**10/13/16: Alma Merge Rules**

**Differences in Merge rules:**

How you write merge rules changes according to the direction of the data and the primary record.

Copy cataloging merge rule (primary record is incoming record):

rule "Replace all fields except local data and match keys"
when
merge
then
replace MARC."001"
replace MARC."035"
replace MARC."019"
replace MARC."59"X
replace MARC."9"XX
end

Import profile merge rule (primary record is Alma):

rule "Replace all fields except local data and match keys"
when
merge
then
replace MARC.XXX excluding "001,019,035,59X,9XX"
end

**Merge rules & External Resources:**

Primary record is the external resource. Use the copy cataloging merge rule to add the relevant local fields to the external resource record.

**Merge rules & Import Profiles:**

Primary record is the record in Alma.

Use the import prolife merge rule to replace all fields except the fields to be retained.

We will demo this in the import profile process next week.

**Merge Rules & Alma records:**

Primary record is the one on the left when records are open in split screen editor.

Use the merge rule that is appropriate for the current primary record.

**Things to be aware of with a Network Zone:**

* Import profiles (come back next week!) that use the NZ will not be able to use any IZ merge rules. You’ll need to create a merge rule process in the NZ for everyone to share with their Import Profiles. This will also help to create standardization with your NZ bib records.
* NZ bib records will have the same problem if you are running merge rules on Alma records.

**Helpful links:**

Working with Merge Rules

[http://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/Alma\_Online\_Help\_(English)/Resource\_Management/040Metadata\_Management/080Working\_with\_Merge\_Rules](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_%28English%29/Resource_Management/040Metadata_Management/080Working_with_Merge_Rules)

[Rules - Merge rules and routines.pptx](https://knowledge.exlibrisgroup.com/%40api/deki/files/42086/Rules_-_Merge_rules_and_routines.pptx) in [Presentations and Documents](https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents)

[*https://knowledge.exlibrisgroup.com/Alma/Training/Extended\_Training/Presentations\_and\_Documents*](https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents)

[Rules - Merge rules syntax for copy cataloging.docx](https://knowledge.exlibrisgroup.com/%40api/deki/files/42141/Rules_-_Merge_rules_syntax_for_copy_cataloging.docx) in [Presentations and Documents](https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents)

[*https://knowledge.exlibrisgroup.com/Alma/Training/Extended\_Training/Presentations\_and\_Documents*](https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents)

[Merge Rules Logic](https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Merge_Rules_Logic)

[*https://knowledge.exlibrisgroup.com/Alma/Knowledge\_Articles/Merge\_Rules\_Logic*](https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Merge_Rules_Logic)

[Merge Two Bibliographic Records in the Metadata Editor](https://knowledge.exlibrisgroup.com/Alma/Training/02_What%27s_New_Videos_2015/11-February_2015_Release/Merge_Two_Bibliographic_Records_in_the_Metadata_Editor)

[*https://knowledge.exlibrisgroup.com/Alma/Training/02\_What%27s\_New\_Videos\_2015/11-February\_2015\_Release/Merge\_Two\_Bibliographic\_Records\_in\_the\_Metadata\_Editor*](https://knowledge.exlibrisgroup.com/Alma/Training/02_What%27s_New_Videos_2015/11-February_2015_Release/Merge_Two_Bibliographic_Records_in_the_Metadata_Editor)

**Chat Transcript**

from Northridge 2 to Everyone:

Do you know when the recording of last week's functional call on normalization rules will be available? We missed it because of a power outage.

from North American Professional Services to Everyone:

Hi CSUN - I got the recording to Brandon yesterday, so you should see it on Confluence soon.

from Northridge to Everyone:

Thank you

from Tom (CSUEB) (privately):

i say do the demo

from Eva Sorrell (CSUSB) (privately):

Why would you want to keep the 001, 019, & 035 it it didn't match? We should only be replacing records in the NZ with the same record

to Eva Sorrell (CSUSB) (privately):

Hi Eva - this is a very hypothetical example just to show how merge works.

from Eva Sorrell (CSUSB) (privately):

We plan to get regular updates of the OCLC master records for records in the NZ

from Eva Sorrell (CSUSB) (privately):

Okay, thanks

from Tom (CSUEB) (privately):

you are losing me

from Laura (Sonoma) (privately):

It didn't look like you had the option to select the merge rules you created. Why is that?

from Cal Poly SLO to Everyone:

Why isn't there a temple icon for your local fields?

from Northridge 2 to Everyone:

You can specify the merge rule in resource configuration, configuration menu, other settings, #16

from Mark B. (Los Angeles) (privately):

Yes, that helps--set the merge rule in External Resource settings, or else leave blank. And so one must leave the External Resource setting \_blank\_ if one wishes to \_choose\_ a Merge Rule (as Megan has wanted to do?).

from Svetlana (privately):

the fields 590 and 990 were not added as local extensions to the NZ record

from Mark B. (Los Angeles) (privately):

(sorry for the long note)

from Pam (privately):

What happened to all the versions that appeared? There were 4 versions and one was picked. Are those other 3 gone? How did those appear as well?

from Laura (Sonoma) (privately):

I'm also confused about why some of the merge rules start with drools and some don't.

from Laura (Sonoma) to Everyone:

Oops sorry!

from Laura (Sonoma) to Everyone:

What's the difference between setting the merge rules in Othere Settings and setting the merge rule in your External Resources profiles?

from Svetlana (privately):

If record is a NZ record rules are coming from NZ

from Svetlana to Everyone:

the fields 590 and 990 were not added as local extensions to the NZ record

from Svetlana to Everyone:

If record is a NZ record rules are coming from NZ

from San Marcos to Everyone:

why aren't you using $$9LOCAL

from Svetlana to Everyone:

Local Extension can be added from MD Editor - Edit menu or by typing $$9 LOCAL ( or $$9 local) at the end of the local field

from Svetlana to Everyone:

Q: What's the difference between setting the merge rules in Othere Settings and setting the merge rule in your External Resources profiles?

from Pam to Everyone:

What happened to all the versions that appeared on the right in split screen earlier in the presentation? After one is picked, do those other ones disappear?

from Maria Pena to Everyone:

merge rule is not enabled?

from Steve (SDSU) (privately):

Within merge rules, do 'remove' commands always apply only to the primary record, and 'add' commands always apply only to the secondary record?

from Svetlana to Everyone:

versions should not disapper

from North American Professional Services to Everyone:

from Steve (SDSU):

Within merge rules, do 'remove' commands always apply only to the primary record, and 'add' commands always apply only to the secondary record?

from Pam to Everyone:

Okay, that helps. Thank you!

from Steve (SDSU) to Everyone:

Thanks for forwarding my question to Everyone. 'Everyone' is not appearing on my 'send to' list for some reason.

from Chico to Everyone:

For how long are versions retained?

from Svetlana to Everyone:

Commands:

Remove ‘field’ - removes all lines with this field from the primary record

Add ‘field’ – adds all lines with the field from the secondary record to the primary record

Replace ‘field’ – 1) removes all lines with the field from the primary record (that exist in the secondary record) and 2) adds all lines with the field from the secondary record to the primary record

from Steve (SDSU) to Everyone:

Thank you, Svetlana.

from Steve (SDSU) to Everyone:

Yes, it's clearer for me, thank you.

from Samuel (privately):

Would it help to think of the 'Primary' record as the 'Target' record? Or, are there exceptions to this based on circumstances?

from Samuel (privately):

Right, so it's the target record then. Thank you :)

from Mark B (Los Angeles) to Everyone:

Thank you