


Authority Process

The following instructions start with the import of Library of Congress records from the following site: <http://authorities.loc.gov/>

There is currently NO authority module in Evergreen. Current functionality is limited to the validation of authority records against bibliographic records in your Evergreen database.

Saving Records from Library of Congress

1. Go to <http://authorities.loc.gov/>
2. Click Search Authorities.
3. Enter a search term, such as “Anthropology History” (quotes not required).
4. Choose search index, such as Subject Authority Headings.

SOURCE OF HEADINGS: Library of Congress Online Catalog		
YOU SEARCHED: Subject Authority Headings = Anthropology history		
SEARCH RESULTS: Displaying 1 through 100 of 100.		
#	Bib Records	
 1	108	Anthropology--History.
2	9	Anthropology--History--18th centur
3	7	Anthropology--History--19th centur

5. Next to the required heading, click on the red button/link for “Authorized Heading.”
6. Another screen will show the 1XX headings. In this case, just there is one heading for Anthropology – History.
7. Select the link to view the authority record. This will take you to the MARC Display.
8. At the bottom of the page, select Save as MARC (Unicode or non-Unicode will depend on whether diacritics are present in the authority record).
9. Press to Save the record. NOTE: Records will generally save to the Downloads folder on your PC unless configured otherwise. It will save as Pwebrecon.cgi potentially with a number at the end if you’ve imported multiple files (i.e. Pwebrecon(3).cgi).

TIP: Once you’ve saved an authority record, it’s good practice to go to the Downloads folder and rename your Pwebrecon file so you know what authority record is represented there, such as anthro.history.cgi. You might also save the newly named files into an Authority file on your Desktop.

10. Go back to New Search and continue importing records using steps 3-9 above.

Importing Authority Files into Evergreen

1. Log into the Staff Client with a login that provides cataloging permissions.
2. From the Cataloging menu, select MARC Batch Import/Export.

3. Choose the record type of Authority Records instead of the default for Bibliographic Records.
4. Enter the name of a new queue or append to an existing queue (see second option in screen shot below).
5. Check the box to auto-import all non-colliding records. This will automatically load your authorities into the authority index.
6. Ignore Holdings fields.
7. Choose a source for records (optional, this will have no impact on how the records are imported, it simply identifies the place from which you obtained the records).
8. Browse your PC or network for the authority file.
9. Click Upload.

Evergreen MARC File Upload

Record Type:

Create a New Upload Queue: or Add to an Existing Queue:

Auto-Import Non-Colliding Records:

Import Attached Holdings:

Holdings Import Profile:

Select a Record Source:

File to Upload:

10. A progress bar will show and then the authority queue. If no records show initially, click on the check box for Limit to Non-Imported Records to see the import time of all records just loaded.
11. Use the View MARC link next to each record to look at the full MARC display.

NOTE: There is currently no way to search for authority records in the database. There is, however, a report that can be run to list all authority records in the database (instructions further down).

Validate Bibliographic Records Against Authority Headings

1. Retrieve a Catalog record via a Staff Client search.
2. From the full record display for the title, click on Actions for this Record in the upper right hand corner.
3. Select MARC Edit (if you are a cataloger who has their default set to show the MARC Editor by default, you will skip step #2).
4. Click Validate.

NOTE: Headings not valid according to records in the authority index will show in red. Headings that are valid show in black. See screen shot below.

