# Polaris® Integration with EContent Guide

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# Contents

# EContent Vendors and Polaris

EContent integration is available through the Polaris ILS and the following eContent vendor applications: 3M® Cloud Library, Baker & Taylor's Axis 360, and OverDrive®. When integrated eContent features are configured in Polaris and the library has purchased the eContent titles, patrons can search for, place holds on, and check out the vendor's eContent directly from the PAC. In addition, all associated circulation processing and tracking for integrated eContent occurs in Polaris.

The 3M Cloud Library and Axis 360 use Polaris API (PAPI) authentication, defined in Patron initiated circulation rules. For these vendors, Polaris requires an SSL certificate for PAPI server security.

OverDrive uses SIP authentication, defined in Polaris SIP authentication rules. Since authentication takes place via SIP and not PAPI, SSL is not required.

When an integrated eContent vendor's bibliographic records are imported in Polaris, a resource entity is automatically created for each 856 tag. A resource entity is a group of fields that collectively identifies the eContent vendor, the library's account with the vendor, and the specific electronic resource in the vendor's repository. See "Resource Entities" on page 87.

For a checklist of the licenses, vendor information, Polaris setup and other components that enable the integration, see "Implementing EContent Integration" on page 2.

For information on a specific vendor, see:

- "Axis 360 EContent Integration" on page 4
- "OverDrive® EContent Integration" on page 29
- "3M® EContent Integration" on page 53

For information on managing eContent title display and patron access in the PAC, see "Managing EContent in the PAC" on page 73.

If you want to limit patron access, but not integrate with Polaris Circulation, you can set up a non-integrated vendor account and specify the resource group whose patrons will have access to the eContent. See "Non-Integrated EContent in Polaris" on page 107.

# Implementing EContent Integration

The following components are required for implementing eContent integration with Polaris:

- ☐ **Subscription to the eContent service** - The library contracts with the eContent vendor for a subscription to the eContent service.
- ☐ **Polaris Integrated eContent license** - The library obtains a single integrated eContent license that covers Polaris PowerPAC, Polaris Mobile PAC, and Polaris PowerPAC Children's Edition.
- ☐ **Polaris API (PAPI) license** - (Not currently required for OverDrive.) Only one Polaris API license is required for each Polaris installation, regardless of the number of vendor contracts. If the library already has a license for the Polaris API, no additional API fee is required.
- ☐ **Automatic import item template** - The library sets up an the item template for each eContent vendor account. The template is selected in the Vendor Account record. The name must begin with **Ebook automatic import** (case does not matter, and **e-book** is also accepted). This template is used for any eContent items, including audio ebooks.

**Tip:**
The integrated vendor record is visible in Polaris Administration only if the library has a license for that vendor.

- ☐ **Vendor Account** - The library staff, with the assistance of their Polaris site manager, sets up the integrated vendor account record under the vendor record in Polaris Administration. The vendor account is used to create resource entities for the eContent bibliographic records and eContent item records in Polaris. If the library is using resource groups, the vendor account is also linked to the resource group.
- ☐ **Integrated EContent Import Profile** - Polaris provides a read-only **Integrated ebook Bibs** import profile that can be renamed and modified. Your library may want to set up multiple import profiles for different tasks. Your Polaris site manager can assist you with creating import profiles.

**Important:**
For OverDrive and 3M, newly-purchased eContent records are imported automatically using the import profile selected in the Vendor Account workform.Your library can copy and rename the **Integrated ebook Bibs** profile, but the renamed profile must be selected in the Vendor Account workform.

The library may also want to implement the following optional Polaris records and settings:

- ☐ **Polaris Digital Branch**- If multiple libraries in your system use the same vendor account (contract), Polaris recommends that you set up a digital branch to represent the account. You can set up multiple digital branches, one per multi-library vendor contract, if necessary. Or, you can set up a single digital branch and associate multiple eContent vendors' materials with this branch. During import processing, the item records are created with the digital branch as the assigned branch. In the PAC, materials associated with the digital branch are available according to the branch's resource group membership. If only one library is involved in the contract, a digital branch is not needed. All the eContent item records are assigned to that library.
- ☐ **Resource Groups** - The library can set up resource groups for library organizations that allow their patrons to access the eContent. See "Manage patron access to eContent using resource groups" on page 76.
- ☐ **Patron Services Administration Profile, Patron initiated circulation: Transaction branch** - You can change the transaction branch setting from **Patron's branch** (the default) to **Item's branch** in the Patron Services profile to track eContent circulation transactions from the PAC separately from check outs and holds for physical items.
- ☐ **OverDrive Advantage Vendor Information** - If your library has OverDrive Advantage, you can control access to the Advantage eContent using a setting in the vendor record. See "Create an OverDrive integrated vendor account" on page 33.

# Axis 360 EContent Integration

Libraries using the Polaris ILS can catalog, display in PAC, manage access, and circulate eContent from Baker & Taylor's Axis 360. Polaris Library Systems requires a license for each integrated eContent vendor and for the Polaris API (PAPI). Axis 360 uses Polaris API (PAPI) authentication, and Polaris requires an SSL certificate for PAPI server security.

Once the library has a subscription with Baker & Taylor's Axis 360 and the Polaris licenses, the library creates an item template, an integrated vendor account, and an import profile in Polaris. The vendor account is in Polaris Administration, not in Acquisitions, and it is used during importing to create resource entities in the eContent bibliographic records. After the setup is complete, the library imports the eContent MARC data using special features that are required to support the integration.

As a result of this integration, patrons can search for, place holds on, and check out Axis 360 eContent directly from the PAC. All associated circulation processing, and tracking for these integrated eContent occurs in Polaris.

Axis 360 eContent may be in one of the following formats:

**Note:**
This list is subject to change as Axis 360 develops its offerings.

- EPUB
- PDF
- Blio
- Acoustik™ digital audiobooks

Availability and holds counts for Axis 360 eContent are driven by the status of the items in the Axis 360 repository, not the status of the items in the Polaris database. When patrons check out, check in, or place holds on Axis 360 eContent from the PAC, the synchronization between Polaris and the Axis 360 repository takes place in real time. For circulation transactions where patrons use the Axis 360 application, the synchronization occurs every 5-15 minutes. When the library adds more copies of an existing Axis 360 title, or an Axis 360 title automatically expires due to publisher circulation limits, the synchronization occurs once daily during an overnight process.

See "Implementing EContent Integration" on page 2 for a checklist of the components necessary for Polaris integration with eContent vendors.

# Setting Up Polaris for Axis 360 Integration

Bibliographic records for Axis 360 titles are imported into Polaris using the import utility in the Polaris staff client. The import processing that integrates Axis 360 eContent with Polaris depends on specific settings in the item template, vendor account, and import profile. Your Polaris Site Manager can assist you with this setup.

See the following topics:

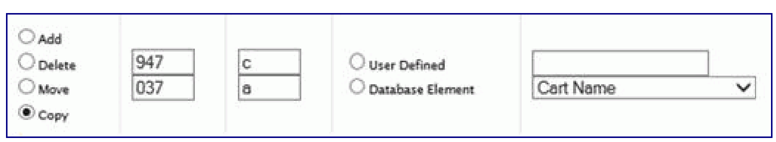

- "Set up the Baker & Taylor TS3 MARC Profile List" on page 5
- "Set up the eContent item templates for Axis 360" on page 6
- "Create an Axis 360 integrated vendor account" on page 8
- "Create the Axis 360 eContent import profile(s)" on page 11


## Set up the Baker & Taylor TS3 MARC Profile List

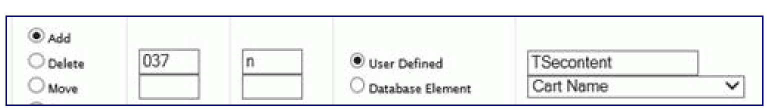
The Polaris import processing and resource entity creation relies on the presence of the Baker & Taylor "BT key" in the 037$a of the imported record. To allow pre-publication titles to be integrated in the PAC, so patrons can place holds, Polaris relies on the presence of an 037$n tag containing the string **TSeContent**. If you use TS3 carts/downloads to order Axis 360 titles, you will need to set up your TS3 MARC Profile List to supply these two fields to the 037 tag in the bibliographic records that you download from TS3. Polaris also strongly recommends that you remove several other tags from the records before downloading from TS3.

Settings for the TS3 MARC Profile List:

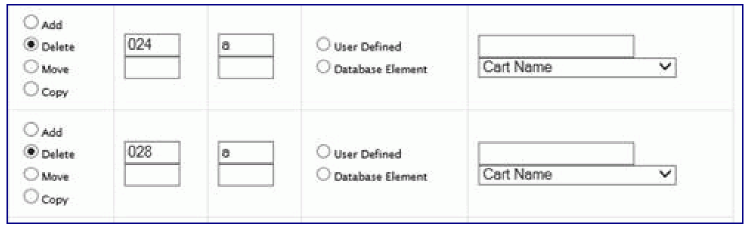
1. Copy the 947$c to the 037$a.




2. Add the **TSeContent** string to the 037$.




3. Remove the 024$a and the 028$a




4. Remove all 856 tags

If you do not use TS3 to order Axis 360 titles, the Axis 360 bibliographic records that you import into Polaris still must have the Baker & Taylor "BT key" in the 037$a.

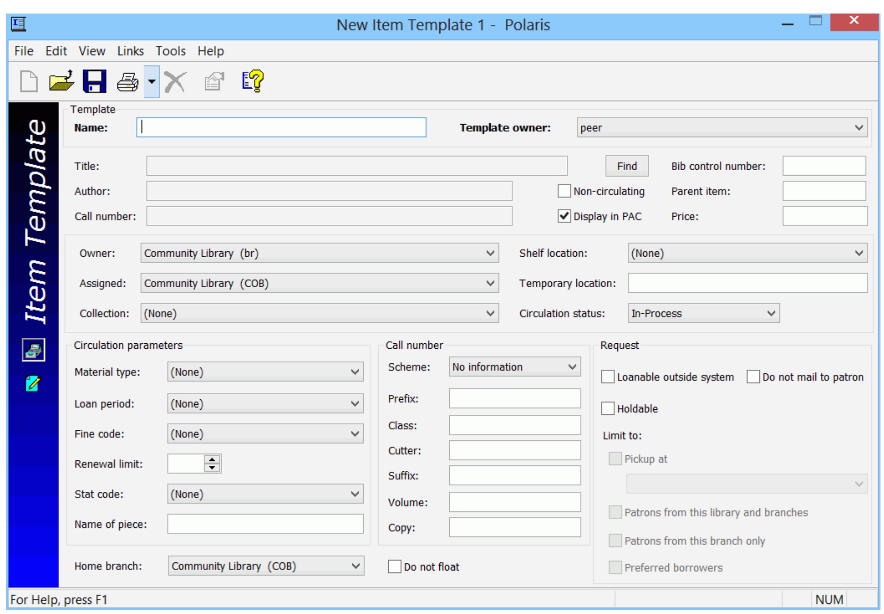
## Set up the eContent item templates for Axis 360

To enable the synch process to automatically create added copies for Axis 360 eContent titles, you must create an item template named **Ebook automatic import** or **E-book automatic import** (additional text can be appended to this name, but it must begin with this string), and select this template in the Axis 360 Vendor Account workform. For more information, see "Axis 360 Added/Expired Copies" on page 24.

You can also create multiple other item templates, named however your library wishes, to create item records when re-importing existing Axis 360 records to enable integration with Polaris Circulation.

Follow these steps to set up the item templates for Axis 360.

1. Select **File, New** from the Polaris Shortcut Bar.
2. Select **Item Template** and click **OK**.
3. The Item Template workform opens.



4. Type a name for the Axis 360 eContent item record.
   - If you are creating the item template that will be selected in the Vendor Account workform, it must be named **Ebook automatic import** or **E-book automatic import**. Case does not matter, and other words can follow this string, but the name must begin with **Ebook automatic import**. For Axis 360, this template is used only for added copies.
   - If you are creating an item template to be selected in an Axis 360 import profile, type any name in the **Name** box. You can create as many of these templates as are appropriate for your library. For example, your library may already have non-integrated Axis 360 records of various types (ebook, audio ebook, etc.) in its database. When you re-import the records to enable their integration, you can select the appropriate template for the eContent.
5. In the **Assigned** box, select the branch for the eContent items that will be created using this template. If a resource group is selected in the Vendor Account, the **Assigned** branch selected in the item template must belong to the resource group.
6. In the **Circulation status** box, select **In**.
7. Select the **Fine code** and **Renewal limit**. These fields are required to save the item template, but they are ignored in eContent items circulation processing.
8. Select **File, Save** to save the template.

# Create an Axis 360 integrated vendor account

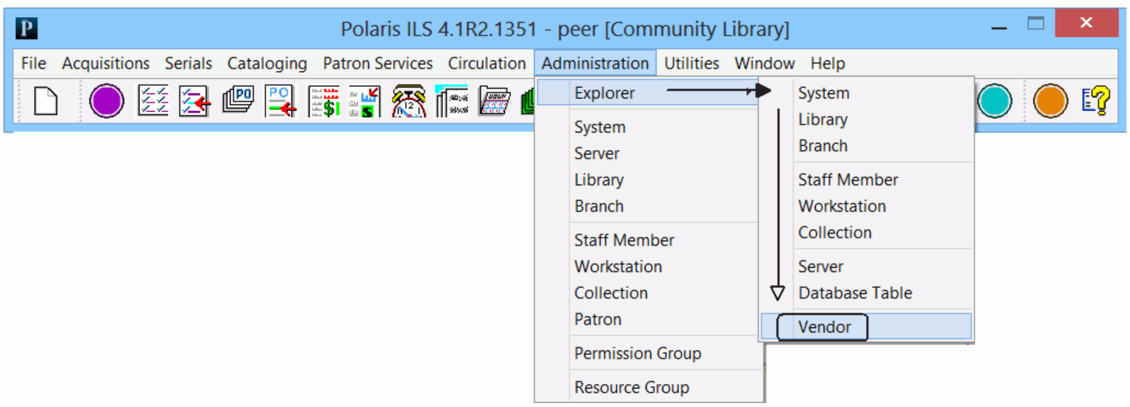
Vendor records and vendor accounts are accessed through the Polaris Administration Explorer; they cannot be accessed from the Find Tool. Polaris Administration ownership and inheritance do not apply to vendor records or vendor accounts.

Follow these steps to create an Axis 360 vendor account.

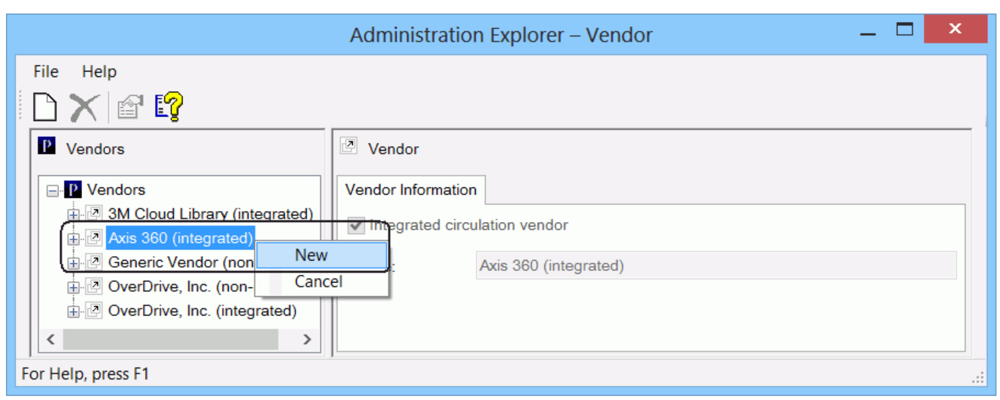
**Note:**
Vendor account permissions are not organization-specific, and users in the Admin group are granted these permissions: **Vendor Account: Access, Create, Modify, Delete**.

**Tip:**
You cannot create a new Vendor Account by selecting **File, New** from the Polaris Shortcut Bar.

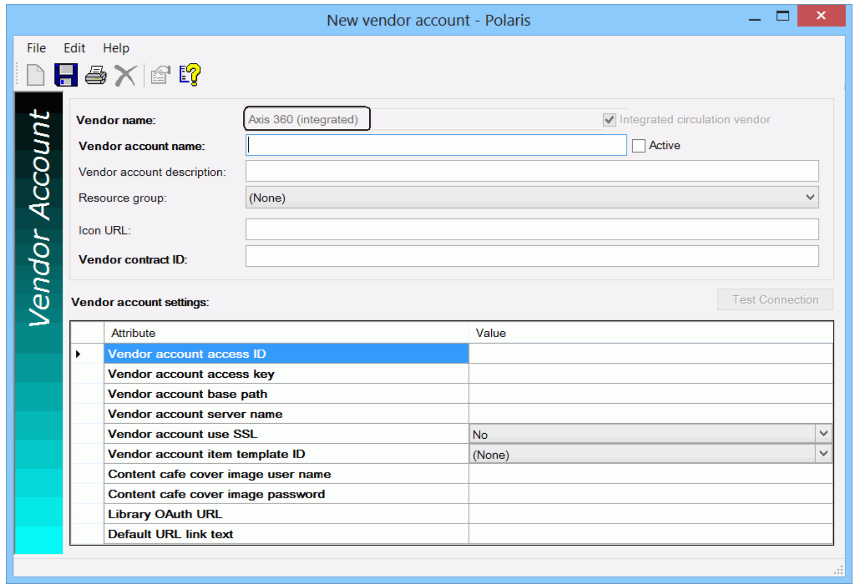
1. Select **Administration**, **Explorer**, **System**, **Vendor**.




2. Expand the **Vendors** node in the left pane to display the eContent vendors.
3. Select the **Axis 360 (integrated)** vendor, right-click, and select **New**.




The Vendor Account workform opens with Axis 360 (integrated) in the **Vendor name** box.




4. View the system-supplied fields and enter information in the editable fields:
   - **Vendor name** - System-supplied; read-only
   - **Integrated circulation vendor** - This check box is automatically checked if the vendor's eContent is integrated with Polaris.
   - **Active** - This check box is initially unchecked when you are creating a vendor account for an integrated eContent vendor. Leave the check box unchecked, and enter the account information. Polaris Library Systems activates the vendor account.
   - **Vendor account name -** (required) The library supplies a unique name to identify the account.
   - **AccountID** - The account ID is supplied by Polaris when the account is saved, and it appears in the title bar of the Vendor Account workform.
   - **Vendor account description** (optional) - The library can add a description for the vendor account.
   - **Resource group** (optional) - The library can select a resource group to limit access to the eContent by branch. For more information on resource groups, see Polaris staff client online Help.
   - **Icon URL** (optional) - The library can specify a URL location for the icon that represents the eContent vendor.
   - **Vendor contract ID** - The vendor's contract ID is required for integrated eContent vendors. The contract ID must be unique, and it can contain up to 255 characters.
   - **Vendor account access ID** - The library's access ID for the eContent vendor account.
   - **Vendor account access key** - The library's access key for the eContent vendor account.
   - **Vendor account base path** - The URL path to the library's resources at eContent vendor.

- **Vendor account server name** - The vendor account server name.
- **Vendor account use SSL** - The library selects **Yes** or **No** to indicate whether Secure Socket Layer is used.
- **Vendor account item template ID** - The library creates the item template used during the API-driven processes. For Axis 360, this template is used for added copies only. The item template name must begin with **Ebook automatic import** or **E-book automatic import**.
- **Content cafe cover image user name**
- **Content cafe cover image password**

**Tips:**
The library's server should be set within 5 minutes of the correct time because Baker & Taylor has a 5-minute time-difference threshold on their servers. In addition, SSL must be configured correctly.

- **Library OAuth** - Used to grant the Polaris ILS an access token, which is used to access the Axis 360 API.
- **Default URL link text** - Identifies the URL link text and is also used as hover text for the vendor icon.

5. Save the Vendor Account workform.
6. Click the **Test Connection** button to test the API settings in the vendor account and ensure that a connection is made to the vendor's service (Baker & Taylor Axis 360 API).

   If the test is successful, a message confirms that the connection was made. If a connection problem is encountered, one of the following messages may appear: **Library account does not exist; Incorrect URL; There was a problem communicating with the Baker & Taylor Axis 360 API service**; or other error messages as they become implemented by the Baker & Taylor API service.
7. Ask your Polaris representative to activate the vendor account.

   This starts the API consumer service. To check the status of the service, see "Polaris API Consumer Service" on page 102.

   **Important:**
   After activating a vendor account, or reactivating a suspended vendor account, an IIS reset is required so that the PAC shows the correct information for the vendor's resources. For example, the IIS reset enables the Check Out or Place Hold button to be displayed instead of the **Temporarily Unavailable** button.

# Create the Axis 360 eContent import profile(s)

**Note:**
These are suggestions for setting up the import profiles for Axis 360 eContent processing; your Polaris site manager can assist you in setting up the import profiles to support your library's specific needs.

Depending on your library's purchasing and processing workflow for Axis 360 eContent, you may need to create multiple import profiles to support the following parts of the process:

- **Enable integration for existing Axis 360 non-integrated eContent bibs** - Export and then re-import the non-integrated Axis 360 eContent titles. See "Integrating Existing Axis 360 EContent" on page 12.
- **Enable integration for eContent titles downloaded from TS3** - Import bibliographic records and enable integration for titles that have not yet been ordered. Then, bulk add the bibs to create the purchase order. See "Integrating New Axis 360 Bibs (Pre-Order)" **on page 16**.
- **Overlay Axis 360 integrated eContent bibs and retain resource entities** - Fully cataloged eContent bibs can be imported to overlay existing integrated eContent bibs while retaining the resource entities that enable the integration. See "Overlaying Axis 360 EContent Bibs" **on page 21**.

# Integrating Existing Axis 360 EContent

If your library already has Axis 360 eContent records in its catalog, resource entities must be created for these records to enable integration with Polaris Circulation. This process involves locating all the Axis 360 eContent bibliographic records, putting the records in a record set, exporting the records to a file, optionally deleting the bibliographic records from the Polaris database, and then re-importing them using the import profile set up for integrating Axis 360 eContent records.

See the following topics:


- "Put existing non-integrated Axis 360 eContent records in a record set" on page 12
- "Export the record set of non-integrated Axis 360 eContent records" on page 13
- "(Optional) Delete the existing non-integrated Axis 360 records" on page 14
- "Import existing Axis 360 records to enable the integration" on page 14


1-2-3

## Put existing non-integrated Axis 360 eContent records in a record set

Follow these steps to locate the existing Axis 360 eContent records and put them in a record set.

> **Note:**
> Work with your Polaris Site Manager to determine the best way to find these records. You may need to set up an SQL search in the Find Tool.

1. Set up the search criteria in the Find Tool to find the existing non-integrated Axis 360 records.
2. Select the records in the results list, right-click, and select **Add to record set**.

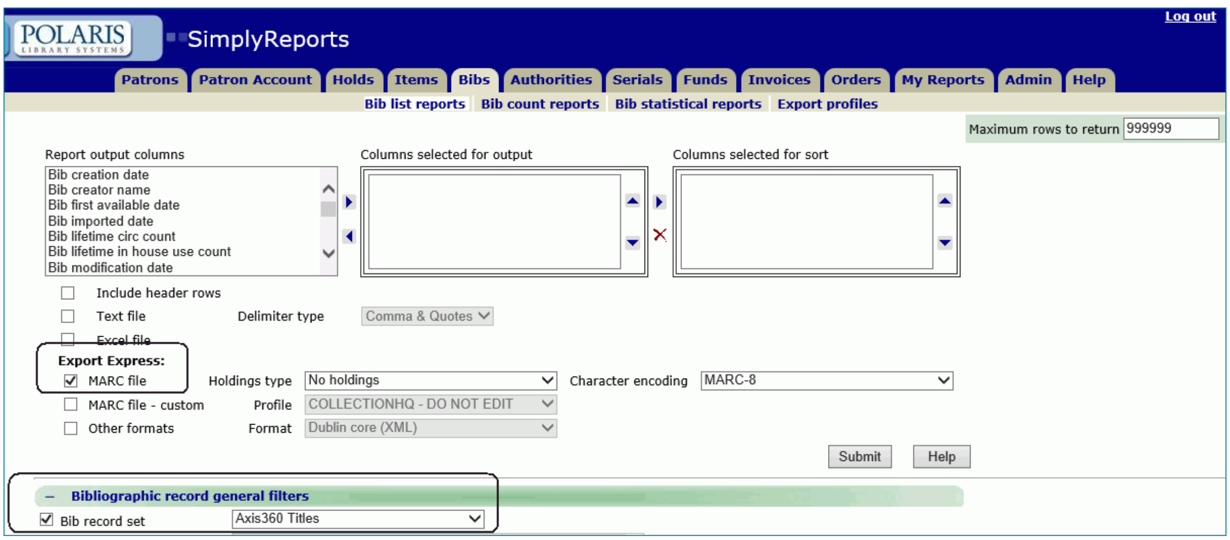
# Export the record set of non-integrated Axis 360 eContent records

**Note:**
If your library has SimplyReports and Export Express, you can select the record set to export. If your library does not have Export Express, your Polaris Site Manager can assist you with exporting the record set from the staff client.

Follow these steps to export the Axis 360 eContent records using Export Express.

1. Log in to SimplyReports.
2. Select the **Bib list reports** tab.
3. Select **Export Express, MARC file, No holdings**.

   Expand the Bibliographic record general filters, select Bib record set, and select the record set.



# (Optional) Delete the existing non-integrated Axis 360 records

**Note:**
Work with your Polaris site manager to determine if this task is right for your library. If you choose not to delete the bibliographic records, you must delete any item records that are linked to the bibliographic records. (New eContent item records will be created automatically during integration process.)

After exporting the records to a file on the desktop or another location, delete the records from the database. Follow these steps to delete the non-integrated records from the Polaris database.

1. Open the record set of the non-integrated records.
2. Delete the non-integrated Axis 360 eContent bibliographic records and their linked items from the Polaris database.

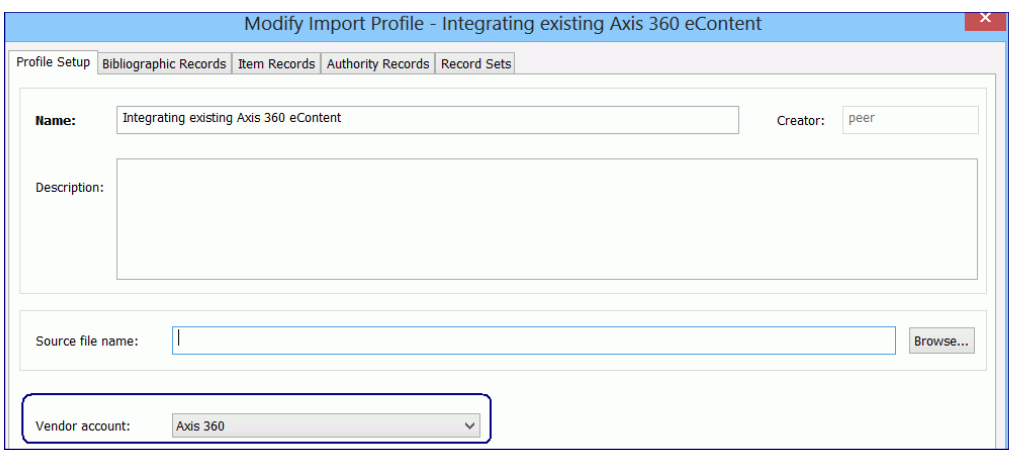
# Import existing Axis 360 records to enable the integration

Follow these steps to set up the import profile, and then import the file of exported non-integrated Axis 360 records to enable their integration with Polaris Circulation.

