Polaris® Cataloging Guide

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Contents

About This Guide

This guide explains how to use Polaris to add and change bibliographic, item, and authority records in the catalog database. It also explains how to use templates and record sets to make cataloging more efficient.

If your library has a license for Polaris Feature It, you can use promotion records to feature the resources in the PAC. See "Managing Promotions" on page 205. If your library has a license for Polaris Community Profiles, you can create community records and specify the organization representatives in the Polaris Staff Client. For more information, see the Polaris Community Profiles Guide or Polaris online Help.

To do the cataloging tasks in this guide, permissions must be set for your user name. If you have questions about permissions in Polaris, see your Polaris administrator.

Cataloging Topics

Important:
For information about developments that may have occurred after this information was published, go to **www.polaristown.com**.

This guide covers the following topics:

Getting Started in Cataloging	Overview of Polaris cataloging records and methods; how to search for and display bibliographic, authority, and item records.
Creating, Copying, and Editing MARC Records	Creating original MARC records; copying MARC records from remote sources; editing MARC records.
Using Cataloging Templates	Using templates to streamline your cataloging processes.
Setting Up Import Profiles and Importing Records	Setting up import profiles; importing records into your Polaris catalog.
Checking Cataloging Records	Checking records for headings, MARC format, and duplicates.
Maintaining Item Records	Creating item records and preparing items for circulation; printing labels.
Working With Multiple Records	Grouping related cataloging records in record sets for bulk processing.
Maintaining Your Catalog	Maintaining your catalog; exporting records; identifying unlinked records; deleting records; and using reports to identify problems.
Managing Promotions	Creating and editing promotion records to feature resources in PAC.

Type of Material Codes (TOMs) Lists the Type of Material Codes (TOMs); the MARC codes required to produce specific TOMs; order of precedence to determine primary TOM.

Cataloging Shortcut Keys List of Cataloging shortcut keys formatted for convenient printing and clipping.

Related Resources

In addition to this guide, the following resources may be helpful when using Polaris Cataloging:

- Polaris Online Help

  Polaris online Help is accessible from the Help menu on any Polaris window or by pressing **F1** with a Polaris window active. It provides information and instructions for the Polaris staff client subsystems, and Polaris administration (includes administration and customization options for the staff client, PAC applications, and other Polaris functions).

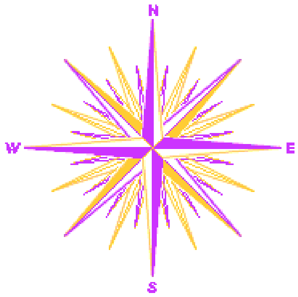
- Polaris Staff Client and Technical Services Administration Guides
  - *Polaris® Acquisitions Guide*
  - *Polaris® Basics Guide*
  - *Polaris® Serials Guide*
  - *Polaris® Technical Services Administration Guide*
- *Polaris® Community Profiles Guide*
- Library Polaris Administrator

  If you have questions about using Polaris, contact your Polaris administrator or trainer at the library for help.

- Polaris Library Systems Web Site

  For updated user and support information, go to **www.polaristown.com**. You can also contact your Site Manager at:
  1-877-857-1978.

Getting Started in Cataloging



Polaris Cataloging records provide the core data upon which all other functions in Polaris depend. Bibliographic and item records are used throughout the Polaris staff client, and they determine the PAC display. Authority records provide standardized access points to indexes and headings in the public catalog. Community records provide information about community organizations, and Promotion records enable the library to promote titles, Web sites, community organizations, and events in Polaris PowerPAC.

To streamline your cataloging tasks, Polaris provides tools such as import profiles for efficiently importing records, bulk creation of item records, and remote database searching for easy copy cataloging. For original cataloging, you can select the appropriate codes in the MARC 21 view of the Bibliographic Record workform, then go to the PAC view to preview the title display in Polaris PowerPAC. Setting up templates for different material types and collections makes it easy for cataloging staff to create new records.

In addition, Polaris helps you maintain the quality of your catalog with duplicate detection, bibliographic record replacement, MARC validation, and authority control tools. To further increase efficiency, you can group related records in record sets so they can be retrieved, modified, or processed together.

This unit covers the following topics:

- "Cataloging Records" on page 4
- "Methods for Adding New Records" on page 14
- "Finding Cataloging Records" on page 18

Cataloging Records

Polaris Cataloging uses bibliographic records, authority records, item records, and templates. Bibliographic records can be linked to multiple item records and multiple authority records. Authority records can be linked to multiple bibliographic records and multiple authority records, but they are not linked to item records. An item record is linked to a single bibliographic record, and multiple item records can be linked to the same bibliographic record. Item records can also be linked to other item records.

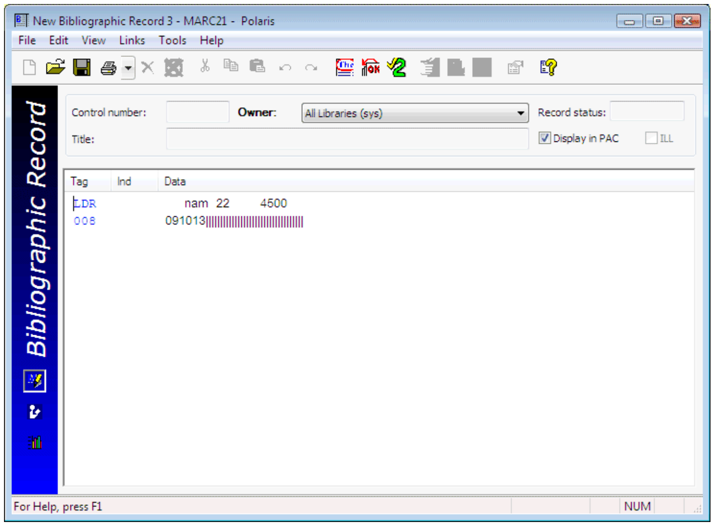
Depending on your library's Polaris licenses, other selections may be available on the Cataloging menu. If your library has a license for Polaris Feature It, you can use Promotion records to feature titles, events, or community records in Polaris PowerPAC. If your library has a license for Polaris Community Profiles, you can create community records in Cataloging and then designate the organization representative who can update the record from the PAC.

Bibliographic Records

Every title in the library's catalog is represented by a bibliographic record saved in the Polaris database in MARC 21 Format for Bibliographic Data. Each bibliographic record is identified by a unique control number recorded in the 001 tag. You can add bibliographic records for new titles by importing records, copy cataloging, or original cataloging. See "Creating MARC Records" on page 27. A bibliographic record must have a Leader and an 008 tag to be saved in the Polaris database.

When you save a bibliographic record, it is checked for the correct MARC format and for possible duplicate records already in the catalog. When duplicate bibliographic records are found, you can automatically replace them. You can also replace records that were not identified as duplicates. In addition, headings are checked against authority records to maintain consistent authority control. See "Checking Cataloging Records" on page 105.

You can create linked item records from the Tools menu on the Bibliographic Record workform. See "Creating Item Records" on page 124.

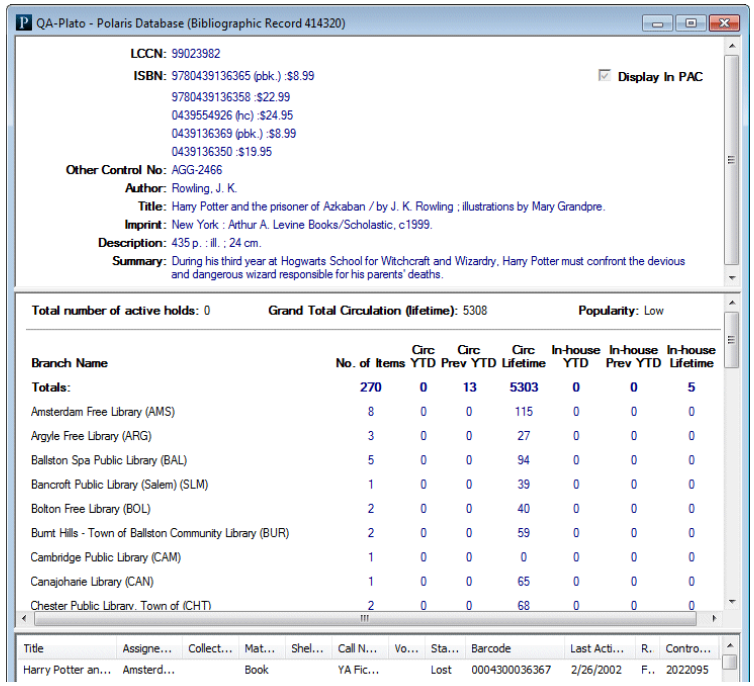


Viewing Circulation Statistics and Linked Item Records

Bibliographic records may be linked to multiple item records, each representing a distinct physical item. To view the circulation statistics for all items linked to the bibliographic record, select **Tools, Show Usage Statistics** or press **CTRL+R** from the Bibliographic Record workform. You can also select a bibliographic record in the Find Tool results list, right-click and select **Preview**. The preview window's top pane displays the brief bibliographic view, the middle pane displays the usage statistics for linked items, and the bottom pane displays the list of linked items.

The usage statistics in the middle pane include the total number of items and circulations for all branches, and a list of the items and circulations by branch. The popularity of the title is displayed as **High**, **Medium**, or **Low**, based on the number of circulations and holds. The titles with a popularity of High have circulated and had holds placed on the linked items within the last 120 days. The titles with a popularity of Medium have linked items that either circulated or had holds placed on them within the last 120 days. The titles that have a popularity ranking of Low have not had any linked items circulated or held within the last 120 days.

All the individual items linked to this bibliographic record are displayed in a list in the bottom pane of the window. You can click on the column headers to sort the list. You can double-click on an item in the list to open it in the Item Record workform, or you can right-click an item and perform various functions on the item record using the context menu. For more information, see "Item Records" on page 9.



Preview the Title Display in the PAC

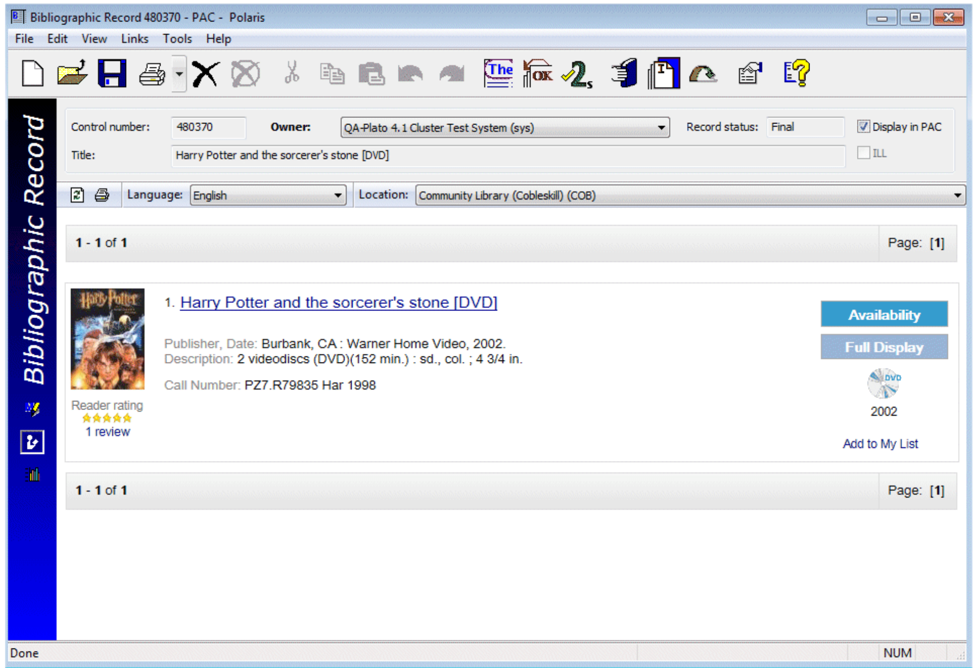
Note:
The title information that is displayed in the PAC can be customized in Polaris Administration. See "Configuring the PowerPAC Title Display" in the *Polaris Public Access Administration Guide 4.1*.

Tip:

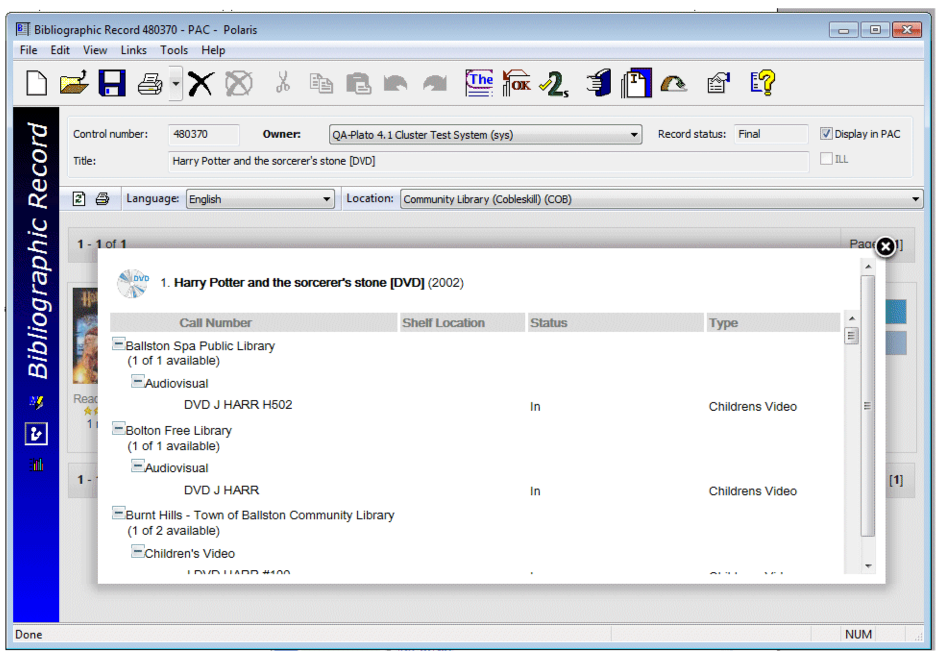
Click to display the PAC view.

