Merge Methods (Best Practice)

The recommendation is to use "com.exlibris.repository.mms.match.uniqueOCLC" because these records are being imported from OCLC and have an OCLC number and therefore should be matched by unique OCLC identifier. The match method is set at each campus' instance of Alma.

Background

Merge rules determine how two records will be merged. MARC fields can be added, removed, or replaced.

This recommendation applies only to records imported using an import profile (example: vendor records) and records imported from Connexion. This recommendation does not apply to merge rules for Alma's Search External Resource functionality. For a discussion of these scenarios, please see Exlibris documentation.

The recommended merge rule is CCC Bib Overlay NZ. This merge rule is the primary rule for the Orbis Cascade Alliance and is used by various other consortia. It protects the 001 field (MMS ID) and replaces the 035 if it is an OCLC number. If the 035 is non-OCLC it is protected from being overwritten. It also removes all fields from the existing record and replaces them with all fields in the incoming record.

Best Practice Recommendations

The merge rule, CCC Bib Overlay NZ is applied to the Connexion integration profile established in the Network Zone and applies to all records imported from Connexion into the NZ.

This merge rule should also be applied to any import profile that imports to the NZ.

> (This is what Orbis has: in any institutional import profile that loads records into the Alliance NZ (i.e., the import profile has "Use Network Zone = Yes").)

> SUNY: Recommendation: all SUNY libraries will use the "SUNY Merge Rule for OCLC/MARC Records" merge rules in any import profiles that imports MARC records into the Network Zone.

Procedures in Alma

The recommended merge rule is shared with all campuses in the CCC and should be selectable in any import profile that imports into the NZ.