1. Create an import profile specifically for importing existing non-integrated Axis 360 eContent as follows:

   a) Select the **Integrated ebook Bibs** PolarisExec import profile in the Profile Manager, right-click, and select **Copy**.

   b) On the Profile Setup tab, type a new name for the import profile, and select the Axis 360 vendor account.




   c) Select the Bibliographic Records tab and set the duplicate detection options that are appropriate for your library. Work with your Polaris site manager to determine which settings to modify.

**d)** Select the Item Records tab and select the item template created for Axis 360 eContent.

> **Note:**
> You can select any item template, but if your library uses resource groups, ensure that the item template’s assigned branch is in the resource group with access to the Axis 360 vendor account.

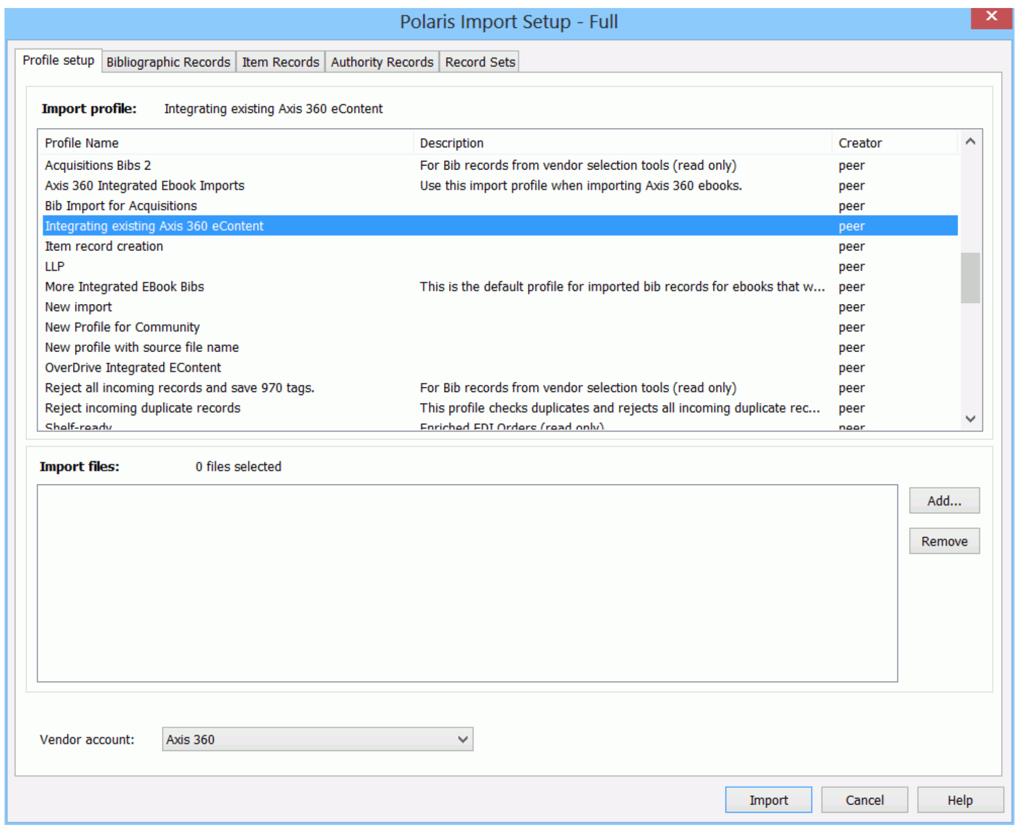
**e)** (Optional) Select the Authority Records tab, and modify the settings.

**f)** (Optional) Select the Record Set tab, and modify the settings.

**g)** Save the import profile.

**2.** Select **Utilities**, **Importing**, **Express Import** or **Full Import**.

**3.** Select the import profile created for integrating existing non-integrated Axis 360 eContent.




**4.** Click **Add** and select the file to import.

**5.** Click **Import**.

The Axis 360 titles are imported and integrated with Polaris circulation. After the import is complete, an overnight process synchronizes items out and hold requests in existing patron accounts.

> **Note:**
> If you want to add call numbers from the 099 tag to the newly-created eContent item records, you can select the **Use call number fields from bib record** setting on the Item Bulk Change dialog box.

# Integrating New Axis 360 Bibs (Pre-Order)

If your library creates Polaris purchase orders for Axis 360 eContent titles by downloading bibs from Baker & Taylor's Title Source 3 (TS3), importing the downloaded bibs, and then bulk-adding them to the purchase order, you can continue to use this workflow for integrated Axis 360 eContent records. At this point in the process, the records downloaded from TS3 are "placeholder" bib records for pre-publication titles or for published titles that have not been ordered yet. These records are not fully cataloged and lack the 856 tags that link to the eContent and enable the integration with Polaris.

Therefore, if your library uses TS3 for selecting and downloading Axis 360 records, your TS3 MARC Profile List must be set up first to supply the following sub-fields in the 037 tags of the downloaded Axis 360 records:

**Note:**
See "Set up the Baker & Taylor TS3 MARC Profile List" on page 5.

- **037$a** *BT key string* - The import process that creates resource entities for these placeholder records depends on the presence of the Baker & Taylor "BT key" in the 037$a of the imported record. This also provides a unique identifier for deduplication when the full MARC record is imported at a later date.
- **037$nTSeContent**- To allow pre-publication titles to be integrated in the PAC, so that patrons can place holds on them, Polaris relies on the presence of an 037$n tag containing the string: **TSeContent** (case does not matter).

When the files containing these 037 tags are imported using an import profile with Axis 360 selected in the **Vendor Account** field, 856 tags are constructed during import initialization using the data in these 037 tags and data from the selected Axis 360 vendor account. The constructed 856 tags follow this pattern:

**856 40 ‡u{*contractID*}.baker-taylor.com/Title?itemID={*string from 037 a subfield*}‡3{*Default URL link text string from vendor account*}‡x{contractID}**

During the import process, these constructed 856 tags are used to create the resource entities in the bibliographic records. See "Resource Entities" on page 87. No item records are created because the titles have not yet been ordered.

When releasing the purchase order, the user must *not* create on-order items because the eContent item records are created by the overnight sync process after the titles have been purchased.

# Import Axis 360 eContent bibs downloaded from TS3

Follow these steps to set up the import profile for importing the Axis 360 eContent bibs downloaded from TS3 and enable integration with Polaris.

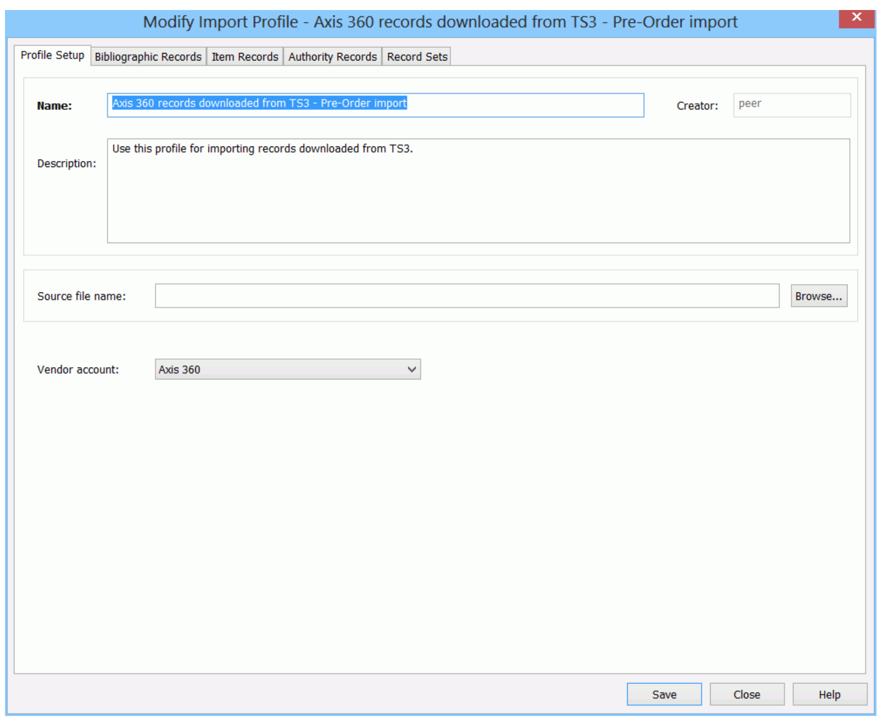
**Note:**
Once you have set up the import profile and saved it (step 1), any staff member with the appropriate Polaris permissions can select it for subsequent imports of Axis 360 records downloaded from TS3.

1. Create an import profile specifically for importing Axis 360 bibs downloaded from TS3:

a) Create a new, blank import profile or start with a PolarisExec import profile and copy it.

**Note:**
For general information about creating, copying, and modifying import profiles, see “Setting Up Import Profiles” in the *Polaris Cataloging Guide 4.1R2*.

b) On the Profile Setup tab, type a name for the import profile, select the Axis 360 vendor account in the **Vendor account** drop-down list box, and click **Save** to save the import profile.




c) Select the Bibliographic Records tab and select or modify the options. Work with your Polaris site manager to determine the settings appropriate for your library.

### Examples of Settings for TS3 Imports

The following are examples of settings on the import profile's Bibliographic Record tab to support a specific workflow. Your library may choose other options for importing TS3 pre-order bibs.

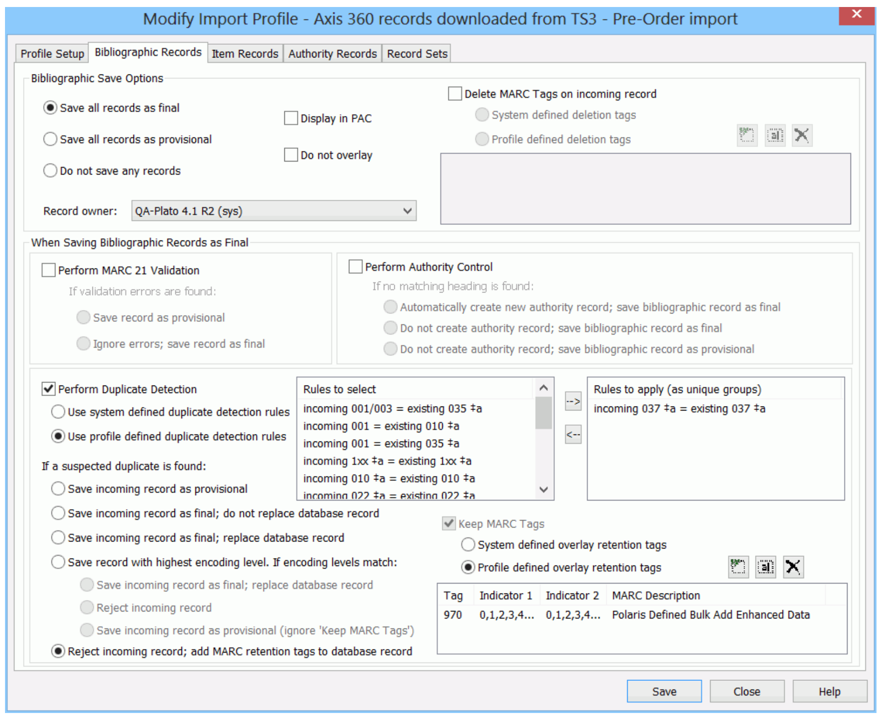
**Display in PAC** box is unchecked because the library opts to display these records only after the purchase order is released.

**Perform MARC Validation** and **Perform Authority Control** boxes are unchecked because the records are not yet fully cataloged.

**Perform Duplicate Detection** and **Use profile defined duplicate detection rules** are selected. The profile-defined rule is **incoming 037$a = existing 037$a.** If the incoming records include added copies, they are detected based on this rule.

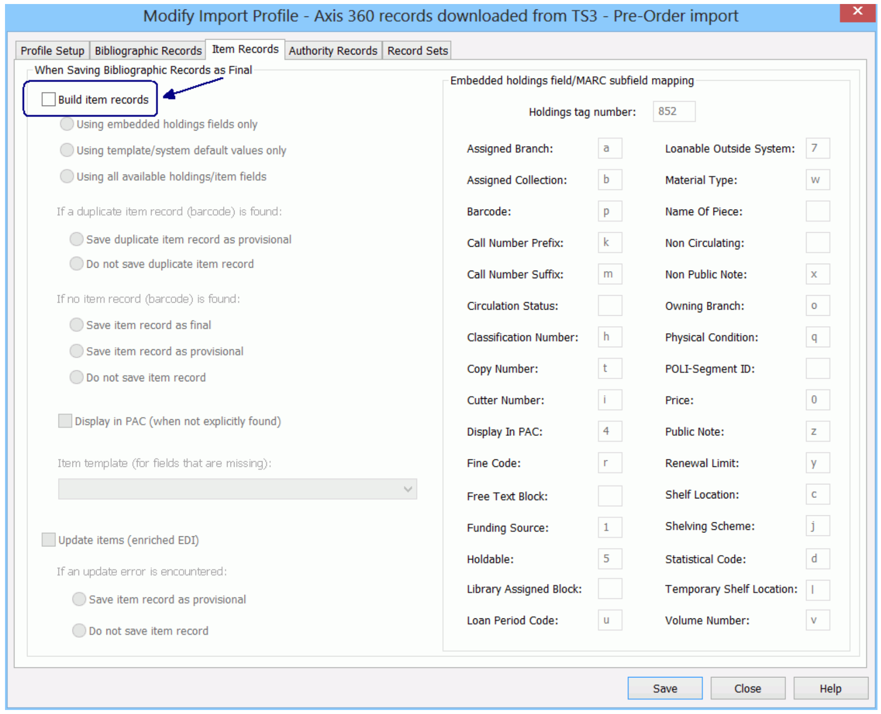
**Reject incoming record; add MARC retention tags to database record** is selected for processing suspected duplicate bibs. **Keep MARC tags** is selected automatically.

**Profile defined overlay retention tags** is selected, and the 970 tag and indicators are the tags to retain. This allows the ordering data for added copies to be retained in the database record.




**d)** Select the Item Records tab and clear the **Build item records** check box.

(EContent item records will be built by the overnight sync process once the titles have been ordered.)




**e)** (Optional) Select the Authority Records tab, and modify the settings.

**f)** (Optional) Select the Record Set tab, and modify the settings.

**g)** Save the import profile.

The import profile is ready for any staff member with the appropriate permissions to select when importing pre-order Axis 360 eContent records from TS3.

**2.** Select **Utilities**, **Importing**, **Express Import** or **Full Import**.

**3.** Select the import profile created for importing Axis 360 records from TS3.

**4.** Click **Add** and select the file of Axis 360 eContent bibliographic records downloaded from TS3.

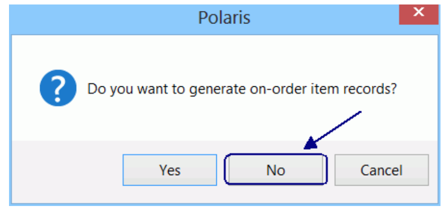
**5.** Click **Import**.

The import job is added to the import queue. See "Axis 360 Import Jobs" on page 25. Once the import processing is complete, the Axis 360 eContent records are integrated with Polaris.

If your library follows this workflow, the imported records can be bulk-added to create the purchase order and the order can be sent to Baker & Taylor via EDI. See "Create a purchase order by bulk adding titles" in the *Polaris Acquisitions Guide 4.1R2*.

When releasing the purchase order, the **Display in PAC** option can be selected so that patrons can place holds on these on-order titles.

However, on-order items must *not* be created when the purchase order is released because the eContent item records are created by the overnight sync process when the titles have been purchased. When releasing an order for Axis 360, select **No** when the dialog box asks if you want to create on-order items.




Later, the library can import the full MARC records to overlay these "placeholder" bibs, while retaining the resource entities that enable the integration with Polaris. See "Overlaying Axis 360 EContent Bibs" **on page 21**.

# Overlaying Axis 360 EContent Bibs

When your library receives fully-cataloged Axis 360 eContent bibliographic records from Baker & Taylor or another vendor, a staff member imports these records using an import profile set up to: detect duplicates based on the 037 tag; overlay these duplicate with the full incoming records; and retain tags that create resource entities.

**Important:**
Inform the bibliographic record vendor that the fully-cataloged eContent bibliographic records provided to overlay integrated eContent bibs must have the following requirements:

- The records must be MARC or MARCXML bibliographic records.
- The 037 tags must be retained because that tag contains the eContent item identifier and serves as a match point to detect duplicates during importing.

## Import fully-cataloged bibs to overlay Axis 360 bibs

Follow these steps to set up an import profile designed for importing fully-cataloged Axis 360 eContent bibliographic records, and then import the records using the profile.

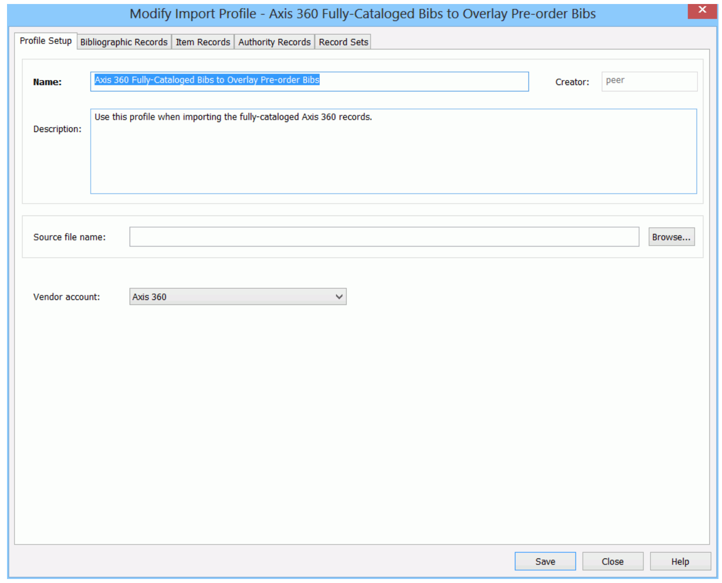
**Note:**
Once you have set up the import profile and saved it (step 1), any staff member with the appropriate Polaris permissions can select it for subsequent imports of full Axis 360 bib records.

1. Create an import profile specifically for importing fully-cataloged Axis 360 from Baker & Taylor or another vendor.

a) Copy the PolarisExec **Integrated ebook Bibs** import profile, or create a new import profile.

**Note:**
For general information about creating, copying, and modifying import profiles, see “Setting Up Import Profiles” in the *Polaris Cataloging Guide 4.1R2*.

b) On the Profile Setup tab, type a name for the import profile, select the Axis 360 vendor account in the **Vendor account** drop-down list box, and click **Save** to save the profile.



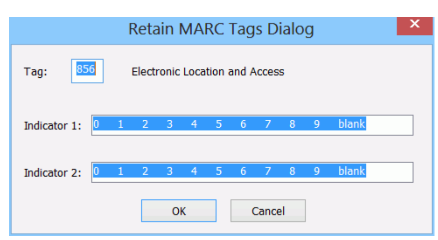

**c)** Select the Bibliographic Records tab and verify that the following options are set:

**Important:**
The Bibliographic Records tab must be set up to:
- perform duplicate detection using profile-defined rules;
- these rules must include ***incoming 037$a = existing 037$a***;
- the incoming records must be retained as final;
- 856 tags must be retained from overlaid bibs.

Other settings may be defined according to your library's workflow. Work with your Polaris site manager to set up this import profile specifically for overlaying Axis 360 pre-order bibs.

- **Perform duplicate detection** - The check box must be selected.
- **Use profile defined duplicate detection rules** - The check box must be selected.
- **Rules to apply (as unique groups)** - The profile-defined rules must include **incoming 037$a = existing 037$a**
- **Save incoming record as final; replace database record** - This option must be selected under **If a duplicate is found.**
- **Keep MARC tags** - The check box must be selected.
- **Profile defined overlay retention tags** - This option must be selected, and the following tags must be listed as profile-defined overlay retention tags:

  **856** - any indicator 1 or 2 value.



d) Click **Save** to save the settings for the Bibliographic Records tab.

e) Select the Item Records tab and verify that the options for building item records are set correctly.

> **Note:**
> Item records are created by the overnight synch process after the Axis 360 titles are ordered. If you select the option to build item records when importing full Axis 360 bibs, item records are created only under certain circumstances. Work with your Polaris site manager to determine which item record options to select.

f) (Optional) Select the Authority Records tab, and modify the settings.

g) (Optional) Select the Record Set tab, and name the record sets to identify the type of records being imported.

h) Save the import profile.

The import profile is ready for any staff member with the appropriate permissions to select when importing fully-cataloged Axis 360 eContent records.

2. Select **Utilities**, **Importing**, **Express Import** or **Full Import**.
3. Select the import profile created for importing fully-cataloged Axis 360 records.
4. Click **Add** and select the file of Axis 360 eContent bibliographic records downloaded from TS3.
5. Click **Import**.

The import job is added to the import queue. See "View the jobs or print reports for Axis 360 imports" on page 25. Once the import processing is complete, the pre-order Axis 360 eContent records are overlaid with the fully-cataloged records, and the Axis 360 titles retain the resource entities that enable the integration.

# Axis 360 Added/Expired Copies

The API consumer service queries Axis 360 on a daily basis and synchs the number of eContent item records for each resource entity, either adding or removing eContent item records as necessary. For details on the synch process, see "EContent Vendor and Polaris Synchronization" on page 103.

The item records are populated from the fields in the item template selected in the Axis 360 Vendor Account record. Only one **Ebook automatic import** item template can be selected in the vendor account, but the incoming added copies could be for either ebooks or downloadable audio ebooks. Since the library may need to modify fields, such as the item material type, collection etc., the added copy item records are automatically placed in a record set to make them easier to find and modify. Each vendor account can have only one record set for added copies, named following this pattern:

**E-added copies_VendorAccountName_ID=nnn**

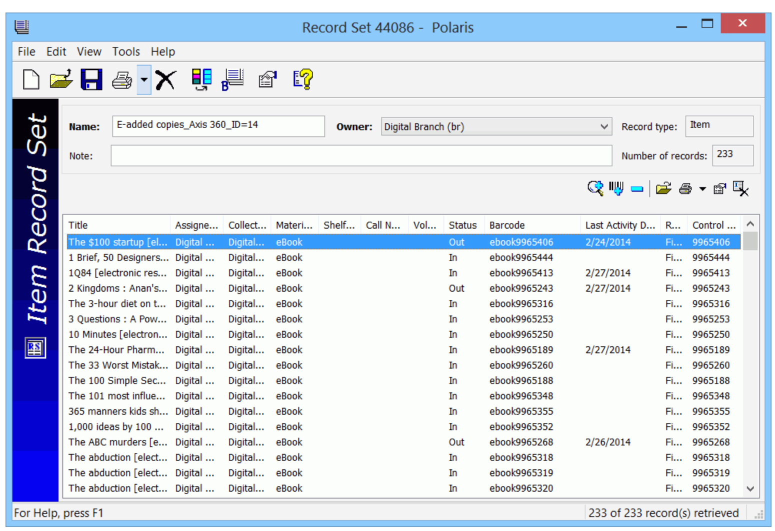
If necessary, the vendor account name is truncated to fit the 50-character record set name limit, and the vendor account ID follows the name.

**Example:**

**E-added copies_Axis 360_ID=14**

The record set owner is the same as the **Ebook automatic import** item template owner. If the owner is changed, a new system-generated record set with the correct owner is automatically created the next time the added copy process runs. If the record set is deleted or renamed, a new one is created automatically.

A staff member with the appropriate permissions can bulk change the item records in the record set. After making the changes, the records should be removed from the record set.



# Axis 360 Import Jobs

The Import Jobs Queue lists import jobs by the date and time posted, whether the import jobs are for eContent bibs or other types of records. If multiple files were selected for import, each file appears on a separate line. Completed jobs remain in the queue until an authorized user manually deletes them.

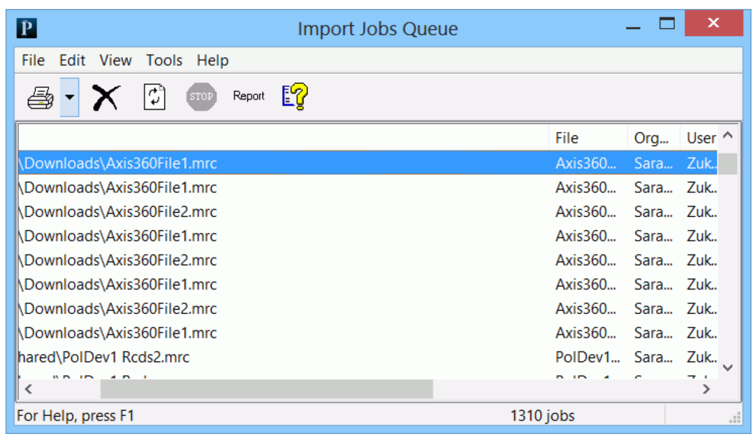
You can view or print a report for completed import jobs from the Import Jobs Queue window. The import report provides details regarding the import profile that was used, the settings in the import profile, the records created, errors (if any), and other details.

## View the jobs or print reports for Axis 360 imports

Follow these steps to view import jobs in the Import Jobs Queue.

1. Select **Utilities, Importing, Import Jobs Queue** to open the Import Jobs Queue window.

   By default, the jobs are sorted by the date and time posted. If multiple files were selected for import, each file appears on a separate line. Completed jobs remain in the queue until an authorized user manually deletes them.




**Tip:**
If you do not need to view the report before printing it, you can select the import job in list, and click the **Report** button, or right-click and select **Print Report**.

2. Double-click the import job you want to view or print.

   The Import Report pdf appears in the preview window.

3. Select **File, Print** to print the report displayed in the preview window.

# Axis 360 MARC Tags - Reference

When a user selects an Axis 360 vendor account in the import profile, the following MARC tags are used in the import process to create resource entities and enable integration between Axis 360 records and Polaris:

**Note:**
For more information, see “Resource Entities” on page 87.

- **037** - The 037 (source of acquisition) tag is required for creating the resource entity. Baker & Taylor provides the 037.

  **Example:**

  **037 ‡adk42g9‡bBaker & Taylor Axis 360‡nhttp://eContent.Baker & Taylor.com**

- **852** - During import initialization, if the incoming Axis 360 records have 852 tags, they are removed from the records. New 852 tags are added for the correct number of copies.
- **856 40** - During import initialization, the 856 tags with a first indicator (access method) of 4 (HTTP) and a second indicator of 2 (related resource) are updated with a second indicator of 0 (resource). The tag is then converted to a resource entity and moved to the Resources view of the Bibliographic Record workform. It does not display in the MARC view.

  **Example:**
  **856 40 ‡uhttp://poldev1.axis360qa.baker-taylor.com/Title?itemid=0012371026‡3Axis 360 eContent‡xPolDev3**

- **856 42** - An 856 tag for the Axis 360 cover image is inserted into the record. The tag is copied to the Resources view of the Bibliographic Record workform and then changed to a 956 tag, which is retained in the MARC view.

  **Example:**

  **85642‡uhttp://images.btol.com/ContentCafe/Jacket.aspx?UserID=polaris-test&Password=polaris-test&Return=1&Value=9781458123299&Type=S**

- **856 42 $3** - During initializing, subfield 3 is populated by the **Default URL link text** field in the Axis 360 Vendor Account record.
- **008 and 007** - The values required to create eContent Type of Material (TOM) codes may not be present in the Axis 360 records. You can use Bibliographic Bulk Change process to change or insert the appropriate tags and/or values.

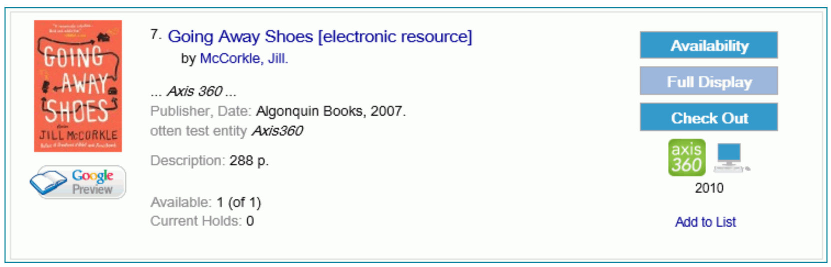
# Patron Access to Axis 360 EContent

For patrons who have logged into their library accounts, the eContent available for checkout or hold requests depends on the Axis 360 vendor account and whether the patron's registered branch has access to the eContent provided by that account. For more information about options for displaying, managing, and circulating eContent, see "Managing EContent in the PAC" on page 73.

