Working with Authority Headings Rules

To work with authority headings rules, you must have the following role:

- Catalog Administrator

Authority headings display results for preferred/nonpreferred records (using F3 in the MD Editor) can be expanded with configurable options to provide greater detail. In some cases, the standard authority headings results display a limited amount of information as shown in the figure below making it difficult to determine which record to select when more than one record appears with the same information in the authority headings results list.

Standard Authority Headings Results Display

With authority headings rules, the same results can be expanded to display more details as shown in the figure below making it easier for the cataloger to determine which record to select.

Expanded Authority Headings Results Display Configured

For more information about working with preferred and nonpreferred authority headings, see Managing Authority Records in the MD Editor.

The authority headings rules used to expand your authority headings results are created in the MD Editor from the Rules tab.

Authority Headings Rules in the MD Editor

Authority headings rules use drools-type logic to specify the content and format of the expanded authority headings display. The syntax used for authority headings rules is described in Authority Headings Rules Syntax and Examples.

For more information, see the Authority Headings Display Options video (4:33 mins).

Implementing Authority Headings Rules

In order to work with expanded authority headings display results in the MD Editor, complete the following steps:

- Create one or more authority headings rules to identify the content and format of the expanded authority headings
• Select an authority headings rule for each vocabulary that you want to be able to expand that you have configured on the Metadata Configuration List page (Configuration Menu > Resources > Cataloging > Metadata Configuration) in the Authority Vocabularies section. Since selecting F3 for preferred/nonpreferred headings invokes authority records for a specific vocabulary to be displayed, the authority headings rule needs to be associated with a specific authority vocabulary (managed locally or in the community). Select Set authority heading rule from the list of row actions, select a rule, and select Submit to associate a rule with a specific vocabulary.

See Configuring Cataloging for more information about the Metadata Configuration List page.

Creating Authority Headings Rules

Authority headings rules are created in the MD Editor and appear under the Rules tab in the Authority headings rules folder. Where applicable, you can Duplicate or Copy authority headings rules and modify them to create new rules.

To create an authority headings rule:

1. Open the MD Editor page (Resources > Cataloging > Open Metadata Editor).
2. Select File > New > Authority headings rules and enter your authority headings rule properties in the Normalization Rule Properties dialog box.
4. Enter your rule details. For information on the syntax to be used, see Authority Headings Rules Syntax and Examples.
5. Select Save. The saved authority headings rule appears in the Rules tab.

Saved authority headings rules can be edited, deleted, duplicated (to create new rules), or contributed (to the Community for others to access). You can also modify the rule properties.

Authority Headings Rules Syntax and Examples

The authority headings rules follow a specific syntax. See below for an example.

```
rule "Expand Headings"
when
not preferred
then
add to text displayValue
add to text " | "
add to text preferredDisplay
add to text " | "
add to text from "079.b" if (exists "079.b")
add to text " | "
add to text from "035.a" if (exists "035.a.*588*")
add to text " | "
add to text from headingSourceField "[9,w]"
end
```
For a description of the authority headings rules syntax, see the table below; and refer to the [Conditions Supported for Authority Headings Rules](#) section for the list of supported conditions. Conditions and actions apply to record elements, such as the MARC record, fields (one or more), indicators, subfields (one or more), and field/subfield contents.

### Authority Headings Rules Syntax

<table>
<thead>
<tr>
<th>Expression</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>when not preferred then</td>
<td>Perform the action only if the heading is the nonpreferred heading.</td>
</tr>
<tr>
<td>when preferred then</td>
<td>Perform the action only if the heading is the preferred heading.</td>
</tr>
<tr>
<td>when (exists/not exists &quot;&lt;element&gt;&quot;) then</td>
<td>Check for fields (exists/non exists) in the authority record (like regular normalization rules). Example: when (not exists &quot;100.d&quot;) then</td>
</tr>
<tr>
<td>add to text preferredDisplay</td>
<td>Add the preferred heading to the display. It shows the preferred heading that matches the format of the record such as MARC 21 or UNIMARC and so forth.</td>
</tr>
<tr>
<td>add to text displayValue</td>
<td>Add the displayed headings value.</td>
</tr>
<tr>
<td>add to text &quot;&lt;hard coded value&gt;&quot;</td>
<td>Concatenate a hard-coded value to the text such as a pipe character (</td>
</tr>
<tr>
<td>add to text from &quot;&lt;element&gt;&quot;</td>
<td>Add a value from the record. This can include field/subfield specifications and conditions. For a list of supported conditions, see the <a href="#">Conditions Supported for Authority Headings Rules</a> section for more information. For repeating fields, you can use the first occurrence syntax (onlyfirst) to display only the first instance of the repeating fields. For concatenated subfields, you can use the delimited by syntax to add delimiters between subfields. Examples: add to text from &quot;005&quot; if (not existsControl &quot;005.{0,2}.19&quot;) add to text from &quot;005&quot; if (existsControl &quot;005.{0,2}.19&quot;) add to text from &quot;005.(0,4)&quot; if (not existsControl &quot;005.{0,2}.19&quot;) add to text from &quot;005.(0,4)&quot; if (existsControl &quot;005.{0,2}.19&quot;)</td>
</tr>
<tr>
<td>Expression</td>
<td>Meaning</td>
</tr>
<tr>
<td>------------</td>
<td>---------</td>
</tr>
<tr>
<td>add to text from &quot;005&quot;</td>
<td>add to text from &quot;005.a&quot;</td>
</tr>
<tr>
<td>add to text from &quot;005.{0,4}&quot;</td>
<td>add to text from &quot;400.a&quot; if (not exists &quot;400.d.1808*&quot;)</td>
</tr>
<tr>
<td>add to text from &quot;400.a&quot; if (exists &quot;400.d.1808*&quot;)</td>
<td>add to text from onlyfirst &quot;035.a&quot; if (not exists &quot;035.a&quot;)</td>
</tr>
<tr>
<td>add to text from onlyfirst &quot;035.a&quot; if (exists &quot;035.a.(OCoLC)*&quot;)</td>
<td>add to text from &quot;400.a&quot; delimited by &quot;;&quot;</td>
</tr>
</tbody>
</table>

add to text from headingSourceField

Add the text from the authority headings source field.

Example:

add to text from headingSourceField "[a-z]"

add to text from headingSourceField excluding "<field.subfield>"

Add the text from the authority headings source field and excludes the fields specified.

Example:

add to text from headingSourceField excluding "[0-9]|e|E"

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**Conditions Supported for Authority Headings Rules**

The following conditions are supported for authority headings rules:

- preferred
- not preferred
- existsControl "{element}"
- not existsControl "{element}"
- exists "{element}"
- not exists "{element}"
- existsMoreThanOnce "{element}"