Select **View, PAC** to preview the title's display in Polaris PowerPAC. The view of the PAC from the Bibliographic Record is the same as it appears for your patrons, including all the customization you have set up for your PAC. Some actions that are possible from the PAC may not be possible from this view, such as searching for other records. Web links are active from the PAC view if the record has an 856 tag. For more information on how Web links are displayed in the PAC, see "Web Links Display in the PAC" on page 8.

Tip:
A Polaris Administration profile can be set to always open the Bibliographic Record workform to the PAC view. See "Setting Preferred Workform Views" in the *Polaris Administration Guide 4.1*.



Click the **Availability** button to see the branches where the title is available.



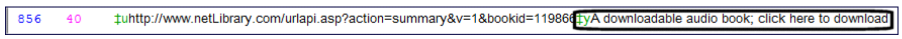
Web Links Display in the PAC

The clickable Web link text that displays in the PAC full and brief displays for a title is determined by the subfields in the 856 tag as follows:

Note:
See "Configuring the PowerPAC Title Display" in the *Polaris Public Access Administration Guide 4.1*.

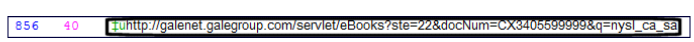
Tip:
If there is text in the 856$z, it displays as a note but not part of the Web link.

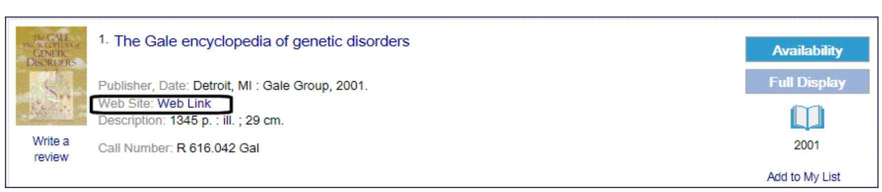
- **856$y - Link Text** - If the bibliographic record has an **856$y**, the text in the first occurrence of this tag is used for the Web link display instead of the URL in the 856$u.



- **856$3 - Material Specified** - If the bibliographic record does not have an **856$y**, but it does have an **856$3**, the text in the first occurrence of this tag is used for the Web link display instead of the URL in the **856$u**.

- **856$u - URL** - If the bibliographic record has an **856$u** without an **856$y** or an **856$3**, the default text **Web Link** is displayed in PowerPAC instead of the URL.





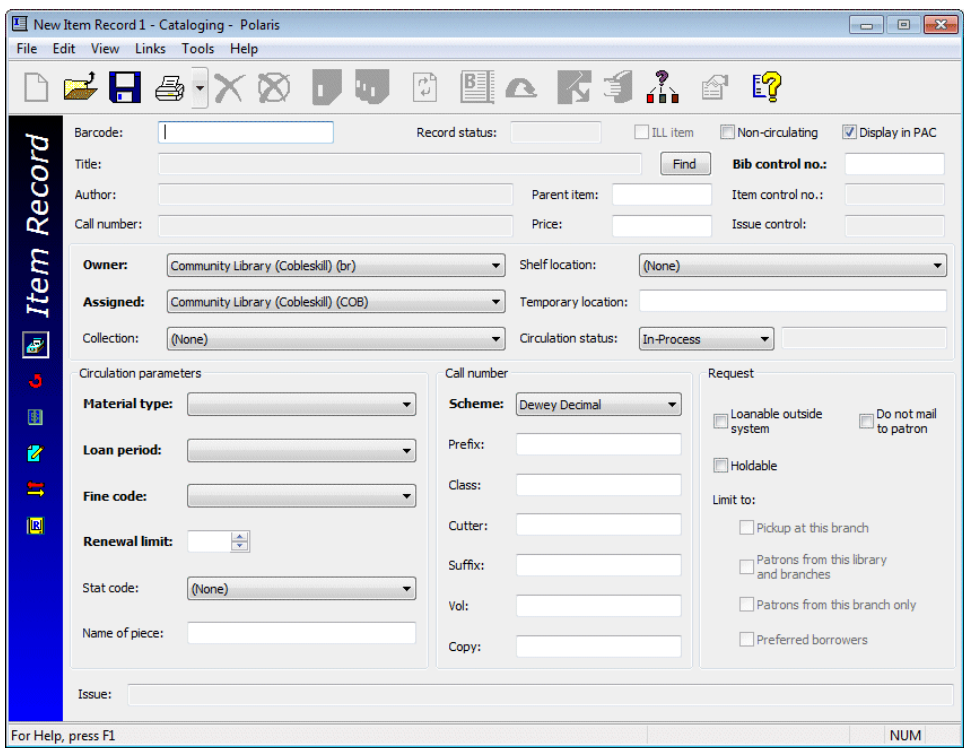
Item Records

An item record contains information about a specific physical item, such as its circulation status, its owner, and its shelf location. Item records are linked to bibliographic records, but they do not contain MARC 21 data. Several item records, each representing a separate item, may be linked to the same bibliographic record.

Note:
If you select **File, New, Item Record** from the Polaris Shortcut Bar, the New Item Record Options dialog box appears. Use this dialog box to create multiple items linked to the same bibliographic record. See "Creating Item Records" on page 124. If you are creating one record, you can click **OK** to go to the Item Record workform.

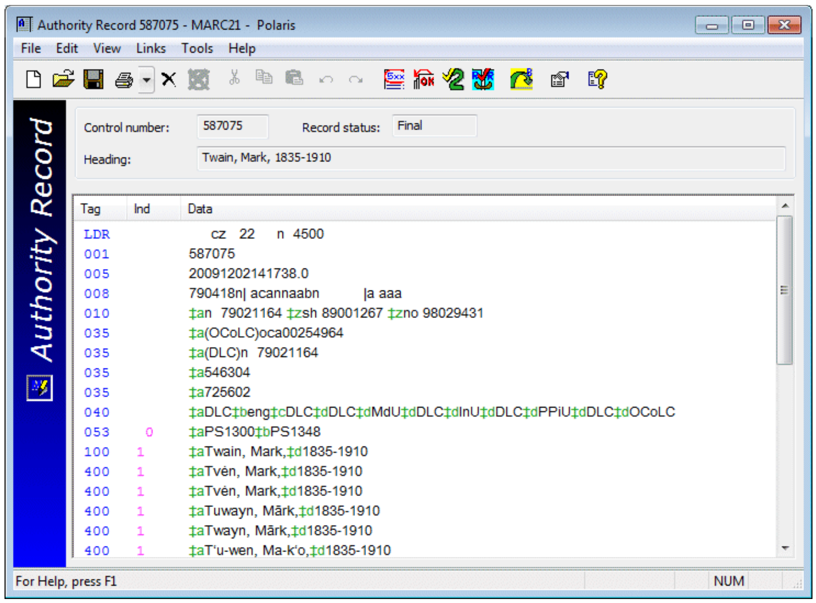
By default, the initial view of the Item Record workform depends on how you open the record. When you are creating a new item record, the workform opens to the Cataloging view. When you open an item record from a purchase order line item or invoice line item, the workform opens to the Source and Acquisition view. In all other cases, the workform opens to the Circulation view. However, you can set a Polaris Administration profile so that the Item Record workform always opens to a particular view. See "Setting Preferred Workform Views" in the *Polaris Administration Guide 4.1*.

Tip:
Select **Links, Item Records**, press CTRL+T or click  to see all the other item records that are linked to the same bibliographic record.



Authority Records

Polaris uses the MARC 21 Format for Authority Data for authority records, which are linked to bibliographic records or other authority records. When you change an authority record, the change is applied to all linked records. Authority records are identified by a unique control number recorded in the 001 tag of the authority record. Like bibliographic records, authority records are subject to MARC 21 validation (tag checking) to help you maintain correct and consistent records. For more information, see “Create a new authority record” on page 30.



Automatic Authority Control Using a Remote Database

If you have a subscription to Polaris ZMARC, you can find and save a new authority record from ZMARC when you save a bibliographic record and no matching authority record is found in the local database. The new authority record is saved and the bibliographic record is linked. See “ZMARC Remote Authority Control” on page 107.

Authorities Weekly Update Service

If you have a subscription to Polaris Authorities Weekly, Polaris Library Systems installs a job at your site that tracks your authority records. When updates are issued by the Library of Congress, the system checks the records to see if any match the authority records your library has. If matches are found, and there are updates, an e-mail message informs your administrator that there are updates and provides the location of the file containing the updated authorities. You can then import the authority records and overlay your existing ones using the import profile **Authority Update Import**. See “Setting Up Import Profiles and Importing Records” on page 55.

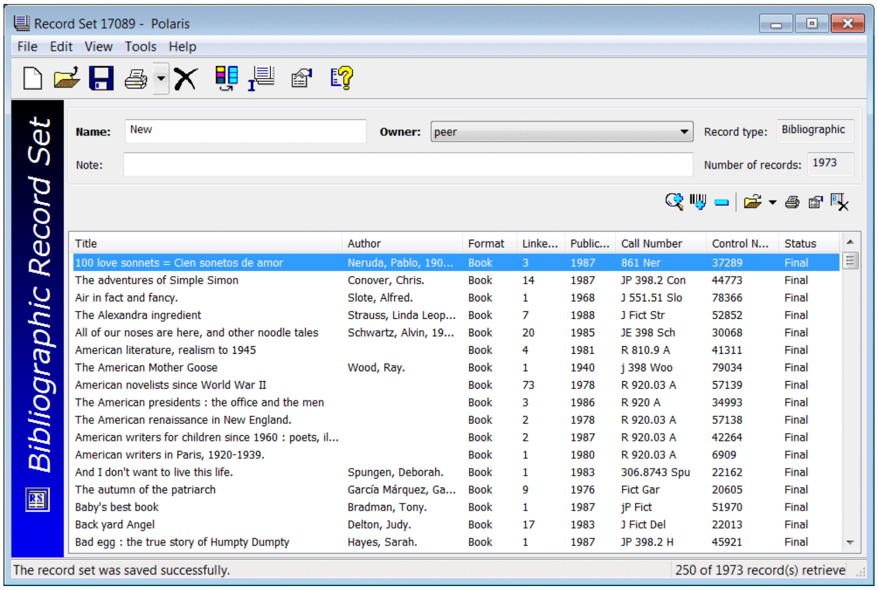
Cataloging Templates

Cataloging templates help your library maintain consistent records and reduce the number of keystrokes required to create new cataloging records. You can create bibliographic, authority, and item templates by manually entering data or by saving existing records as templates, and then editing the data. See “Using Cataloging Templates” on page 51 for more information.

Record Sets

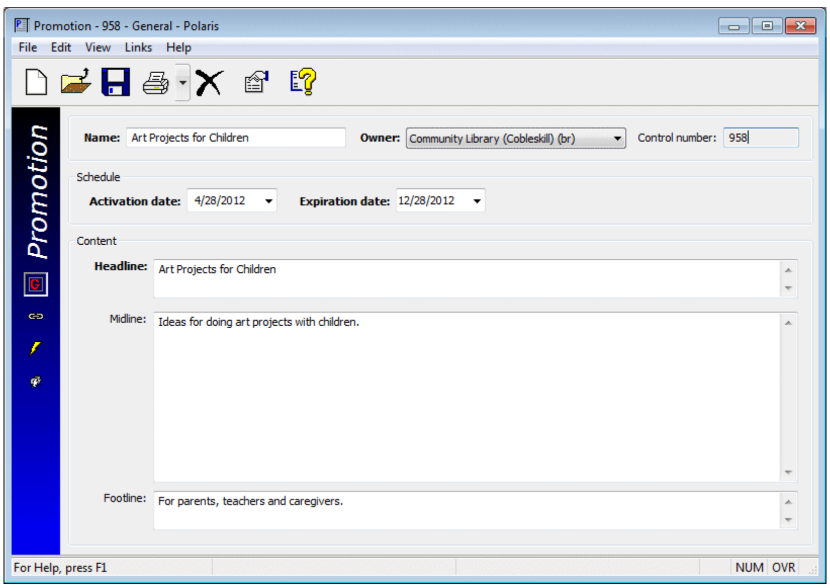
Record sets group related records together so you can retrieve, change, or process them in one step. For example, you can gather bibliographic records in a record set, and then use the Bulk Change process to make the same changes to all the records in one step. You can create record sets of bibliographic, item, or authority records, but you cannot have different types of records in one record set. See “Creating and Using Record Sets” in the *Polaris Basics Guide 4.1*.

When you import bibliographic or authority records, you can specify a destination record set to group them. This makes retrieval and manipulation of the imported records more efficient. See “Set import options for record sets” on page 75.



