

# Authority Control at Your Library

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# Land Acknowledgement

We acknowledge with respect that we are on the ancestral lands of the Osage people, Missouri people, and Illinois Confederacy, whose connections to this land continue to this day.

# About this session

## Outcome

All participants will leave with a manageable goal related to authority control they can implement at their own library.

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## What to expect

- Hands-on work with the Web client
- Working in groups of 2-3
- Interactive

# Outline

- Introductory material
- 3 activities
- Break
- Discussion: ethical dimensions of authority control
- Another activity
- Discussion: applying what you've learned today

Slides available

<http://tinyurl.com/authorityeic>

# Please interrupt and yell!

**Interrupt** when something is unclear, if I make an assumption that is untrue, or if you'd like to share a very relevant experience of your own.

**Yell** during activities to coordinate with other groups.

# Definition of Authority Control

Authority control is the process of grouping similar resources together using a specific term taken from an authority file.

## Reasons for authority control projects

- Improving patron discovery experience by maintaining consistent terminology
- Reducing the hostile terminology that your patrons encounter
- Future-proofing your catalog for a linked-data context
- Identifying low-quality and out-of-date records in your system
- Creating rich search data for discovery software



## Authority Control and Evergreen

- Galen Charlton, Chad Cluff, and Mary Jinglewski did an excellent presentation at the 2016 Evergreen Conference
- Slides available at [https://evergreen-ils.org/wp-content/uploads/2015/11/eg16-CatalogingForester\\_reduce.pptx](https://evergreen-ils.org/wp-content/uploads/2015/11/eg16-CatalogingForester_reduce.pptx)
- Today's preconference will build on their presentation, especially related to authority work that you can do without an authority vendor.

## Activity 1: Identify and correct outdated terminology

1. Working with a partner, go to  
<https://egconf.missourievergreen.org/eg/staff>
2. Go to Search → Search the Catalog.
3. Click Browse the Catalog
4. Find a bibliographic record with a subject heading “Cookery”.
5. Edit the record to the more current LCSH term “Cooking”.

## Control sets vs. thesauri

**Thesaurus** – a list of authorized and variant terms. Each MARC authority record should be part of a thesaurus.

**Control set** – a mapping of bibliographic fields to the thesauri they should match, as well as ways to control that matching process.

In practice, most libraries will only use one control set.

## Short control set rant

- They are helpful for controlling different fields with different thesauri.
- Unfortunately, the MARC standard is likely to have different thesauri going on in the same field, distinguished by an indicator or \$2. See bug 1766378.

650\_2 \$aUnicorns in art. will validate, even though it is a LCSH term where a MeSH heading should be.

## What the validate button does

1. Finds the control set for a particular bib field.
2. Looks for a matching term in that control set's thesauri, based on settings in the control set.
3. If there is at least one authority heading field that matches, show a checkmark icon.
4. Otherwise, turn the field red.

## Activity 2: Add a local authority record

Create a thesaurus for your new authority records:

1. Go to Administration → Server Administration.
2. Choose Authority Thesauri.
3. Create a new thesaurus just for you! Choose any capital letter for your short code. Make sure your thesaurus is part of the LoC control set.

## Activity 2: Add a local authority record

Create a local authority record:

1. Open up a bibliographic record.
2. Click the Validate button and find a record that shows up as red.
3. Click the Link icon next to the field.
4. Click Create and Edit.
5. In the Subj fixed field, enter the capital letter that represents your thesaurus.
6. Click Save, then Use this Authority, then Save.
7. Save the bib record.
8. Hit Validate.

## Activity 2: Add a local authority record

But wait! The Validate button doesn't check fields that contain a \$0 red. So...

1. Remove the \$0.
2. Hit Validate again.



## Limitation of the Validate button

### Based on an assumption

Validate assumes that catalogers only work with one record at a time.