When the Axis 360 eContent is accessible to the logged-in patron, a **Check Out** button is displayed in the PAC search results if the title is available. If the patron has access, but the title is not available because it is checked out, a **Place Hold** button is displayed. A **Restricted** button is displayed if the patron's registered branch has not purchased access to the eContent title.

The library can change the **Check Out** and **Place Hold** button text by modifying the following strings in WebAdmin:

- **PACML_AXISCHECKOUT**
- **PACML_AXISPLACEHOLD**

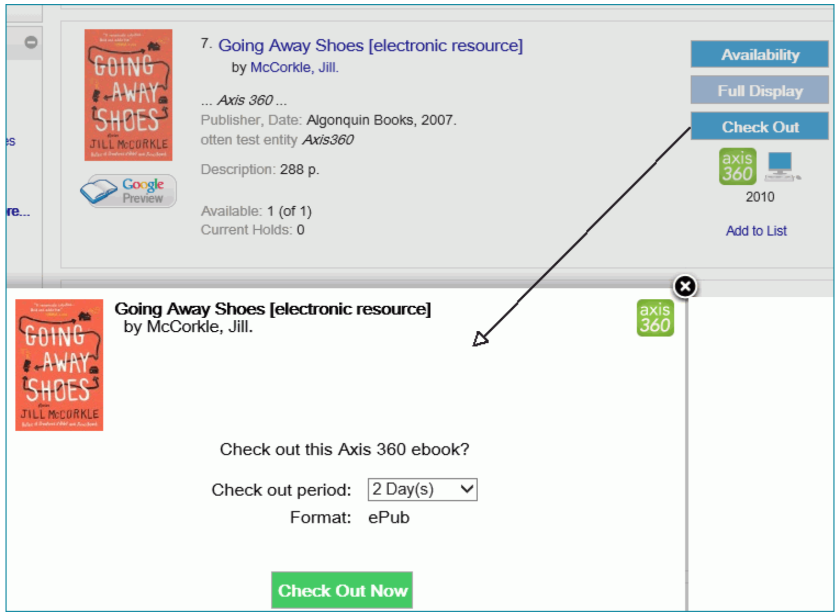



Before checking out the Axis 360 eContent in Polaris, the patron must first go to the library's Axis 360 Magic Wall web page and create an account using their library barcode, password, and the email address in their Polaris library account. To check out eContent in Blio or Acoustik formats, the patron must also create Blio or Acoustik accounts.

To download the checked out eContent to a personal device and read, hear, or view the eContent, the patron must first download the appropriate apps on their personal device. For information on downloading the Axis 360 apps and the devices and formats that Axis 360 supports, go to http://btol.com/axis360/faq.htm

After creating the account(s) and downloading the necessary app(s), the patron can check out the Axis 360 eContent item in the PAC, and then download the eContent to their device.

To check out the eContent in the PAC, the patron clicks the **Check Out** button, which opens a light box.




The patron selects the format for the download (if it is available in more than one format), and clicks the **Check Out Now** button. A message confirms the download.

The patron goes to the Axis 360 app on their device, logs into their Axis 360 account, selects **My lists**, **Items on Loan**, and downloads the eContent.

# OverDrive® EContent Integration

Libraries using the Polaris ILS can catalog, display in PAC, manage access, and circulate eContent from OverDrive. Polaris Library Systems requires a license for each integrated eContent vendor.

Once the library has a subscription with OverDrive and the required Polaris license, the library creates an item template, an integrated vendor account, and an import profile in Polaris. The Vendor Account is in Polaris Administration, not in Acquisitions, and it is used during automatic importing to create resource entities for the bibliographic records.

As a result of this integration, patrons can search for, place holds on, and check out OverDrive eContent directly from the PAC. All associated circulation processing and tracking for these integrated eContent occurs in Polaris.

OverDrive eContent may be in one of the following formats:

**Note:**
This list is subject to change as OverDrive develops its offerings.

- EPUB ebook
- PDF ebook
- WMA Audiobook
- MP3 Audiobook

Availability and holds counts for OverDrive eContent are driven by the status of the items in the OverDrive repository, not the status of the items in the Polaris database. When patrons check out, check in, or place holds on OverDrive eContent from the PAC, the synchronization between Polaris and the OverDrive repository takes place in real time.

When a library purchases a new OverDrive title, it is identified by the library's collection and contract. The Polaris API consumer service queries the OverDrive database daily to find and fetch the metadata for titles identified as those the library has purchased. After fetching the OverDrive metadata, the API consumer service identifies duplicates by matching on the object identifier or title ID.

If the title is new to the catalog, the OverDrive XML metadata is converted to MARC XML, and the file is automatically added to the Polaris import queue to be imported. OverDrive imports are done once daily, around midnight. The **Integrated ebook Bibs** read-only PolarisExec import profile, which is selected by default in the OverDrive Vendor Account workform, provides the processing specifics for this automatic process.

When a library purchases added copies for eContent titles already in the database, or when copies expire because of publisher restrictions, Polaris is updated automatically with the vendor's information. For OverDrive, the synchronization process runs once daily, around midnight. For details, see "EContent Vendor and Polaris Synchronization" on page 103.

If your library uses OverDrive® Advantage™, you can set up the OverDrive Vendor Account so that PAC users who are connected at the system level and not logged in do not see the Advantage titles. See "Create an OverDrive integrated vendor account" on page 33.

# Setting Up Polaris for OverDrive Integration

To enable the import processing that integrates OverDrive eContent with Polaris, the item templates, vendor account, and import profiles must be set up correctly in Polaris. Your Polaris Site Manager can assist your library with this setup.

See the following topics:

- "Set up the eContent item templates for OverDrive" on page 31
- "Create an OverDrive integrated vendor account" on page 33
- "Create OverDrive eContent import profile(s)" on page 37

## Set up the eContent item templates for OverDrive

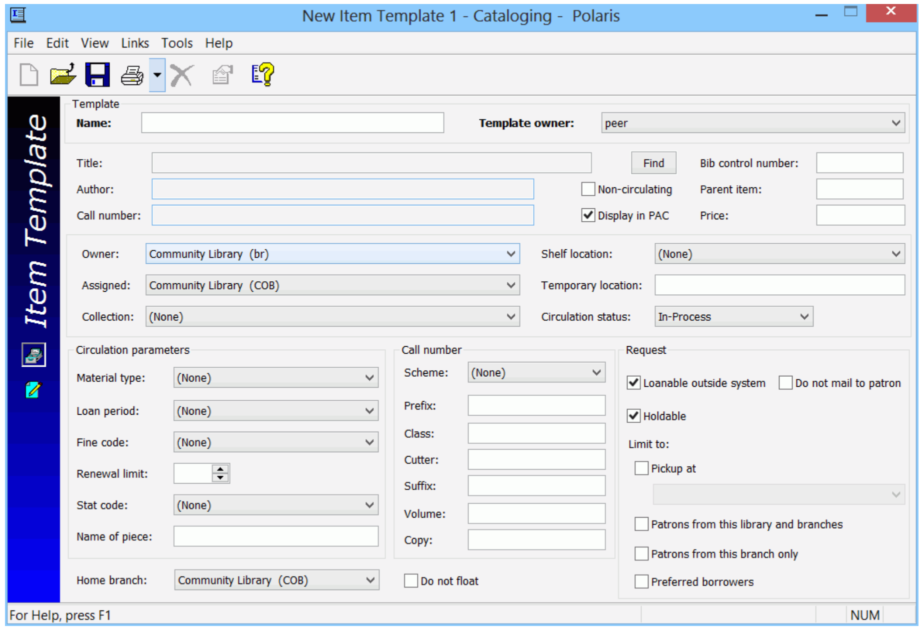
To enable the automatic creation of OverDrive eContent item records, you must create an item template named **Ebook automatic import** or **E-book automatic import** (additional text can be appended to this name, but it must begin with this string). This template supplies the default data used to create eContent item records during the automatic import process. After you set up the **Ebook automatic import** item template, you select it in the Vendor Account workform. See "Create an OverDrive integrated vendor account" on page 33.

> **Note:**
> The **Ebook automatic import** item template is used for all types of integrated eContent, including audio ebooks. After the automatic import, you can edit the OverDrive item records using the Item Bulk Change process.

You can also create multiple other item templates, named however your library wishes, to use when re-importing existing non-integrated OverDrive records. For example, if your library has existing non-integrated OverDrive ebooks and audio-ebooks, you can set up one item template for ebooks and one item template for audio-ebooks. Then, you can select the appropriate item template in the import profile when you are re-importing these existing records.

Follow these steps to set up the item templates for OverDrive.

1. Select **File, New** from the Polaris Shortcut Bar.
2. Select **Item Template** and click **OK.**
3. The Item Template workform opens.




4. Type a name for the OverDrive eContent item record.
   - If you are creating the item template that will be selected in the OverDrive Vendor Account workform, it must be named **Ebook automatic import** or **E-book automatic import**. Case does not matter, and other words can follow this string, but the name must begin with **Ebook automatic import**. For information about the items created from the automatic import item template, see
   - If you are creating an item template to create eContent item records during a non-automatic import, you can type any name in the **Name** box. You can create as many of these templates as are appropriate for your library. For example, your library may already have non-integrated OverDrive records in various electronic formats (ebook, audio ebook, etc.) in its database. When importing these records to enable their integration with Polaris Circulation, the user can select one of these eContent templates.
5. Select the branch that owns the template in the **Template owner** box.
6. In the **Assigned** box, select the branch for the eContent items that will be created using this template.

   **Note:**
   If a resource group is selected in the Vendor Account, the **Assigned** branch selected in the item template must belong to the resource group.
7. In the **Circulation status** box, select **In**.
8. Select the **Fine code** and **Renewal limit**. These fields are required to save the item template, but they are ignored in eContent items circulation processing.
9. Select **File, Save** to save the template.

   For more information, see "EContent Item Records" on page 93.

# Create an OverDrive integrated vendor account

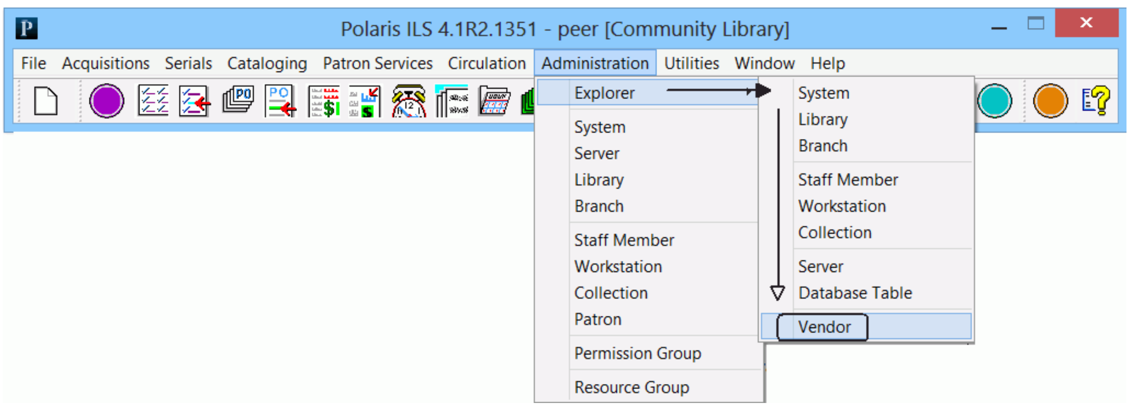
Vendor and Vendor account records are accessed through the Polaris Administration Explorer; they cannot be accessed from the Find Tool. Polaris Administration ownership and inheritance do not apply to vendor records or vendor accounts.

Follow these steps to create an integrated vendor account for OverDrive.

**Note:**
Vendor account permissions are not organization-specific, and users in the Admin group are granted these permissions: **Vendor Account: Access, Create, Modify, Delete**.

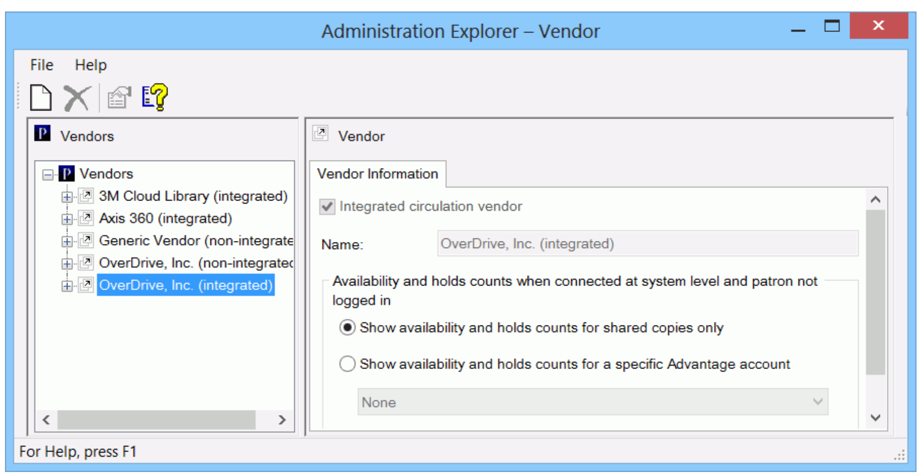
**Tip:**
You cannot create a new Vendor Account by selecting **File, New** from the Polaris Shortcut Bar.

1. Select **Administration**, **Explorer**, **System**, **Vendor**.




2. Select the OverDrive **Vendor** node in the Administration Explorer.

   The Vendor information is displayed in the right tab.

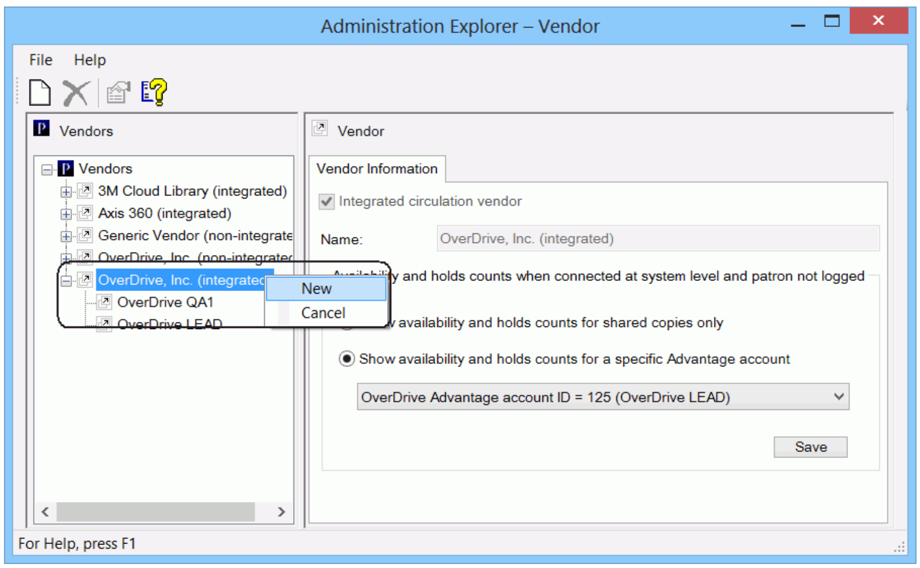



The **Integrated circulation vendor** read-only box is checked.

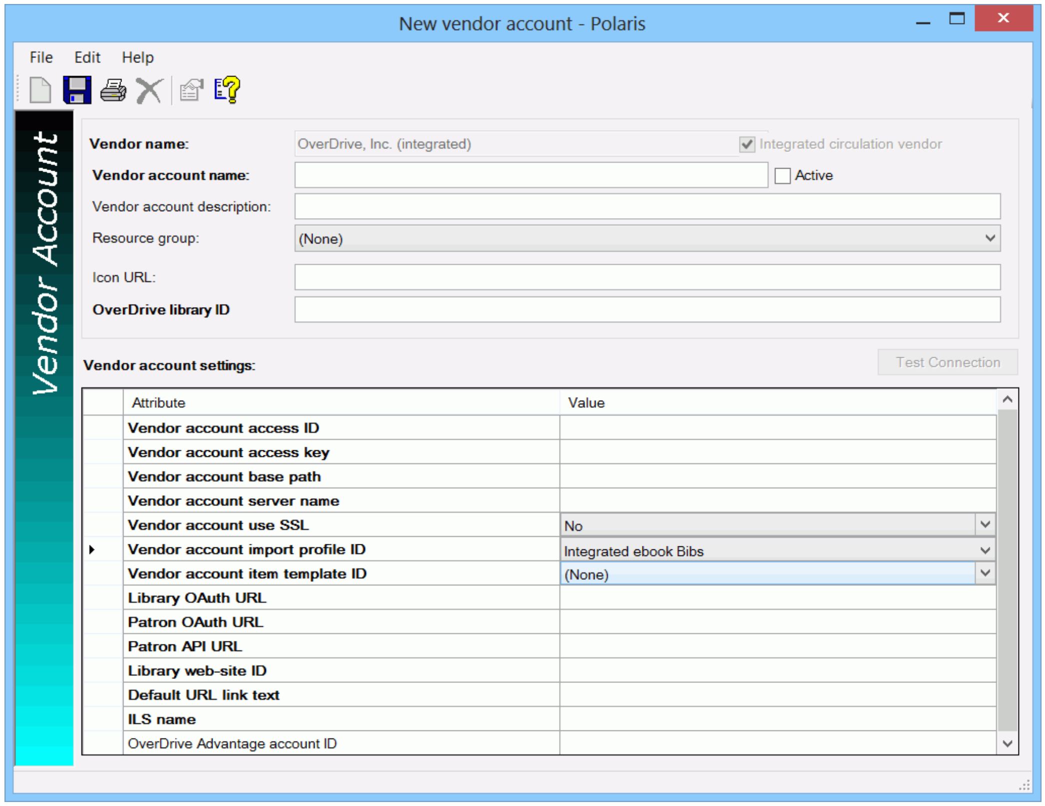
The Vendor Information tab provides two options for displaying eContent availability and holds counts to PAC users who are searching the PAC at the system level and are not logged in:

- **Show availability and hold counts for shared copies only** - When this option is selected (the default), users who are connected to the PAC at the system level, and have not logged into their patron accounts, will see availability and holds counts only for OverDrive eContent copies shared throughout the OverDrive group. Advantage titles display only after the patron has logged in to an organization that participates in the Advantage account.
- **Show availability and holds counts for a specific Advantage account** - When you select this option and select the specific Advantage account from the drop-down list, both the shared eContent titles and the titles from the selected Advantage account display when users are connected at the system level and not logged in.

**3.** Right-click the **Overdrive, Inc. (integrated)** Vendor node, and select **New**.




The Vendor Account workform opens with **OverDrive Inc. (integrated)** in the **Vendor name** box.




**4.** View the system-supplied fields and enter information in the editable fields:

> **Note:**
> Required fields have bold labels.

- **Vendor name - OverDrive Inc. (integrated)**. System-supplied; read-only
- **Integrated circulation vendor** - This check box is automatically checked.
- **Vendor account name -** (required) The library supplies a unique name to identify the account.
- **Active** - This check box is initially unchecked when you are creating a vendor account for an integrated eContent vendor. Leave the check box unchecked, and enter the account information. Polaris Library Systems activates the vendor account.
- **Vendor account description** (optional) - The library can add a description for the vendor account.
- **Resource group** (optional) - The library can select a resource group to limit access to the eContent by branch. See “Manage patron access to eContent using resource groups” on page 76.
- **Icon URL** (optional) - The library can specify a URL location for the icon that represents the eContent vendor.
- **OverDrive library ID** - The ID identifying the library’s account with OverDrive.
- **Vendor account access ID** - The library’s access ID for the eContent vendor account.

- **Vendor account access key** - The library's access key for the eContent vendor account.
- **Vendor account base path** - The URL path to the library's resources at eContent vendor.
- **Vendor account server name** - The vendor account server name.
- **Vendor account use SSL** - The library selects **Yes** or **No** to indicate whether Secure Socket Layer is used.
- **Vendor account import profile ID** - Identifies the import profile set up to enable the automatic import and integration. The PolarisExec **Integrated ebook Bibs** import profile is selected by default.
- **Vendor account item template ID** - The library creates the item template used during the API-driven processes. The item template name must begin with **Ebook automatic import** or **E-book automatic import**.

**Tips**
The library's server should be set within 5 minutes of the correct time because OverDrive has a 5-minute time difference threshold on their servers.

- **Library OAuth URL** - The URL is used to grant the Polaris ILS an access token to access the OverDrive API.
- **Patron OAuth URL** - The URL is used to grant the Polaris ILS an access token for patron circulations.
- **Patron API URL** - The URL used to perform circulation functions.
- **Library web-site ID** - The web site ID used by OverDrive to identify the library's collection for circulation purposes.
- **Default URL link text** - Identifies the URL link text and is also used as hover text for the vendor icon.
- **ILS name** - Identifies the ILS.
- **OverDrive Advantage Account ID** - This field is required only for OverDrive Advantage accounts.

5. Save the Vendor Account workform.
6. Click the **Test Connection** button to test the API settings in the vendor account and ensure that a connection is made to the vendor's service (OverDrive API).

   If the test is successful, a message confirms that the connection was made. If a connection problem is encountered, a message appears.
7. Ask your Polaris representative to activate the vendor account.

   This starts the API consumer service. To check the status of the service, see "Check the status of the Polaris API consumer service" on page 102.

   **Important:**
   After activating a vendor account, or reactivating a suspended vendor account, an IIS reset is required so that the PAC shows the correct information for the vendor's resources. For example, the IIS reset enables the Check Out or Place Hold button to be displayed instead of the **Temporarily Unavailable** button.

# Create OverDrive eContent import profile(s)

**Note:**
These are suggestions for setting up the import profiles for OverDrive eContent processing; your Polaris site manager can assist you in setting up the import profiles to support your library's specific needs.

Your library can copy and rename the PolarisExec read-only **Integrated ebook Bibs** import profile, and then select the renamed import profile in the Vendor Account workform. Before selecting an import profile other than the **Integrated ebook Bibs** import profile in the OverDrive Vendor Account workform, consult with your Polaris site manager. See "Automatic Import Profile Selected in the OverDrive Vendor Account" on page 44.

Depending on your library's processing workflow for OverDrive eContent, you may need to create other import profiles used to support the following non-automatic import processes:

- **Enable integration for existing OverDrive non-integrated eContent bibs** - Export and then re-import the non-integrated OverDrive eContent titles. See "Integrating Existing OverDrive EContent" on page 38.
- **Overlay OverDrive integrated eContent bibs with fully-cataloged bibs while retaining the resource entities** - Fully cataloged eContent bibs can be imported to overlay existing integrated eContent bibs, while retaining the resource entities that enable the integration with Polaris circulation. See "Overlaying OverDrive EContent Bibs" on page 47.

# Integrating Existing OverDrive EContent

If your library already has OverDrive eContent records in its catalog, these existing non-integrated bibs must be processed to create the resource entities that enable integration with Polaris Circulation. This process involves: locating all the OverDrive eContent bibliographic records; putting the records in a record set; exporting the records to a file; deleting the non-integrated bibliographic records from the Polaris database; and then re-importing the exported bibs using an import profile set up for this purpose.

1-2-3

## Put existing non-integrated OverDrive bibs in record sets

Follow these steps to locate the existing OverDrive eContent records and put them in record sets.

**Note:**
You can put all the existing OverDrive eContent bib records in a single record set. However, separating your ebooks from audio-ebooks, and then re-importing the bibs in separate processes allows you to create item records from specific templates.

1. Set up the search criteria in the Find Tool to find the existing non-integrated OverDrive records.

   **Note:**
   Work with your Polaris site manager to determine the best way to find these records. You may need to set up an SQL search in the Find Tool.

2. Select the records in the results list, right-click, and select **Add to record set**.

   Save the record set with a name that identifies the records.

# Export OverDrive non-integrated eContent bibs

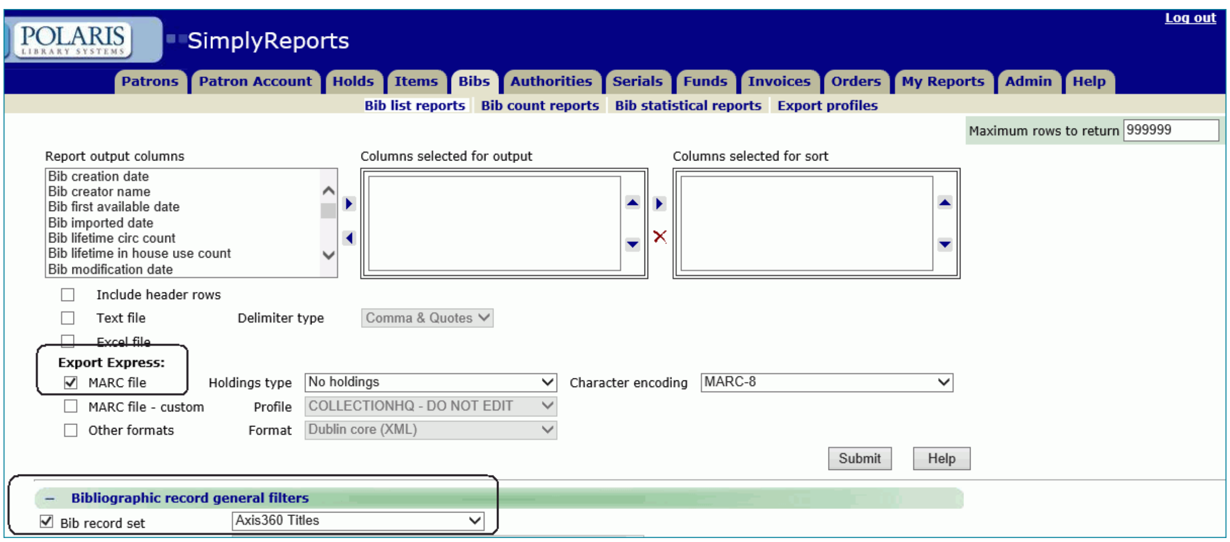
Export the records to a file on the computer's desktop or some other easily-accessible location. It is not necessary to include embedded holdings in the export.

**Note:**
If your library has SimplyReports and Export Express, you can select the record set to export. If your library does not have Export Express, your Polaris Site Manager can assist you with exporting the record set from the staff client.

Follow these steps to export the OverDrive eContent records using Export Express.

1. Log in to SimplyReports.
2. Select the **Bib list reports** tab.
3. Select **Export Express, MARC file, No holdings**.

   Expand the Bibliographic record general filters, select **Bib record set**, and select the record set.



## Delete the exported OverDrive non-integrated bibs

After exporting the OverDrive non-integrated bib records to files on the desktop or another location, delete the bibs and items from the database.

Follow these steps to delete the non-integrated records from the Polaris database.

1. Open the record set of the non-integrated records.
2. Delete the OverDrive non-integrated eContent bibliographic records and their linked items from the Polaris database.

## Re-import existing non-integrated OverDrive records

The import profile must have specific settings that enable the integration with Polaris circulation. Other settings depend on your library's decisions.

You can create multiple import profiles, each with a specific item template selected, so that the eContent item records are created for specific collections. Then, if your exported non-integrated ebooks and audio-ebooks are in different files, you can import them in separate processes.

> **Note:**
> Newly-purchased OverDrive eContent records will be imported automatically using the default **Integrated ebook bibs** import profile (or a renamed copy of this profile) selected in the OverDrive Vendor Account workform. See "Automatic Import Profile Selected in the OverDrive Vendor Account" on page 44.

