Merge Rules in Alma Community Zone

Ex Libris integrates bibliographic records from various providers into the Community Zone to create a comprehensive metadata repository. To ensure high-quality records for each resource in the Alma Community Zone, Ex Libris has established merge rules to align new metadata feed records with existing ones.

These merge routines have settings that allow for the consolidation of records. This means that if an existing record lacks certain metadata, the new incoming feed can supplement the missing information.

To enhance the quality of bibliographic records, CZ MARC records from content providers may sometimes overwrite previous fields. This knowledge article describes the merge processes for bibliographic records for Electronic Collections, Serials, and Monographs.

Electronic Collection

The CZ Electronic Collection in Alma has an Electronic-Collection level bibliographic record, and it is referred to by Ex Libris as the "Descriptive Record." Community members are welcome to add and edit fields to improve each Electronic Collection's descriptive record.

However, the following fields can always be overridden by provider data in Alma's system updates, so community members are discouraged from editing these fields, as your edits might be overwritten:

- Collection description | 520
- Collection public name | 245
- Collection & Content type | 300 (that is repeatable field, and it will appear separately for Collection type and for Content type)
- Target ID | 904

Serials

Our primary source for serials enrichment is the CONSER feed, supplemented by the German Union Catalogue of Serials (ZDB). For more information on merge rules for serial records, please refer to the article: Community_Zone_Serial_Records_Enrichment

Monographs

For monographs, merge rules vary by provider. Each provider has its own cataloging practices to produce MARC records, which they send to us for enriching their collections. Once we confirm the availability of MARC files, we review a portion of the file to assess the quality of the records. Then, the Ex Libris Cataloging team develops merge rules that correspond to each MARC record provider's strengths, and adjusts what is added or replaced on a field-by-field basis. If specific fields in a provider record source have consistent quality or formatting issues, the Cataloging team can choose to either not take these fields or to only merge them into the existing records if the given field or fields do not yet exist.

If the content provider records are robust, they will populate fields such as title, identifier, author, subject, table of contents,

and others to enrich the records. The ISBN fields (020/776) are typically not sourced from MARC records; instead, they are generally sourced from the content providers' title lists to maintain linking functionality. These title lists (typically in KBART format) are loaded via the Knowledge Base ingestion process.

In some cases, the provider's metadata will override already populated fields, even if they are correct, due to the established merge rules for that MARC feed in order to maximize the benefits of provider-originated metadata.

Ex Libris uses Merge rule logic to decide whether to override or not override fields based on whether a record is already enriched (that is, whether a record is already high quality).

Community members are encouraged to edit CZ records to make them more robust. By updating the following fields, community members can raise the quality of a CZ record and make it so their edits to MARC fields throughout the record are more likely to remain in the record and not be overwritten:

- Add any 3XX fields
- Ensure the catalog record is created in accordance with international cataloging guidelines such as Resource Description and Access (RDA) and coded accordingly in the LDR/18 position. In particular, if the existing CZ LDR/18 is a dash ("-"), this needs to be modified to a character listed in the MARC21 LDR standards.

Please note that even with these updates, there may be instances where the content provider's metadata overrides your contributions.

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