

AUTHORITIES UPDATING INSTRUCTIONS

Middlebury is scheduled for Authorities Updating after the 1st quarter of each year (ie early April)
Contact at LTI: Marsha Hunt [mhunt@librarytech.com] (as of 4/2010-mw)

Before sending replacement file, create a list of all items in MIDCAT with

- No cat date
- Item record with status 'available'
- Item code 2 blank (should be 'u' if the record is for equipment or Ilsey magazines or something that is intended to remain uncataloged)
- Do not have item variable field message containing 'Return' (eliminates Music items that are circulating but not yet cataloged)

And fix whatever needs fixing—usually by supplying a catdate, which can be done in Global update; be sure to supply a date you're happy with—usually to put the records in the file you're pulling.

Send Full replacement file by the 30th of the month that ends the quarter when we are scheduled to have authorities updating through that quarter.

1. Using the largest list in 'create list'; limit to records with cat dates (through the last date for which an Authority express file was previously sent); exclude Serials Solutions records (unless we can find a way to separate brief from full records and decide to send the full records) and any batches of records we are planning to send to LTI as a future project.
2. Note the ending bib number in the resulting list.
3. Using Data Exchange/Process: Output MARC records Out, click on 'Create C' (create a file of bib, authority, or item records). Name your output file. End the name with 'a' or '1' because you will be creating more files. Choose 'review' instead of the default 'range' and select your review file. Create file.
4. Close and return to Create list. Reuse the largest list with the same criteria BUT change the starting bib number to the one following the ending bib number of your previous list. Note that the last digit in a b number is a check digit so increase the second-to-last digit of the previous ending bib number by '1' and put an 'a' in the check digit position. Create the list and again note the ending bib number.
5. Repeat step 3 using your new list.
6. Repeat step 4.
7. When the list you create does not fill up, you have extracted all relevant records.
8. Using Data Exchange, send the files to LTI. Log on to LTI as follows:
 - LTI's server name: ftp.librarytech.com (case insensitive)
 - User name: INBOUND (uppercase)
 - Password: **** (Changes each year Marsh Hunt will send)Use DOS file naming conventions--i.e., max of 8 chars for filename & max of 3 chars for extension, e.g., cenulib1.bib
After file(s) has been ftped, send an email note to:
mhunt@librarytech.com giving filename and record count.

When Authorities Processing is complete, you will receive a notification email.

To load the results of Authorities Processing:

1. Use Data Exchange as outlined in the instructions for Authority Express except that the name of the file of bib records ends in CHG (for changed bib records.)
2. The bib records should all overlay existing records; records that find no match should not be loaded.
3. Some authority records will overlay, some will be new.
4. There will be a file of Deleted authority records also (see below)

For DELETED AUTHORITY RECORDS

1. Download twice: once as Name authorities; once as subject authorities
2. When load, click on 'use review file' (If you forget, you need to do it again and set the start block back to 0)
3. Go to Create lists. Click on an empty list. Click on 'copy' button
4. Choose correct list from dropdown: will begin with 'load';
5. will be two lists—one for overlaid records, one for newly created records.
6. Go into SSH (telnet). Choose A; then delete records.
7. Identify correct list. Delete.
8. Go back to Create lists and do same for other list.

Scope authorities (see directions under Instructions for Authority Express)

Let Bill know to expect the invoice.

Record new bib and authority record numbers in spreadsheet (see Instructions for Authority Express)