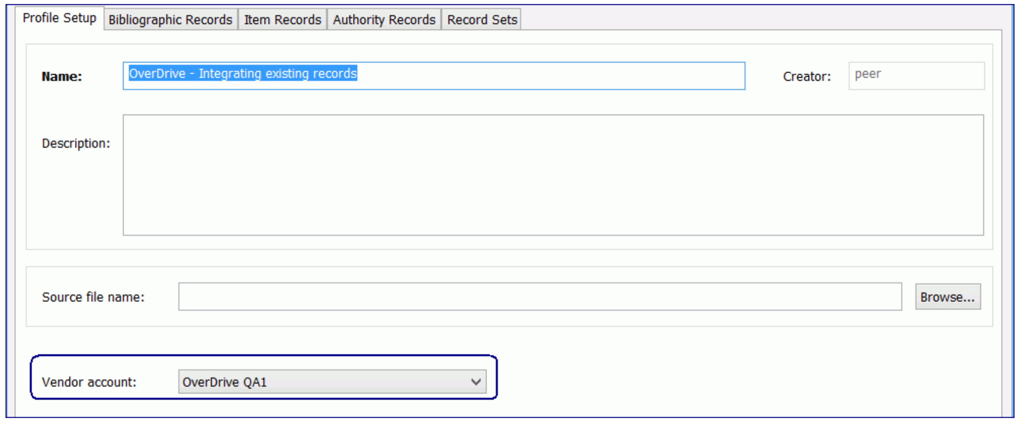
Follow these steps to set up the import profile and then import the existing non-integrated OverDrive bibs.

> **Note:**
> If this profile is already set up, skip step 1.

1. Create an import profile specifically for importing existing non-integrated OverDrive eContent.

   You can start with a new import profile, or select an existing profile, rename it, and modify the settings. For general information about copying and renaming import profiles, see "Copy a Polaris read-only import profile" in the *Polaris Cataloging Guide 4.1R2*.

   a) On the Profile Setup tab, type a new name for the import profile, and select the OverDrive account in the **Vendor account** box.



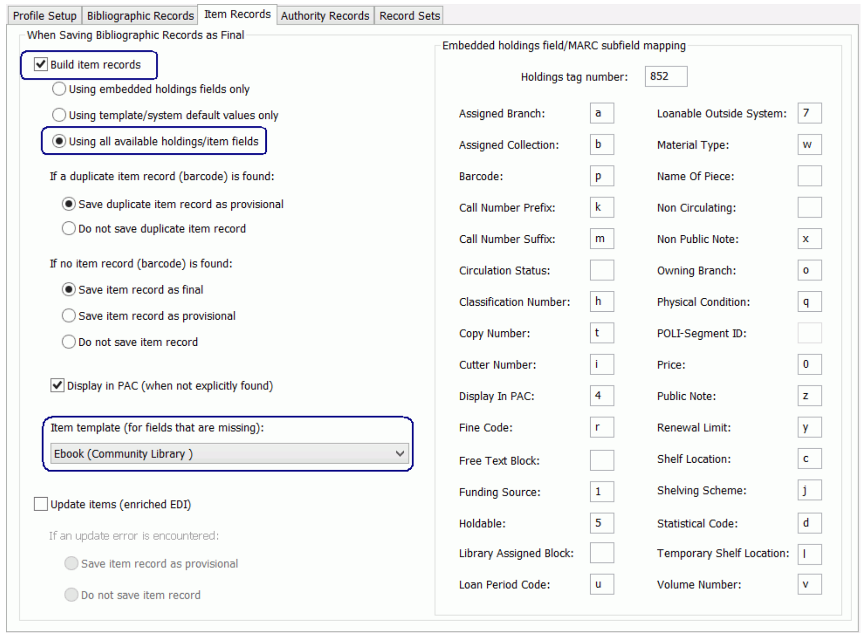

**b)** Select the Bibliographic Records tab. If you have deleted all your OverDrive records, you can turn off duplicate detection.

Work with your Polaris site manager to determine which duplicate-detection settings are appropriate for your library.

**c)** Select the Item Records tab, and ensure that the following options are set:

- **Build item records** check box is checked
- **Using all available holdings/item fields** is selected.
- **Item template (for fields that are missing)**: The correct eContent item template is selected.

**Note:**
You can select any item template when you import existing non-integrated OverDrive eContent. However, if your library uses resource groups, ensure that the item template's assigned branch is in the resource group that shares the OverDrive vendor account. When *new* OverDrive eContent is purchased by the library, the automatic process uses the specific Ebook automatic import item template selected in the OverDrive Vendor Account.



**d)** (Optional) Select the Authority Records tab, and modify the settings.

**e)** Select the Record Set tab, and ensure that the record sets are named appropriately to identify the types of records in them.

**f)** Save the import profile.

The import profile is available to select when re-importing existing OverDrive eContent bibs to enable the integration with Polaris circulation.

**2.** After the import profile is set up, to re-import the OverDrive bibs, select **Utilities**, **Importing**, **Full Import**.

**3.** Select the import profile created in step 1.

**4.** On the Profile Setup tab, click **Add** and select the file of exported non-integrated OverDrive bibs to import.

**5.** Click the **Import** button.

The OverDrive titles are imported and integrated with Polaris circulation, and item records are created. After the import is complete, an overnight process synchronizes items out and hold requests in existing patron accounts.

**Note:**
If you want to add call numbers from the 099 tag to the newly-created eContent item records, you can select the **Use call number fields from bib record** setting on the Item Bulk Change dialog box.

# Integrating New OverDrive EContent

When the library purchases a new OverDrive title, bibliographic metadata about that title is automatically received by the Polaris API consumer service, formed into a MARC record, added to an import file, and positioned for import in the import jobs queue. Then, the bibliographic records are imported by the automatic import process, which uses settings in the OverDrive Vendor Account to create a resource entity for each record. The resource entity identifies the Polaris Vendor Account and provides the link to the electronic resource in the OverDrive repository. Beginning with the first record in the file, each bib is checked for a match between the URL syntax in the 856 tag and the information in the Polaris Vendor Account. If a match is found, a resource entity is created in the bibliographic record. See “Resource Entities” on page 87

The automatic import process also creates eContent item records. During the import initialization, OverDrive is queried to find the number of copies. Based on the results of this query, 852 tags are created in the eContent bibliographic records. When the bibliographic records are imported, item records are created from the 852 tags and the fields in the template selected in the OverDrive Vendor Account. For more information, see “EContent Item Records” on page 93.

Once an 852 tag has been used to create an item record, a $9 subfield is added to the 852 tag so that it is not used again to create an eContent item record. When the Subfield 9 cleanup utility runs, the subfield $9 is removed.

# Automatic Import Profile Selected in the OverDrive Vendor Account

The **Integrated ebook Bibs** PolarisExec import profile is set up to enable eContent integration for automatic imports. If you copy and rename this import profile, the renamed import profile must be selected in the Vendor Account workform.

Work with your Polaris site manager to create the import profile to select in the OverDrive Vendor Account. These are some guidelines when copying the **Integrated ebook Bibs** to create a new import profile for OverDrive automatic imports:

- **Profile Setup** tab - You can type a different name and description, but do not select a source file or a vendor account.
- **Bibliographic Records** tab - Work with your site manager to determine the duplicate detection options to set.
- **Item Records** tab - The **Build item records, Using all available holdings/item fields** must be selected, and the **Embedded holdings field/MARC subfield mapping** options should not be changed. Do not select a template because the item template used in automatic import processing is selected in the Vendor Account workform, not in the import profile.
- **Authority Records** tab - Leave the **Do not save any records** option selected.
- **Record Sets** tab - You can rename the record sets without affecting the automatic import.

# OverDrive Added/Expired Copies

The API consumer service queries OverDrive on a daily basis and synchronizes the number of eContent item records for each resource entity, either adding or removing eContent item records as necessary. For details on the synch process, see "EContent Vendor and Polaris Synchronization" on page 103.

The item records are populated from the fields in the **Ebook automatic import** item template selected in the OverDrive Vendor Account record. Only one Ebook automatic import item template can be selected in the vendor account, but the incoming added copies could be for either ebooks or audio ebooks. Since the library may need to modify fields, such as the item material type, collection etc., the added copy item records are placed in a record set to make them easier to find and modify.

EContent item records created during added copy processing are automatically added to record sets. Each vendor account has only one system-supplied record set for added copies, named following this pattern:

**E-added copies_*VendorAccountName*_ID=nnn**

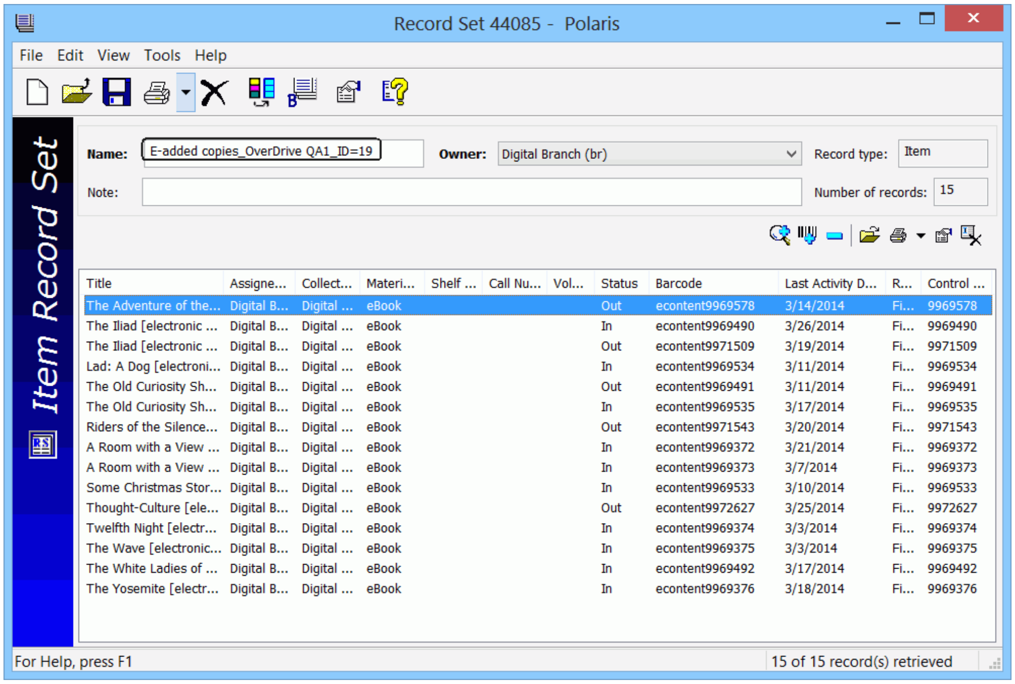
If necessary, the vendor account name is truncated to fit the 50-character record set name limit, and the vendor account ID follows the name.

**Example:**

**E-added copies_OverDrive_ID=10**

The record set owner is the same as the **Ebook automatic import** item template owner. If the owner is changed, a new system-generated record set with the correct owner is automatically created the next time the added copy process runs. If the record set is deleted or renamed, a new one is created automatically.

A staff member with the appropriate permissions can bulk change the item records in the record set. After making the changes, the records should be removed from the record set.


Record Set 44085 - Polaris
File Edit View Tools Help
Item Record Set
Name: E-added copies_OverDrive QA1_ID=19
Owner: Digital Branch (br)
Record type: Item
Note:
Number of records: 15
Title | Assigne... | Collect... | Materi... | Shelf ... | Call Nu... | Vol... | Status | Barcode | Last Activity D... | R... | Control ...
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Thought-Culture [ele... Digital B... Digital ... eBook Out econtent9972627 3/25/2014 Fi... 9972627
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The Wave [electronic... Digital B... Digital ... eBook In econtent9969375 3/3/2014 Fi... 9969375
The White Ladies of ... Digital B... Digital ... eBook In econtent9969492 3/17/2014 Fi... 9969492
The Yosemite [electr... Digital B... Digital ... eBook In econtent9969376 3/18/2014 Fi... 9969376
For Help, press F1
15 of 15 record(s) retrieved

# Overlaying OverDrive EContent Bibs

When your library receives fully-cataloged eContent bibliographic records to overlay existing OverDrive records, a staff member imports these records using an import profile set up to: detect duplicates based on the 037 tag; overlay these duplicate with the full incoming records; and retain tags that create resource entities.

**Important:**
Inform the bibliographic record vendor that the fully-cataloged eContent bibliographic records provided to overlay integrated eContent bibs must have the following requirements:

- The records must be MARC or MARCXML bibliographic records.
- The 037 tags must be retained because that tag contains the eContent item identifier and serves as a match point to detect duplicates during importing.

## Import fully-cataloged bibs to overlay OverDrive bibs

Follow these steps to set up an import profile designed for importing fully-cataloged OverDrive eContent bibliographic records, and then import the records using the profile.

**Note:**
Once you have set up the import profile and saved it (step 1), any staff member with the appropriate Polaris permissions can select it for subsequent imports of full bib records to overlay the OverDrive bibs.

1. Create an import profile specifically for importing fully-cataloged bibs to overlay OverDrive records.

   a) Copy the PolarisExec **Integrated ebook Bibs** import profile, or create a new import profile.

   **Note:**
   For general information about creating, copying, and modifying import profiles, see “Setting Up Import Profiles” in the *Polaris Cataloging Guide 4.1R2*.

   b) On the Profile Setup tab, type a name for the import profile, select the OverDrive vendor account in the **Vendor account** drop-down list box, and click **Save** to save the profile.

**c)** Select the Bibliographic Records tab and verify that the following options are set:

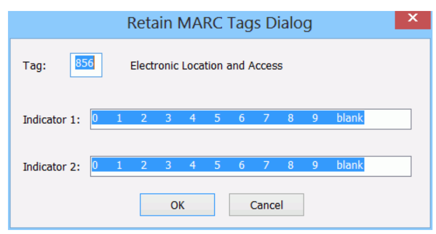
**Important:**
The Bibliographic Records tab must be set up to:

- perform duplicate detection using profile-defined rules;
- these rules must include ***incoming 037$a = existing 037$a***;
- the incoming records must be retained as final;
- 856 tags must be retained from overlaid bibs.

Other settings may be defined according to your library's workflow. Work with your Polaris site manager to set up this import profile specifically for overlaying OverDrive bibs.

- **Perform duplicate detection** - The check box must be selected.
- **Use profile defined duplicate detection rules** - The check box must be selected.
- **Rules to apply (as unique groups)** - The profile-defined rules must include **incoming 037$a = existing 037$a**
- **Save incoming record as final; replace database record** - This option must be selected under **If a duplicate is found.**
- **Keep MARC tags** - The check box must be selected.
- **Profile defined overlay retention tags** - This option must be selected, and the following tags must be listed as profile-defined overlay retention tags:

  **856** - any indicator 1 or 2 value.




**d)** Click **Save** to save the settings for the Bibliographic Records tab.

**e)** Select the Item Records tab and verify that the **Build item records** check box is not checked.

**Note:**
OverDrive item records are created automatically via the automatic import process.

**f)** (Optional) Select the Authority Records tab, and modify the settings.

**g)** (Optional) Select the Record Set tab, and name the record sets to identify the type of records being imported.

**h)** Save the import profile.

The import profile is ready for any staff member with the appropriate permissions to select when importing fully-cataloged OverDrive eContent records.

2. Select **Utilities**, **Importing**, **Express Import** or **Full Import**.
3. Select the import profile created for importing fully-cataloged OverDrive records.
4. Click **Add** and select the file of fully-cataloged eContent bibliographic records to replace the existing OverDrive records, while retaining the tags required for integration with Polaris Circulation.
5. Click **Import**.

   The import job is added to the import queue. Once the import processing is complete, the OverDrive bibs are overlaid with the fully-cataloged records, and they retain the resource entities that enable the integration.

# OverDrive Import Jobs

The Import Jobs Queue lists import jobs by the date and time posted, whether the import jobs are for eContent bibs or other types of records. If multiple files were selected for import, each file appears on a separate line. Completed jobs remain in the queue until an authorized user manually deletes them.

You can view or print a report for completed import jobs from the Import Jobs Queue window. The import report provides details regarding the import profile that was used, the settings in the import profile, the records created, errors (if any), and other details.

## View the jobs or print reports for OverDrive imports

Follow these steps to view import jobs in the Import Jobs Queue.

1. Select **Utilities, Importing, Import Jobs Queue** to open the Import Jobs Queue window.

   By default, the jobs are sorted by the date and time posted. If multiple files were selected for import, each file appears on a separate line. Completed jobs remain in the queue until an authorized user manually deletes them.

2. Double-click the import job you want to view or print.

   The Import Report pdf appears in the preview window.

3. Select **File, Print** to print the report displayed in the preview window.

**Tip:**
If you do not need to view the report before printing it, you can select the import job in list, and click the **Report** button, or right-click and select **Print Report**.

# Patron Access to OverDrive EContent

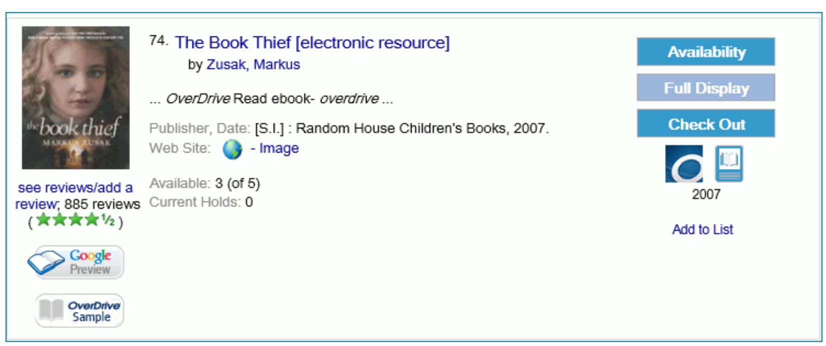
For patrons who have logged into their library accounts, the eContent available for checkout or hold requests depends on the OverDrive account with the patron's registered branch or with the resource group to which the registered branch is a member. If the Polaris Vendor Account has been set up for an OverDrive Advantage account, users who are not logged in and are connected to the PAC at the system level will see availability and hold counts depending which OverDrive Advantage option is selected in the OverDrive Vendor Account: **Show availability and hold counts for shared copies only** or **Show availability and hold counts for a specific Advantage account**. See "Create an OverDrive integrated vendor account" on page 33.

For more information about options for displaying, managing, and circulating eContent, see "Managing EContent in the PAC" on page 73.

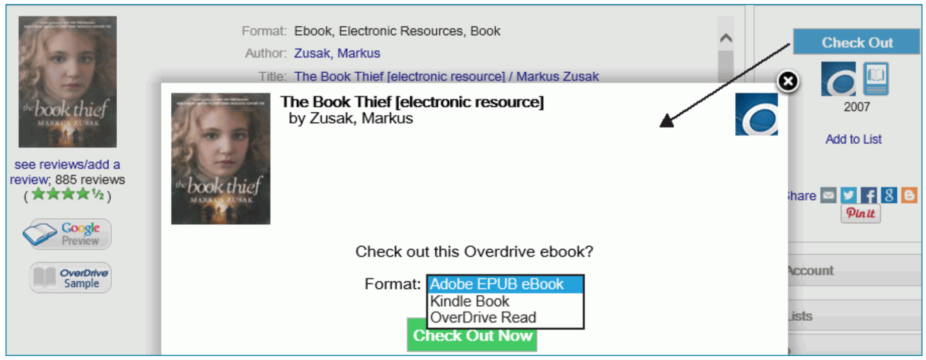
When the OverDrive eContent is accessible to the logged in patron, a **Check Out** button is displayed in the PAC search results if the title is available. If the patron has access, but the title is not available, a **Place Hold** button is displayed. A **Restricted** button is displayed if the patron does not have access to the eContent title because the patron's registered branch has not purchased access to it.

The library can change the **Check Out** and **Place Hold** button text for OverDrive eContent by modifying the following strings in WebAdmin:

- **PACML_OVERDRIVECHECKOUT**
- **PACML_OVERDRIVEPLACEHOLD**




When the title is available for check out, the patron clicks the **Check Out** button. A lightbox displays the title and formats box.




The patron selects the format for the eContent (if it is available in multiple formats), and clicks **Check Out Now**. A message confirms the checkout.

First-time users of OverDrive will need to download and the install the OverDrive Media Console app on a device where they can read, listen to, or view the eContent. For information on downloading the OverDrive Media Console and the devices and formats that OverDrive supports, go to:

http://omc.overdrive.com/

The patron then goes to the OverDrive Media Console on their device, and downloads the eContent.

# 3M® EContent Integration

When the library purchases eContent from 3M, the following automatic processes enable the integration with the 3M eContent and Polaris:

- 3M's API makes a call to the Polaris API (PAPI).
- The Polaris API consumer service is notified. This service allows the Polaris ILS to consume data from third-party APIs.
- The Polaris API consumer service calls 3Ms API and gets the MARCXML records and a count of the number copies for each eContent title the library purchased.
- The Polaris API consumer service parses the MARCXML records and creates the appropriate number of holdings tags based on the holdings count.
- The Polaris API consumer service then submits an automatic import job for processing.
- The bibliographic records are imported automatically using the import profile selected in the Vendor Account workform. The **Integrated ebook Bibs** import profile is selected by default, but your library can select another import profile, provided it has the settings required for the integration.
- Automatic import jobs appear in the Import Jobs Queue. The automatic import jobs are listed in the Import Jobs Queue in the same way as staff-initiated import jobs, and the import report provides details regarding the automatic import.
- New bibliographic records for the integrated 3M eContent are saved in the Polaris database.
- A Resource Entity is created for each 856 tag that contains 3M vendor account data and links to the eContent in 3M's repository. The vendor contract ID is in subfield x of the 856 tag. The Resources view of the Bibliographic Record workform displays the Resource Entity. See "Resource Entities" on page 87.
- Integrated eContent item records are created when the eContent bibs are automatically imported. During import initialization, the API determines how many item records need to be built, and 852 tags are inserted into the bibliographic records. When the bibliographic records are automatically imported, the appropriate number of item records are created using information in these tags as well as information in the **Ebook automatic import** item template selected in the 3M Vendor Account workform.
- Auto-suggest and facets are updated the following day - PAC auto-suggest and search results facets for these newly imported eContent records are updated after the overnight jobs for these processes are run.

Then, when a patron checks out an eContent item in the Polaris PAC, the transaction is integrated between the 3M and Polaris:

- The PAC notifies 3M's API that an eContent checkout took place, in real time.
- The item is checked out in the vendor's service (3M Cloud Library).
- The item is checked out in Polaris.

**Note:**
Integrated eContent checkins through the PAC are handled the same way.

If the patron checks out the eContent directly from the integrated vendor's service (3M Cloud Library), the following occurs:

- 3M's API contacts PAPI to inform it that the checkout took place. These checkout calls to PAPI take place in a batch, which is sent to PAPI every 10-20 minutes.
- The Polaris API consumer service monitors the PAPI checkout queue and processes any pending checkout transactions.
- The item is checked out in Polaris.

**Note:**
Integrated eContent checkins through the vendor's service (3M Cloud Library) are handled the same way.

To ensure that the API consumer service synchronizes transactions correctly when a server is rebooted, the API consumer service attempts to connect every 35 seconds for 20 minutes. If it fails to connect, the service stops.

# Setting Up Polaris for 3M Integration

To enable the import processing that integrates 3M eContent with Polaris, the item templates, vendor account, and import profiles must be set up correctly in Polaris. Your Polaris site manager can assist your library with this setup.

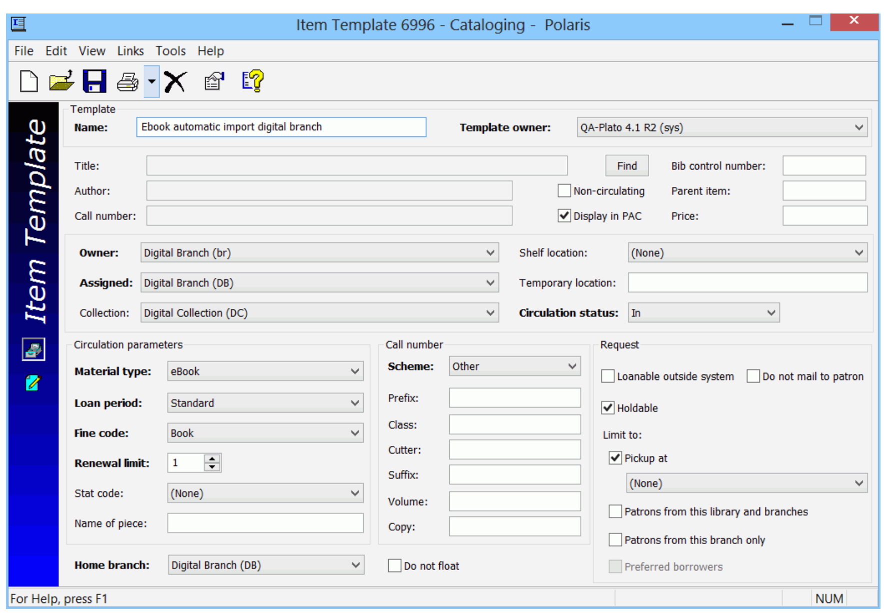
See the following topics:


- "Set up the eContent item templates for 3M" on page 55
- "Create a 3M integrated vendor account" on page 56


## Set up the eContent item templates for 3M

The **Ebook automatic import** item template is selected in the Vendor Account, and it supplies the default data used to create eContent item records during the API import process. This template can also be used for imports from the staff client import utility. Follow these steps to set up the item template to associate with the vendor account.

1. Select **File, New** from the Polaris Shortcut Bar.
2. Select **Item Template** and click **OK.**
3. The Item Template workform opens.
4. Type **Ebook automatic import** or **E-book automatic import** in the **Name** box. Case does not matter, and other words can follow this string, but the name must begin with **Ebook automatic import**.



5. Select the branch that owns the template in the **Template owner** box.
6. In the **Assigned** box, select the branch for the eContent items that will be created using this template. If a resource group is selected in the Vendor Account, the **Assigned** branch selected in the item template must belong to the resource group.
7. In the **Circulation status** box, select **In**.
8. Select the **Fine code** and **Renewal limit**.
9. Select **File, Save** to save the template.

**Note:**
The Fine code and Renewal limit fields are required to save the item template, but they are ignored in eContent item circulation processing.

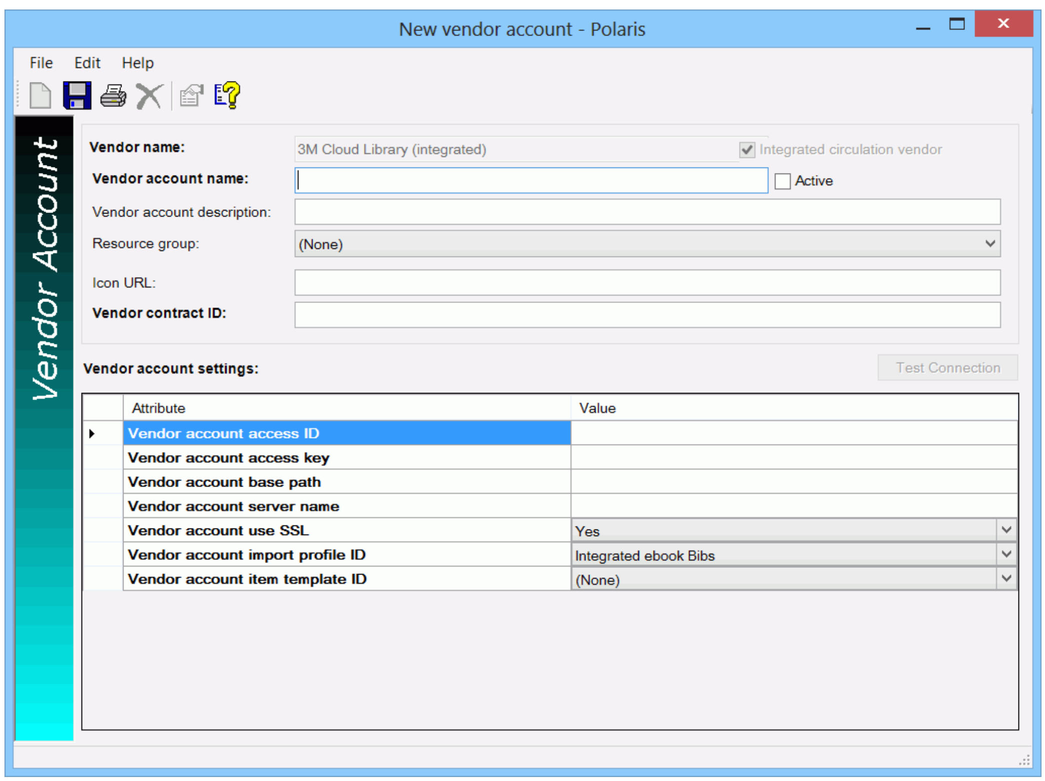
## Create a 3M integrated vendor account

Follow these steps to create a vendor account for a 3M integrated eContent vendor.