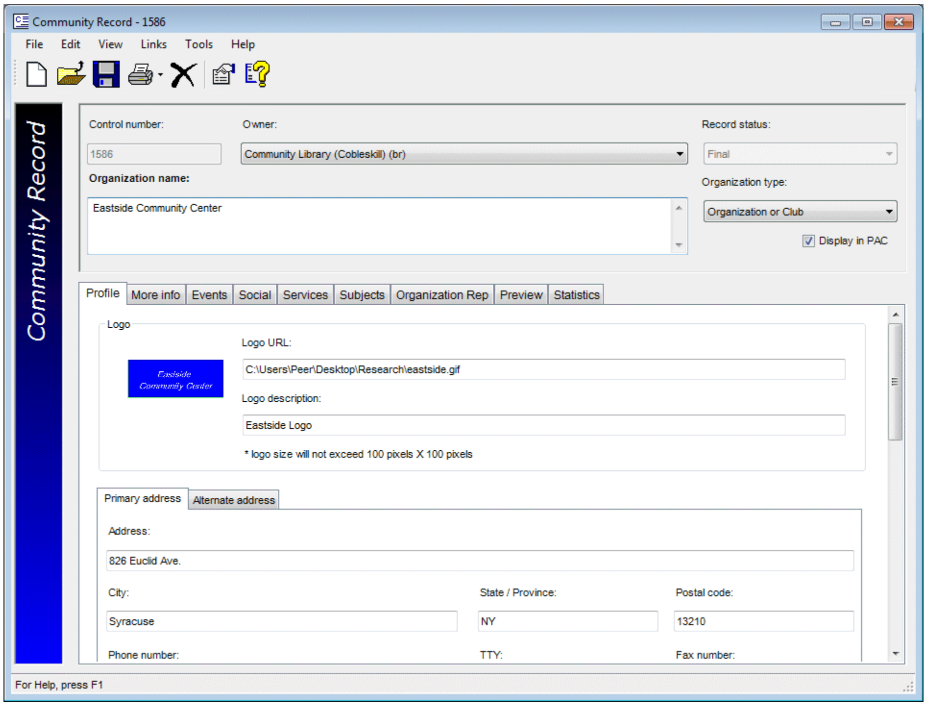
Promotion Records

If your library has a license for Polaris Feature It, Promotion records are used to feature titles, events, or community records in Polaris PowerPAC. Staff members select the featured resources and specify the conditions under which the resources are featured. The library can specify the materials in the library's collection, community organizations, events, and services. For more information, see "Creating and Editing Promotion Records" on page 206.



Community Records

If your library has purchased Polaris Community Profiles, a separately-licensed product, a staff member with the appropriate permissions can create or edit a community record using the Community Record workform. After the community record is created, a staff member can designate a patron as a community representative who can update and modify the record from Polaris PowerPAC. For more information, see “Community Records in the Staff Client” in the *Polaris Community Profiles Guide 4.1*.



Methods for Adding New Records

You can add bibliographic and authority records to the Polaris catalog database by manually entering original records using the MARC Editor, importing records from other sources, and copying records from remote databases. In most libraries, original cataloging is done infrequently. Instead, catalog records are usually converted from other library automation systems, produced by library vendors and conversion services, imported, or copied from other sources.

There are also several ways to create item records. You can quickly create multiple items for copies of the same title by entering information common to all the items, and then entering the branch and collection for each copy. If you are creating a single item record, you can enter the information on the Item Record workform. In either case, whether you are creating a single or multiple item records, you can use an item record template. Another method for adding item records is to create them automatically when bibliographic records are imported.

Original Cataloging

Original cataloging is the process of creating bibliographic and authority records by adding fields, indicators, subfields, and record data. Polaris has several tools to make original cataloging faster and easier. With the MARC Editor, you can select data from lists, check the MARC format, enter international characters, and use macros to automatically enter standard information. In addition, you can use templates that have default cataloging data already filled in. For more information, see "Creating MARC Records" on page 27.

Importing Records

Importing is the process of moving multiple MARC 21-formatted records into the Polaris database from an outside source. You can import bibliographic and authority records, and item records can be created from embedded holdings data in 852 tags (or other locally-defined tags, such as the 949 tag) in the imported bibliographic records. For more information, see "Setting Up Import Profiles and Importing Records" on page 55.

Copying MARC Records from Other Sources

You can modify an existing record in Polaris, or you can display and copy bibliographic and authority records from other sources. Such sources may be other libraries, suppliers, or cataloging services that make their catalog records available at no cost or for a fee. If you subscribe to ZMARC, you can search for and save bibliographic or authority records from the ZMARC database. See "Copy a MARC record from a remote source" on page 32.

Creating Preliminary Bibliographic Records in Acquisitions

You can create brief bibliographic records by typing the bibliographic information in a purchase order line item, or by pulling in title information from a supplier's database using Titles to Go. See "Adding Titles to a Purchase Order" in the *Polaris Acquisitions Guide 4.1*.

Creating Multiple Items for a Single Title

You can create multiple item records linked to the same bibliographic record using the New Item Record Options dialog box where you specify the distribution information for each item. See "Create multiple item records for a single title" on page 125.

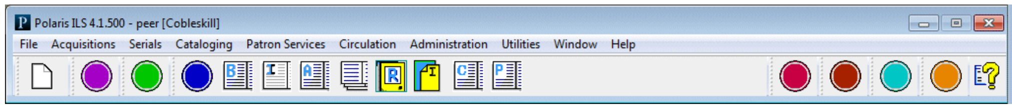
Start a cataloging task

Follow these steps to begin a cataloging task.

Tip:
Click the blue orb to expand the Cataloging toolbar. You can click the icons to open the Find Tool and search for existing Cataloging records. For example, click to search for an existing bibliographic record.

1. Start Polaris and log on.

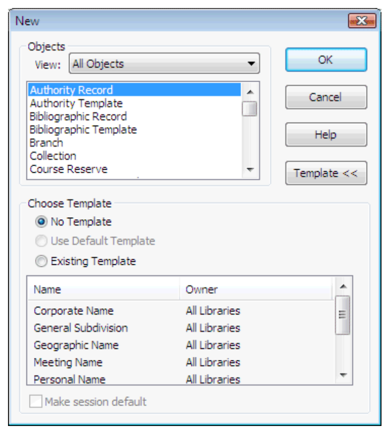
   The Polaris Shortcut Bar appears.



2. Choose one of the following options:
   - To create a new Cataloging record, select **File**, **New**, press **CTRL+N** or click .

     The **New** dialog box appears.

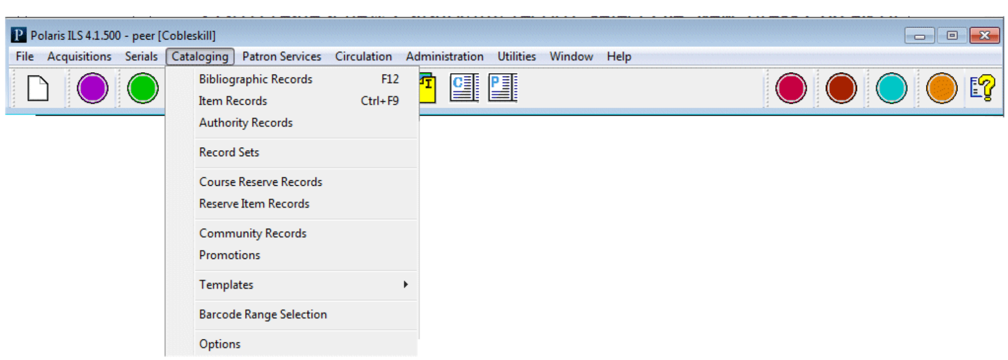
Tip:
You can select **Cataloging Objects** in the **View** box to list only Cataloging records.



Tip:
If you are creating several records of the same type using the same template, you can select an existing template, and then click **Make session default**. When you create the next record of the same type, the template you selected will be used.

Select **Existing Template** and choose a template to create a new record, or select the type of record, and click **OK**.

   - To work with an existing record, select **Cataloging** and select a menu option.



When you select a record type from the Cataloging menu, the Find Tool appears with the type of record selected. Use the Find Tool to search for the existing record.

Note:
Some Cataloging functions, such as importing and bulk changing records, are available from the **Utilities** menu. Information about Community Records can be found in "Community Records in the Staff Client" in the *Polaris Community Profiles Guide 4.1*.

Related Information

- "Finding Cataloging Records" on page 18
- "Creating MARC Records" on page 27
- "Using Cataloging Templates" on page 51
- "Setting Up Import Profiles and Importing Records" on page 55
- "Creating Item Records" on page 124
- "Creating and Using Cataloging Record Sets" on page 156

Finding Cataloging Records

You can use the Polaris Find Tool to search your library's catalog, catalogs of other libraries using Polaris, catalogs of remote libraries that do not use Polaris, and other remote databases. When you search for bibliographic records in languages other than English, you can enter diacritics and special characters. If you have a subscription to ZMARC, you can also search the ZMARC records directly from Polaris. MARC records from these outside sources can be previewed and then saved to the Polaris database.

Important:
Before you can search remote databases from the Polaris Find Tool, your Polaris administrator must set up the remote databases as targets. See "Registering Z39.50 Target Servers" in the *Polaris Administration Guide 4.1*.

When you do a search, the records are displayed in the results list, or if you selected **Count Only**, a count of the matching records is displayed. You can select a **Sort by** option to sort the records so that they display in a specified order. From the results list, you can open the record in the appropriate workform, or you can right-click the record and perform other actions from the context menu. The results list can be sorted and printed to create a quick report. You can also send the records to a record set from the Find Tool, with or without displaying them in the results list.

Note:
For more information on searching, see "Finding Polaris Records" in the *Polaris Basics Guide 4.1*.

Searching Tips

You can reduce typing by using an implicitly truncated search. For example, a title search for "bulletin" could be done using the following string: **bulle**. You have the option to use the wild card character * at the beginning and end of a search string. For example, an author search for Isaac Asimov could be done by inputting: **Asimov***. The results would contain all instances of *Asimov* as an author in the catalog.

Note:
When you do a phrase or keyword search for a title that includes an ampersand (&), the search treats the ampersand the same as the word "and". The ampersand and the word "and" are not interchangeable for exact match or browse searches.

Tip:
You can change the **Use Initial Articles Table** check box to help find records where the non-filing indicators are set improperly.

If the **Use Initial Articles** check box is checked, the initial article in a title is ignored or "stripped out" if that article is defined in the Initial Articles table in Polaris Administration. See "Defining Leading Articles" in the *Polaris Administration Guide 4.1*.

The initial articles check box is used when the search type is **Exact match** (either implicitly or explicitly truncated), and you are searching for the following records:

Tip:
The **Use Initial Articles** check box is inactive for all other searches.

- **Authority Records (Heading, Tracing/Reference)**
- **Bibliographic Records (Title and Series)**
- **Serials Check In Records (Title)**
- **Claims (Title) (both for Acquisitions and Serial versions)**
- **Course Reserve Records (Title)**
- **Hold Requests (Title)**
- **ILL Requests (Title)**
- **Invoice Line Items (Title)**
- **Issue Records (Title)**
- **Item Records (Title and Series)**
- **Part Records (Title)**
- **Purchase Order Line Items (Title)**
- **Reserve Item Records (Title)**
- **Route Lists (Title)**
- **Selection List Line Items (Title)**
- **Serial Holdings Records (Title)**
- **Subscription Records (Title)**

Shortcut Keys to Search for Bibliographic and Item Records

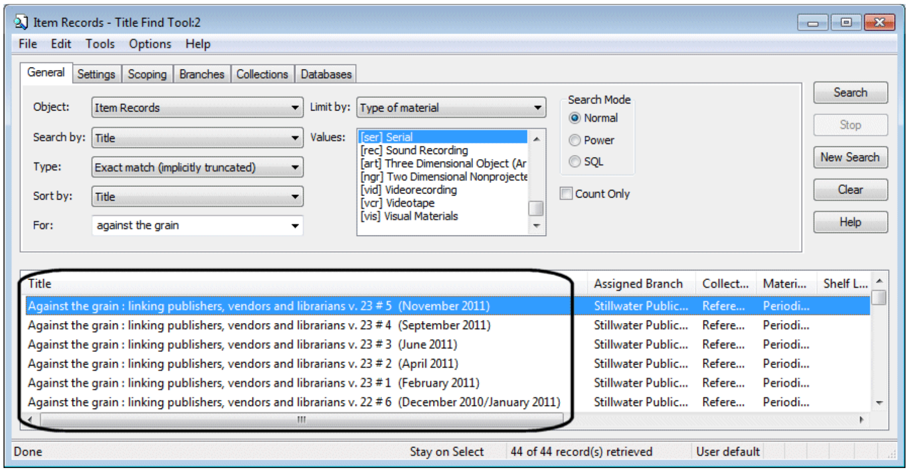
From anywhere in the Polaris application, you can use the following shortcut keys to bring up the Find Tool to search for cataloging records.

- Bibliographic Records - **F12**
- Item Records - **CTRL+F9**

For a list of other shortcut keys, see "Cataloging Shortcut Keys" on page 241.

Viewing Serial Item Records in the Polaris Find Tool

When you search for serial item records, you may need to expand the **Title** column in the Polaris Find Tool results list to see the serial item's designation because it is appended to the title. You can drag the bottom right corner of the window, then drag the **Title** column border right to expand it. The serial item's designation is displayed at the end of the title.



Access Points for Cataloging Records

Tip:
Searching a remote database for bibliographic records requires the access point to have a standard Bib-1 Attribute, which are not defined for some access points, such as UPC. If you are searching a remote database for bibliographic records by UPC, select the access point **Standard system number**, and enter the UPC barcode number.

The **Search by** box on the Find Tool contains index criteria specific to the type of record you want to find. The available search types depend on what is selected in the **By** box. You can narrow your search using a **Limit By** option and entering a limit by value.

You can customize the Find Tool with your preference for searching by setting up your search for a specific type of record, and then selecting **Options, Save as User Default**. For example, you can set the value in the **By** box to **Title** when you search for bibliographic records. Each time you log on to Polaris and search for a bibliographic record in Cataloging, **Title** will be in the **By** box. You can change your user defaults or set them back to the system defaults at any time. See “Find cataloging records in your library’s database” on page 22.

Searching for Items or Bibliographic Records by RFID Tag

The option to search by RFID tag is located under the **Tools** menu. When **RFID Read Tag** is selected, the **Search by** selection is set to **Barcode** automatically. You can also search for the linked bibliographic record by scanning the RFID tag. Select **Tools, RFID Read Tag** and scan the tag using the RFID reader. The item record is displayed in the Find Tool results.