MARC Record			
925	0		+a acquire +b 2 shelf copies +x policy default
955			+a sf07 04-13-01; sf12 04-18-01; sf05 to Dewey 04-19-01; aa20 04-20-01 +a ps15 2001-
010			+a 2001002259
020			+a 0745313906
020			+a 074531385X (pbk.)
040			+a DLC +c DLC +d DLC
042			+a pcc
050	0	0	+a GN17 +b .E75 2001
082	0	0	+a 306/.09 +2 21
100	1		+a Eriksen, Thomas Hylland.
245	1	2	+a A history of anthropology / +c Thomas Hylland Eriksen and Finn Sivert Nielsen.
260			+a London ; +a Sterling, Va. : +b Pluto Press, +c c2001.
300			+a viii, 207 p. ; +c 22 cm.
440	0		+a Anthropology, culture and society
504			+a Includes bibliographical references (p. 179-191) and index.
650	0		+a Anthropology +x History.
650	0		+a Anthropology +x Philosophy.
700	1		+a Nielsen, Finn Sivert.
830	0		+a Anthropology, culture, and society.
856	4	2	+3 Publisher description +u http://www.loc.gov/catdir/enhancements/fv0904/2001002259

- Right click over any heading to see the authority index. If there is an authority heading that starts with any of the terms, it will show to the right (essentially a heading browse on the authority index). Otherwise, it will just say “no matching authority records were found.”

The screenshot shows the MARC Editor interface with a right-click context menu open over the 'Anthropology +x History' field. The menu contains the following items:

- +a (DLC)369952
- +a (DLC)sh2007101153
- +t 8888 +u te00 +v 0
- +a DLC +b eng +c DLC
- +a sh2007101153
- +a Anthropology +x History
- +a Record generated for validation purposes.
- +a Work cat.: Delimiting anthropology, c2001
- +a te00

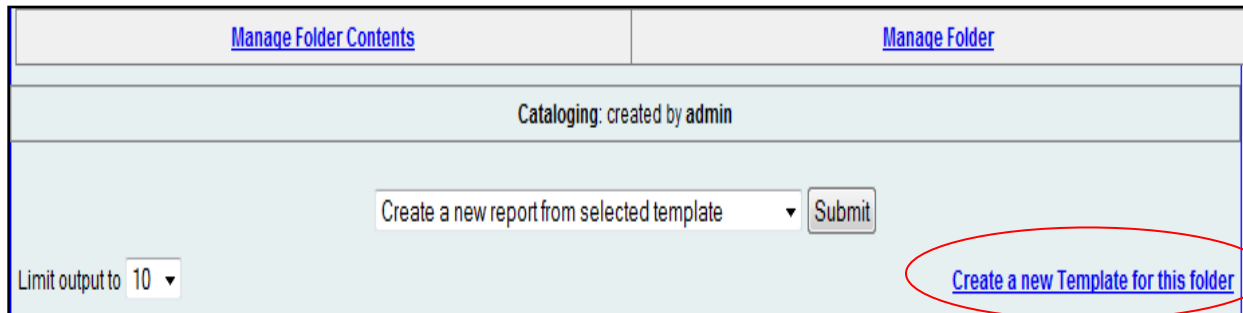
The 'Anthropology / History' option is highlighted in blue. At the bottom of the menu, there is an 'Apply Selected' button.

- To apply this authority record, select all subfields to apply from the 1XX field and click Apply Selected at the bottom of the pop up box.
- Be sure to SAVE any changes you’ve made to the bibliographic record by clicking the Save Changes button at the top of the MARC Editor.

