

Manually updating headings (LTS procedures #172)

Scope: After [processing the JSON file generated by CUL-IT into an excel spreadsheet](#), each item on the spreadsheet needs to be resolved. These instructions focus on updated and new authority records, which require changes to authorized access points in bibliographic records.

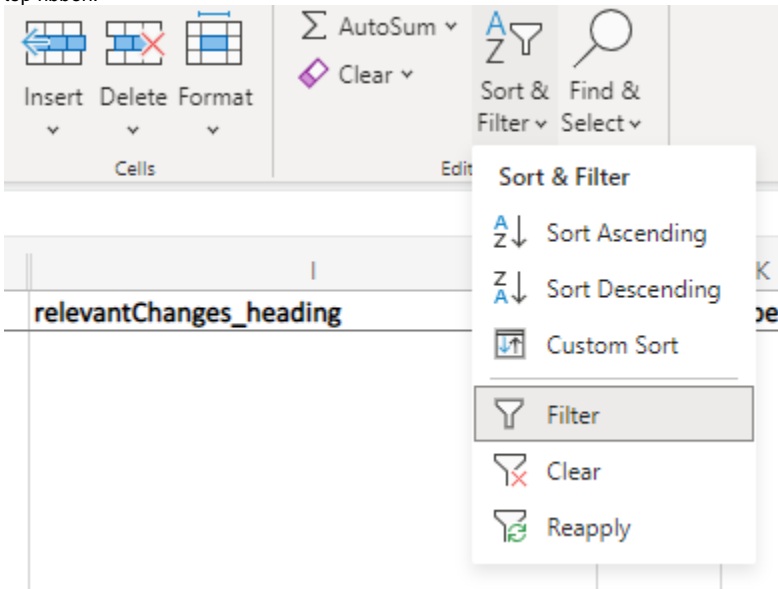
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Date last updated: June 2023

Date of next review: June 2024

1. Highlight the first two columns of the spreadsheet, "Completed" and "changeCategory". Select the "Filter" button from the "Editing" section in the top ribbon.



2. Filter the "changeCategory" to show only "New" or "Update". While the process for the two types are very similar, it is slightly easier to deal with one type at a time, since each type is prone to different issues.
3. Skip all rows that have a value higher than 10 in the "instanceCount" column. These should be batch edited. If there is a row with the same name that is a different type (eg, name and subject), those should be saved for batch edit because the same bib record can show up in results for multiple types.
4. Click the link in the "blacklightLink" column.
5. Open the relevant authority record in OCLC using the value in the "id" column.
6. Determine if the entity in the bibliographic records shown in Blacklight match the entity described in the authority record. (Often, further research will be required.)
7. If the entity matches the one described in the authority record or the librarian has found another entity that matches the item, update the bib record accordingly.
8. Regardless of whether a match was found or not, update the "completed" column with one of the values listed below. Explanations of values are included in parentheses.
 - a. Done (All bib records associated with this row have been updated, and the Blacklight search result page will display as empty.)
 - b. Auto (This change ONLY adds a death date to the old heading. These will be updated in batch once the infrastructure exists to do so.)
 - c. Diacritic (The change could not be saved because the new heading was the same as the old heading except for a change in diacritic that Folio considers identical to the old one.)
 - d. Vendor (The record comes from a vendor and either cannot be saved because it lacks an 008 OR is so sparse that the librarian has good reason to believe that their change will be overwritten when a new version of the record is loaded in.)
 - e. Skip (An appropriate authority record was not found for all items listed in the Blacklight search results. Even if matches were found for most items, if even one bib record remains the row should be marked as a skip)
 - f. Stays (The heading has changed back to the old version of the heading, or a geographic subdivision has been falsely matched with the authorized access point. The bib records stay as they are because they are already correct.)