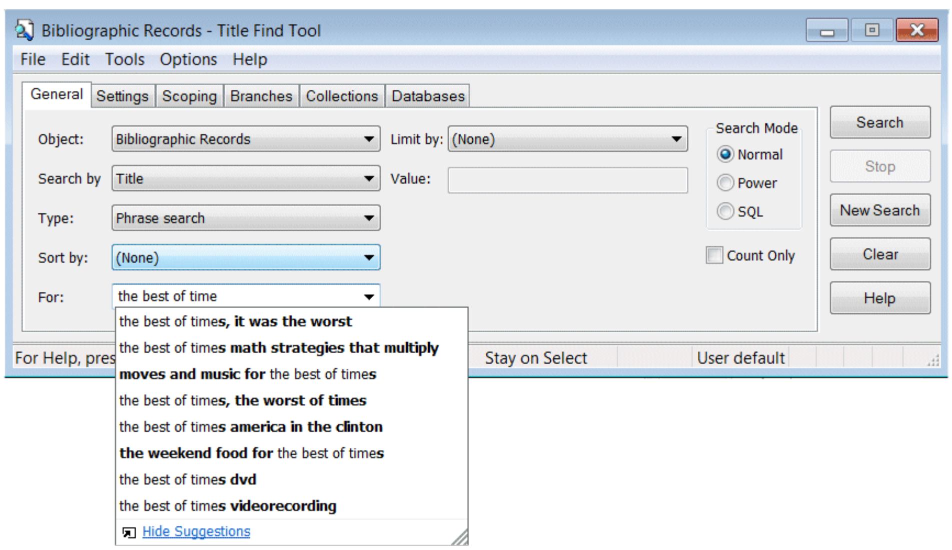
Sorting the Results List

You can select a **Sort by** option to sort the results before they are displayed. The **Sort by** options depend on the type of record selected. For example, you could search for bibliographic records by subject and sort by **Title, then Author, then Type of Material**. Sorting options can also be saved as a user default.

Note:
For more information on searching in Polaris, see "Finding Polaris Records" in the *Polaris Basics Guide 4.1*.

Automatic Suggestions for Keyword and Phrase Searching

As you type a keyword or phrase for a bibliographic, item, or authority record, suggested titles or headings appear if the **Auto-suggest feature enabled** Cataloging parameter is set to **Yes** in Polaris Administration. Select one of the suggestions to see the matching records. You can turn off automatic suggestions by clicking on **Hide Suggestions**. To show suggestions when they are hidden, click on the right side of the text entry box.



Linking Between Records

Certain types of cataloging records are linked in Polaris. For example, item records are always linked to a bibliographic record. You can easily navigate from a record to its linked records by selecting **Links** from the workform. You can also link from a cataloging record listed in the Find Tool results, a list box, or a list view (such as records listed in a record set). For more information, see "Linking to Other Records" in the *Polaris Basics Guide 4.1*.

Find cataloging records in your library's database

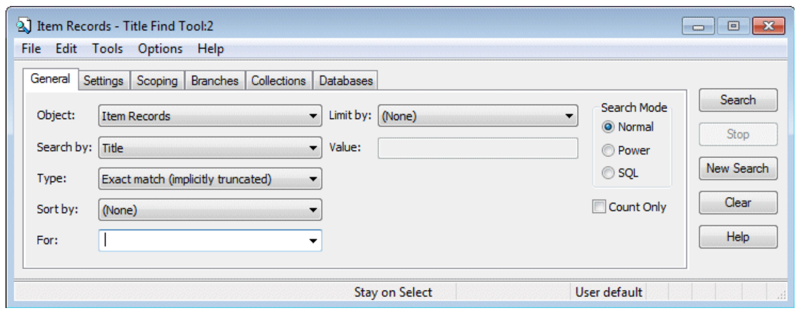
Follow these steps to find and list bibliographic records, item records, authority records, templates, or record sets in your local database.

Tip:
To search for bibliographic records from anywhere in the Polaris application, press F12. To search for item records press Ctrl+F9.

Tip:
You can tab from field to field in the Find Tool.

1. From the Polaris Shortcut Bar, select **Cataloging**, or press **ALT+C** to display the Cataloging menu.
2. Select a record type from the Cataloging menu.

   The Polaris Find Tool appears.



   You can change the type of record in the **Object** box.

3. Select the search access point in the **Search By** box.

Tip:
If you are searching for a bibliographic record, you can search for a 10-digit or 13-digit ISBN. You can also search by the Other Standard Identifier (which can be a UPC code or stock number). The Other Standard Identifier may be used when searching for non-print items that do not have an ISBN.

4. If you would typically search for this type of record using the same search criteria, select **Options, User Default** to save your search options. When you search for the same type of record from a different subsystem, you may need to set a different user default. To set the option back to the system default, select **Options, Revert to System Default**.
5. Select the search type in the **Type** box:
   - To find anything that begins with the contents of the **For** box, select **Exact match (implicitly truncated)**.
   - To find anything that has exactly the contents of the **For** box, select **Exact match (explicitly truncated)**.
   - To open an index that begins with the contents of the **For** box, select **Browse**.
   - To find any occurrence of the contents in the **For** box, select **Keyword search**.
   - To find the entries in the **For** box adjacent to each other in the data, and in order, select **Phrase search**.

Tip:
If you are doing a keyword or phrase search for a bibliographic or authority record, you may see automatic suggestions as you type.

6. To sort the search results, select an option in the **Sort by** box. Sort is not available in Browse searches.
7. Type your search text in the **For** box.
8. To limit your search results, select an option in the **Limit by** box, and either select a value or type it in the **Value** box. Some **Limit by** options have pre-set selections in the **Value** box. For example, if you select **Language**, a list of languages appears in the **Value** box. If you select **Author**, you type the author's name in the **Value** box.

Tip:
If you just want a count of the records without seeing them in a list, click **Count Only**.

9. Click **Search**, or press **Enter** or **ALT+S**.

   A list of records matching your search criteria appears at the bottom of the Find Tool (unless you selected **Count Only**). You can use the scroll bar to scroll through the list of results, or use the up and down arrows on your keyboard.

10. Double-click the record to open the record in its workform, or right-click and choose an option from the context menu. Depending on the record type, you can perform various actions on the record without opening it in the workform.

Related Information

- **Setting limits on the number of records returned** - See “Set Find Tool results limits” in the *Polaris Basics Guide 4.1*.
- **Searching databases other than your library’s database** - See “Search multiple and remote databases” in the *Polaris Basics Guide 4.1*.
- **Searching using an SQL query** - See “Do an SQL search” in the *Polaris Basics Guide 4.1*.
- **Using the Power Search option** - See “Do a power search” in the *Polaris Basics Guide 4.1*.
- **Using scoping to narrow your search** - See “Do a search with scoping” in the *Polaris Basics Guide 4.1*.
- **Sending all search results to a record set** - See “Create a record set from all the Find Tool results” in the *Polaris Basics Guide 4.1*.

Preview bibliographic records from the Find Tool

Follow these steps to preview bibliographic records from the Find Tool results list without opening the records.

1. Select **Cataloging, Bibliographic Records** from the Polaris Shortcut Bar, or press **F12**.

   The Find Tool appears.

Tip:
You can preview bibliographic records from remote databases, but the circulation statistics do not appear.

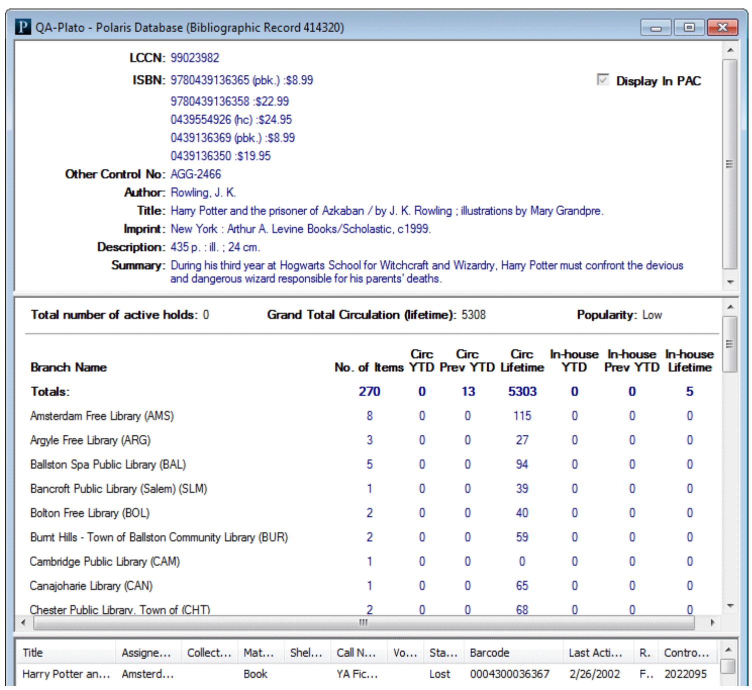
2. Search for the bibliographic record or records. See "Find cataloging records in your library's database" on page 22.

   The records that match the search criteria appear in the results list.

3. Select the bibliographic record that you want to preview, right-click, and select **Preview**.

Tip:
To preview other bibliographic records in the list, leave the Preview window open, click in the Find Tool results list, and press the down arrow key.

The Preview window displays brief bibliographic information about the selected record, circulation statistics (including totals for all items and all branches), popularity ranking, and linked item records.



Tip:
To see more of any part of the window, drag the panel edges.

The popularity ranking is determined as follows:

- If no linked item records were circulated or held within the last four months, the popularity is **Low**.
- If at least one linked item was circulated *or* held within the last four months, the popularity ranking is **Medium**.
- If one or more linked item records were circulated *and* one or more linked item records were held within the last four months, the popularity ranking is **High**.

Creating, Copying, and Editing MARC Records

You can create an original bibliographic or authority record in the Bibliographic or Authority Record workform using various editing features. You can also search a remote database and copy a MARC record to create a new one in Polaris.

For information on creating item records, see "Maintaining Item Records" on page 123.

Note:
You can also add MARC records to your catalog by importing or copying them. See "Setting Up Import Profiles and Importing Records" on page 55

This unit covers the following topics:

Terms

008 field A 40-character field used to identify and retrieve records matching specific criteria. In bibliographic records, specific codes indicate whether a book is large print, identify the country of publication, identify juvenile materials, indicate the language of the text, and so on. In authority records, the 008 field includes coding for subject heading, system/thesaurus, and appropriate heading use.

content designators Tags, indicators, and subfield codes.

delimiter A character that separates subfields.

diacritical mark Any of various marks, such as a macron or cedilla, added to a letter or symbol to indicate its pronunciation or to distinguish it in some way.

field (MARC record) Each authority and bibliographic record is divided logically into fields. There is a field for the author, for the title information, and so on. These fields are subdivided into one or more subfields. Fields are represented by 3-digit tags.

indicator Two character positions follow each tag (with the exception of Fields 001 through 009). One or both of these character positions may be used for indicators. In some fields, only the first or second position is used; in some fields, both are used; and in some fields, like the 020 and 300 fields, neither is used. When an indicator position is not used, that indicator is referred to as “undefined” and the position is left blank.

Leader The first field in all MARC records, fixed in length at 24 character positions. It contains data elements that provide information for the processing of the record. The data elements contain numbers or coded values and are identified by a relative character position.

macro A sequence of keyboard actions that can be recorded once and replayed on demand.

subfields Most fields contain several related pieces of data. Each type of data within a field is called a subfield, and each subfield is preceded by a subfield code. Fields 001 through 009 do not have subfields.

subfield code Subfield codes are one lower-case letter (occasionally a number) preceded by a delimiter. Each subfield code indicates what type of data follows it.

tag Each field is associated with a 3-digit number called a tag. A tag identifies the type of data that follows it. Tags are generally organized by hundreds as follows:

0xx - control information, numbers and codes
1xx - main entry
2xx - titles, edition, imprint, publication information
3xx - physical description
4xx - series statements
5xx - notes
6xx - subject added entries
7xx - added entries other than subject or series
8xx - series added titles
9xx - codes left for locally-defined uses

For more information on MARC 21 Format for Bibliographic records, see the Library of Congress web site at:

http://www.loc.gov/marc/bibliographic/ecbdhome.html

For more information on MARC 21 Format for Authority records, see the Library of Congress web site at:

http://www.loc.gov/marc/authority/ecadhome.html

Creating MARC Records

When you create an original bibliographic record, you can save it with a status of provisional or final. Provisional records are not displayed in the public catalog, they are not indexed, and they cannot be linked to final item records. Final records are fully indexed for searching and you can choose to display them in the PAC.

The contents of Polaris bibliographic records are displayed in the MARC Editor view of the Bibliographic Record workform. This view shows the MARC Leader, tag number, indicator, subfield, and data format. You can also preview how the record displays in the public access catalog. To change the record, you can edit it in the MARC Editor view.

Note:
Using Polaris Administration settings, your Polaris Administrator specifies whether call number and price fields are copied from bibliographic records to their linked item records. If the options are set to copy the call number and price data, your System Administrator also defines the order in which specific bib tags are checked for the call number and price data. See "Copying Bib Data to Items" in the *Polaris Technical Services Administration Guide 4.1*.

Authority records provide uniformity in the forms of names and some types of titles and subject headings. They also provide a system of cross-references to "instead of" headings (**See** references), and references to other related "like" headings (**See Also** references).

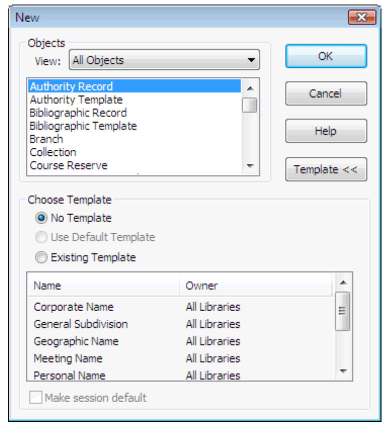
Note:
When you save a bibliographic record and there are no matching authority records for a heading, you can automatically create an authority record to match the heading. See "List and resolve unlinked headings" on page 108.