**Tip:**
You cannot create a new Vendor Account by selecting **File, New** from the Polaris Shortcut Bar.

1. Select the **Vendor** node in the Administration Explorer.
2. Select the 3M Cloud Library vendor, right-click, and select **New**.

   The Vendor Account workform opens.



3. Modify the editable fields and test the vendor connection as follows:

   **Note:**
   Required fields are labeled in bold.

   - **Vendor name** - 3M Cloud Library (Integrated). System-supplied; read-only
   - **Integrated circulation vendor** - This check box is automatically checked if the vendor's eContent are integrated with Polaris.
   - **Active** - This check box is initially unchecked when you are creating a vendor account for an integrated eContent vendor. Leave the check box unchecked, and enter the account information. Polaris Library Systems activates the vendor account.
   - **Vendor account name -** (required) The library supplies a unique name to identify the account.
   - **AccountID** - The account ID is supplied by Polaris when the account is saved, and it appears in the title bar of the Vendor Account workform.
   - **Vendor account description** (optional) - The library can add a description for the vendor account.
   - **Resource group** (optional) - The library can select a resource group to limit access to the eContent by branch. For more information on resource groups, see Polaris staff client online Help.
   - **Icon URL** (optional) - The library can specify a URL location for the icon that represents the eContent vendor. The icon is always sized at 16x16 pixels so it is aligned correctly in the PAC. For an integrated eContent vendor, the icon appears next to the TOM icon in PAC displays. If a bibliographic record has multiple resource entities for different integrated vendor accounts, and more than one resource entity is eligible for display in PAC based on resource group filtering, the default icon for the PAC theme is used.
   - **Vendor contract ID** - The vendor's contract ID is required for integrated eContent vendors. The contract ID must be unique, and it can contain up to 255 characters.
   - **Vendor account access ID** - The library's access ID for the eContent vendor account.
   - **Vendor account access key** - The library's access key for the eContent vendor account.
   - **Vendor account base path** - The URL path to the library's resources at eContent vendor.
   - **Vendor account server name** - The vendor account server name.
   - **Vendor account use SSL** - The library selects **Yes** or **No** to indicate whether Secure Socket Layer is used.
   - **Vendor account import profile ID** - The import profile for automatic API-driven imports for the integrated eContent vendor. The PolarisExec **Integrated eContent Bibs** profile, or a renamed copy of this profile. See

- **Vendor account item template ID** - The library creates the item template used during the automatic API-driven import process. The item template name must begin with **eContent automatic import** or **eContent automatic import**. See “Set up the eContent item templates for 3M” on page 55.

**Tips:**
The library’s server should be set within 5 minutes of the correct time because 3M has a 5-minute time difference threshold on their servers. In addition, the SSL must be configured correctly.

- **Test connection** - Save the Vendor Account workform, and click the **Test Connection** button to test the API settings in the vendor account and ensure that a connection is made to the vendor’s service (3M Cloud Library API). If the test is successful, a message confirms that the connection was made. If a connection problem is encountered, one of the following messages may appear: **Library account does not exist**; **Incorrect URL**; **There was a problem communicating with the 3M Cloud Library API service**; or other error messages as they become implemented by the 3M API service.

  The test details display the test start and end date/time, the test duration in milliseconds, and the API method used in the test, for example, **Get Item circulation**.

4. Save the Vendor Account workform.
5. Ask your Polaris representative to activate the vendor account, which starts the API consumer service.

**Important:**
After activating a vendor account, or reactivating a suspended vendor account, an IIS reset is required so that the PAC shows the correct information for the vendor's resources. For example, the IIS reset enables the Check Out or Place Hold button to be displayed instead of the **Temporarily Unavailable** button.

# Create 3M eContent import profile(s)

**Note:**
These are suggestions for setting up the import profiles for 3M eContent processing; your Polaris site manager can assist you with setting up the import profiles to support your library's specific needs.

The **Integrated ebook Bibs** import profile is a PolarisExec read-only import profile that enables eContent integration. It is selected by default in the 3M Vendor Account workform to enable automatic imports. Your library may copy and rename this import profile, and then select the renamed import profile in the Vendor Account workform, but the settings that create the resource entities must be retained. Before selecting an import profile other than the default **Integrated ebook Bibs** import profile in the 3M Vendor Account workform, consult with your Polaris site manager. See "Automatic Import Profile Selected in the 3M Vendor Account" on page 62.

Depending on your library's processing workflow for 3M eContent, you may need to create an import profile to overlay 3M integrated eContent bibs with fully-cataloged bibs while retaining resource entities - See "Overlaying 3M eContent Bibs" on page 66.

If your library has existing non-integrated 3M eContent bibliographic records, delete them from the database, and delete any linked items. However, if you want to preserve cataloging work that was done for these non-integrated titles, you can export the bibs to a file, and then re-import them after the synch process has created the integrated eContent bibs.

# Integrating Existing 3M EContent

If your library already has 3M eContent records in its catalog, you can locate them and delete the bibs and items. Then, the overnight synch process brings the titles into the database as integrated eContent.

To preserve cataloging work that was done for these non-integrated eContent bibs, you can export the records and then re-import them after the synch process has run. See “Overlaying 3M eContent Bibs” on page 66.

## Put existing non-integrated 3M bibs in a record set

Follow these steps to locate the existing 3M eContent records and put them in a record set.

1. Set up the search criteria in the Find Tool to find the existing non-integrated 3M records.

   **Note:**
   Work with your Polaris site manager to determine the best way to find these records. You may need to set up an SQL search in the Find Tool.

2. Select the records in the results list, right-click, and select Add to record set.
3. Save the record set with a name that identifies the records as 3M non-integrated eContent records.

## (Optional) Export 3M non-integrated eContent bibs

This is necessary only if you want to preserve cataloging work. If you opt to export the bibs, you will need to wait until after the synch process has created the integrated bibs for these titles and then re-import them. See “Overlaying 3M eContent Bibs” on page 66.

**Note:**
If your library has SimplyReports and Export Express, you can select the record set to export. If your library does not have Export Express, your Polaris site manager can assist you with exporting the record set from the staff client. It is not necessary to include embedded holdings in the export

Follow these steps to export the 3M eContent records using Export Express.

1. Log into SimplyReports.
2. Select the Bib list reports tab.
3. Select Export Express, MARC file, no holdings.
4. Expand the Bibliographic record general filters, select Bib record set and select the record set.

## Delete the 3M non-integrated bibs

Follow these steps to delete the non-integrated bibs.

1. Open the record set of non-integrated 3M eContent bibliographic records.
2. Delete the non-integrated eContent bibliographic records and their linked items from the Polaris database.

# Integrating New 3M EContent

The API-driven import process automatically imports the records when eContent titles are purchased from the 3M Cloud Library. Staff members do not launch the import by selecting an import profile; the automatic import process uses the settings in the import profile selected in the 3M Vendor Account workform.

Once the library implements the components necessary to enable the integration, and the API-driven import process is up and running, the library purchases the 3M eContent, and the bibliographic records are imported automatically.

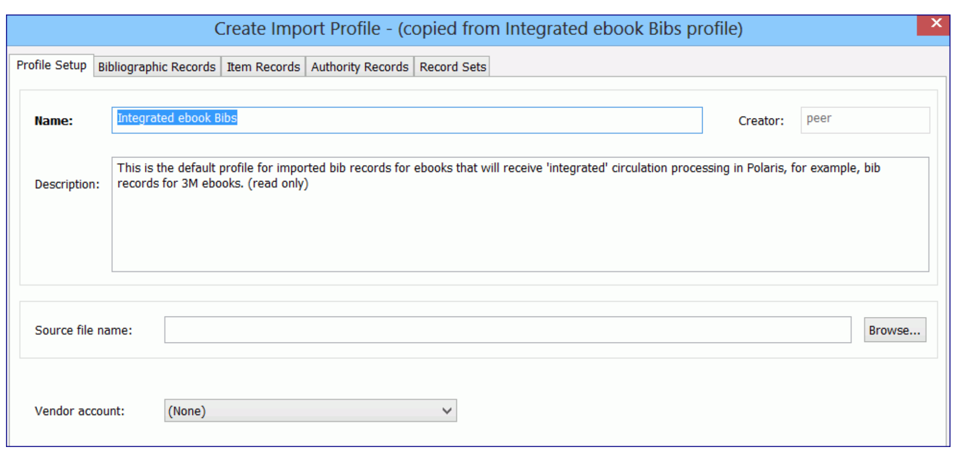
## Automatic Import Profile Selected in the 3M Vendor Account

The **Integrated ebook Bibs** PolarisExec import profile, which is selected by default in the 3M Vendor Account workform, is set up to enable eContent integration for automatic imports. Since this is a PolarisExec read-only import profile, you cannot modify the settings, but you can copy and rename the profile. After saving the import profile with a different name, you can change the settings. If you rename the profile to use for automatic importing, the renamed import profile must be selected in the 3M Vendor Account workform.

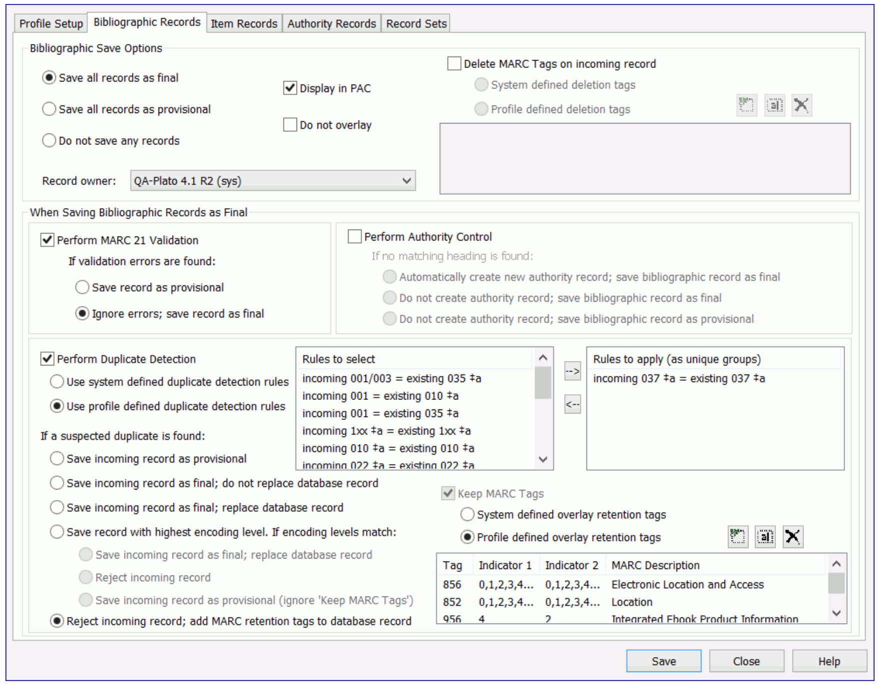
**Important:**
Since the automatic import relies on specific settings, consult with your Polaris site manager before selecting an import profile other than the **Integrated ebook Bibs** profile, which is selected by default in the 3M Vendor Account workform.

If you rename and modify the **Integrated ebook Bibs** import profile, the following settings must be retained:

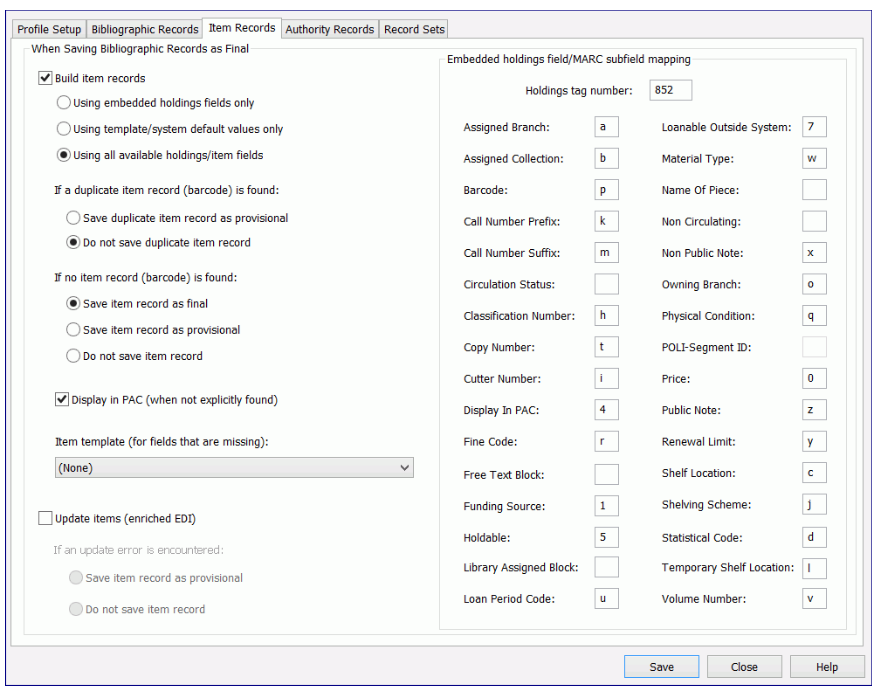
- On the Profile Setup tab, you can type a different name and description, but do not select a source file or a vendor account.



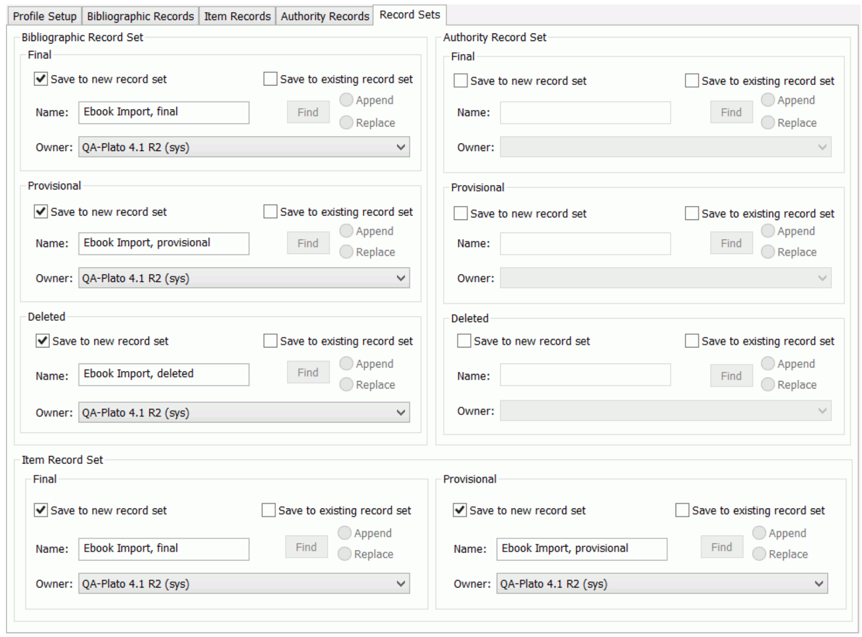
- On the **Bibliographic Records** tab, do not change the settings.




- On the **Item Records** tab, do not change the settings. Do not select a template because the item template used in automatic import processing is selected in the Vendor Account workform.



- The Authority Records tab is set to **Do not save any records**. Leave this setting.
- On the Record Sets tab, you can rename the record sets without affecting the automatic import.



# 3M Added/Expired Copies

The API consumer service queries 3M on a daily basis and synchronizes the number of eContent item records for each resource entity, either adding or removing eContent item records as necessary. For details on the synch process, see "EContent Vendor and Polaris Synchronization" on page 103.

The item records are populated from the fields in the **Ebook automatic import** item template selected in the 3M Vendor Account workform. Only one Ebook automatic import item template can be selected in the vendor account, but the incoming added copies could be for either ebooks or audio ebooks. Since the library may need to modify fields, such as the item material type, collection etc., the added copy item records are placed in a record set to make them easier to find and modify.

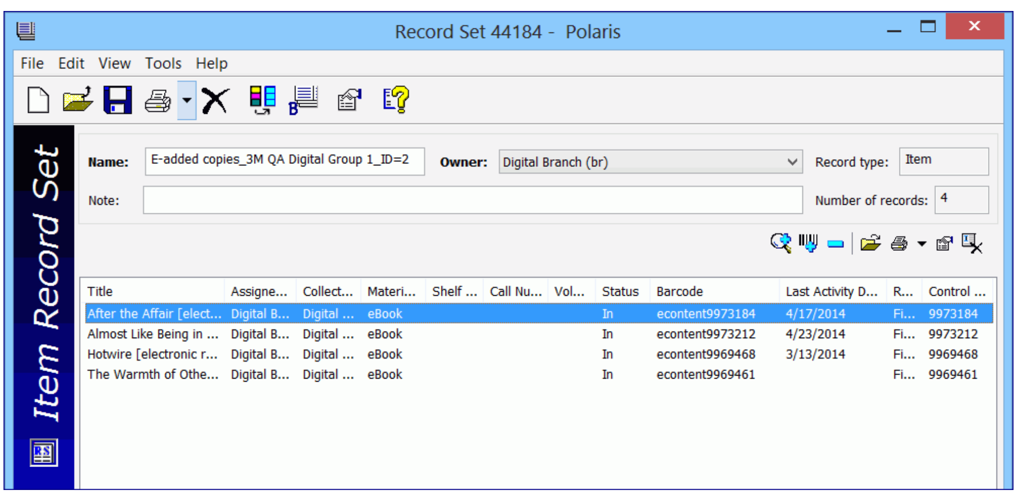
EContent item records created during added-copy processing are automatically added to record sets. Each vendor account has only one system-supplied record set for added copies, named following this pattern:

**E-added copies_*VendorAccountName*_ID=nnn**

If necessary, the vendor account name is truncated to fit the 50-character record set name limit, and the vendor account ID follows the name.

**Example:**
**E-added copies_3M_ID=10**

The record set owner is the same as the **Ebook automatic import** item template owner. If the owner is changed, a new system-generated record set with the correct owner is automatically created the next time the added copy process runs. If the record set is deleted or renamed, a new one is created automatically. A staff member with the appropriate permissions can bulk change the item records in the record set. After making the changes, the records should be removed from the record set.



# Overlaying 3M eContent Bibs

When your library receives fully-cataloged eContent bibliographic records to overlay existing 3M records, a staff member imports these records using an import profile set up to: detect duplicates based on the 037 tag; overlay these duplicate with the full incoming records; and retain tags that create resource entities.

**Important:**
Inform the bibliographic record vendor that the fully-cataloged eContent bibliographic records provided to overlay integrated eContent bibs must have the following requirements:

- The records must be MARC or MARCXML bibliographic records.
- The 037 tags must be retained because that tag contains the eContent item identifier and serves as a match point to detect duplicates during importing.

## Import fully-cataloged bibs to overlay 3M bibs

Follow these steps to set up an import profile designed for importing fully-cataloged eContent bibliographic records to overlay existing 3M records, and then import the records using the profile.

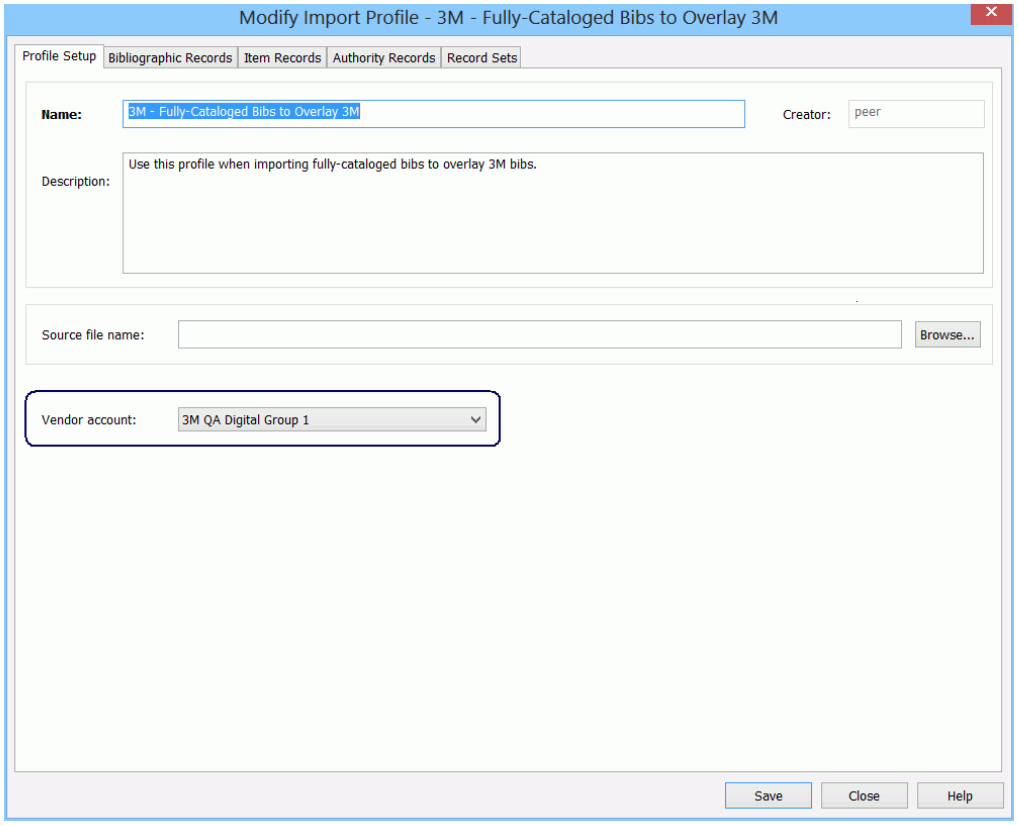
**Note:**
Once you have set up the import profile and saved it (step 1), any staff member with the appropriate Polaris permissions can select it for subsequent imports of full bib records to overlay the 3M bibs.

1. Create an import profile specifically for importing fully-cataloged bibs to overlay 3M records.

   a) Copy the PolarisExec **Integrated ebook Bibs** import profile, or create a new import profile.

   **Note:**
   For general information about creating, copying, and modifying import profiles, see “Setting Up Import Profiles” in the *Polaris Cataloging Guide 4.1R2*.

   b) On the Profile Setup tab, type a name for the import profile, select the 3M vendor account in the **Vendor account** drop-down list box, and click **Save** to save the profile.



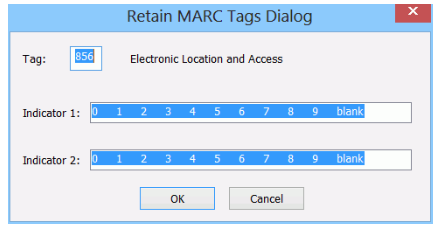

**c)** Select the Bibliographic Records tab and verify that the following options are set:

> **Important:**
> The Bibliographic Records tab must be set up to:
> - perform duplicate detection using profile-defined rules;
> - these rules must include ***incoming 037$a = existing 037$a***;
> - the incoming records must be retained as final;
> - 856 tags must be retained from overlaid bibs.
>
> Other settings may be defined according to your library's workflow. Work with your Polaris site manager to set up this import profile specifically for overlaying 3M bibs.

- **Perform duplicate detection** - The check box must be selected.
- **Use profile defined duplicate detection rules** - The check box must be selected.
- **Rules to apply (as unique groups)** - The profile-defined rules must include **incoming 037$a = existing 037$a**
- **Save incoming record as final; replace database record** - This option must be selected under **If a duplicate is found**.
- **Keep MARC tags** - The check box must be selected.

- **Profile defined overlay retention tags** - This option must be selected, and the following tags must be listed as profile-defined overlay retention tags:

  **856** - any indicator 1 or 2 value.




**d)** Click **Save** to save the settings for the Bibliographic Records tab.

**e)** Select the Item Records tab and verify that the **Build item records** check box is not checked.

> **Note:**
> 3M item records are created automatically via the automatic import process.

**f)** (Optional) Select the Authority Records tab, and modify the settings.

**g)** (Optional) Select the Record Set tab, and name the record sets to identify the type of records being imported.

**h)** Save the import profile.

The import profile is ready for any staff member with the appropriate permissions to select when importing fully-cataloged eContent records to overlay 3M bibs.

2. Select **Utilities**, **Importing**, **Express Import** or **Full Import**.
3. Select the import profile created for importing fully-cataloged records to overlay 3M bibs.
4. Click **Add** and select the file of fully-cataloged eContent bibliographic records to replace the existing 3M records, while retaining the tags required for integration with Polaris Circulation.
5. Click **Import**.

   The import job is added to the import queue. Once the import processing is complete, the 3M bibs are overlaid with the fully-cataloged records, and they retain the resource entities that enable the integration. See “3M Import Jobs” on page 69.

# 3M Import Jobs

The Import Jobs Queue lists import jobs by the date and time posted, whether the import jobs are for eContent bibs or other types of records. If multiple files were selected for import, each file appears on a separate line. Completed jobs remain in the queue until an authorized user manually deletes them.

You can view or print a report for completed import jobs from the Import Jobs Queue window. The import report provides details regarding the import profile that was used, the settings in the import profile, the records created, errors (if any), and other details.

## View the jobs or print reports for 3M imports

Follow these steps to view import jobs in the Import Jobs Queue.

1. Select **Utilities, Importing, Import Jobs Queue** to open the Import Jobs Queue window.

   By default, the jobs are sorted by the date and time posted. If multiple files were selected for import, each file appears on a separate line. Completed jobs remain in the queue until an authorized user manually deletes them.

**Tip:**
If you do not need to view the report before printing it, you can select the import job in list, and click the **Report** button, or right-click and select **Print Report**.

2. Double-click the import job you want to view or print.

   The Import Report pdf appears in the preview window.

3. Select **File, Print** to print the report displayed in the preview window.

# MARC Tags in 3M Bibs - Reference

**Tip:**
The following fields are required for 3M integrated eContent records: 037$a and 856 40. If a 3M record is missing either of these fields, a resource entity is not created.

3M supplies the following tags that are used for integrated eContent processing in Polaris:

- **037 tag containing 3M's item ID** - The 037, source of acquisition, tag is required for creating the resource entity.

  **Example:**

  **037 ‡adk42g9‡b3M Cloud Library‡nhttp://eContent.3m.com**

- **856 tag for the electronic resource itself** - The 2nd indicator = 0 (resource). This tag is required for creating the resource entity. During importing, the contract ID in subfield **x** matches the resource with the vendor account, and the object ID identifies the eContent in the vendor's repository. The tag is converted to a resource entity and moved to the Resources view of the Bibliographic Record workform.

  **Example:**

  **856 40 ‡33M Cloud Library‡uhttp://eContent.3m.com/library/polarisdemo-document_id-dk42g9$xbu8mf**

- **856 tag for the cover image** - The 2nd indicator = 2 (related resource). This tag is not required. If present, this tag is copied to the Resources view of the Bibliographic Record workform, then changed to a 956 and retained in the MARC view.

