

Authority Control

Update on the Current Landscape

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Goals for the Authority Control Working Group

- explore current Alma functionality
- advocate for improvements in Alma
- recommend an Alliance-wide approach to performing authority control tasks in Alma

Phase 1

- Explore current Alma functionality related to authority control
- document Alma functionality gaps

Phase 1 - Report summary

Alma authority control tools

- Link bib headings - daily job
- Preferred term correction - daily job
- Local authorities at the IZ level - only link heading in bibs not linked to the NZ

Phase 1 - Report summary

- OCLC master records complicate things
- Unable to test functionality in the sandbox

Phase 1 - Survey feedback

- 28 institutions responded
- desire for Alma-based tools that would operate at the consortium (NZ) level
- Primo display
- Reports

Phase 1 conclusions

Alliance level / centralized
guidance on authority work

Focused approach for
enhancing master records

We need better reports from
Alma

Phase 1b

- Fully test functionality in the NZ premium sandbox
- Document what works well
- Document functionality that is lacking

Phase 1b testing in sandbox

- Link bib headings job report
- Preferred term correction job report
- Authority control task list

Phase 1b testing in sandbox

- Link bib headings job report
 - report includes: hyperlink to “all titles” set with bibs when heading not linked
 - lacks indication of which headings in each bib are unlinked

Link Bib Headings job

ExLibris Alma - Sandbox

Tasks Analytics Currently a

Job Report

 **Completed Successfully**

Process ID 16325504440001451
Started on 06/29/2016 11:02:22 PDT
Total run time 21 Minutes 36 Seconds
Status Completed Successfully
Records processed 388352

Counters

Number of Bib-Heading(s) where [39459](#)
no appropriate authorized term
was found

Number of Bib-Heading(s) were 348893
linked

Initial run true

Number of Bib-Heading(s) with [6226](#)
multi-matches for linking

Phase 1b testing in sandbox

- Preferred Term Correction job
 - report includes: MMS ID, vocabulary, MARC field, old value, new value
 - Most headings in this report had identical old and new values (case opened)
 - Lots of errors (case opened)

Preferred Term Correction job

ExLibris **Alma** Sandbox Tasks Analytics

Job Report

Completed with Errors

Process ID 16326765570001451
Started on 06/29/2016 11:55:59 PDT
Total run time 9 Hours 22 Minutes 32 Seconds
Status Completed with Errors
Records processed 781490

Alerts

Of the 781490 records processed, 29700 records failed. For more information view the report

Counters

Number of Bib-Heading(s) corrected	907114
Number of Bib-Heading(s) where no appropriate authorized term was found	39647
Bib-Heading(s) correction report	Click to download report

How useful are these reports?

Phase 1b testing in sandbox

Authority control task list

- Reports that can be filtered by:
 - Corrected headings
 - Unlinked headings
 - Multi-matches
 - Linked headings
 - Updated/deleted authority records
- Can be exported and sorted by MARC tags in Excel

Phase 1b testing in sandbox

Authority control task list problems:

- PTC reports on headings that did not change (opened case)
- MMS ID does not export, no OCLC numbers
- Lots of errors (30,000) when running PTC job (opened case)
- Unable to filter vocabularies (FAST, GND, MESH, LC) or MARC fields
 - Export and filter in Excel
- Very slow (spins and spins when changing filters)

Which reports are most
important?

Phase 1b testing to be continued...

- Browse bibliographic headings (feedback from IZ testing welcome)
- Primo display (unavailable for NZ at this time)
- Worldcat API to batch update headings in OCLC
- Explore approaches to insuring consistent use of terms in the new bibliographic fields 382 (medium of performance), 385 and 386 (demographic group terms), 388 (time period terms), and 257 (Country of producing entity).
- ExL linked data initiatives

Phase 2

Work with Ex Libris staff on implementing existing Alma authority control functionality where possible, advocating for Alma enhancements where necessary, working with Ex Libris to design enhancements that meet our needs, and test enhancements as they become available.

Your feedback and ideas are
welcome!