Create a new bibliographic record

Follow these steps to add a new bibliographic record to the Polaris database.

1. Select **File, New**, press **CTRL+N**, or click from the Polaris Shortcut Bar.

   The New dialog box appears.



2. Select **Bibliographic Record** from the **Objects** list.

3. To use a template to create the new bibliographic record, do the following steps:

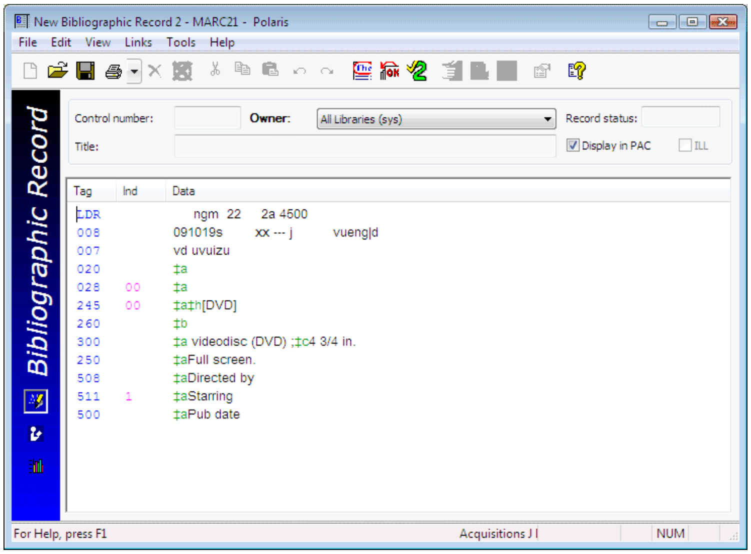
   Note:
   For more information on creating templates, see “Using Cataloging Templates” on page 51.

   a) Select **Existing Template**, and select a bibliographic template from the list.

   Note:
   If you are creating multiple records using the same template, you can select the **Make default** box. When you create the next bibliographic record in the same session, the template you chose will be selected automatically as the default.

   b) Click **OK**.

   The Bibliographic Record workform appears with the information from the template. Depending on the data already in the template, you may or may not need to do all the steps in this procedure.

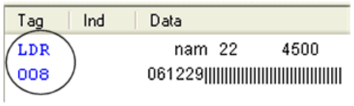


4. Indicate whether you want the record to display in the public catalog by selecting the **Display in PAC** check box to display the title in the PAC, or by clearing the check box to limit the title to staff display only.

5. Select the owner of the bibliographic record in the **Owner** box.

Note:
The record owner is the organization that can determine the permissions for the record.

6. Double-click **LDR** in the Tag column.



Tip:
If **LDR** does not appear, place the cursor in the first position (far left) of the Tag column, and press **CTRL+L**.

Tip:
To insert subfield delimiters, press **CTRL+Q**.

7. Enter the values for Leader positions 05, 06, 07, 08, 17, 18, and 19. See "Change the MARC Leader" on page 37.

8. Edit the values for the 006, 007, or 008 fixed fields, as needed. See "Edit the 008 field in a MARC record" on page 38 or "Add 006 and 007 fixed fields" on page 39.

9. Type additional tags, subfields, and enter data.

10. When you finish adding the bibliographic tags, save the record by choosing one of the following options:
   - If the record is ready for use in Polaris, select **File, Save**, press **CTRL+S** or click .

     Note:
     Non-provisional records are saved with a status of final if no errors are found in the headings and tags. If there are errors in the record, an error dialog box appears.

   - To save the bibliographic record provisionally, select **File, Save Provisionally**. To edit the record later, save it provisionally.

If the Cataloging profile **Bibliographic records: Warning for records saved with display in PAC unchecked** is set to **Yes**, a warning message appears if the Display in PAC check box is unchecked. You can check the **Display in PAC** check box on the Bibliographic Record workform, or you can continue to save the record. For more information on the Cataloging profile, see "Set warning message for bibs that will not display in PAC" in the *Polaris Technical Services Administration Guide 4.1*.

11. To see how the title will display in the PAC, select **View, PAC.**

Related Information

- "Configuring the PowerPAC Title Display" in the *Polaris Public Access Administration Guide 4.1*.
- "Preview the Title Display in the PAC" on page 6
- "Web Links Display in the PAC" on page 8
- "Type of Material Codes (TOMs)" on page 219
- "Editing MARC Records" on page 36
- "Checking Authority Headings" on page 106
- "Checking MARC Format" on page 115
- "Checking for Duplicate Records" on page 118

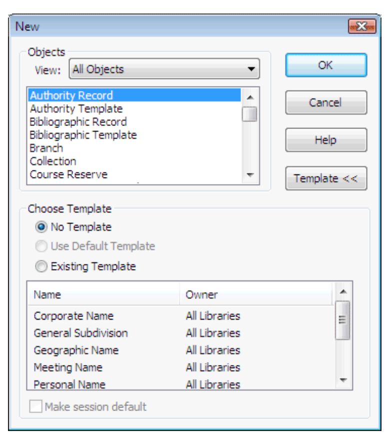
1-2-3

Create a new authority record

Follow these steps to create an original authority record in Polaris.

1. Select **File, New**, press **CTRL+N**, or click from the Polaris Shortcut Bar to display the New dialog box.

   The New dialog box appears.



2. Select **Authority Record** from the Objects list.
3. To use a template to create the new authority record, do the following steps:

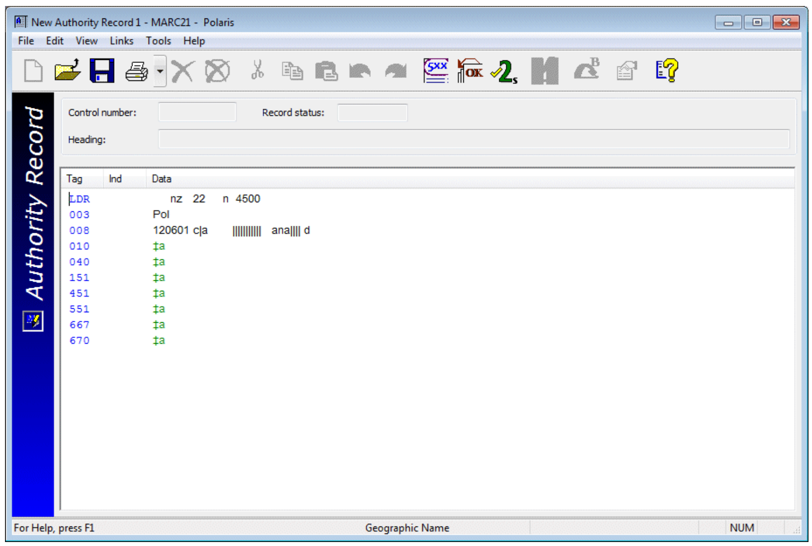
Note:
For more information on creating templates, see “Using Cataloging Templates” on page 51.

a) Select **Existing Template**, and select an authority record template from the list.

Note:
If you are creating multiple records using the same template, you can select the **Make session default** box. When you create the next authority record in the same session, the template you chose will be selected automatically as the default.

b) Click **OK**.

The Authority Record workform appears with the information from the template filled in. If you chose **No Template**, a blank Authority Record workform appears.



Tip:
You can set Authority Leader positions 05, 06, and 17. The remaining positions are supplied automatically.

4. Use the MARC Editor commands to add tags and subfields as needed. See “Editing MARC Records” on page 36.

Note:
When you save an authority record, it is automatically checked for MARC format, duplicates, and authority headings. However, you can resolve any problems before saving the record by performing these checks first (see “Checking Cataloging Records” on page 105).

Tip: 
Click to save the record as complete.

5. Select **File, Save** to save the authority record.

The record was saved successfully appears if no errors were found.

Related Information

- “Checking MARC Format” on page 115
- “Checking for Duplicate Records” on page 118
- “Checking Authority Headings” on page 106

Copying MARC Records

You can locate bibliographic or authority records in remote databases (such as the Polaris ZMARC database) and copy them into the Polaris database. To search a remote database, it must be configured in Polaris Administration and identified for your organization in the Search Database policy table. See "Controlling Database Access" in the *Polaris Administration Guide 4.1*. To subscribe to the Polaris ZMARC database, contact your Polaris Site Manager.

Copy a MARC record from a remote source

Follow these steps to copy bibliographic or authority control records from a remote library catalog.

Important:
When you are copying records, you should always check for potential duplicates that may exist in your database, and you should check the format and headings.

1. From the Polaris Shortcut Bar, select **Cataloging** and select **Bibliographic Records** or **Authority Records**.

   The Polaris Find Tool appears.

2. In the **Search by** box, select the access point by which to find the record.

   Note:
   You can search for a 10-digit or 13-digit ISBN. The search process checks for a matching ISBN in the 020 tag and in the 024 tag with a 3 in the first indicator.

Most likely to return results	*May not be indexed in target catalog, so may not return results*	
• All indexed fields (both searches) • Author (bibliographic search) • Heading (authority search) • ISBN (bibliographic search) • ISSN (bibliographic search) • LCCN (both searches) • Series (bibliographic search) • Subject (bibliographic search) • Title (bibliographic search) • Tracing/Reference (authority)	• CODEN • Dewey classification • General Notes • Genre • Gov doc classification • LC classification • NAL classification • NLC classification	• NLM classification • Other system control # • Publisher • Publisher's number • STRN • UDC Classification

3. Select the type of search in the **Type** box.

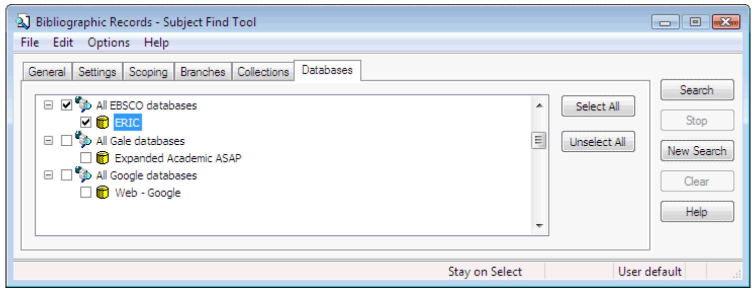
   Note:
   The target database may not allow some of the Find Tool search types. Many remote catalogs support only keyword searches. Also, sorting search results may not work with remote databases.

4. Type the description of the item in the **For** box.

> **Note:**
> Implicit truncation is not supported when searching remote databases. End the search for text with the wild card symbol (*****) if you are unsure of an exact match. For example, type **Asimov, Isaac***.

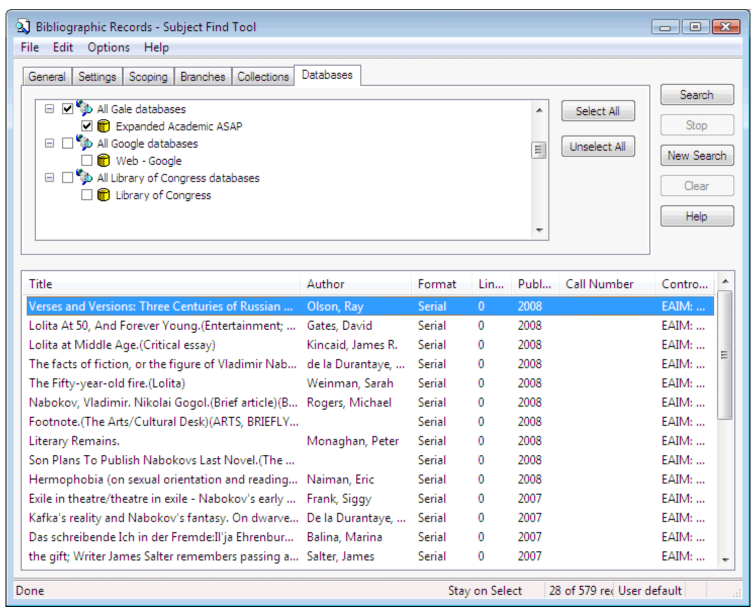
5. Select **Databases** to display the remote databases.

6. Select the check box next to the remote database or databases you want to search.



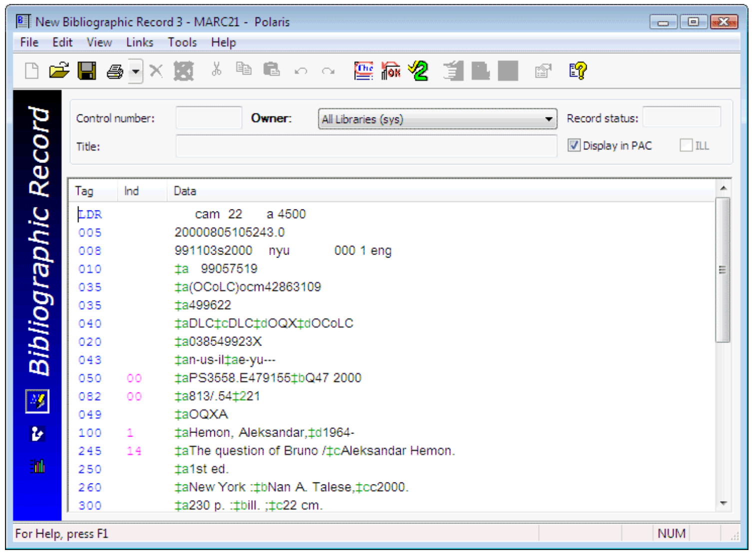
7. Click **Search** to start the catalog search.

A dialog box appears with a list of the bibliographic records in the selected database that match your query.



8. Double-click the record, or right-click and select **Open** from the context menu.

The selected record appears in the Bibliographic Record or the Authority Record workform. The **Record status** and **Control Number** boxes are blank because this record does not yet belong to your Polaris catalog.