  **Example:**

  **856 42 ‡3Cover Image‡uhttp://eContent.3m.com/delivery/img?type=DOCUMENTIMAGE&documentID=dk42g9&token=nobody**

- **856 tag for the 3M cloud icon** - The 2nd indicator = 2 (related resource). This tag is not required. If present, this tag contains a link to the 3M Cloud Library icon. This tag remains in the MARC view of the Bibliographic Record workform and is not copied to the Resources view.

  **Example:**

  **856 42 ‡33M Cloud Icon‡uhttp://eContentdownload.3m.com/sites/prototypes/web/media/themes/mmm_patron/img/landing_page/step1.png**

- **956 tag for the whole product** - This tag is not required for the creation of the resource entity and is not copied to the Resources view of the Bibliographic Record workform; it remains in the MARC 21 view. It also displays the vendor's contract ID and object identifier.

  **Example:**

  **956 42 ‡3Whole product‡uhttp://cloudlibraryapi.3m.com/Library/bu8mf/Item/dk42g9**

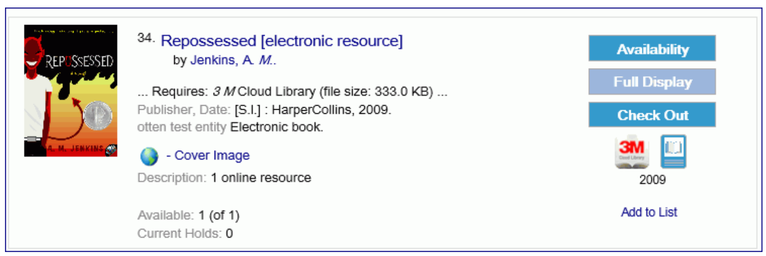
# Patron Access to 3M EContent

For patrons who have logged into their library accounts, the eContent available for checkout or hold requests depends on the 3M vendor account and whether the patron's registered branch has access to the eContent provided by that account. For more information about options for displaying, managing, and circulating eContent, see "Managing EContent in the PAC" on page 73.

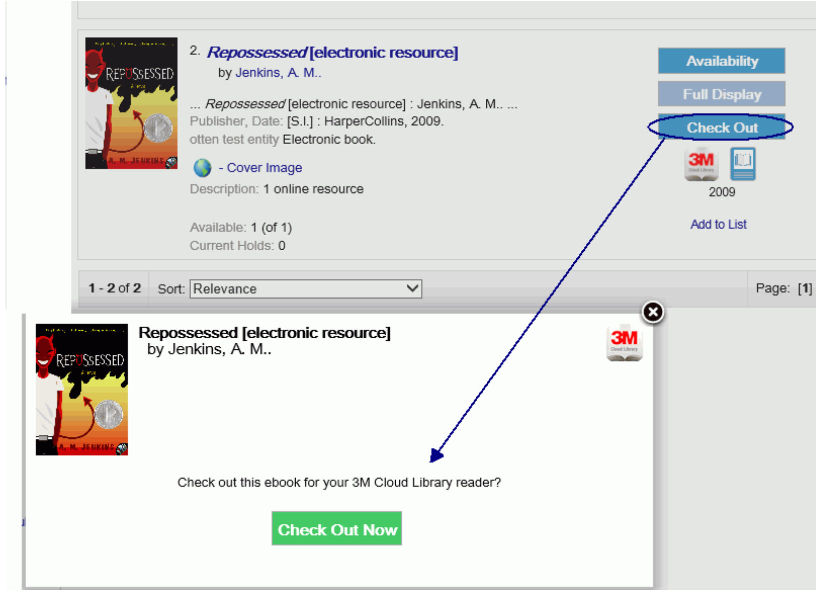
When the 3M eContent is accessible to the logged-in patron, a **Check Out** button is displayed in the PAC search results if the title is available. If the patron has access, but the title is not available because it is checked out, a **Place Hold** button is displayed. A **Restricted** button is displayed if the patron does not have access to the eContent title. You can use resource groups to prevent titles from displaying at all if they are restricted, instead of displaying with a **Restricted** button.

The library can change the **Check Out** and **Place Hold** button text for 3M eContent by modifying the following strings in WebAdmin:

- **PACML_MMMCHECKOUT**
- **PACML_MMMPLACEHOLD**




To check out the eContent in the PAC, the patron clicks the **Check Out** button, which opens a light box.




The patron selects the format for the download (if it is available in more than one format), and clicks the **Check Out Now** button. A message confirms the check out if it is successful.

**Important:**
Patrons can also create accounts in the 3M Cloud application by choosing their library and entering the patron barcode. The patron must sign up with the library account barcode, not the library account user name; otherwise, the patron’s transactions in the 3M Cloud application and in the PAC patron account will not be synchronized.

**Tip**:
Charges for check-out do not apply to eContent.

The patron goes to the 3M Cloud Library app on their device, and downloads the eContent. First-time users must go to the 3M™ Cloud Library web page and download the 3M Cloud Library app on their device. For information on downloading the 3M apps, and the devices and formats that 3M Cloud Library supports, go to:

http://www.3m.com/us/library/eBook/index.html

# Managing EContent in the PAC

EContent titles provided by integrated vendors can be displayed in the Polaris PowerPAC, Mobile PAC, and PowerPAC Children's Edition. Patrons can search for and view eContent title information using the same features and functions that are available for searching for physical material titles.

Many Polaris Administration settings are used for both physical and eContent titles. These include settings for search types, access points, limit by options, facets, and title display configuration. Advanced search options are supported to the extent that the data is present in the eContent item and bibliographic records.

**Note:**
If your library offers a Limit By filter for currently available items, the system uses the information currently in the Polaris database. Selecting this filter does not trigger real-time synchronization with the integrated eContent vendor.

Other Polaris Administration settings apply only to eContent in the PAC. These settings are used to: limit title display and access based on the resource group that shares the vendor account; manage eContent availability and hold counts; and track eContent circulations separately from physical items. The library can also customize the text for the **Check Out** and **Place Hold** buttons in WebAdmin.

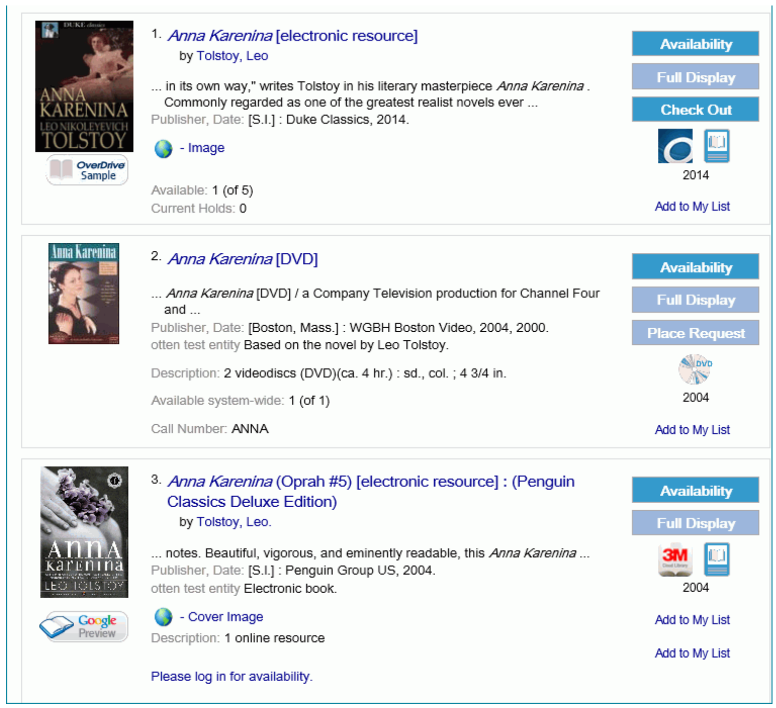
**Important:**
Make sure to do both a PowerPAC and Mobile PAC (if your library uses Mobile PAC) reload each time you: add or change a resource group; add or change a vendor account; or change the **Resource Groups: Search results settings** profile in Polaris Administration.

See the following topics:

- "EContent in PAC Search Results" on page 74
- "EContent Availability and Holds Counts" on page 75
- "EContent Product Page Display in the PAC" on page 79
- "Patron-Initiated EContent Circulation from PAC" on page 82
- "EContent in the PAC Patron Account" on page 85

# EContent in PAC Search Results

When patrons search for titles in the PAC, the integrated eContent titles display along with titles for physical material. For example, if a patron searches for a specific title, the results may include a physical DVD and a downloadable ebook or audio ebook from one or more integrated vendors.




The Availability depends on how your eContent vendor accounts are set up and whether these accounts are shared by the entire library system, shared by specific organizations, or limited to a single branch. See "EContent Availability and Holds Counts" on page 75.

# EContent Availability and Holds Counts

The availability and holds counts for integrated eContent titles are populated in real time on the PAC search results lists. These counts are not affected by settings in the **Title Display: Configure** profile.

For OverDrive Advantage accounts, Advantage copies for the branch display when a patron is connected to the PAC at that branch, regardless of whether the patron is logged in or not. The library uses an option in the Vendor Record to specify whether patrons see Advantage titles when connected to the PAC at the system level. See "Create an OverDrive integrated vendor account" on page 33.

In some cases, the patron does not see availability and holds counts. Instead, the patron may see a **Please log in for availability** message that indicates Polaris cannot determine the library organization (the patron has not yet logged in and is connected to the PAC at an organization that does not honor resource groups.) Or, the patron may see a **Restricted** button if their registered branch is not part of the resource group that shares the eContent.

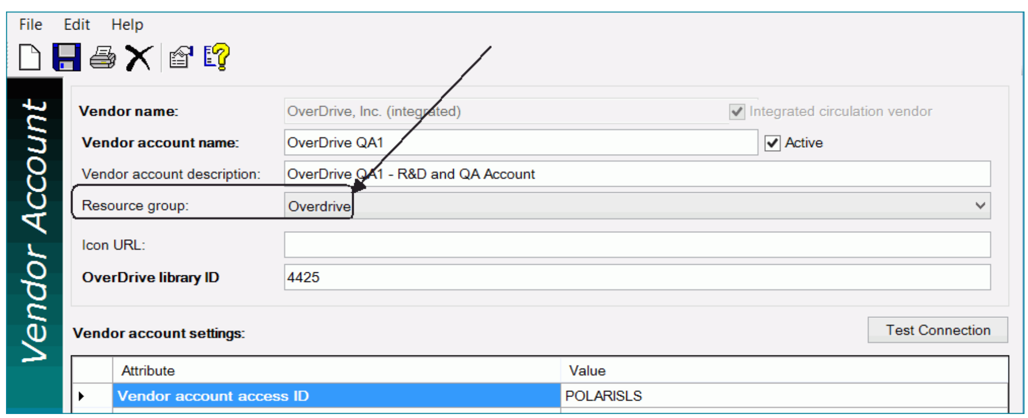
See the "Manage patron access to eContent using resource groups" on page 76

# Manage patron access to eContent using resource groups

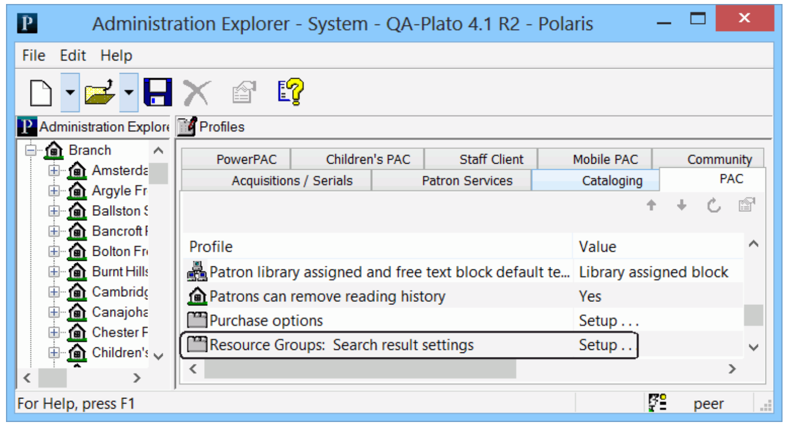
Your library can set up resource groups to manage patron access to eContent in the PAC and then select the resource group in the vendor account. Then you can use the PAC profile **Resource Groups: Search results settings** to control when the title is displayed in PAC search results. The profile is available at the system, library, and branch levels. The system uses the settings for the current PAC connection branch.

Follow these steps to set restrictions on the display of integrated eContent titles based on resource groups.

1. Select **File, New, Resource Group**, and select the organizations that will belong to this resource group. Save the resource group. For more details, see "Setting Up Organization Resource Groups" in the *Polaris Administration Guide 4.1R2*.
2. Select the resource group in the eContent vendor account. For information on setting up vendor accounts, see one of the following topics:
   - "Create an Axis 360 integrated vendor account" on page 8
   - "Create an OverDrive integrated vendor account" on page 33
   - "Create a 3M integrated vendor account" on page 56



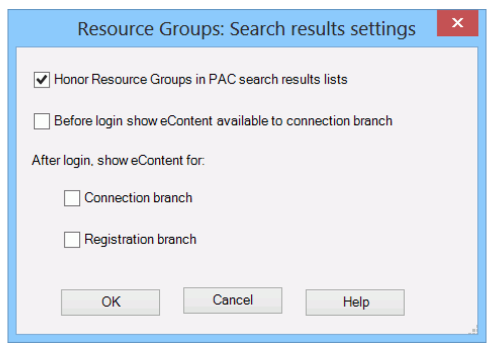

3. Select **Administration, Explorer**, select the organization, select **Profiles**, and click the **PAC** tab in the details view.
4. Double-click **Resource Groups: Search results settings.**




The Resource Groups: Search results settings dialog box opens.

5. To display search results according to the resource groups when displaying search results, select (check) **Honor Resource Groups in PAC search results lists**.

   When you check **Honor Resource Groups**, the remaining options become available for selection. Select at least one option to specify the eContent that is available to patrons based on the branch's membership in the resource group




**Note:**
If you do not select **Honor Resource Groups in PAC search results lists**, eContent titles are displayed in the PAC regardless of the connection branch or whether the patron is logged in or not. As a result, patrons may see titles for eContent that they cannot access.

6. If you want to display eContent titles that are available to the branch when a patron is connected to that branch in the PAC, but not logged in, select (check) **Before login show eContent available to connection branch**.

   When this option is checked, patrons may see titles in search results that are not available to check out once they are logged in.

   When this option is unchecked, and the patron is not logged in, the eContent titles that are not available to the patron do not display.

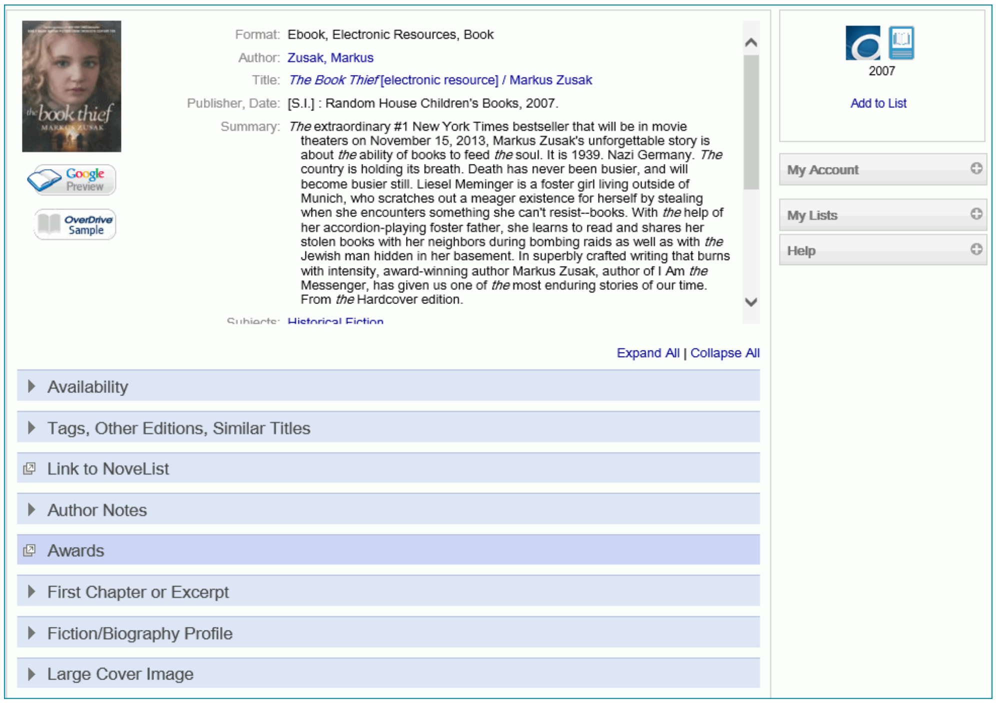
7. Select one of the following options under **After login, show eContent for:**

- **Connection branch** - If this option is checked, logged in patrons searching the PAC at a connection branch that is not their registered branch will see eContent titles that are not available to check out.
- **Registration branch** - If this option is checked, logged in patrons searching the PAC at a connection branch that is their registered branch will see the eContent titles that are available to them.

**Note:**
Although the **Before login** option is independent of the **After login** options, if you check **Before login** but do not select either **After login** option, you receive the following warning message, because in this case no eContent will be displayed after the patron logs in: **Once a patron logs in, eContent will no longer appear in the PAC display. Please correct this problem by checking the connection branch check box and/or the registration branch check box.**

# EContent Product Page Display in the PAC

The product page (full display) for eContent is similar to the full display for other bibliographic materials.



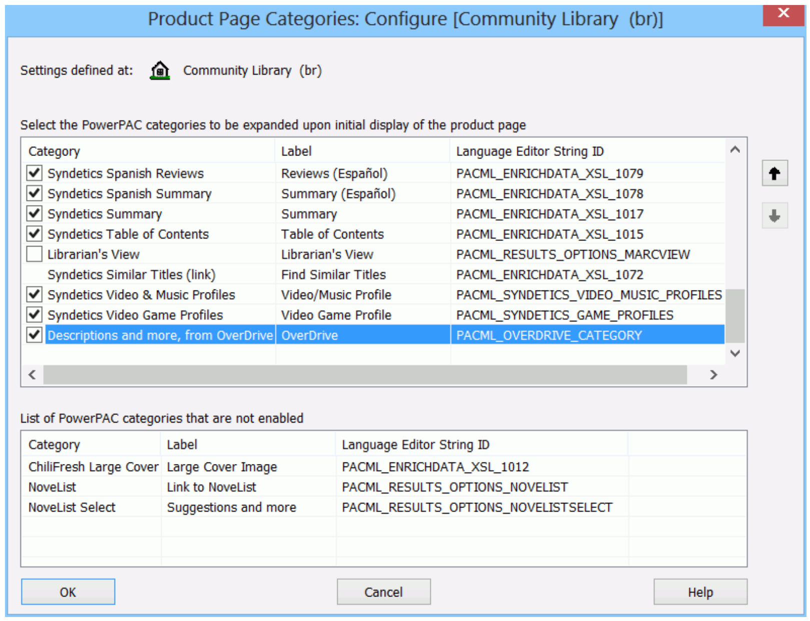

The bibliographic information display for eContent is configured with the PowerPAC and Mobile PAC **Title Display Configure** profiles. See "Configuring the PowerPAC Product Page" on page 156.

The **Purchase** button and the **Map It** feature are suppressed for eContent.

# Configure the enriched content drawer for PowerPAC

Follow these steps to configure the enriched content display for the eContent vendor in Polaris PowerPAC.

1. In the Administration Explorer tree view, open the Profiles folder for the organization, and click the PowerPAC tab in the details view.
2. Double-click **Product page categories: Configure**.




3. Enable the categories by selecting the check boxes.
4. Click **OK**.

**Note:**
You can use a separate profile to configure the product page for Mobile PAC. See “Set up the Mobile PAC title (product) page” in the Public Access Administration Guide or in the staff client online Help.

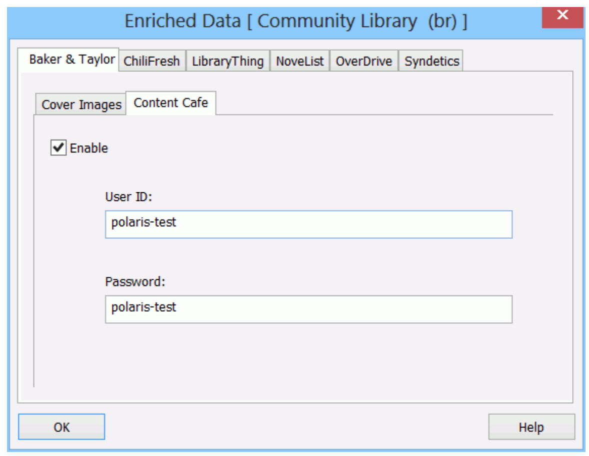
# Enable enriched content for Axis 360 or OverDrive

You can enable enriched content provided by Baker & Taylor for Axis 360 or for OverDrive.

When your library has implemented the eContent vendor, and enabled the enriched content, patrons will see a “drawer” in the PAC, labeled **Descriptions and more, from** [vendor name].

Follow these steps to enable enriched content for an eContent vendor.

1. In the Administration Explorer tree view, open the Profiles folder for the organization, and click the PAC tab in the details view.
2. Double-click **Enriched data.**
3. Select the Baker & Taylor and select the Content Cafe subtab for Axis 360 or the OverDrive tab, and select the **Enable** check box.




This enables the enriched content.

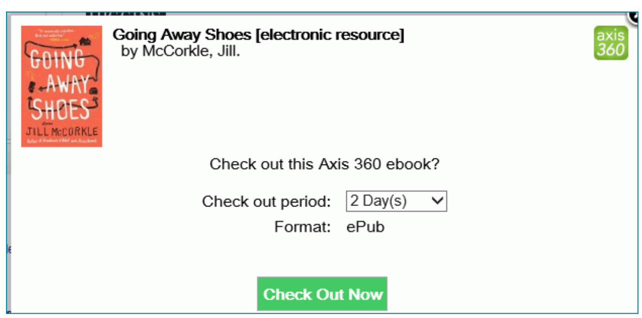
# Patron-Initiated EContent Circulation from PAC

EContent titles in PAC search results display the **Check Out** button if the item is available to the patron or a **Place Request** button if no local item is available. (If the vendor account is not active, a **Temporarily Unavailable** button is displayed.)

If a logged-in patron does not have access to materials from a particular vendor, a grayed-out **Restricted** button is displayed instead of the **Check Out** button. Patrons can also be blocked from checking out eContent based on settings in the Patron Services Administration profile **Patron initiated circulation: Blocking conditions**.

**Note:**
Your library can change the labels on the **Place Hold** and **Check Out** buttons by modifying vendor-specific strings in WebAdmin. See "Patron Access to Axis 360 EContent" on page 27, "Patron Access to OverDrive EContent" on page 51, or "Patron Access to 3M EContent" on page 71.

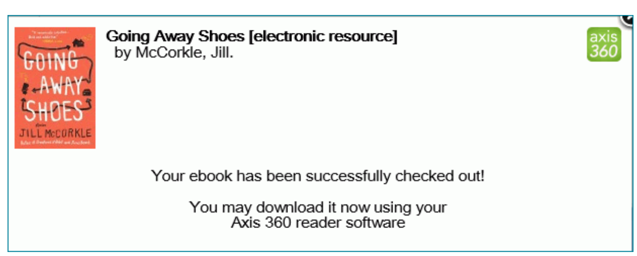
If the patron has access to the eContent and no blocks prevent the checkout, the patron clicks the **Check Out** button, and a light box displays the cover image, title and author, eContent vendor's icon, and a **Check Out Now** button.




**Tip**:
Charges for check-out do not apply to eContent.

The patron clicks **Check Out Now** to check out the eContent.

Once the book has been successfully checked out, a message informs the patron that the checkout was successful and they can download it.



For information on an eContent vendor’s software and requirements, see one of the following topics:

- “Patron Access to Axis 360 EContent” on page 27
- “Patron Access to OverDrive EContent” on page 51
- “Patron Access to 3M EContent” on page 71

**Note:**
The due date is calculated from the check-out date and time, not from the download time. The system does not generate a check-out receipt or e-receipt for the checkout.

Patrons can view their checked out items from the PAC patron account Items Out page.

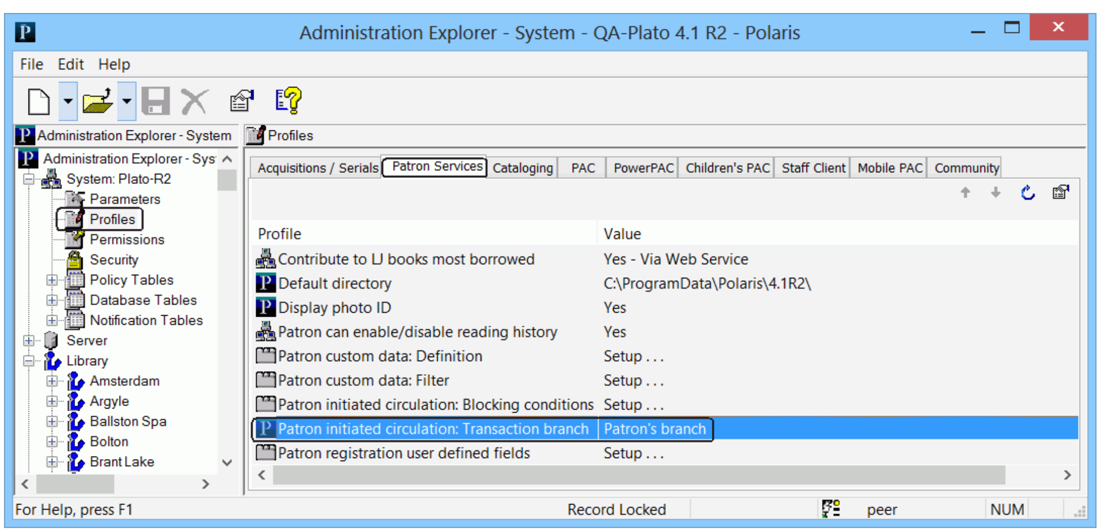
The patron may also search for and check out eContent directly from the vendor’s application, using library account information. The patron and item records are then updated in Polaris during data synchronization.

## Set the loaning branch for eContent circulations

In Polaris, the loaning branch for circulation transactions is the patron’s registered branch. However, your library may want to set the loaning branch as the item’s assigned branch for patron-initiated circulations, where the patron places holds or checks out eContent from the PAC. This profile can be set at the System level only.

Follow these steps to set the loaning branch for eContent circulation.

1. In the Administration Explorer tree view, open the **Profiles** folder at the System level, and select the **Patron Services** tab in the details view.
2. Double-click **Patron initiated circulation: Transacting branch to open the drop-down list**.



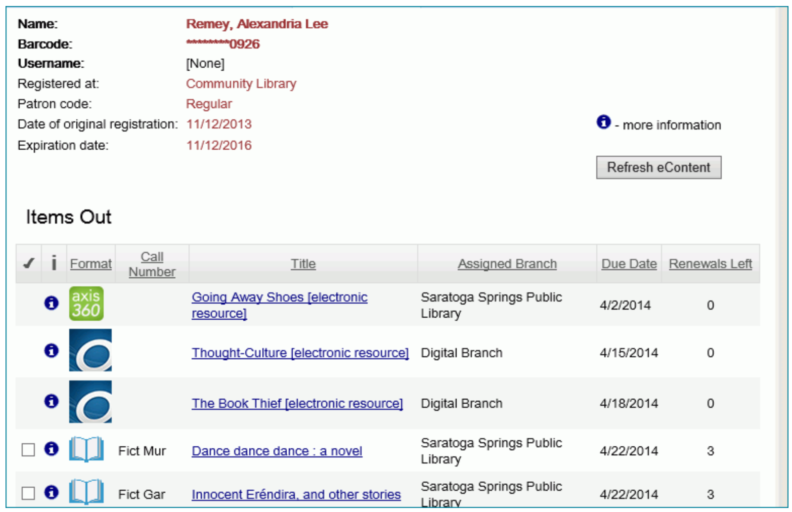

3. Select **Patron’s branch** or **Item’s branch**.

When you change this setting, it applies to eContent circulations from the PAC only; the loaning branch for physical items is still the patron's registered branch.

