



POLARIS CATALOGING

How to Create or Import an Authority Record

Creating Authority Control Options in Polaris

Do-it- yourself manually

- Create individual authority records
- Retrieve and import needed authority records from an external source

Remote Automatic Authority Control: (subscription service)

A Z39.50 connection to an authority database, to retrieve needed records

Periodic updates by 3rd party vendor

Create Individual Authority Record

- Select a template
- Fill in the appropriate fields

The screenshot displays the Polaris Authority Template selection interface. On the left, there is a menu with options: General, Settings, Scoping, Branches, Collections, and Databases. The 'General' tab is selected. Below the menu, there are search filters: Object (Authority Templates), Search by (Name), Type (Exact match (implicitly truncated)), Sort by (None), and For (*). A table lists available templates:

Name	Owner	Date Created
Uniform Title	Polaris Library Training System	2/12/2007
Topical Term	Polaris Library Training System	2/12/2007
Personal Name	Polaris Library Training System	2/12/2007
Meeting Name	Polaris Library Training System	2/12/2007
Geographic Name	Polaris Library Training System	2/12/2007
General Subdivision	Polaris Library Training System	2/12/2007
Corporate Name	Polaris Library Training System	2/12/2007

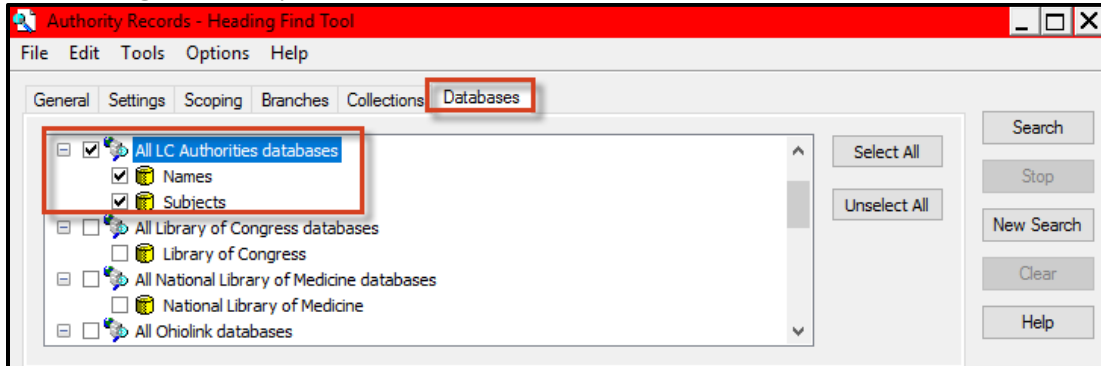
The 'Personal Name' template is selected. The right pane shows the details for this template:

Template Name: Personal Name
Heading:
Tag Ind Data
|DR nz 22 n 4500
003 Pol
008 ||||| c|ac|||a|| | aaa d
010 +a
040 +a
100 0 +a
400 0 +a
500 0 +a
667 +a
670 +a
680 +a

Training

Retrieve/import an authority record from an external source

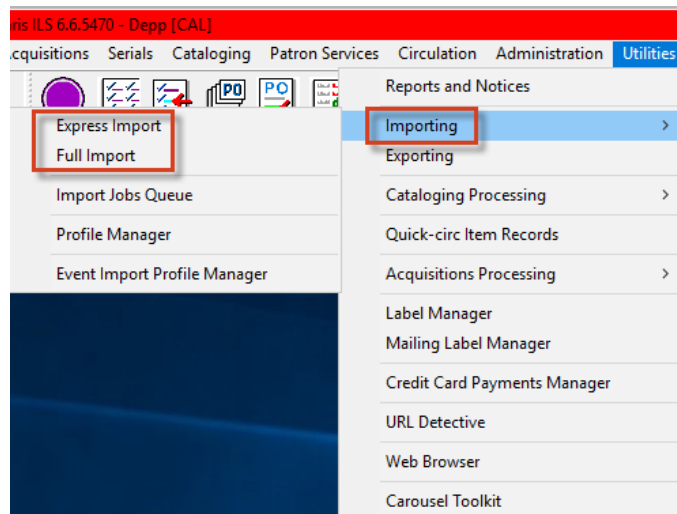
Search other Databases such as Library of Congress or a Bib Utility via Z39.50
Heading Find Tool | Database tab, select the source



Retrieve / import needed authority records from an external source

To import records from the third party:

Click on Utilities | Importing | Express Import or Full Import



NOTE: Full Import the elements in the profile can be edited but not in Express Import.

