Local Authority Headings Workflows

The following are the workflows used by the WRLC Consortial Network Zone Manager to oversee, edit, and update the local authority records in the WRLC Network Zone environment.

Replacement Headings

For subject headings that the Metadata Cmmittee approves as replacements, a local Library of Congress authority record is created and saved in the WRLC Network Zone; the new, approved term is the preferred term in the authority record, and the previous term is the non-preferred term in the record. The existing subject heading in Network Zone-linked bibliographic records will then be changed through the Preferred Term Correction job that runs daily in the Alma NZ.

- Look up the authority record in the Alma Community Zone.
- Open the CZ record, then chose the ***Copy*** option to copy the record into the Network Zone.
- Search for the newly copied authority record in the NZ.
- Open the record in the Metadata Editor, and make the following changes :
  - Delete the existing 040 field. Replace it with the 040 field below

```
$$a CAO $$f WRLC local LCSH
```

  - Update the 15X field with the new term
  - Remove any 45X fields with $$w nne and $a [previous term], then add the previous term to a 45X field
  - If any 45X fields exist that contain the previous term, duplicate them and swap in the old term with the new term if they don't already exist
  - Remove all 6XX fields that mention old term
  - Add the following two 667 fields

```
$$a Local WRLC heading approved by the WRLC Metadata Committee on [insert date of approval]. The Library of Congress subject heading "[insert old heading]" is changed to "[insert new heading]" by the daily Preferred Term Correction job. For more information, see the "Local WRLC Subject Headings" section of the Network Zone Bibliographic Record Policies document.
```

```
$$a At the time this local authority record was added "[insert old heading]" was the authorized Library of Congress Subject Heading.
```

- Update 78X fields with new term if necessary
- Delete 035 field with prefix (LIBRARY_OF_CONGRESS)
- Then Save the record. Do not import records, the headings will not link to an imported authority record unless that authority record is opened and saved in the Metadata Editor.
- Follow instructions for CZ records (see appropriate section below)

Supplemental Headings

1. Create local authority record. Save as a Local WRLC authority record in the NZ
2. Add normalization rules to the WRLC transform 650 to 650 subf 2 local subf 5 CAO normalization rule
3. Create set of NZ records containing original LCSH
4. Run normalization rule on the set
5. After 24 hours, check the results of the set to make sure the local headings are linked to their local authority records.
6. Follow instructions for CZ records (see appropriate section below).

Community Zone Local Headings

Library of Congress subject headings cannot be edited in Community Zone records. That being said, local fields can be added to CZ records. Hence why both replacement and supplement headings are added to CZ records as local supplemental fields in this workflow. If institutions do not want to display the original subject headings in their instances of Primo, they can write Primo display rules to mask the previous heading and only display the new local term in the CZ record.

- Write normalization rule with title “WRLC CZ [New Heading] Local LCSH”. Below is an example of a norm rule that adds a supplemental 690 field to a record if there exists a 650 or 651 field containing the phrase "America, Lake"

```
rule "WRLC CZ 650 subfield z Ontario, Lake Local LCSH"
priority 10
when
not exists  "690.{-,7}.z.Ontario, Lake*"
then
copyfield "650" to "690" if (exists "650.{-,0}.z.America, Lake*")
```

```
replaceContents "690.z.America, Lake" with "Ontario, Lake"
changeSecondIndicator "690" to "7"  if (exists "690.z.Ontario, Lake*")
removeSubfield "690.0" if (exists "690.z.Ontario, Lake*")

addSubfield "690.9.local" if (exists "690.{-,7}.z.Ontario, Lake*")
addSubfield "690.5.CAO" if (exists "690.{-,7}.z.Ontario, Lake*")
end

########################

rule "WRLC CZ 651 subfield a Ontario, Lake Local LCSH"
priority 9
when
not exists "690.{-,7}.a.Ontario, Lake*"
then
copyfield "651" to "690" if (exists "651.{-,0}.a.America, Lake*")
replaceContents "690.a.America, Lake" with "Ontario, Lake"
changeSecondIndicator "690" to "7"  if (exists "690.a.Ontario, Lake*")
removeSubfield "690.0" if (exists "690.a.Ontario, Lake*")

addSubfield "690.9.local" if (exists "690.{-,7}.a.Ontario, Lake*")
addSubfield "690.5.CAO" if (exists "690.{-,7}.a.Ontario, Lake*")
end
```

- Create a logical set of all CZ records with the following parameters :
  - Is Linked = Yes (if run in the NZ, this will ensure all records are CZ records)
  - AND
  - Subjects (LC) Contains Phrase "previous term"
- Run the normalization rule on the set (choose the job 'WRLC Normalization Rule', then choose the appropriate norm rule from the drop down menu when saving the configurations of the job).
- Save the job as a recurring job (to run every 2 months on the 15th)
- Consortial NZ Manager will review results of scheduled jobs every 2 months

Documentation

WRLC Local Subject Headings tracking spreadsheet : Replacement and Supplemental Heading Tracking

Testing document : Local Authority Records

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