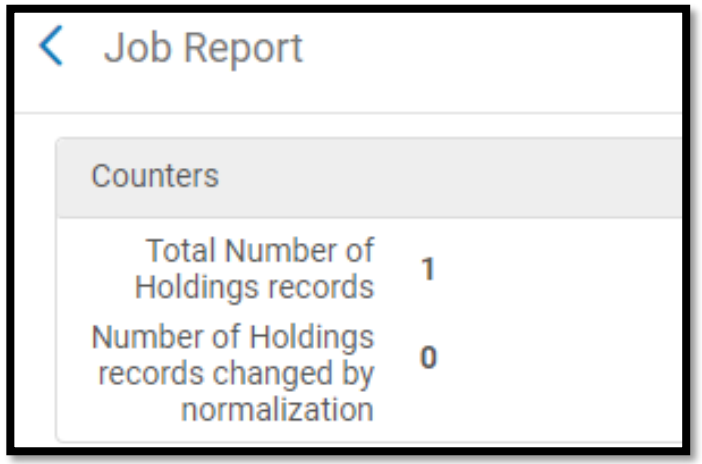




Review the Job

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





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

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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

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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