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Authority records can be imported when importing bibliographic records:

Polaris Import Setup - Full

Profile setup | Bibliographic Records | Item Records | Authority Records | Record Sets

Bibliographic Save Options

☒ Save all records as final
☐ Save all records as provisional
☐ Do not save any records

☒ Display in PAC
☐ Do not overlay

Record owner: Polaris Library Training System (sys)

☒ Delete MARC Tags on incoming record
☐ System defined deletion tags
☒ Profile defined deletion tags

Tag	Indicator 1	Indicator 2	MARC Description
660	0,1,2,3,...	0,1,2,3,...	

When Saving Bibliographic Records as Final

☒ Perform MARC 21 Validation
 If validation errors are found:
☐ Save record as provisional
☒ Ignore errors; save record as final

☒ Perform Authority Control
 If no matching heading is found:
☐ Automatically create new authority record; save bibliographic record as final
☒ Do not create authority record; save bibliographic record as final
☐ Do not create authority record; save bibliographic record as provisional

NOTE: System generated authority records are very minimal and will need to be updated:

Authority Record

Control number: 724021 Record status: Final

Heading: Cowboys--Humor.

Tag	Ind	Data
LDR		nz 22 o 4500
001		724021
005		20120626084628.0
008		120626 anannbab a d
040		\$aSAR\$cSAR
150		\$aCowboys\$vHumor.
667		\$aPolaris system generated authority record

Training

Or import just authority records: Select the profile | click the tab for Authority records

Polaris Import Setup - Full

Profile setup | Bibliographic Records | Item Records | **Authority Records** | Record Sets

Authority Save Options

☒ Save all records as final ☐ Save all records as provisional ☐ Do not save any records

When Saving Authority Records as Final

☒ Perform MARC 21 Validation

If validation errors are found:

☐ Save record as provisional ☒ Ignore errors; save record as final

☒ Perform See Also From Reference Linking

If no matching heading is found:

☐ Automatically create new see also reference; save authority record as final ☒ Do not create see also reference; save authority record as final ☐ Do not create see also reference; save authority record as provisional

☒ Perform Duplicate Detection

☒ Use system duplicate detection rules ☐ Use custom duplicate detection rules

If a suspected duplicate is found:

☐ Save incoming as provisional ☐ Save incoming as final; do not replace existing ☒ Merge duplicate records

Preferred cataloging source for:

Polaris Library Training System (sys)

Authority Save Options:

Save all records as:

- Final: if you do not need to edit.
- Provisional: if editing is needed.

When Saving Authority Records as Final:

- Perform MARC 21 Validation
- Perform See Also Reference Linking
- Perform Duplicate Detection
 - Use system duplicate detection rules. Administration | Database Tables | Authority Deduplication
 - Use custom duplication rules. Select additional fields.

☒ Perform Duplicate Detection

☐ Use system duplicate detection rules ☒ Use custom duplicate detection rules

Rules to select

incoming 001/003 = existing 035 #a
incoming 001 = existing 010 #a
incoming 1xx = existing 1xx
incoming 010 #a = existing 010 #a
incoming 010 #z = existing 010 #a
incoming 035 #a = existing 001
incoming 035 #a = existing 035 #a

Rules to apply (as unique groups)

- If a duplicate is found.

Remote Automatic Authority Control (Subscription)

Using Z39.50 to search ZMARC authority database

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- ZMARC is a copy of the Library of Congress' authority database
- ZMARC for Authorities is on a subscription basis
- Remote Automatic Authority Control works two different ways:
 - Each time a bibliographic record is individually saved
 - During the import of bibliographic records

Automatic Authority Control while creating a bibliographic record

- When a bib record is individually saved and needs an authority record, the remote automatic authority control launches to the linked database to retrieve a valid authority record
- The imported authority records and their headings are linked to the bibliographic record headings
- Any remaining unlinked headings will still appear in the Check Headings Assistant dialog box

NOTE: The remote database connection dialog flashes by very quickly. Staff may not always see it.

Periodic updates by 3rd party vendor

Vendor will notify the library of a new file. The staff will import the new file using Import Profile.

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