# EContent in the PAC Patron Account

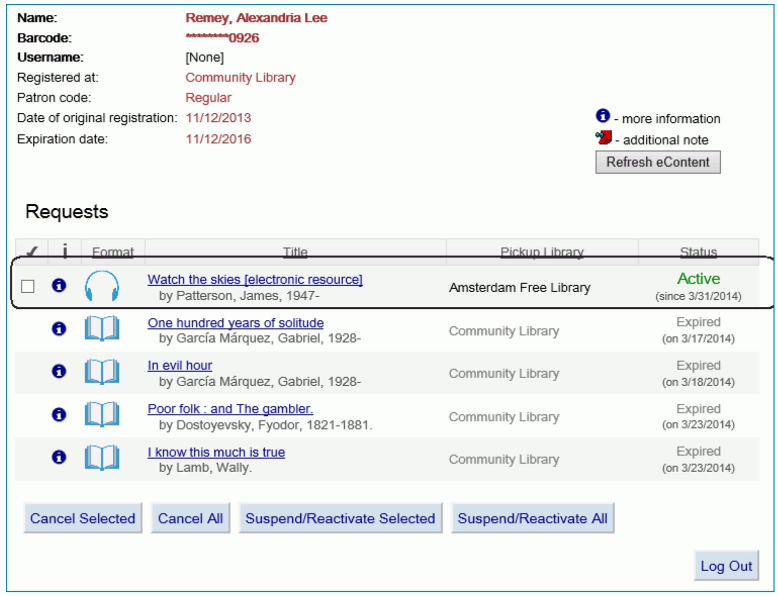
Once eContent titles are checked out, they are listed on the Items Out page of the patron account. The list reflects the eContent currently checked out, regardless of whether the patron has actually downloaded them.

**Note:**
EContent titles cannot be renewed from PAC, the staff client, or Polaris Phone Attendant. Check-in from the staff client is not supported. For more information, see "EContent in the Polaris Staff Client" on page 92.




EContent items automatically expire when the item's expiration date and time are reached. When the expiration date of the item is reached, the item becomes available to someone else. Polaris automatically checks in the item and removes it from the patron account. Patrons can check in 3M eContent and some OverDrive eContent formats before they expire. Check in does not apply to Axis 360 eContent.

A logged-in patron can view the status of requests for eContent. Items available for checkout and download are included in the count of items ready for pickup in the patron account summary dashboard. (This count may change if the user takes action after accessing the account.)



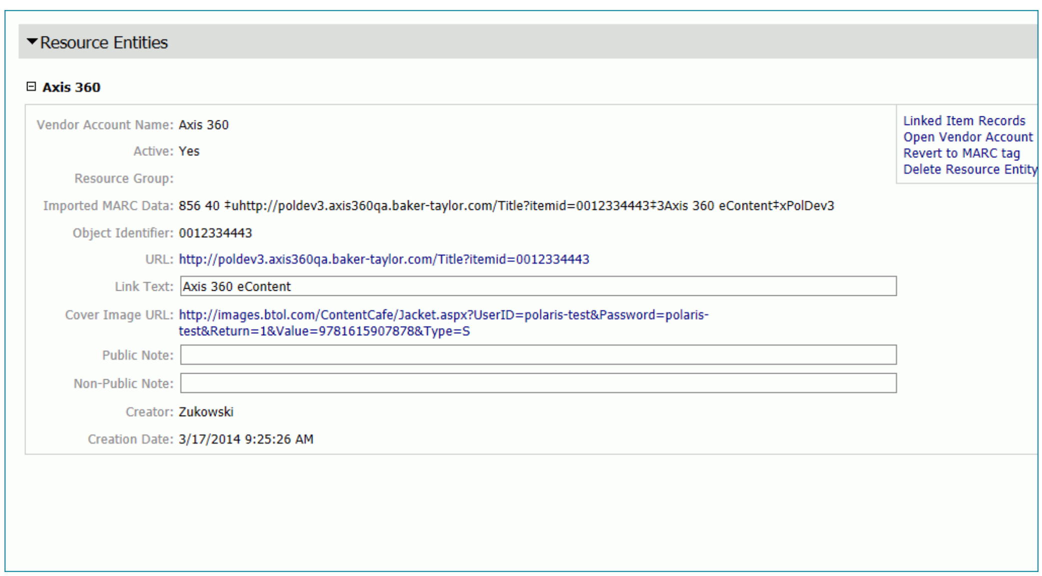

Requests for eContent titles cannot be suspended or reactivated, but requests with a status of Active can be canceled. The patron can click **Refresh eContent** to see the changes in PAC. All actions taken on the patron account Request page result in a real-time update to the patron's vendor account and to the information on the PAC patron account Request page.

# Resource Entities

A resource entity on a bibliographic record is a group of fields that collectively identifies the eContent vendor, the library's account with the vendor, and the specific electronic resource in the vendor's repository. For eContent provided by an integrated vendor, resource entities are used to integrate eContent with Polaris circulation. They can also be used to restrict access to eContent for either integrated or non-integrated vendors. See "Non-Integrated EContent in Polaris" on page 107.

When an integrated eContent vendor's bibliographic records are imported in Polaris, a resource entity is automatically created for each 856 tag containing data that identifies the vendor account and links to the electronic resource in the vendor's repository. The 856 tag for the integrated eContent vendor must have a first indicator (access method) of 4 (HTTP) and a second indicator of 0 (resource) in order to create the resource entity. Other 856 tags with a second indicator of 2 (related resource) may be present, but are not required to create the resource entity.

If a bibliographic record has a resource entity associated with it, the Resources view of the Bibliographic workform displays the resource entity information.



The Resource Entity view of the Bibliographic Records workform displays the following information:

- The vendor's name
- **Vendor Account Name** - Identifies the account associated with the vendor.
- **Active (Yes/No)** - Vendor account's status
- **Resource Group** - (optional) This is the name of the Resource Group, which is derived from the Vendor Account. The Resource Group cannot be modified from this view; you must change it in the Vendor Account.
- **Imported MARC data** - The 856 tag for the electronic resource, which includes the object identifier and the vendor's contract ID (if available).
- **Object Identifier:** The eContent vendor's unique ID that identifies the electronic resource in the vendor's repository.
- **URL** - The URL to the eContent in the vendor's repository.

**Tip:**
Currently, the link text and public note do not display in Mobile PAC for an integrated eContent vendor.

- **Link Text** - You can change the link text. The link text and public note appear in the PAC in the tooltip associated with the vendor logo. If the link text is not defined for the resource entity, a default text string identifies the eContent vendor.
- **Cover Image URL** - The link to the cover image.
- **Public Note** - You can enter a public note that appears in the tooltip next to the vendor logo. The public note displays on a separate line in the tooltip, prefixed with the label **Note:**.
- **Non-Public Note** - You can enter a non-public note for staff members.
- **Creator** - **PolarisExec** indicates the resource entity was created automatically.
- **Creation Date** - The date and time when the resource entity was created automatically.

A submenu in the right portion of the Resources view includes the following options:

- **Linked Item Record**s - Links to electronic (eContent) items associated with this resource entity. The eContent check box is checked on the Item Record workform.
- **Open Vendor Account** - Links to the Vendor Account workform for the resource entity.
- **Revert to MARC tag** - Changes the resource entity to an 856 tag. See Convert a resource entity to an 856 tag
- **Delete Resource Entity** - Deletes the resource entity from the bibliographic record.

  **Note:**
  A single bibliographic record cannot contain resource entities for both integrated and non-integrated eContent.

# Delete a resource entity

Follow these steps to delete a resource entity from the Resource view of the Bibliographic Record workform.

1. Open the Bibliographic Record workform for the integrated eContent.
2. Go to the Resources view.
3. Select **Delete**.

   The following message appears: **This action completely removes the resource entity and the 856 tag from the record, and it removes any linked eContent item records. It cannot be restored.**

4. Select **OK** to remove the resource entity.

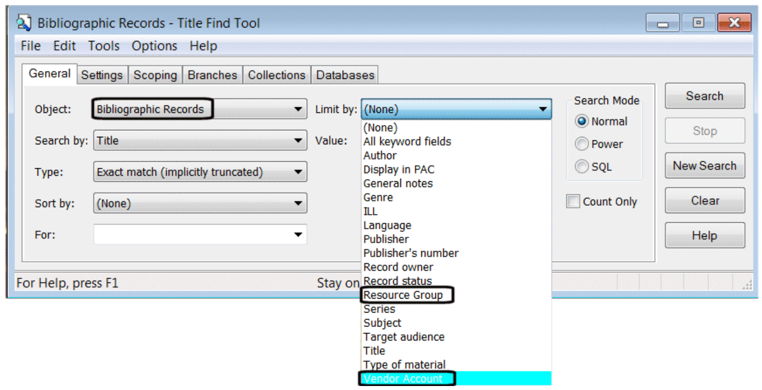
   Any eContent items linked to the resource entity are also deleted except if the item circulation status is other than **In** or the **Retain deleted item records profile** is set to **Yes.** If any linked eContent item records have a circulation status other than **In**, the following message appears: **You cannot delete this resource entity because copies of the book are currently checked out**. If the **Retain deleted item records** profile is set to **Yes**, the item is marked for deletion and later purged following the same purge process as other types of item records.

## Delete a bibliographic record with a resource entity

Before a bibliographic record that has a resource entity can be deleted, all eContent item records must be deleted. Follow these steps to delete a bibliographic record with a resource entity.

1. Search for the bibliographic record for the eContent title.

   You can limit by **Vendor Account** in the Find Tool.




2. Right-click the eContent title listed in the Find Tool results list, and select Links, Item Records.

   If more than one item record is linked to the eContent bib, a list box appears. If a single item record is linked to the eContent bib, the Item Record workform opens.

3. Delete the linked item record.

4. Right-click the bibliographic record, and select **Delete** from the menu.

   When the bibliographic record is deleted, the resource entities remain in the bibliographic record. This allows the resource entity to be restored automatically if the bibliographic record is ever undeleted.

## Copy a bibliographic record with a resource entity

When you select **File, New, Copy** from the Bibliographic Record workform, the resource entity is not copied to the new record. Instead, the tags are converted to traditional MARC tags in the new record. The resource entity can be created for the new record in another step.

## Convert a resource entity to an 856 tag

Follow these steps to convert a resource entity to a traditional 856 tag.

1. Open the Bibliographic Record workform for the integrated eContent.
2. Go to the Resources view.
3. Select **Revert to MARC tag**.

   The integrated eContent tag is changed to an 856 tag in the bibliographic record, and item records linked to the reverted resource entity are unlinked and deleted. If the eContent item is not currently checked in, the following message appears: **You cannot convert this resource entity because copies of the book are currently checked out.**

## Exporting Bibliographic Records with Resource Entities

When you export bibliographic records for integrated eContent from the staff-client or by using SimplyReports and Export Express, the resource entities revert to regular MARC tags in the bibliographic records. Resource entities are also converted to regular 856 MARC tags if another library copies an integrated eContent bibliographic record from your library's catalog using a Z39.50 search.

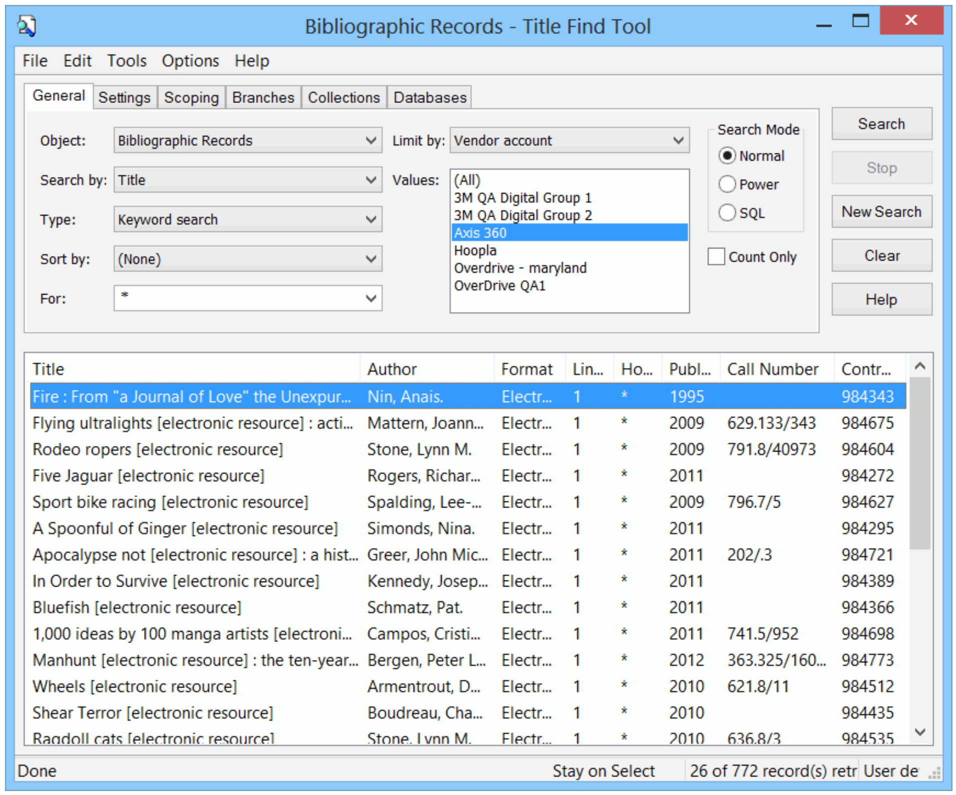
## Resource Entities Transactions

Transactions are recorded when resource entities are created, modified, reverted, or deleted. The resource entity creator/date, and the resource entity modifier/date are displayed in the Resources view of the Bibliographic Record workform.

# EContent in the Polaris Staff Client

EContent can be circulated from the PAC only and not the Polaris staff client. If a staff member attempts to check out or renew an eContent title from the staff client, an error message displays. Staff members can search for and access eContent bibliographic and item records in the staff client. They can be placed in record sets and bulk changed.

To find eContent records for integrated eContent vendors, select the vendor in the Find Tool.

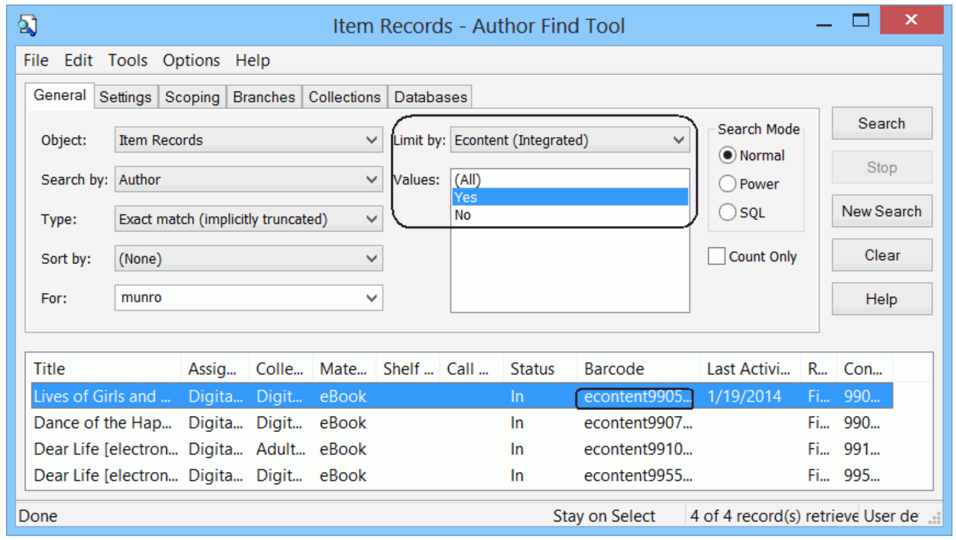



For more information on eContent bibliographic records and their resource entities, which enable the integration between Polaris and the vendor, see "Resource Entities" on page 87.

For more information on integrated eContent item records, see "EContent Item Records" on page 93.

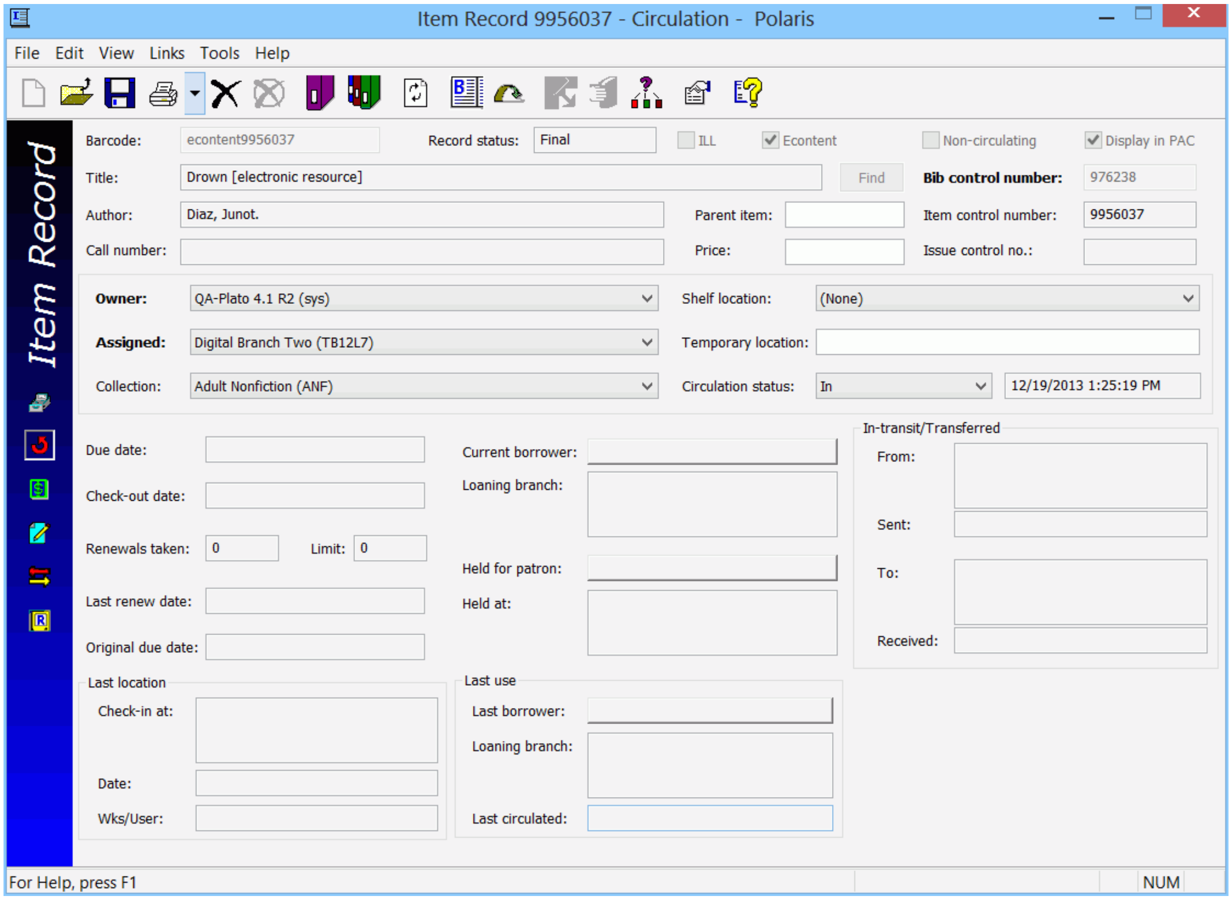
# EContent Item Records

You can search for integrated eContent item records in the Polaris Find Tool by selecting **Limit By, EContent (Integrated)** and then selecting **Yes, No** or **All.**




The **EContent** check box is checked automatically in the Item Record workform, which identifies the item record as an integrated eContent item record. Integrated eContent item records are assigned item barcodes with an eContent prefix.

No special permissions are necessary for working with eContent item records; the existing **Item records: Create, Modify, Delete** permissions also apply to eContent items.




The Item Record workform is generally the same for eContent item records as for other types of item records, with the following additional features and exceptions:

- **Links** - You can link to the vendor account and resource group. Select **Links, Vendor Account** or **Resource Group** from the Item Record workform or from the right-click menu for an item record listed in the Find Tool or another list.
- **Econtent check box** - The **Econtent** check box is always checked for integrated eContent vendor item records; it is supplied automatically and cannot be changed.
- **File, New -** You cannot create a new eContent item record from the Item Record workform if the item is from an integrated eContent vendor.
- **Assigned branch** - If your library uses Resource Groups to limit access to eContent by branch, the assigned branch in the eContent item records should be in the resource group or digital branch selected in the integrated eContent vendor account. If the assigned branch is not in the resource group, the availability information in the PAC is negatively affected.
- **Additional read-only fields** - These cannot be changed in the Item Record workform or via Item Bulk Change. See "Read-Only Fields in Integrated EContent Items" on page 95.

- **Vendor account and resource group** - The vendor account and resource group are displayed on the Item Record workform's Source and Acquisition view and the property page.
- **Added copy note** - The History view displays the following note for added copies of an existing eContent title that is under the same vendor contract: **Added copy created by API consumer service.**

## Read-Only Fields in Integrated EContent Items

Certain fields in item records, such as the check out date, cannot be changed in item records regardless of the type of material. The following additional fields are read-only for integrated vendor eContent item records:

- **EContent Item Record workform header**
  - **Barcode**
  - **EContent** (check box always checked)
  - **ILL item** (check box always unchecked)
  - **Non-circulating item** (check box always unchecked)
  - **Display in PAC** (check box always checked unless the copy has expired due to publisher restrictions)
  - **Title** (the **Find** button is disabled in the Item Record workform)
  - **Bib control no.**
- **EContent Item Record workform Cataloging view**
  - **Loan period**
  - **Fine code**
  - **Renewal limit**
  - **Loanable outside system** (check box always checked)
  - **Do not mail to patron** (check box always unchecked)
  - **Holdable** (check box always unchecked)
  - **Pickup at this branch** (check box always unchecked)
  - **Patrons from this library and branches** (check box always unchecked)
  - **Patrons from this branch** (check box always unchecked)
  - **Preferred borrowers** (check box always unchecked)
- **EContent Item Record workform Circulation view**
  - **Renewals/limits**
- **EContent Item Record workform History view**
  - **Do not float** (check box always unchecked)
- **EContent Item Record workform Reserves view** - The fields are always blank on the Reserves view.

## EContent Item Records and Item Bulk Change

If you select an option in the Item Bulk Change dialog box, and the change cannot be made for some of the selected items because they are eContent, the changes are made in item records where the changes are possible, but not in the eContent items. The bulk change report lists the eContent item records that were not changed.

# EContent Circ/Holds Transactions

Circulation and hold request transactions for eContent are logged in the staff client. This includes circulation transactions initiated from the vendor's application. Some circulation actions, such as resetting due dates, do not apply to eContent.

The following Polaris circulation activities apply to eContent:

> **Note:**
> The default loaning branch for circulation transactions is the patron's registered branch, but your library can set the loaning branch as the item's assigned branch for eContent circulations. This allows patron-initiated circulations, where the patron checks out or places holds on eContent from the PAC, to be tracked separately from circulations for physical items. See "Patron-Initiated EContent Circulation from PAC" on page 82.

- **Check-out and check-in transactions** -
  - Two subtype codes identify eContent: one for an electronic item; one for the vendor account. EContent circulation transactions are included in existing standard Polaris reports, and can be identified in Polaris SimplyReports.
  - Check-outs and check-ins done from the eContent vendor's application are logged in Polaris after synchronization. The check-out subtype is 44 (Third party Checkout). The check-in subtype is 47 (Third party Checkin).
  - Checked out eContent titles are displayed in the Patron Status workform - Items Out view, and in the patron's reading history. They can be removed from the reading history.
  - The due date is set at the point that the checkout occurs in Polaris, according to the rules established by the library's account with the vendor. The due date includes the time due.

    > **Note:**
    > Due dates (automatic expiration dates) for eContent are calculated from the check-out transaction date and time, not the download date and time.
  - When an eContent item is checked in from PAC, the action is recorded in the Polaris item record. The due date, check-out date, original due date, current borrower and loaning branch fields are cleared, and the **Last Borrower** fields are populated. The check-in transaction is recorded in the item record history.

- **Hold request transactions** -
  - Econtent hold request created (6100)
  - Econtent hold requests satisfied (6101)
  - Econtent hold request cancelled (6102)
  - These transactions include the following details:

    Date/time

    Vendor ID

    Title

    Bib ID

    Patron ID and patron branch, if available
  - Transaction subtypes identify the eContent type: eContent, Audio eContent, or Digital video recording.
  - EContent hold transaction types are not included in existing standard Polaris reports, but are available for reporting in Polaris SimplyReports, Patron History reports.
  - EContent requests placed from the PAC are not displayed in the Patron Status, Holds view or in other areas where holds display for physical items.
  - Item-level requests are not allowed, and eContent item records are automatically set to non-holdable.

The following circulation actions do not apply to eContent items:

- Fines
- Renewal
- Reset due date
- Claim
- Declare lost
- Manual changes to the circulation status
- Route lists
- Course reserves
- Shelving status

# Expired EContent

EContent publishers may restrict eContent circulations using one of the following methods:

- Number of copies
- Expiration date
- Hybrid (expiration date or number of copies, whichever comes first)

Polaris processes expired titles differently depending on the eContent vendor.

## 3M Expired EContent

3M sends a "remove" event when a library's access to an eContent title ends because a checked out copy has reached the maximum circulation limit, or a copy with any circ status expires because it has reached the time limit specified by the publisher.

The Polaris API consumer services detects the remove event, and Polaris reduces the number of available copies by one - either by suppressing the record from display in PAC or by changing its status to Withdrawn. If 3M sends a single remove event for a title with multiple copies, Polaris removes the oldest item with the earliest creation date. If two items have the same creation date, the item with the lower item record ID is selected.

If the expired item's status is Checked Out, the **Display in PAC** setting is changed so that the item does not display. When it is checked back in, its **Display in PAC** setting is turned back on, and its circ status changes to Withdrawn. If the expired item's status is In, no changes are made to the Display in PAC setting, and the status is set to Withdrawn.

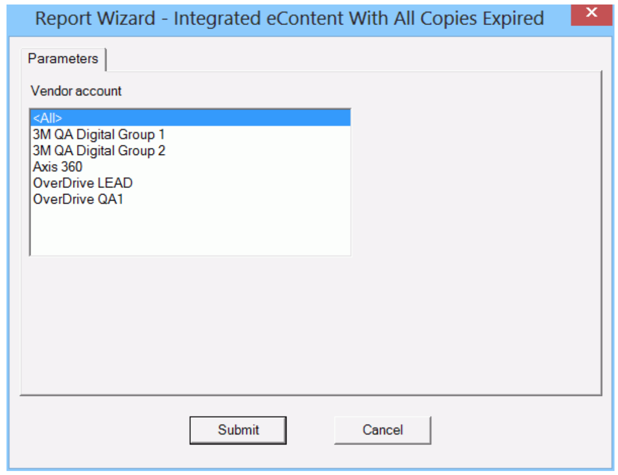
When an eContent item has expired, the item record stays in the database and remains linked to the bibliographic record and the resource entity. The History view of the Item Record workform includes information about the **Modified by API consumer service** status changes from **In** to **Withdrawn** and **Withdrawn** to **In**, and the **Modified by API consumer service** changes to the **Display in PAC** setting.

**Important:**

If your library does not prevent withdrawn items from displaying in PAC, these expired items will still display in PAC availability information.