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## Working in batch

If you want to create links and identify unauthorized headings on a larger scale, you need to use command-line tools:

- `authority_control_fields.pl` finds matching headings and creates links.
- SQL queries on your handout can identify records that don't match your authority file.

## Activity 3: Download MARC authorities and upload

1. Download at least one MARC authority record from one of the sources on your handout.
2. Go to Cataloging → MARC Batch Import/Export.
3. Set Record Type to Authority Records.
4. Check Import Non-Matching Records.
5. Upload your file.
6. When it's done, go to Cataloging → Manage Authorities and search for the record you imported.

# Break

See you soon

## Finding one's self in the catalog

“When people walk into the library of their own free will – when it is an act not in response to a mandatory class assignment or work project – what are they looking for? Many times, it is themselves – traces of self, fragments, whole stories.”

– De la Tierra, T. (2008). Latina lesbian subject headings: the power of naming. *Radical cataloging: Essays at the front*, 94.

## Finding one's self in the catalog

“Through the use of inaccurate language in the Library of Congress Subject Headings and problematic classification schemes, catalogers often unwittingly contribute to the creation of library environments that are passively hostile to transgender users.”

– Roberto, K. R. (2011). Inflexible bodies: metadata for transgender identities. *Journal of Information Ethics*, 20(2), 56.

# Professional ethical commitments

From the IFLA Statement of International Cataloging Principles:

**Common usage** – Vocabulary used in descriptions and access should be in accord with that of the majority of users.

**Representation** – Controlled forms of names of persons, corporate bodies and families should be based on the way an entity describes itself.

**Accuracy** – Bibliographic and authority data should be an accurate portrayal of the entity described.

From the ALA Code of Ethics:

**Privacy** – We protect each library user's right to privacy and confidentiality.

Helpful strategies for reducing hostility?



## Activity 4: Choose your own

Three options:

1. View an authority record in various formats
2. Add linked data URIs to a MARC record using MARCEdit
3. Run SQL queries on your own authority file
4. Do a refresher of activities 1-3

Reminder: slides at <http://tinyurl.com/authorityeic>

## Activity 4a: View an authority record in various formats

Authority records are public, but a little hard to track down:

- Browse:  
[http://libcat.linnbenton.edu/opac/extras/browse/marcxml/authority.subject/1/Saint Charles Mo/1/20](http://libcat.linnbenton.edu/opac/extras/browse/marcxml/authority.subject/1/Saint%20Charles%20Mo/1/20)
- Specific record by ID: <http://libcat.linnbenton.edu/opac/extras/supercat/retrieve/marcxml/authority/354524>
- List of available formats:  
<http://libcat.linnbenton.edu/opac/extras/supercat/formats/authority>

## Activity 4b: Add linked data URLs to a MARC record using MarcEdit

1. Download and install MarcEdit:  
<http://marcedit.reeset.net/downloads>
2. Open up some bib records in the MarcEditor feature (you may need to run MarcBreaker first)
3. Go to Tools → Linked Data Tools → Build Linked Records
4. Move contents of \$0 to \$9 so that it doesn't mess with Evergreen's Authority Control features

## Activity 4c: Run SQL queries

In your local system, run some of the queries on your handout. Think about additional `WHERE` clauses that might be helpful for your library.

## Consultant time

Get into pairs, and act as consultants to each other. Establish some basic parameters for an authority control project, keeping in mind:

- What is your goal?
- How big will your project be?
- Will you need more authority records? Will you create them locally or bring them in from another system?
- Will you need to configure Evergreen a bit differently, especially with Control Sets or Thesauri?
- What training will you need?
- Will you need to advocate for this project, or can you just do it?
- How will you measure success?

# Thank you!

## Special thanks...

...to Blake, who created the demo server we used today.

## Continuing our conversations

I am available...

- ...at this conference
- ...on email at sandbej [at] linnbenton [dot] edu
- ...on the evergreen-catalogers email list
- ...on Github at sandbergja