

# Authority Control

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ed to <https://support.goalexandria.com/tools/authority-control/>

## How It Works

This page has been moved to <https://support.goalexandria.com/tools/authority-control/>

are uncomfortable with the complexities of MARC records a simple way to maintain consistency in their Authority Control in Alexandria is always enabled and can not be turned off. After the initial launch of Alexandria, one of the major goals of the project is to create a new Authority Control database from your data. Alternately, if you are using the previous version of Alexandria, the software will create a brand new Authority Control database from your existing data. When you add data to an authority-controlled field in Alexandria, your term is automatically added to the Authority database. This can be done by opening up future imports, manual entry of titles, or the conversion of an older Alexandria data set.

ers in an authority-controlled field, Alexandria will check to see if the newly-entered data already exists in your newly-provided data is an exact match against existing data, the field will auto-complete slightly lighter than the s point, if you <tab> out of the field, the auto-completed term will be used and your cursor will move to the next add a more current term or select one that already exists.

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## Navigation

## Navigation

bibliographic (or other) data elements you want authority controlled, the process by which information contained in used using distinct terms for specific data elements. That is to say, operators assign certain data elements (e.g. graphic records a unique term which is then used to describe all references to that same element (e.g. "Clemens, are spelling variations, pen names, or aliases. When these standards are consistently applied to bibliographic catalog) is better maintained and organized, keeping it user-friendly and searchable so that patrons can easily find

does not support MARC Authority standards, but works like the "controlled" vocabulary model on MARC and non-MARC does more, far more intuitively. Every time that an entry is made to one of Alexandria's actively controlled data / Control index is updated. Authority Control is always on and can not be deactivated.

es the familiar layout found in most Alexandria management interfaces.

- On the left contains a list of all existing authority control categories (e.g. Subjects) and types (e.g. Topical Term).  
 The top row acts as filters, allowing you to narrow your focus and display only relevant authority-controlled types.  
 The bottom row allows you to add, remove, or modify terms for the selected category/type as you see fit.

### Fun Fact

The word *authority* in *authority control* derives from its initial use in identifying *authors*, and does *not* have the usual meaning of *authority* as a power relationship, although both senses of the word *authority* are related etymologically.

### Actions Menu

The  Actions dropdown menu contains specialized authority-specific functions and other tools. To remove unused terms, select (highlight) the authority control type that you would like to tidy up from the Category/Type pane.

- **Remove Unused "XXX" Terms.** This selection queues a utility that examines all of the terms for the currently selected Category/Type; if no matching records are found for the term, it's removed from the authority control database. Remember, this removes all unused entries from the Authority Control database, but will not remove entries that are currently being used. The completion time for this utility depends on the number of records modified and the capabilities of your server. Click Proceed to continue or Cancel to abort.
- **Remove All Unused Terms.** This hidden selection queues a utility that examines and removes all of your authority controlled terms and any that don't match one or more records are removed from your database. Please contact COMPanion's Customer Support team if you need to access this option.
- **Rebuild All Authority Records.** This hidden selection queues a utility that examines all of the authority control-related tables in Alexandria and then adds missing terms to the authority control database. Please contact COMPanion's Customer Support team if you need to access this option.



Due to COMPanion's migration to newer **MARC Authority** standards over the years, those upgrading from a previous version of Alexandria may be forced to rebuild their existing authority-control database.

Older AACR2 authority-controlled records will be converted to the newer **RDA**-style on rebuild and unsupported records will be removed from the database.

## Categories

### Categories

The first step in creating or modifying an authority control record is picking the appropriate type located to the left of the main category name. You are able to expand or contract category sections by clicking the icon located to the left of the main category name. Selecting (highlighting) one of the main category names (e.g. Subjects) will reveal all of the authority control types available for that category.

For example, if you want to add (or update) a term used for a publisher, you would select Publication from the Category/Type pane.

