Training

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

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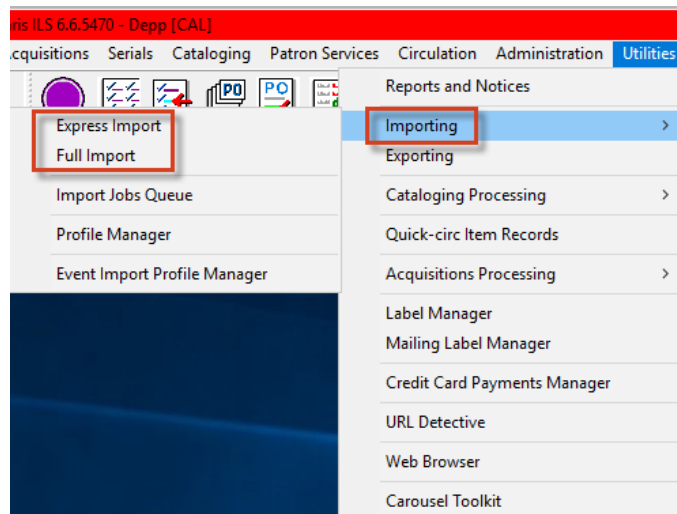# Retrieve/import an authority record from an external source

Search other Databases such as Library of Congress or a Bib Utility via Z39.50

Heading Find Tool | Database tab, select the source
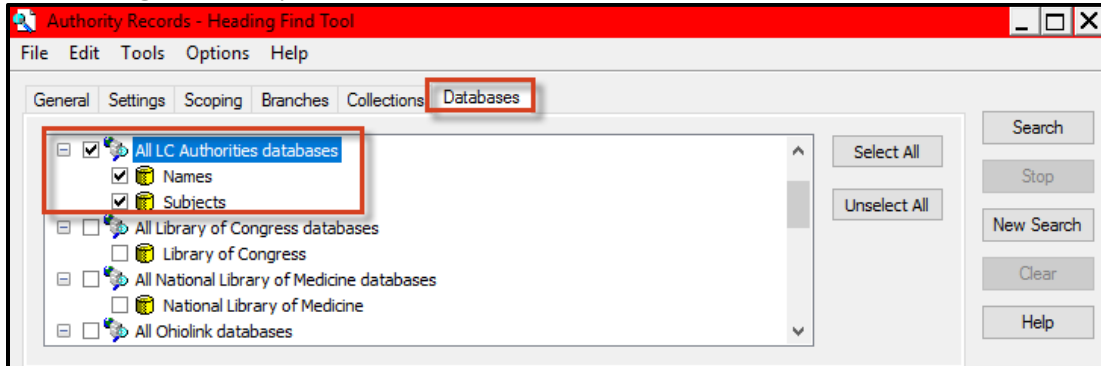
Retrieve / import needed authority records from an external source

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.

Authority records can be imported when importing bibliographic records:

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

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

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.

- If a duplicate is found.

Remote Automatic Authority Control (Subscription)
Using Z39.50 to search ZMARC authority database

- 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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