If the library orders another copy of the 3M title to replace the expired copy, the eContent item with a *Withdrawn* status is set to a status of Checked In, and it is set to display in PAC.

You can use the standard Cataloging Bibliographic report, Integrated eContent With All Copies Expired, to see the eContent bibliographic records where all the linked item records have a status of *Withdrawn*. In the Report Wizard window, select the vendor account from a drop-down list of all integrated eContent vendors. The report columns display the bib ID, title, author, the number of resource entities, and the vendor account with all copies expired.




## OverDrive and Axis 360 Expired EContent

An overnight synchronization process identifies discrepancies between the number of eContent item records in Polaris, for a given title, and the number of copies at the eContent vendor. For a given title, if the provider reports fewer copies for the library than there are eContent item records in Polaris, then item records are deleted from Polaris. The following rules determine which item records are deleted from Polaris:

- The eContent item record with the lowest item record control number that has a circulation status of “in” is deleted. The system administration setting “Retain deleted item records” is followed.
- If no eContent item records have a circulation status of “in,” then the record with the lowest control number with a circulation status of “unavailable” is deleted. (EContent item records have a circulation status of “unavailable” when they are checked out via the vendor’s app to a consortium patron who is not in the local Polaris database.)
- If no eContent item records have a circulation status of either “in” or “unavailable,” then no item record is deleted. When one of the copies is subsequently checked in, then the next night’s synchronization process deletes the extra item record. In the interim period between the check in and the sync process, a “place hold” button appears in the PAC, unless there are no copies reported by the eContent vendor, in which case the button says “all copies expired.”

## All Integrated EContent Vendors

If all eContent item records for an eContent title have been deleted, or have a status of *Withdrawn*, the resource entity still remains on the bibliographic record, and after the patron logs in, the PAC **Check Out/Place Request** button is changed to **All Copies Expired** and disabled so it cannot be clicked. The button's hover text is: **Your library's license for this title has expired. Please contact a librarian for more information**. This text can be changed in WebAdmin.

To prevent the eContent title from displaying in the PAC if all copies are withdrawn, the library can set the title to not display in PAC. Other options are to revert or delete the resource entity, or delete the bibliographic record. If you delete the resource entity from the bibliographic record and the library purchases more copies, the API consumer service will create a new resource entity and the associated eContent item records.

**Note:**
When the library replaces the expired copies, the API consumer service does not check or reset the **Display in PAC** setting on the bibliographic record. If the library sets the record to not display in PAC and then purchases added copies, a staff member must manually check the **Display in PAC** box on the Bibliographic Record workform.

# Polaris API Consumer Service

The Polaris API Consumer Service synchronizes the number of items available in the vendor's repository with the number of items available in Polaris, automatically creating new eContent item records for added copies or deleting eContent items when publisher limits are reached. The consumer service also synchronizes circulation transactions (check outs, hold requests, etc.)

## Check the status of the Polaris API consumer service

Follow these steps to check the status of the Polaris API consumer service for an integrated eContent vendor.

1. Go to the server where the service is running.
2. Select **Start**, **Administrative Tools**, **Services**.

   The Services window opens.
3. Select **Polaris API Consumer Service** and scroll right to see the status of the service. The service status should be restarted.

# EContent Vendor and Polaris Synchronization

In the Polaris PowerPAC and Mobile PAC, the availability and holds counts for Axis 360, OverDrive, and 3M Cloud Library eContent, are driven by the status of the items in the vendor's repository, not the status of the items in the Polaris database. The availability information displays whether the patron is logged into their PAC account or not.

The availability counts include the total number of copies, the number of copies available, and the number of holds. If the library adds copies, they are reflected in the availability counts, and delays in synchronization are not evident to the PowerPAC user.

When a patron initiates circulation activity in Polaris by checking out or placing a hold on the eContent, synchronization between the vendor's repository and the Polaris database occurs in real time – the data is immediately updated in the Polaris database and the vendor's repository. And, whenever a patron logs into the Polaris PowerPAC, a complete "on-demand" synchronization process updates the circulation activity in the vendor's repository.

However, if the patron initiates the eContent circulation activity from the vendor's application, the synchronization process takes longer. The vendor "pushes" the synchronization information via the Polaris API (PAPI), and when the information is received by Polaris, the API consumer service completes the synchronization tasks as necessary.

In addition, the API consumer service performs a periodic "pull" query of the vendor's database to determine if any circulation activity has occurred for the time period. If the query discovers circulation activity, the data is synchronized.

Even during the period when the circulation activity in the vendor's database has not yet been synchronized with the Polaris database, patrons will still be able to place a hold or check out the eContent in the PAC.

When a library purchases a new 3M Cloud Library or OverDrive title, Polaris automatically imports the title when it is available. 3M sends a "push" notification that the new title is available, and the title is added to Polaris within minutes. OverDrive imports are done once daily, around midnight.

When a library purchases added copies for eContent titles already in the database, or when copies expire because of publisher restrictions, Polaris is updated automatically with the vendor's information. 3M sends a push synchronization notification to Polaris, which immediately updates the number of copies in the Polaris database. For OverDrive and Axis 360, the synchronization process runs once daily, around midnight.

Although patrons can view, place or cancel holds on integrated eContent in the PAC, the holds are managed exclusively in the vendor's database. Holds activity that takes place in the PAC is recorded, but it does not display in the Polaris staff client because the vendor's hold information is outside of regular holds processing.

With OverDrive Advantage accounts, groups of libraries share collections held by consortia, county, or state contracts. Some libraries that share an Advantage account may not have the Polaris ILS, but their patrons can check out and check in eContent from OverDrive's application. When these remote users, who do not have a patron record in Polaris, check out eContent via OverDrive's application, the items are displayed in the Polaris staff client with a status of **unavailable** rather than **checked out**. The synch process that marks items as unavailable when they are checked out by remote users, and then updates them to checked in when they are available, takes place every 24 hours. For patrons who do have a patron record in Polaris, the synchronization still takes place every 5-15 minutes when they check out or check in from OverDrive's application.

The following table shows the synchronization tasks and the time it takes for patron circulation activity to synchronize in the vendor's repository and the Polaris database.

| *Synchronization Process* | *3M Cloud Library* | *Axis 360* | *OverDrive* |
|---|---|---|---|
| Holds | Real time | Real time | Real time |
| Circulation (Check out/ Check in) in Polaris PAC | Real time | Real time | Real time |
| Circulation (Check out/ Check in) using the vendor's application | Every 5-15 minutes | Every 5-15 minutes | Every 5-15 minutes |
| Added copy | Every 5-15 minutes | Once daily (overnight) | Once daily (overnight) |
| Expired copy | Every 5-15 minutes | Once daily (overnight) | Once daily (overnight) |
| Added title - new MARC record | Every 5-15 minutes | N/A | Once daily (overnight) |
| Added title - prepublication | N/A | N/A | Once daily (overnight) |

# Suspend and Reactivate an Integrated Vendor Account

In the event of a system disruption, you can temporarily suspend an integrated eContent vendor account. Suspending an account applies only to integrated eContent vendor accounts because it allows the library to temporarily suspend API calls. When a vendor account is suspended, most API processes stop, which temporarily disallows eContent check outs and hold requests, and stops the automatic creation of eContent item records from these API calls. Synchronization of circulation transactions continues to take place for records currently checked out; for example, automatic check in occurs when an item is due. After resolving the system problem, you can reactivate the suspended vendor account. All API calls resume.

> **Important:**
> After activating a vendor account, or reactivating a suspended vendor account, an IIS reset is required so that the PAC shows the correct information for the vendor's resources. For example, the IIS reset enables the Check Out or Place Hold button to be displayed instead of the **Temporarily Unavailable** button.

## Suspend an integrated eContent vendor account

Follow these steps to suspend an integrated eContent vendor account.

1. Open the integrated eContent vendor account in the Vendor Account workform.
2. Clear the **Active** check box.
3. Save the workform.
4. Do an IIS reset.

### Results of *suspending* a vendor account

Changes will take effect after the IIS reset. When an integrated eContent vendor account is suspended, the following changes occur in the PAC and the Polaris staff client:

- **PAC -** The **Check out** or **Place request** button changes to **Temporarily Unavailable** (the button text can be changed in WebAdmin).
- **Polaris Staff Client**
    - **Bibliographic Record** - The Resource view of the Bibliographic Record workform indicates that the vendor account is suspended.
    - **Import Profile** - In the import profile associated with the vendor account, the vendor account's name is listed with **suspended** after it. If you select a suspended vendor account and import records using the Polaris Import Setup window, resource entities are built

during the import, but the entities are not accessible for circulation functions. In addition, in the absence of the API call, the import cannot determine how many items to build, so no item records are built. When the vendor account is reactivated and the synchronization process restarts, any necessary item records are generated.

- **Import Report** - The import report indicates the vendor account was suspended at the time of import, so only one item record was built for each imported bibliographic record.

## Reactivate a suspended integrated eContent vendor account

**Important:**
After activating a vendor account, or reactivating a suspended vendor account, an IIS reset is required so that the PAC shows the correct information for the vendor's resources. For example, the IIS reset enables the Check Out or Place Hold button to be displayed instead of the **Temporarily Unavailable** button.

Follow these steps to reactive a suspended integrated eContent vendor account.

1. Open the integrated eContent vendor account in the Vendor Account workform.
2. Check the **Active** check box.
3. Save the workform.
4. Perform an IIS reset.

### *Results of reactivating an integrated eContent vendor account*

When an integrated eContent vendor account is reactivated, the **Active** box is checked in the Vendor Account workform, all API processes resume, and the following changes occur in the PAC and Polaris staff client:

- **PAC -** The **Temporarily Unavailable** changes back to the **Check out** or **Place request** button (whichever is appropriate).
- **Polaris Staff Client -** The message **Vendor Account Suspended** no longer appears on the Resource view of the Bibliographic Record workform; automatic imports resume using the import profile specified in the vendor account; resource entities are built and used in circulation functions; and the item records are created during the import.

# Non-Integrated EContent in Polaris

When the library offers eContent from non-integrated vendors, the records are displayed in PAC search results, but patrons must click a link to check them out on the vendor's site. These circulation transactions are not recorded in Polaris.

You can create vendor accounts for non-integrated eContent vendors if you want to limit patron access to the eContent based on the contract the library has with the vendor. If you do not want to limit access, you do not need a vendor account in Polaris. No license is required for setting up non-integrated vendor accounts.

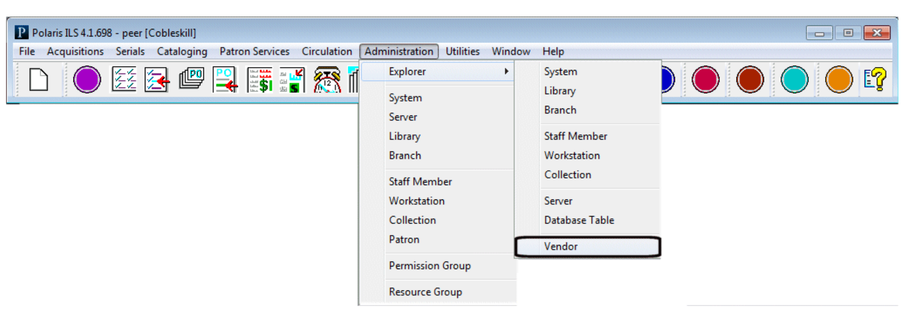
A non-integrated vendor account associates a specific eContent vendor account with a resource group in order to limit patron access to eContent according to the branch or branches that use the account. You can also create a non-integrated vendor account without a resource group if you want a vendor-specific icon to appear with the 856 tags in the PAC.

The fields in the Vendor Account workform contain the following information for a non-integrated vendor:

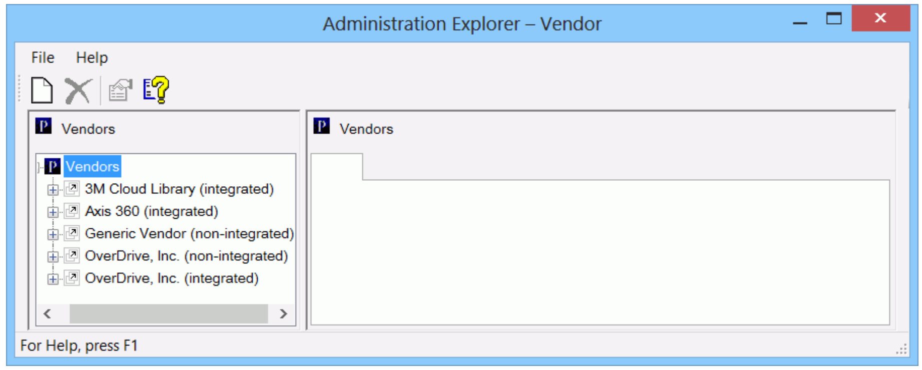
- The vendor account ID, and the MARC tag/subfield where the account ID is found.
- The MARC tag/subfield where the object identifier is found, and where the object identifier starts and ends. This is where Polaris looks for the data that identifies the eContent or electronic resource in the vendor's repository.
- The tag where the URL and link text are found, and the subfields for the URL and the text.
- The subfields where the vendor's public note and non-public note are found.

To implement eContent processing for a non-integrated eContent vendor, the library and Polaris Library Systems do the following:

☐ Polaris provides the non-integrated eContent vendor records. The Vendor option is available under **Administration, Explorer, Vendor**.



The available Vendor records are displayed under the expanded **Vendors** node.



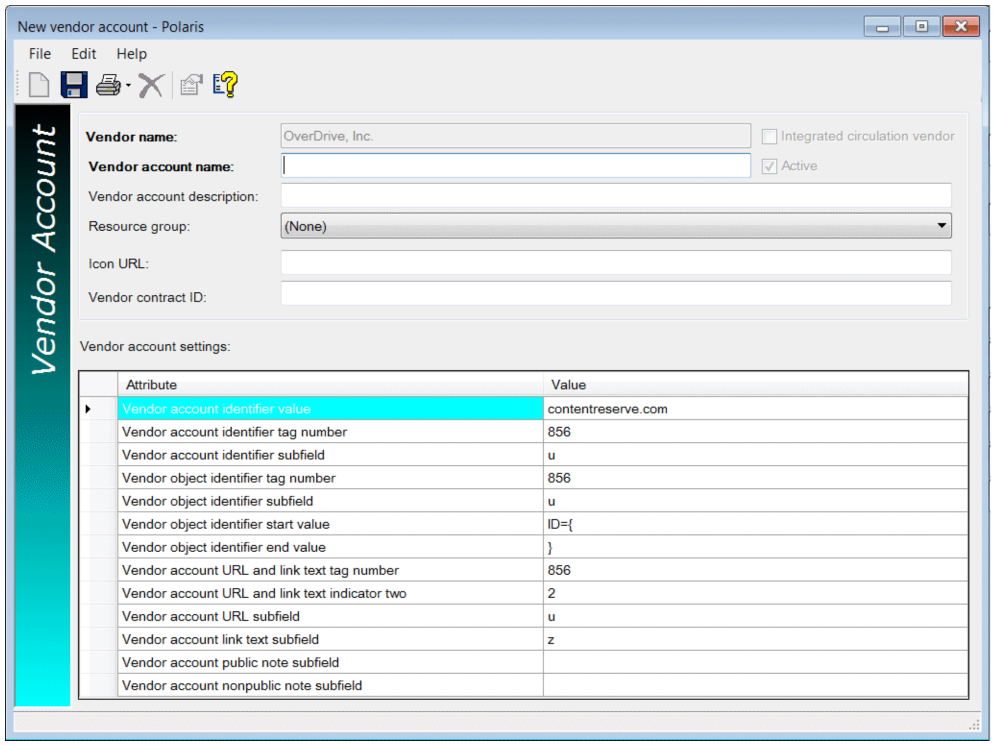

- ☐ The library sets up resource groups in Polaris Administration for the library organizations that allow their patrons to access the eContent from the non-integrated vendor. To set up a resource group, select **File, New, Resource Group** from the Polaris Shortcut Bar. Select the branches that belong to this resource group. For more information, see "Manage patron access to eContent using resource groups" on page 76.
- ☐ The library sets up a non-integrated vendor account under the **OverDrive (non-integrated)** or **Generic (non-integrated)** vendor record. Non-integrated vendor accounts are used to limit access to eContent for a vendor that does not integrate with Polaris Circulation. See "Create a non-integrated eContent vendor account" on page 109.
- ☐ The library imports the eContent from the non-integrated eContent vendor using an import profile with the non-integrated vendor's account selected.
- ☐ For existing eContent titles for a non-integrated vendor, the library gathers the bibliographic records in a record set and uses the Bib Bulk Change process to create resource entities that are used to limit access in the PAC. Resource entities can also be created for single records from the Bibliographic Record workform.

# Create a non-integrated eContent vendor account

Follow these steps to create a non-integrated eContent vendor account.

1. Select the **Vendor** node in the Administration Explorer.
2. Select the **Overdrive (non-integrated)** or **Generic (non-integrated)** vendor, right-click, and select **New**.

   The Vendor Account workform for the non-integrated eContent vendor opens.




**Note:**
The **Vendor name** field is filled in automatically with **OverDrive, Inc.** if you are creating a vendor account for OverDrive, or **Generic Vendor** if you are creating an account for another vendor.

3. Type a name for the vendor account in the **Vendor account name** box and an optional description in the **Vendor account description** box.

   **Note:**
   The following fields are required for non-integrated eContent vendor accounts: **Vendor account name**, **Vendor account identifier value**, **Vendor account identifier tag number**, **Vendor account identifier subfield**, **Vendor account URL and link text tag number**, **Vendor account URL and link text indicator two**, **Vendor account URL subfield**, and **Vendor account link text subfield**.

4. To limit patron access, select the resource group from the **Resource group** drop-down list box.

   **Note:**
   The resource group must be set up in Polaris Administration before it appears in the list. For information on setting up resource groups in

Polaris, see Polaris staff client online Help.

5. To display the vendor's icon next to the URL link in the PAC, enter the URL for the vendor's icon in the **Icon URL** box.

6. Type the contract ID in the **Vendor contract ID** box. The contract ID is optional for non-integrated vendors.

7. In the Vendor account settings, enter the following information:

   **Note:**
   If you are creating a vendor account for OverDrive, some recommended account settings are pre-filled.

   - **Vendor account identifier value -** (required) Identifies the vendor's account.
   - **Vendor account identifier tag number -** (required) Identifies the bib tag where the vendor account ID is located.
   - **Vendor account identifier subfield -** (required) Identifies the bib tag subfield where the vendor account identifier is found.
   - **Vendor object identifier tag number** - (required) Identifies the tag where the eContent object identifier is found.
   - **Vendor object identifier subfield** - (required) Identifies the tag subfield where the eContent object identifier is found.
   - **Vendor object identifier start value** - Specifies where the string that identifies the eContent object starts.
   - **Vendor object identifier end value** - Specifies where the string that identifies the eContent object ends. If the object identifier appears at the end of the subfield, this field can be left blank.

     **Note:**
     If both the object identifier start and end values are left blank, the entire subfield is included.
   - **Vendor account URL and link text tag number** (required) **-** Identifies the tag where the URL for the eContent and link text are found. These need to be in the same tag. This is the tag that becomes the resource entity for the non-integrated eContent bibliographic record.
   - **Vendor account URL and link text indicator two** (required) - Identifies the MARC second indicator value for the tag containing the URL and link text.
   - **Vendor account URL subfield** (required) **-** Identifies the subfield where the URL is located.
   - **Vendor account link text subfield** (required) **-** Identifies the subfield where the link text is located.
   - **Vendor account public note subfield** - Identifies the subfield for the public note.
   - **Vendor account nonpublic note subfield** - Identifies the non-public note subfield.

8. Save the Vendor Account workform for the non-integrated vendor account.

# Resources Entities for Non-Integrated EContent Vendors

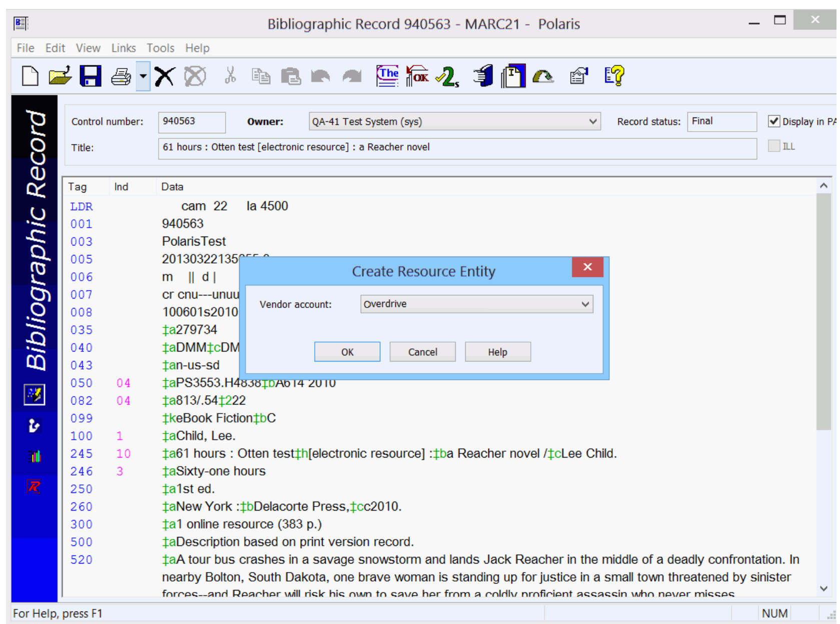
Resource entities are used for non-integrated eContent vendors when the library wants to restrict access to eContent by the branch or branches that have a certain contract with the non-integrated eContent vendor. They must be unique for the vendor account ID/URL within one bibliographic record.

## Create a resource entity from the Bibliographic Record workform

Follow these steps to create a resource entity from the Bibliographic Record workform.

1. Search for and select a bibliographic record for the eContent.
2. Select **Tools, Create Resource Entities** from the Bibliographic Record workform menu.

   The Create Resource Entity dialog box appears.
3. Select the vendor account, and click **OK** to close the dialog box.




4. Save the bibliographic record to create the resource entity.

# Bulk-create resource entities

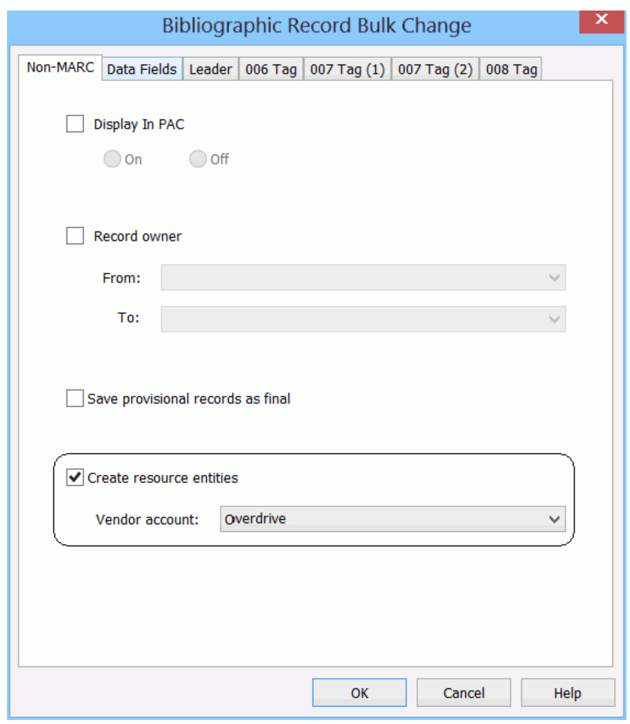
If a vendor account is set up in Polaris, and you have the **Access bibliographic bulk change permission**, you can bulk-create resource entities for bibliographic records that contain data matching to the vendor account. For example, you could bulk-create resource entities for a non-integrated eContent vendor to restrict access by resource group. You cannot bulk-change existing resource entities.

Follow these steps to use the Bibliographic Bulk Change dialog box to bulk-create resource entities from existing 856 (or other) tags.

**Tip:** Click to open the Bulk Change dialog box, or press **CTRL+B**.

1. Open the bibliographic record set containing the records for which you want to create resource entities.
2. Select **Tools, Bulk Change**.

   The Bibliographic Bulk Change dialog box appears with the non-MARC tabbed page displayed.
3. Select the **Create resource entities** check box, and select the vendor account in the **Vendor account** box.



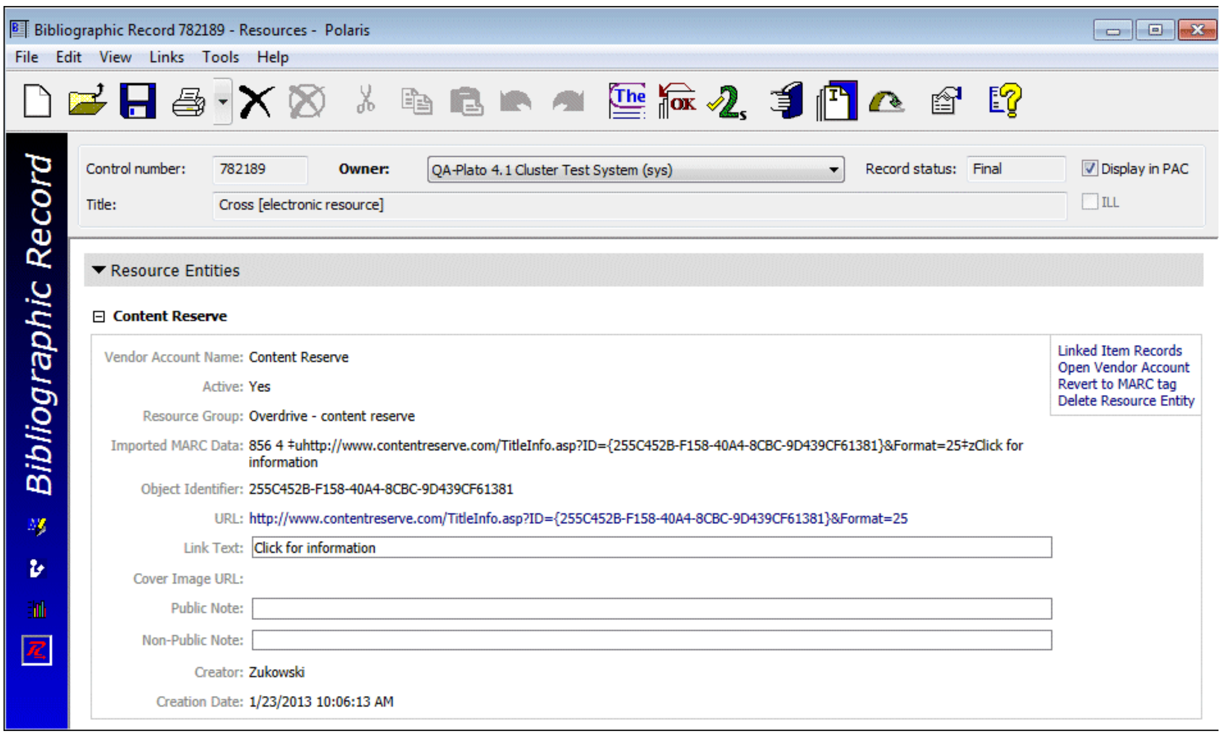

4. Click **OK**.

   A resource entity is created for each bibliographic record that contains data required to create the resource entity. First, the system checks for data matching the vendor account. If the data in the bibliographic record matches the vendor account data, the system then checks for the data required to create the resource entity.

## Bibliographic Bulk Change Report

The report displays the number of resource entities that were created. If a resource entity could not be created, an error message displays the reason the resource entity could not be created:

- **No resource entities were created. The data in the record does not match the vendor account you selected.** - This message appears if the bibliographic record does not have data that matches to the vendor account.
- **No resource entities were created. Required data is missing from the record.** - This message appears if the bibliographic record contains data matching to the vendor account, but not the data required to create the resource entity.



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