Some of the authority-controlled types that appear in the Category/Type pane affect data that is stored in Alexandria's own custom format. These fields have no relation to MARC Authority standards although they are set up and shared similarly. Further, some of these fields are used in patron records (e.g. City, State, and Homeroom). Other types (e.g. Curriculum Term, Interest Term, Bibliography Term, and Publisher) are stored in a MARC format, but aren't part of the MARC Authority standard.

Select the Authority Control Type for which you'd like to add terms.

## Patrons

- **Grade.** Controls terms in the patron Grade field. The name of the [Level] type is customizable in your Localization preferences.
- **City.** Controls terms in the patron City field.
- **State.** Controls terms in the patron State field.
- **Postal Code.** Controls terms in the patron Postal Code field.
- **Homeroom.** Controls terms in the patron Homeroom field; site-specific. The name of the [Location] type is customizable in your Localization preferences.
- **2nd Location.** Controls terms in the patron 2nd Location field; site-specific. The name of the [Sublocation] type is customizable in your Localization preferences.

## Titles

- **Interest Term.** Controls Interest Terms in the 521\_a field.
- **Bibliographic Term.** Controls Bibliographic Terms in the 653\_a field.
- **Curriculum Term.** Controls Curriculum Terms in the 658\_a field.
- **Genre.** Controls Genre terms in the 655\_a field.
- **Awards.** Controls Awards terms in the 586\_a field.

## Series

- **Series.** Series controls data in the following fields:
  - Series Statement (490\_a)
  - Series Personal Names (800\_a)
  - Series Corporate Names (810\_a)
  - Series Meeting Names (811\_a)

| Category/Type |               |
|---------------|---------------|
| ▼             | Patrons       |
|               | Grade         |
|               | City          |
|               | State         |
|               | Postal Code   |
|               | Homeroom      |
|               | 2nd Location  |
| ▼             | Titles        |
|               | Interest      |
|               | Bibliographic |
|               | Curriculum    |
|               | Genre         |
|               | Awards        |
| ▶             | Series        |
| ▶             | Medium        |
| ▶             | Publication   |
| ▶             | Copies        |
| ▶             | Names         |
| ▶             | Subjects      |

## Medium

- **Medium.** Mediums can come from different locations in a record. The AACR2-style records use 245\_h while RDA-style records use a series of separate, more specific tags (336\_a, 337\_a, and 338\_a). You can add an alias for Mediums.

## Publication

- **Publisher.** Controls data in the 264\_b field.
- **Publication Place.** Controls data in the 264\_a field.
- **Publication Year.** Controls data in the 264\_c field.

## Copies

- **Copy Location.** Controls data in the 852\_b field; site-specific.
- **Copy Shelving.** Controls data in the 852\_c field; site-specific.
- **Funding Source.** Controls terms in the copies Funding Source field.
- **Vendor.** Controls terms in the copies Vendor field.

## Names

- **Personal Name (Author).** Controls data in the 100\_a and 700\_a fields.
- **Corporate Name.** Controls data in the 110\_a and 710\_a fields.
- **Meeting Name.** Controls data in the 111\_a and 711\_a fields.

## Subjects

- **Topical Term.** Controls data in field 650\_a.

- **General Subdivision.** Controls data in field 650\_x.
- **Chronological Subdivision.** Controls data in field 650\_y.
- **Geographic Subdivision.** Controls data in field 650\_z.
- **Personal Name (Author).** Controls data in field 600\_a.
- **Corporate Name.** Controls data in field 610\_a.
- **Meeting Name.** Controls data in field 611\_a.
- **Geographic Name.** Controls data in the 651\_a and 751\_a fields.

## Terms

### Terms

The larger, right-side of the interface is dedicated to the Selected Authority Type pane where you can view and edit all of the authority-controlled terms you have created for the selected type. This pane changes dynamically depending on the Category/Type you have selected on the left; for example, if you have Personal Name (Author) selected, you'll see a list of associated author terms. You can edit an existing term from the list by double-clicking on it or by selecting (highlighting) it and clicking Edit Term.

