Updating headings in batch (LTS procedure #173)

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 making batch changes to updated and new authorities which need to be changed from a term that it used to be or is an alternative to the authorized access point, to the authorized access point as shown in the LC name or subject authority record.*
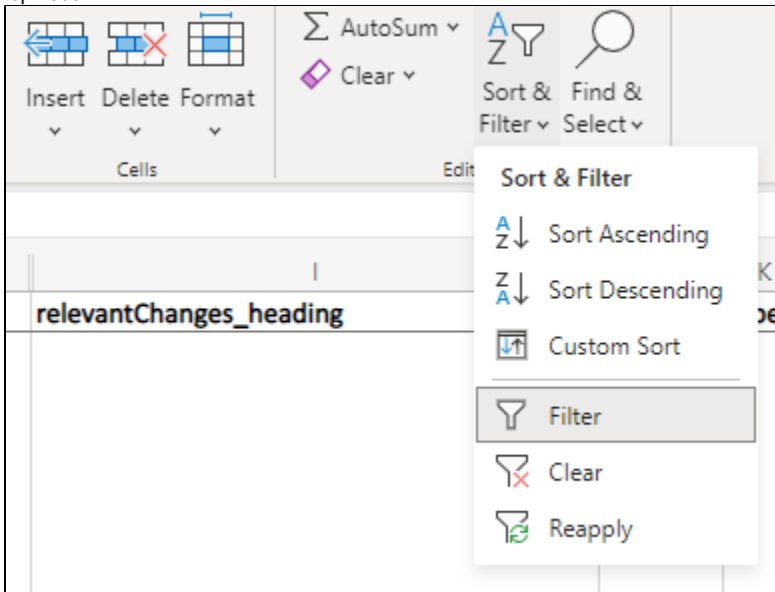
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1. Highlight the first two columns of the spreadsheet, "Completed" and "changeCategory". Select the "Filter" button from the "Editing" section in the top ribbon.

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 lower than 10 in the "instanceCount" column. These can be edited manually unless the entity is the same as a preceding or succeeding row but has a different type. This is because the same bib record can sometimes show up in results for both types.
   a. For example, if "Diakonov, Igor Mikhalovich" has 38 author results but only 3 subject results, it makes more sense to wait until after running the 38-item batch edit to update the 3 subject results manually. This is because some of the 3 bib records with "Diakonov, Igor Mikhalovich" as a subject may appear in the list of 38 bib records with that term as a subject, so they'll get changed during the batch edit anyways.
   b. A filter by less than a given number is possible.
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 entities in the bibliographic records shown in Blacklight match the entity described in the authority record.
   a. Sometimes further research will be required.
   b. If the entries in the search results are all different entities, follow the instructions for manual editing instead.
7. If all bibs match the entity described in the authority record or the librarian has found another entity that matches all items, go back to the spreadsheet and click on the SOLR link to get a list of bib ids.
   a. If some of the bibs match the entity described in the authority record and some do not, manually edit the records instead of batch editing them.
   b. You must be logged into the VPN in order to access SOLR.
8. Copy the bib ids into excel and save them as a .csv.
9. Upload the .csv of bib ids to Data export in Folio.
   a. Export using the "Default instances export job profile".
10. Download the resulting .mrc file.
11. Open the .mrc file using MarcBreaker in Marcedit and convert it to a .mrk file by clicking the "Save as" folder and changing the type to .mrk, then clicking the "Execute" button.
12. Return to the main Marcedit menu and click on "Marceditor".
13. Open the .mrk file.
14. Use CTRL+F to search for instances of the old heading. Replace the old heading with the new heading.
15. Check for alternative forms of the heading that the CTRL+F may have missed, such as differences in diacritics, spacing, or punctuation.
16. Use Tools>Assigned Tasks>Currently Available Tasks>948 to fill in what has been changed. See Jenn Colt or someone in automation for the script for this task.
    a. Date: yyyy/mm/dd
    b. Filename: the new heading (this can be shortened if necessary)
    c. Comment: Heading maintenance
    d. Full example: $a 20230223 $i zasurskii, iasen $x heading maintenance

17. Save record as .mrc. Make sure that the file name is the same as whatever you put as the filename in the previous step. This makes it easier to find everything if the change needs to be rolled back or re-run.
18. Return to the main Marcedit screen and add URIs to bibliographic records.
    a. See "Configuring and running MarcEdit to add URIs to bibliographic records (LTS procedure #171)" for configuration details and instructions.
19. Once the URIs have been added to the records, upload the resulting .mrc file to Data Import in Folio.
    a. Import using the "Replace instance and bib".
20. 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. 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 remains the row should be marked as a skip)
    d. 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.)