Match Profile in the Metadata Editor

Match methods in Alma are primarily used in import profiles to determine whether an incoming record is considered a duplicate of an existing record.

Match methods are also used in the Metadata Editor, specifically when linking records from the Institution Zone to the Network Zone, and when using Search External Resources. In both workflows, a list of record(s) is given if a match is found for the open record in the Metadata Editor.

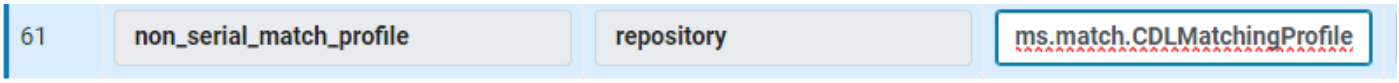
Match Profile Configuration for the Metadata Editor

The matching records are determined by the match profile configured in Alma. This configuration can be found under the **Configuration Menu > Resources > General > Other Settings** page.

> **It is WRLC policy to use the Fuzzy Match Method for both serials and non serials.**

> You must choose the same match profile for both the Network Zone and the Institution Zone. The *Share with Network* functionality may fail if the configuration settings differ between the Network Zone and the Institution Zone.

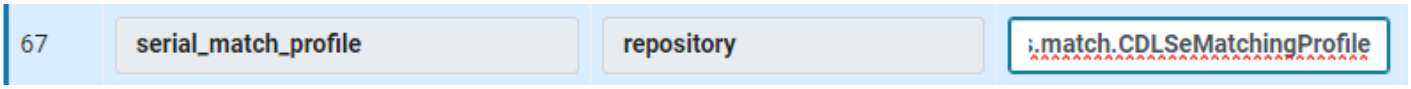
Non Serial Match Profile



The parameter value for the non_serial_match_profile setting in the WRLC NZ and IZs should be as follows:

```
com.exlibris.repository.mms.match.CDLMatchingProfile
```

Serial Match Profile



The parameter value for the serial_match_profile setting in the WRLC NZ and IZs should be as follows:

```
com.exlibris.repository.mms.match.CDLSeMatchingProfile
```

Fuzzy Match Algorithm

Both the Fuzzy Non-Serial Match Method and the Fuzzy Serial Match Method use the following algorithm to find a match:

> Alma attempts to find records with, at least, one of the following matching IDs:
>
> - ISSN
> - ISBN
> - LCCN
> - CODEN
> - OCLC unique number
> - Other system number (035 field)
>
> If no matches are found through this attempt:
>
> - If the incoming record has authors, Alma attempts to find records that have at least one matching combination of title + author.
> - If the incoming record does not have authors, Alma attempts to find records that have at least one matching title.
>
> The following title and author fields are used for matching:
>
> - MARC 21 Title: 245 a; 210 a; 246 a
> - MARC 21 Author: 100 a-d,jq,u; 110 a-e,n,u; 111 a,c-e,n,q,u; 700 a-d,jq,u; 710 a-e,l,n,u; 711 a,c-e,l,j,n,q,u
> - UNIMARC Title: 200 a,e,d,h,i; 531 a
> - UNIMARC Author: 700 a-d,f,p; 701 a-d,f,p; 710 a-h,p; 711 a-h,p; 720 a,f; 721 a,f; 702 a-d,f,g; 712 a-h,p; 722 a,f
>
> Examples:
>
> When the 100/245 match and the 210 exists in the Alma record but is lacking in the incoming record, will there be a match? Yes. Once the records are matched by the 100/245, that is enough. There is no need to check the 210.

When the 100/245 match and the 246 exists in the Alma record but is lacking in the incoming record, will there be a match? Yes. Once the records are matched by the 100/245, that is enough. There is no need to check the 246.

When the 100/245 match and the 246 exists in the Alma record has one or more 700 fields but the incoming record is lacking all or some of the 700 fields, will there be a match? Yes. Once the records are matched by the 100/245, that is enough. There is no need to check the 700 field(s).

If no matches are found in either attempt, Alma issues a message that no matches have been found.

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