9. Do the following checks as needed:

   Note:
   These checks are automatically done when you save the record as final. You do not necessarily need to do these checks as part of your workflow.

   - To check for duplicate records, select **Tools, Check For Duplicates** (see "Checking for Duplicate Records" on page 118).
   - To check authority headings, select **Tools, Check Headings** on the Bibliographic Record workform or **Tools, Check See Also From References** on the Authority Record workform. See "Checking Authority Headings" on page 106 for detailed instructions on checking headings.
   - To check MARC format, select **Tools, Check MARC21 Format**. See "Checking MARC Format" on page 115 for detailed instructions on using this tool.

10. Make changes to the record as needed.

11. Select **File, Save**, press **CTRL+S**, or click to save your record.

    Polaris checks the MARC 21 format and headings, and checks for any duplicate records. If no errors are found, **Record was saved successfully** appears in the status bar. If any problems are listed, correct the problems as directed by your library cataloging policy to finish saving the record. When the record is saved, a control number and record status are assigned automatically.

Related Information

- **Set up a remote database target** - See "Define a remote Z39.50 server connection" in the *Polaris Administration Guide 4.1*.
- **Polaris ZMARC** - Polaris Library Systems offers a subscription to the Polaris ZMARC database that gives you access to over 11 million bibliographic records and 7 million authority records cataloged by the Library of Congress.

  Polaris Library Systems sets up ZMARC as a Z39.50 target in Polaris Administration. You can select the ZMARC databases from the list of established targets on the Database tabbed page of the Polaris Find Tool.

  After ZMARC is established as a remote database that you can search, you can set it up for a source of authority records for automatic authority control. See "Checking Authority Headings" on page 106.

Editing MARC Records

The MARC 21 views of the Bibliographic Record workform and the Authority Record workform display the MARC coding. The MARC 21 view includes the following features that help improve efficiency and accuracy when you enter MARC data:

Tip:
To see how the title will appear in Polaris PowerPAC, select **View, PAC** on the Bibliographic Record workform. The type of material icon that displays in Polaris PowerPAC is determined by the primary type of material. For more information, see "Type of Material Codes (TOMs)" on page 219.

- **Shortcut key combinations** - See "Cataloging Shortcut Keys" on page 241.
- **Copy and paste capability** - You can copy and paste text from other Polaris records and third-party records, such as LC subject headings and Classification Plus. When you paste the text, it conforms to the default font, size, and color used in this view.
- **Dialog boxes for selecting the leader and fixed fields** - The available values in the dialog boxes depend on the selections in other fields. For example, the dialog box that appears in the 008 field depends on the type of record specified in the Leader.
- **Macros** - Record and then "play back" frequently-used text and command sequences.
- **Automatic sorting of MARC data** - Enter fields in any order, and automatically sort the order according to the MARC Validation Editor settings. See "Administering MARC Validation and Display" in the *Polaris Technical Services Administration Guide 4.1*.
- **MARC field descriptions** - The descriptions display automatically in the bottom of the MARC 21 view if your administrator has turned on the automatic display. If the description does not display automatically, you can press **CTRL+L**, or select **Display Description** from the context menu. Your Polaris administrator can customize the descriptions that appear. See "Administering MARC Validation and Display" in the *Polaris Technical Services Administration Guide 4.1*.
- **Automatic checking when you save the record** - The record is checked for MARC format and for duplicate records. For more information, see "Checking Cataloging Records" on page 105.

Tip:
If you enter MARC data using an international keyboard, the keyboard shortcuts may not work correctly. Change the keyboard back to English to use keyboard shortcuts.

- **Ability to enter diacritics or vernacular script** -You can use a character picker dialog box to enter single characters or a diacritical mark. Or, if you frequently enter text in languages other than English, you can change your keyboard settings in Windows to add an international keyboard. "Enter diacritics or non-Roman characters using an IME keyboard" on page 41. The Polaris catalog supports full UTF-16 Unicode.

Change the MARC Leader

Follow these steps to change the values for the Leader positions in a bibliographic or authority record.

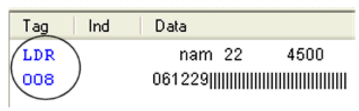
1. Open the Bibliographic Record or Authority Record workform.

   When you open a new bibliographic or authority record, the following information appears in the Leader data column:

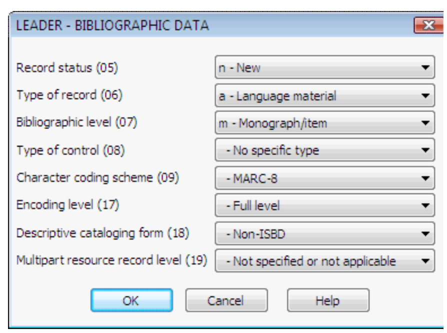
   - For a new bibliographic record, the default data in the Leader is **NAM**. This indicates that the record status is new, the type of record is language material, and the bibliographic level is monograph/ item.
   - For a new authority record, the default data in the Leader is **nz 22 n 4500**. This indicates that the record status is new, the type of record is authority dateless, the record is in MARC format, and the encoding level is complete authority record.

Tip:
If the record does not have a leader tag, press **CTRL+L** to insert the LDR tag.

2. Double-click **LDR** in the **Tag** column.



   The Leader - Bibliographic Data or the Leader - Authority Data dialog box appears.



3. Enter or change the values in the Leader positions as required.

Tip:
The Type of Record (LDR/06) and Bibliographic Level (LDR/07) values determine which dialog boxes are available to set the 008 fixed data.

4. Select from the lists to change the information in the leader.
5. Click **OK**.

   The selections you chose appear in the **LDR** data column.

Edit the 008 field in a MARC record

When you create a new bibliographic or authority record, the Leader and the 008 fixed field automatically appear. The data in the 008 fixed field is the current date. You can add data to the field by typing in the Data column or by using the dialog box. Follow these steps to edit the values in the 008 fixed field.

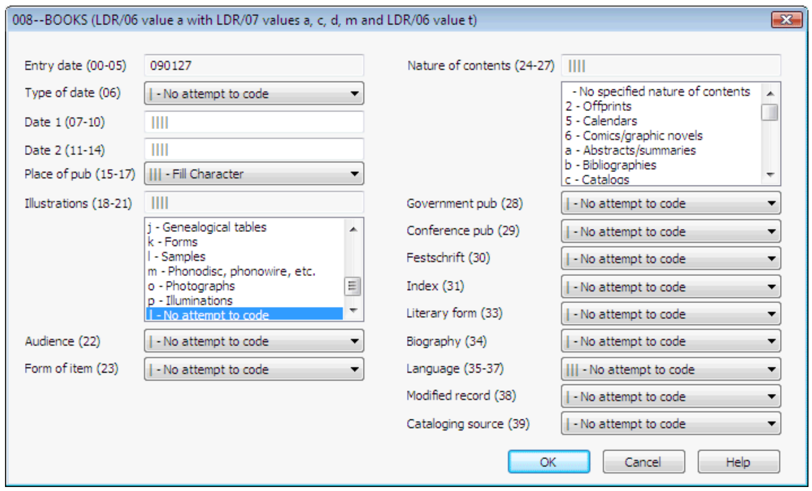
1. Open the Bibliographic Record or Authority Record workform.

Tip:
Click the **Help** button in any of these dialog boxes to get help with the MARC codes.

2. Double-click the 008 tag.

   A dialog box appears.

   Note:
   The dialog box that appears depends on what type of record you specified in the Leader.



3. Choose the appropriate options in the dialog box to change the data in the 008 fixed field.
4. Click **OK**.

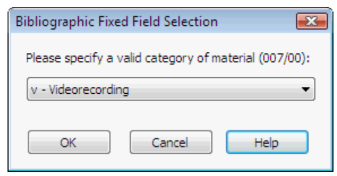
   The 008 field is updated.

Add 006 and 007 fixed fields

To add more information regarding the physical characteristics of the material, use the 006 and 007 fixed fields. Follow these steps to add the 006 and 007 fixed fields in a bibliographic record.

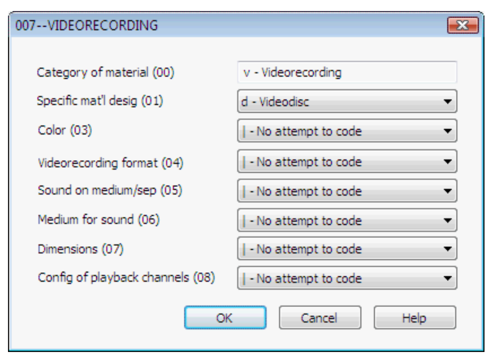
1. Open the Bibliographic Record workform.
2. Position the cursor after the Leader or at the end of any line.
3. Press **Enter** to insert a new line.
4. In the **Tag** column, type one of the following codes:
   - Type **007** for a physical description fixed field.
   - Type **006** for an additional material characteristics field.
5. Double-click the 006 or 007 tag, or position the cursor on the tag and press **CTRL+E**.

   The Bibliographic Fixed Field Selection dialog box appears.



6. Select a form or category of material, and click **OK**.

   A dialog box appears where you can enter more specifics regarding the material. The dialog box that appears depends on the entry you choose in the Bibliographic Fixed Field Selection dialog box.



7. Select from the list boxes to further define the material, and click **OK**.

   The MARC 21 view displays the completed 006 or 007 tag.

Add a MARC tag to a record

Follow these steps to add a tag to a MARC record.

Tip:
The description of the field displays at the bottom edge of the workform. If the workform is positioned too far down on the screen, you may not be able to see the description. Move the workform toward the top of the screen, if necessary.

1. Open the Bibliographic Record or Authority Record workform.
2. Place the cursor at the end of a line.
3. Press **Enter** to insert a new line.
4. Enter the tag number in the **Tag** column of the new line.
5. Enter indicators, subfields, and data as required for the tag.

Insert a subfield

Follow these steps to insert a subfield into a tag in a MARC record.

> **Important:**
> The keyboard shortcut to insert the subfield delimiter is **CTRL+Q**. Do not use **CTRL+D** because this key combination deletes the displayed record.

1. Open the Bibliographic Record or Authority Record workform.
2. Position the text cursor in the field where you want to insert the subfield.

   > **Note:**
   > At the beginning of a field, it is not necessary to insert the delimiter. Type the subfield code and the delimiter is inserted automatically.

3. Select **Tools, Insert Delimiter**, or press **CTRL+Q** to insert the subfield delimiter.
4. Type the subfield code.
5. Type the subfield information.

Move a block of text

Follow these steps to select and move a line or multiple lines of text in a MARC record.

1. Open the Bibliographic Record or Authority Record workform.
2. Select (highlight) the text you want to move.
3. Position the cursor over the selected text.

Tip:
Press **CTRL+X** to cut the highlighted text. Position the cursor where you want to move the text, and press **CTRL+V** to paste it.

4. Press and hold the command (left) button on the pointer.
5. Move the cursor to the location where you want to move the text.

   > **Important:**
   > Be sure you do not move the text into the middle of a tag line or subfield.

6. Release the command button.

   The highlighted text appears in the new location.

Enter diacritics or non-Roman characters using an IME keyboard

Note:
For optimal display of all characters, be sure Arial Unicode MS font is installed on the workstation.

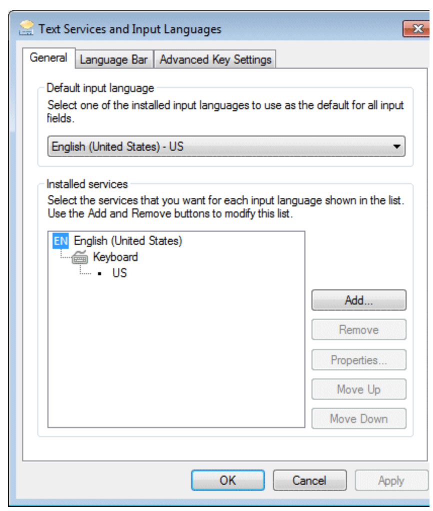
If you frequently enter diacritics or vernacular script using non-Roman characters, add Input Method Editor (IME) keyboards so you can switch back and forth between English and other languages using the keyboard. To enter single characters or diacritics, you can select characters from a dialog box. See “Choose a character/diacritic mark from a chart” on page 43.

Follow these steps to enter diacritics or non-Roman characters using an Input Method Editor (IME) keyboard.

Tip:
The steps for using IME keyboards differ slightly depending on which version of Windows is installed.For more information, see Microsoft’s web site at **www.microsoft.com**.

1. Go to **Control Panel, Region and Language**, and select the **Keyboards and Languages** tab. Then, click **Change keyboards**.

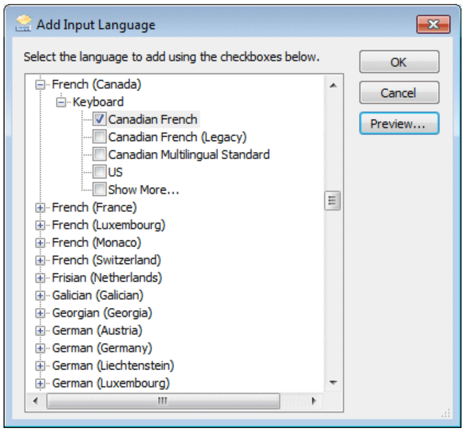
   The Text Services and Input Languages dialog box appears.



2. Click the **Add** button.

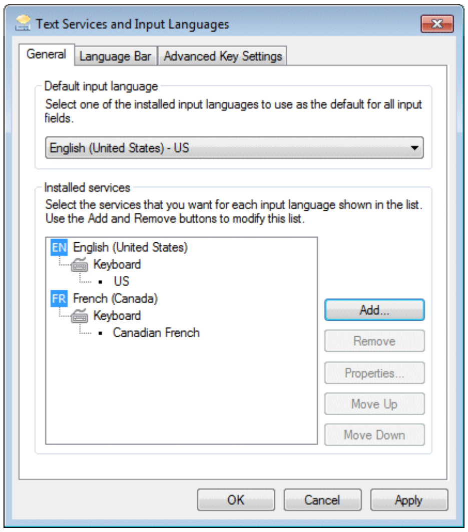
   The Add Input Language dialog box appears.