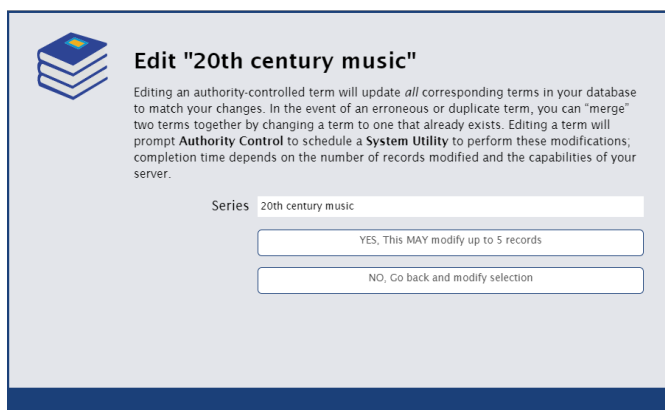
Use the Search field to locate an entry in the currently selected authority control Category/Type. Enter the term (or a close approximation) that you are looking for and Alexandria will display the closest matches.

#### Selected Authority Type Options

If a term is entered erroneously during input, import, or conversion, you can use Edit Term to change the text that you would like to have authority-controlled. The terms that you can edit are based on the Category selected on the left (e.g. Titles, Patrons, Publication, etc). Modify the term that you would like to have authority-controlled and click **YES, this MAY modify up to XX records** or **NO, go back and modify selection to cancel**. When you have modified your term, you will be returned to the Authority Control interface with your updates reflected in the selected authority control list.

#### Edit Term

Editing an authority-controlled term will update all corresponding terms in your database to match your changes. When you click to modify the records, a System Utility will be scheduled to make the changes. The time it takes to complete depends on the number of records being modified and the capabilities of your server.



The screenshot shows a window titled "Edit '20th century music'". On the left is an icon of a book with a star. The main text explains that editing an authority-controlled term will update all corresponding terms in the database to match changes. It also mentions that in the event of an erroneous or duplicate term, users can "merge" two terms together by changing a term to one that already exists. It notes that editing a term will prompt Authority Control to schedule a System Utility to perform these modifications, and that completion time depends on the number of records modified and the capabilities of the server.

Below the text, there is a "Series" label followed by a text input field containing "20th century music". Underneath the input field are two buttons: "YES, This MAY modify up to 5 records" and "NO, Go back and modify selection".

Access the authority control summary in Operations Management by selecting the wrench icon in the top right corner.

#### Edit Alias (for Medium types only)

Mediums can come from different locations in a record.

- The AACR2-style records use 245\_h while RDA-style records use a series of separate, more specific tags (336\_a, 337\_a, and 338\_a).
- Mediums can never contain hyphens "-" as this character is used to denote the separation of tags 336-337-338 in an RDA-structured record; if a hyphen is encountered, it's replaced with a space in the MARC record.
- An Alias allows those who prefer simpler medium names to use them even when their data contains a mixture of AACR2 and RDA-style records.
  - For example, if you prefer the term "Book" over "Text-Unmediated-Volume", you may use it as an Alias for a specific sequence of 336-337-338 RDA tags.

Category/Type

▼ Patrons

Grade

City

State

Postal Code

Homerroom

2nd Location

▼ Titles

Interest

Bibliographic

Curriculum

Genre

Awards

▼ Series

Series

▼ Medium

Medium

► Publication

► Copies

► Names

► Subjects

Search

Listed below are all of the editable terms and fields for the currently selected Authority Control type on the left.

| Term                          | Alias |
|-------------------------------|-------|
| [adobe epub ebook]            |       |
| [adobe pdf ebook]             |       |
| [book]                        |       |
| [electronic resource]         |       |
| [musical sound recording]     |       |
| [sound recording]             |       |
| book                          |       |
| Book                          |       |
| still image-unmediated-volume |       |
| text-unmediated-volume        |       |

Edit Term

Edit Alias