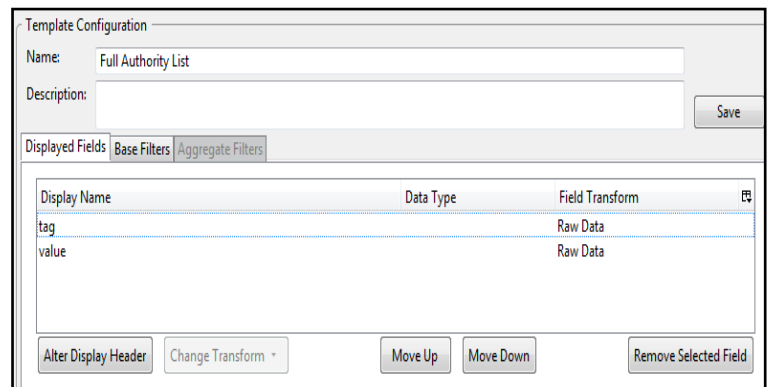
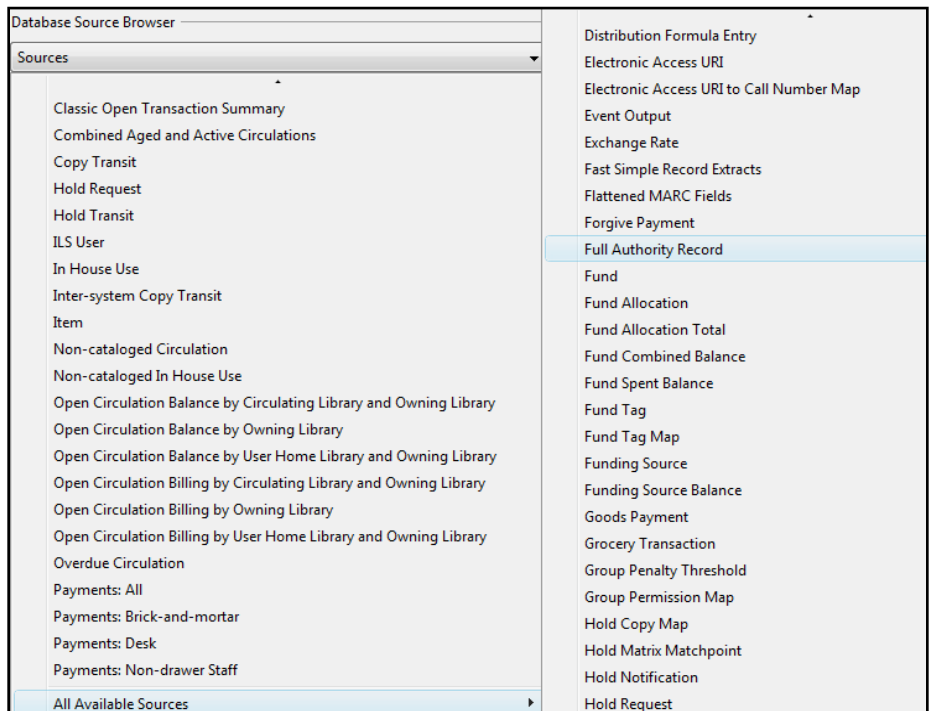
List Full Authority Records Report

Purpose of this report is to list ALL authority records currently in the Evergreen database.

1. Go to the Admin menu in the staff client and select Local Administration – Reports.
2. Select one of your Template folders and click Create a New Template for this Folder.



3. In the list of report sources, go down to ALL Available Sources and then scroll down to “Full Authority Record and select by clicking on the report name source.
4. Click on Full Authority Record source once in the template so a list of field names will show to the right.
5. Double click on “tag” from the Field Name column to add it to your Displayed Fields tab at the bottom.
6. Double click on “value” to add it to the Displayed Fields tab.
7. At the bottom, click on the Base Filters tab.
8. Double click on “tag” to add it to the filters.
9. Highlight “tag” at the bottom under Base Filters and click on Change Value. Operator should be Equals by default.
10. Enter 100,199 and click OK. This is says that it will find all authority records that have a 1XX tag such as a 100, 130, 150, etc...
11. Enter a Report Name and click Save.



12. You should get a confirmation box. Click OK.
13. Run the report by going to the Templates folder and selecting the checkbox next to the report.
14. Select Create Report from this Template and hit Submit.
15. Enter a Report Name.
16. Choose a folder where the report definition will be stored.
17. Select Output Options turning off bar and line chart options.
18. Check "Run as soon as possible" or schedule it to run in the future.
19. Select a folder to store the Output.
20. Save the Report.
21. Confirmation message will show. Click OK.
22. Go to the Output folder where the report is stored (per #19) and choose View Report Output.
23. Select Tabular, CSV or Excel Output depending on your choices in #17.