3. For each language keyboard you want to add, select and expand the language and **Keyboard** to see the check box options.



4. Select the types of keyboard for the languages, and click **OK**.

   The added language(s) appear in the Add Input Language dialog box.



5. Click **Apply**.

   The language(s) appear in the language bar.

6. Select the language in the language bar.
7. Type the characters in the Bibliographic Record or Authority Record workform using the international keyboard.

   Important:
   Set up all your cataloging templates with the English keyboard selected because keyboard combinations, such as **CTRL+Q** for inserting a delimiter, may not work if you have an international keyboard selected.

Choose a character/diacritic mark from a chart

Follow these steps to insert an international character into a MARC record by selecting the character or diacritic mark from the Character Picker dialog box.

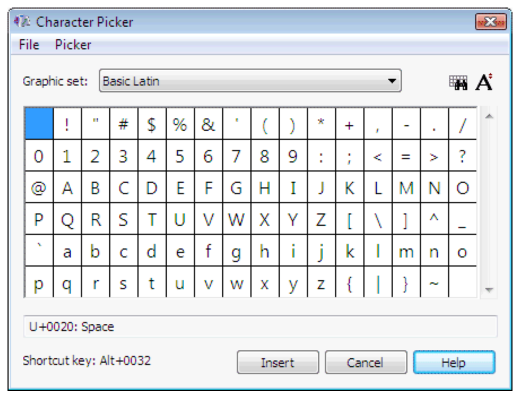
Tip:
If you frequently enter diacritics, you can add Input Method Editor (IME) keyboards and switch back and forth from the English keyboard to the international keyboards. See "Enter diacritics or non-Roman characters using an IME keyboard" on page 41.

Tip:
Press **SHIFT+F10**, **D** to display the Character Picker dialog box.

Important:
When you enter a combining diacritic mark next to a subfield designator, insert the base character before the combining mark.

1. Open the Bibliographic Record or Authority Record workform.
2. Position the text cursor where you want to insert the international character.
3. Select **Tools, Diacritics** or right-click anywhere in the workform, and select **Diacritics** from the context menu.

   The Character Picker dialog box appears.



4. Choose which character set you want to use in the **Graphic set** box.

   Note:
   The language sets that are displayed in the **Graphic set** box depend on the language settings for your computer and the fonts installed on your computer.

5. Select the international character you want to insert.
6. Click **Insert**.

   The selected international character is displayed in the MARC 21 view. You can leave the Character Picker dialog box open for as long as you need it.

Insert a character/diacritic using a code

Follow these steps to insert an international character into a MARC record by typing the character code on the numeric keypad.

Important:
When you enter a combining diacritic mark next to a subfield designator, insert the base character before the combining mark.

1. Open the Bibliographic Record or Authority Record workform.
2. Position the text cursor where you want to insert the international character.
3. If you are combining characters, type the base character.
4. Press and hold **ALT** while you type the decimal character code on the numeric keypad.

   The numeric codes are displayed on the Character Picker dialog box.

   Example:
   To insert a Latin capital letter O with a tilde diacritic (Õ), type **o**. Then hold down the **ALT** key while typing the numbers **0771** using the number keys that are arranged like the keypad on a calculator. (Do not use the number keys above the letter keys on the keyboard.) When you release the **ALT** key, the tilde appears over the O.

5. Release the **ALT** key after you finish typing the character code numbers.

   The international character is displayed in the MARC 21 view.

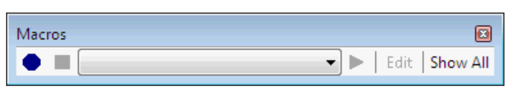
Record a macro

If you frequently use the same text in your MARC records, you can record the keystrokes and save them in a macro that you can use again. Your macros are available when you log on. Follow these steps to record the keyboard actions to include in a macro.

Note:
Plan the tags and fields you want in the macro before recording it.

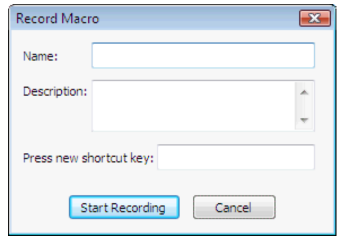
Tip:
Press **ALT+F8** to display the Macros tool bar.

1. Open the Bibliographic Record or Authority Record workform.
2. Select **Tools, Macros** to display the Macros tool bar.



3. Place the cursor in the MARC record where you want to begin the keyboard actions that you want to record.
4. Click (Record button) to open the Record Macro dialog box.

Tip:
You can stop recording the macro at any time by clicking **Cancel** on the Record Macro dialog box.



5. Type a name for the macro in the **Name** box.

   The macro name must be different from the other names in your macro list. The name you define is displayed in the Macros box on the Macros tool bar after you record the macro. You can use up to 50 alphabetic characters, numbers, and spaces to name the macro.

6. Type text describing the macro in the **Description** box.

   Your description should be a short explanation of the purpose of the macro. You can use up to 255 alphabetic characters, numbers, spaces, and punctuation in your description.

7. In the **Press new shortcut key** box, press the keys for the keyboard shortcut.

   Example:
   You could use **SHIFT**+**CTRL+B** as the shortcut to start the macro that enters data for a bindery.

   Important:
   You cannot use key sequences **CTRL**+**A** through **CTRL**+**Z** or function keys in macros because they are reserved for Microsoft Windows or Polaris functions.

8. Click **Start Recording**.

   The Record Macro dialog box closes.

9. Type the tags, fields, and subfields exactly as you want them to be stored in the macro.

Tip:
Test your macro on a disposable MARC record before you use the macro in your regular workflow.

10. After you have completed all of the actions you want recorded, click ■ (Stop button).

    The macro is listed in the Macros box on the Macros tool bar.

Related Information

- "Apply a macro" on page 46
- "Change a macro" on page 47
- "Delete a macro" on page 47
- **Print macros** - You can print reports that list authority record and bibliographic record macros. See "Cataloging Reports" in the *Polaris Basics Guide 4.1*.

Apply a macro

Follow these steps to use a macro to edit a MARC record.

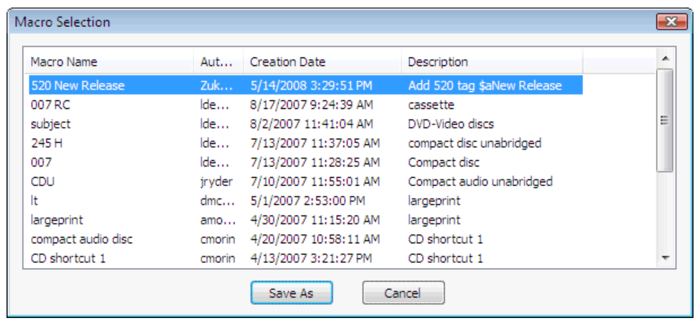
1. Open the Bibliographic Record or Authority Record workform.
2. Place the cursor in the MARC record where you want the macro playback to occur.
3. Select **Tools, Macros** to display the Macros tool bar.

Tip:
If you know the keyboard shortcut, you can quickly apply the macro.

If you have created macros, they appear in the list box.

4. To see all the macros, click **Show All**.

The Macro Selection dialog box appears.



5. Select the macro in the Macro box and click ▶ (Run) on the Macros tool bar, or use its associated keyboard shortcut.

The character sequence stored in the macro is entered in the Editor view of the record.

Change a macro

Follow these steps to change the name, description, or shortcut key of an existing macro in your macro list.

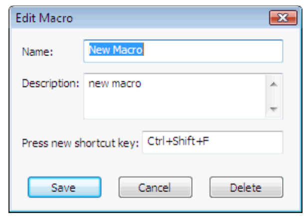
Note:
You cannot change the recorded contents of the macro.

1. Open the Bibliographic Record or Authority Record workform.

Tip:
Press **ALT+F8** to display the Macros tool bar.

2. Select **Tools, Macros** to display the Macros tool bar.
3. Select the name of the macro you want to change, and click **Edit**.

   The Edit Macro dialog box appears.



4. Change the information in the **Name**, **Description**, and **Press new shortcut key** boxes.
5. Click **Save**.

   The macro is changed.

Delete a macro

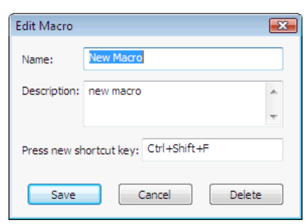
Follow these steps to delete a macro.

1. Open the Bibliographic Record or Authority Record workform.

Tip:
Press **ALT+F8** to display the Macros tool bar.

2. Select **Tools, Macros** to display the Macros tool bar.
3. Select the name of the macro to change, and click **Edit**.

   The Edit Macro dialog box appears.



4. Click **Delete**.

Browse Headings Display

The browse headings that display in browse search results for author, title, subject, or series are based on the first occurrence of the heading that was entered in the Polaris database. For example, a brief bibliographic record is created, and the heading displays in all uppercase letters because it is the first instance of that heading. Another example is an author browse heading that is missing accents. You can select which browse heading to display (when the count is greater than 1 and it is not a *See* or *See Also* heading). The selected heading is displayed for browse searching in the Find Tool and in the PAC.

1-2-3

Update a browse display heading

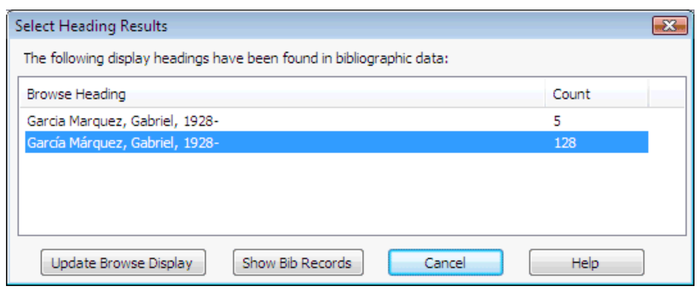
Follow these steps to update a browse display heading.

1. Browse search in the Find Tool for a bibliographic record by title, author, subject, or series.

   The browse search results are displayed.

2. Select the heading you want to display, right-click and choose **Select display heading** from the context menu.

   The Select Heading Results dialog box appears.



3. Select the heading you want to display, and click the **Update Browse Display** button.

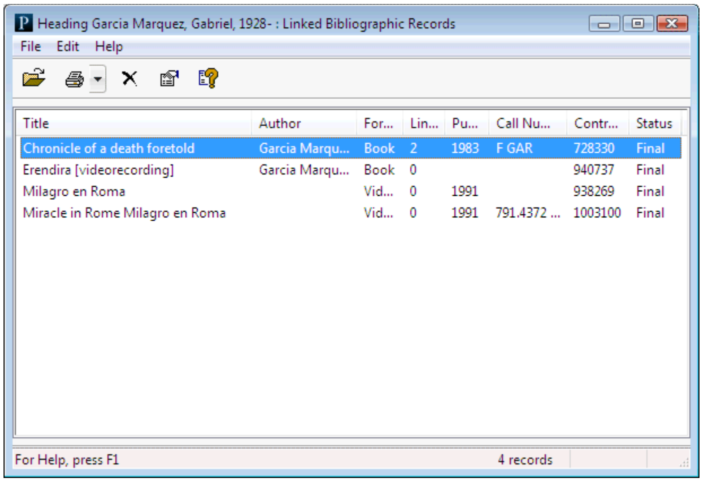
   The heading display is updated both in the Find Tool and PAC browse search results.

4. (Optional) To update the bibliographic records that are linked to the unwanted heading, do the following:

   a) Select the heading that you ***do not*** want to display.

   b) Click **Show Bib Records**.

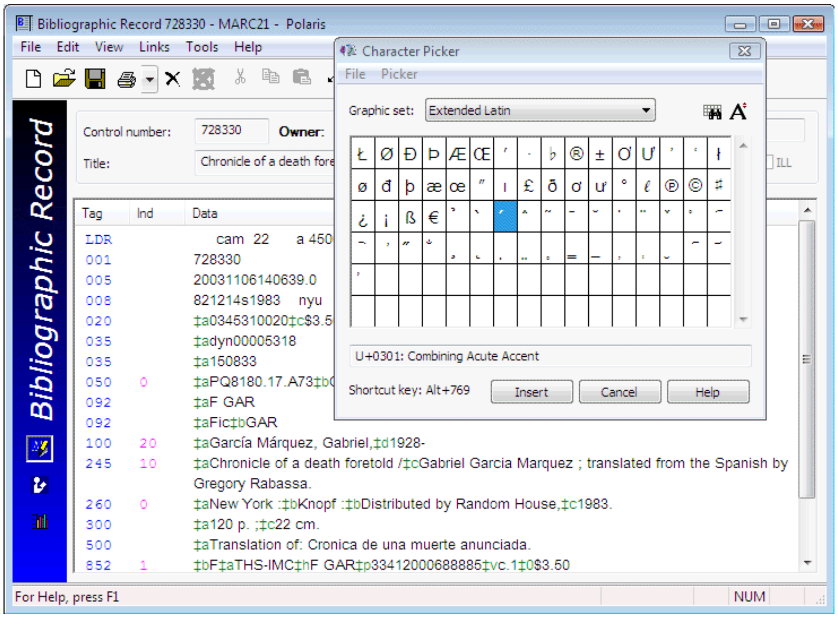
   A list box displays the bibliographic records that have this heading.



c) Double-click on any bibliographic record you want to change.

The Bibliographic Record workform appears.

d) Make any changes to the bibliographic record, and save it. For example, you could add the accent to the author's name.



Using Cataloging Templates

Using templates for bibliographic, authority, and item records greatly reduces the time it takes to do original cataloging because much of the information is already present in the template. In addition, templates ensure consistency in your records and facilitate acquisitions and serials processing workflows.

Any item, bibliographic, or authority record can be used to create a new template, including existing templates. You can use bibliographic, authority, or item records, modify them and then save them as templates. Or, to make modifications to an existing template, you can make the changes and then save it with a different name to create a distinct template.

In addition, you can create several templates for the same type of record. For example, you can have separate bibliographic templates for books, music, videos, and other types of items. The more standard information you can enter in the template, the less you need to enter when you create a new record. To set up templates for specific material types, see "Type of Material Codes (TOMs)" on page 219.

If you are creating new cataloging records and you want to use the same template for all the records, you can choose a template as the template default; it is used to create subsequent records of the same type for the duration of the time you are logged in.

The following types of templates are used outside of Cataloging:

- **On-order bibliographic templates** - Available from a purchase order line item to create brief bibliographic records from title information added to a purchase order line item. See "Adding Titles to a Purchase Order" in the *Polaris Acquisitions Guide 4.1*.
- **On-order item templates** - Automatically create on-order item records when purchase orders are released. See "Create a new on-order item template" in the *Polaris Acquisitions Guide 4.1*.
- **On-the-fly item templates** - Used for circulating uncataloged materials. See "Create on-the-fly item templates" in the *Polaris Patron Services Guide 4.1*.
- **Reserve item templates - Used** for circulating uncataloged materials and instructor-supplied course reserve materials. See "Create a reserve item template" in the *Polaris Patron Services Guide 4.1*.

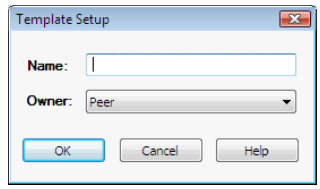
This unit covers the following topics:

Save an existing record as a template

Follow these steps to create a new template based on an existing bibliographic, authority, or item record.

1. Open the Item Record, Bibliographic Record, or Authority Record workform.
2. Select **File, Save As Template** to save the record as a template.

   The Template Setup dialog box appears.



3. Type the name of the template in the **Name** box.
4. Select the template's owner in the **Owner** box.
5. Click **OK** to submit your settings.
   - If the template's name and owner combination are being used, a message appears, and you cannot save the template until you change the name, owner or both.
   - If the template's name and owner combination is unique in your system, the message **The record was saved as a template successfully** appears in the workform status bar.
6. The new template is displayed in the appropriate cataloging workform.
7. Change the template to remove information specific to the original record.
8. Select **File, Save** to save the template.

Create a template from the Shortcut Bar

Follow these steps to create a bibliographic, authority, or item record template from the Shortcut Bar.

1. Select **File, New**, press **CTRL+N**, or click from the Polaris Shortcut Bar to display the New dialog box.
2. Select one of the following template types from the Objects list, and click **OK**:
   - **Bibliographic Template**
   - **Authority Template**
   - **Item Template**

   The appropriate template workform appears.
3. Specify a name and owner for the template using the appropriate method:
   - If you are creating an item template, specify the name and owner in the fields at the top of the workform.
   - If you are creating an authority or bibliographic template, select **File, Template setup** and specify the name and owner on the Template Setup dialog box.
4. Select **File, Save** to save the template.

   The template is saved in the database and added to the list of available templates.

Setting Up Import Profiles and Importing Records

Polaris Library Systems provides read-only import profiles (identified by the owner **PolarisExec**) designed for specific purposes, such as importing brief records for purchase orders or importing updated authority records. Although you cannot change the settings in a PolarisExec import profile, you can copy the profile, rename it, and then modify the settings. See "Polaris Read-Only Import Profiles" on page 56 for a list of the PolarisExec import profiles and their uses.

Tip:
For information on implementing the Authorities Weekly service, contact your Polaris Site Manager.

Staff members with the appropriate permissions can set the following automatic processing options in an import profile: perform MARC validation; save records as provisional or final; check duplicates based on system- or profile-defined rules; specify tags to retain from overlaid records using system- or profile-defined retention tags; check the preferred cataloging source when merging duplicate authority records; create item records from embedded holdings data in the bibliographic records; and group the imported records in record sets for easy retrieval and bulk processing. For more information, see "Setting Up Import Profiles" on page 56.

Before you can import bibliographic or authority records, the MARC record files must be downloaded from the cataloging source or materials vendor to your computer's desktop or another accessible network location. Then, select the import profile and specify the location of the files to import.

All import processing takes place on the server, so once an import is launched, the Polaris Staff Client can be used for other tasks. Users with the required permissions can manage import jobs and specify blackout times when importing jobs cannot be run. For more information, see "Specify import blackout times" in the *Polaris Technical Services Administration Guide 4.1*.

This unit covers the following topics:

Setting Up Import Profiles

You can set up import profiles and then use them whenever you are importing records into the Polaris database. For best results, start with a Polaris read-only profile that is designed for a specific type of import and copy it. For example, if you are importing bibliographic records with embedded holdings data, you can select the **Polaris default (with item creation)** profile, copy it, and save it with a different name.

Tip:
To review all the settings in an import profile, you can print a report from the Import Profile Manager. See "Print an import profile" on page 76.

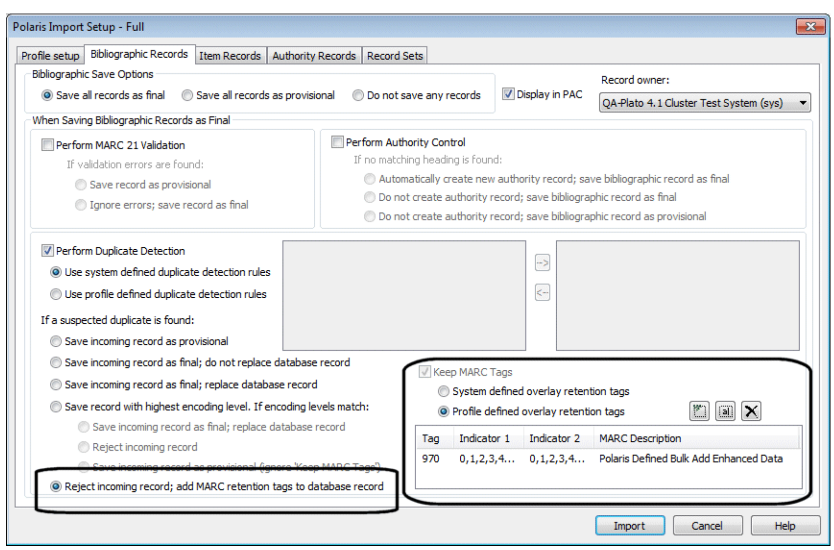
After you copy a profile you can rename it, but the Polaris profile remains read-only. Specific Polaris Administration permissions (set at the System level) control accessing, creating, modifying, and deleting import profiles. For more information about these permissions, see "Maintain Import Profiles in Import Profile Manager" in the *Polaris Technical Services Administration Guide 4.1*.

Polaris Read-Only Import Profiles

Polaris includes the following read-only import profiles that are designed for specific types of import processing:

Acquisitions Bibs Import Profile

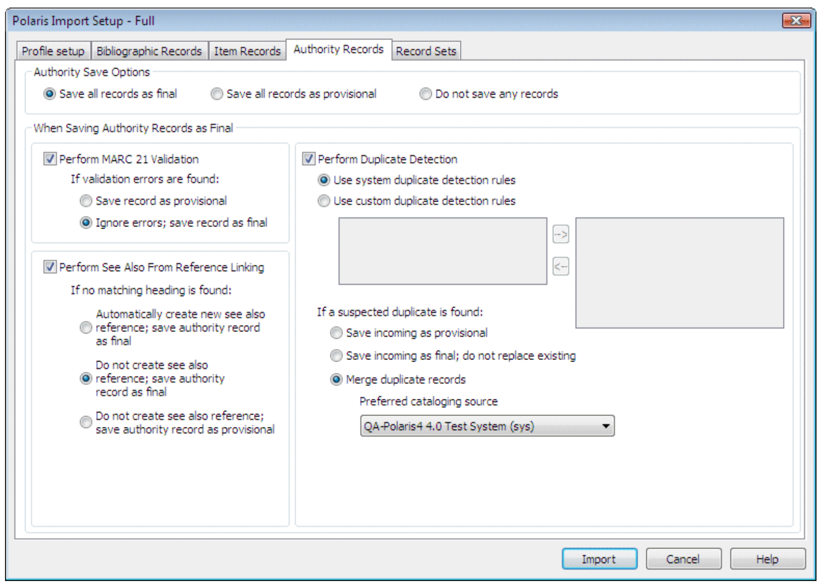
When you import bibliographic records using an online collection development tool, you can use the **Acquisitions Bibs** profile. The profile is set to ignore MARC validation errors because the incoming records are brief and do not require validation. When a duplicate is found, the incoming record is rejected, and the 970 tags from both records are retained in the full bibliographic record.



Copy the Acquisitions Bibs profile for each vendor you use to import records, name each copy of the Acquisitions Bibs profile with the name of the vendor, and make any changes to the settings. To ensure that the most-recently entered ISBN or UPC is retained, add the 020 (ISBN) and 024 (UPC) tags to the profile-defined retention tags. When these tags are retained from an incoming record that is a duplicate of an existing record, and the existing record has multiple ISBNs or UPCs, the most-recently added ISBN or UPC is at the top of the list in a purchase order line item. For more information on creating purchase orders from imported records, see "Creating Purchase Orders" in the *Polaris Acquisitions Guide 4.1*.

Authority Update Import Profile

If you use the Authorities Weekly service to keep your authority records current, use the import profile **Authority Update Import** to import the updated authority records. Polaris Library Systems sets up this profile specifically for importing updated authority records. This import profile is set to perform duplicate detection using system-defined duplicate detection rules, and if duplicates are found, merge the duplicate records based on which record has a higher ranking in the Authority Record Import Preferred Cataloging Source policy table at the System level.

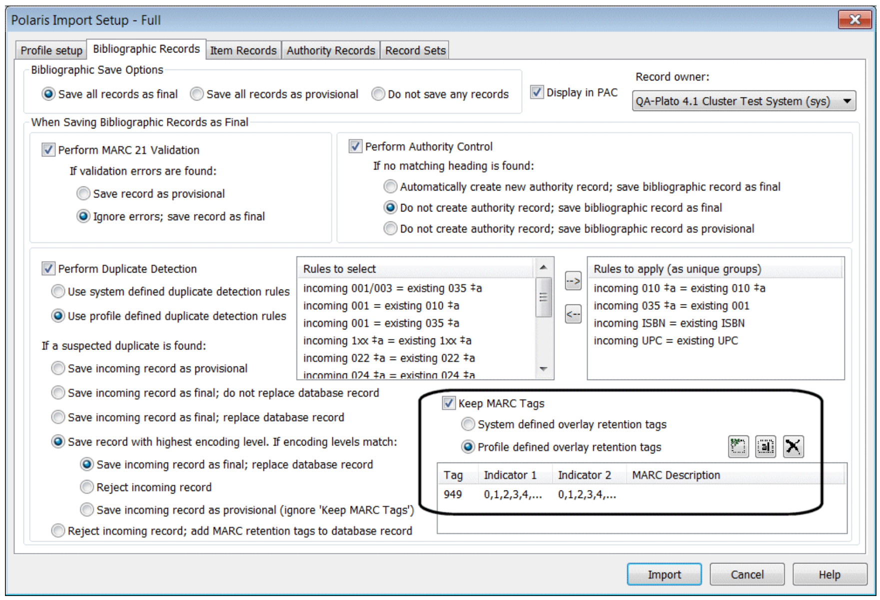


Important:

The Authority Update Import profile is set to check the **Authority Record Import: Preferred Cataloging Source** policy table at the system level. To ensure that the updated records from ZMARC files always overlay existing records, delete all entries in the table at the system level. Then, enter the preferred sources in the Preferred Cataloging Source policy table at the branch level so that the branch determines the preferred cataloging source for non-ZMARC imports. For more information, see "Specify preferred cataloging sources for authority records" in the *Polaris Technical Services Administration Guide 4.1*.

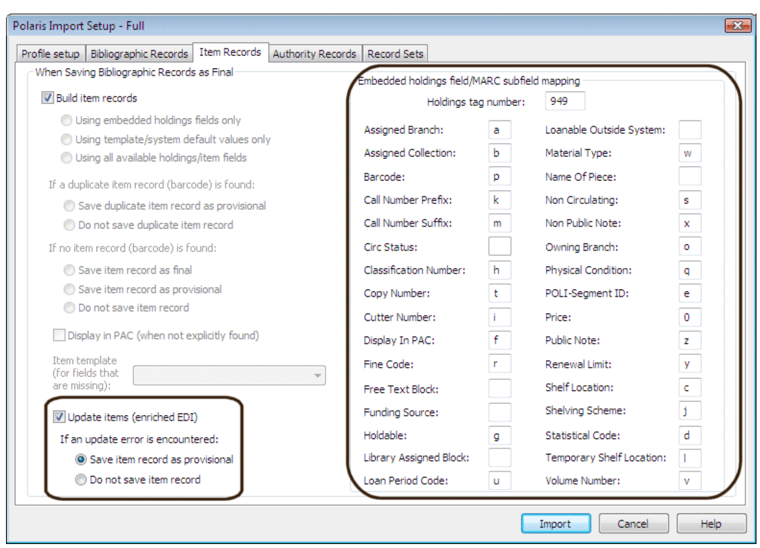
Enriched EDI Orders Import Profile

The Enriched EDI Orders profile is set up specifically to import full bibliographic records from your book vendor and create "shelf-ready" item records, including location and collection information (and the call number fields, if your supplier can process this data). It is set to perform MARC validation, authority control, and duplicate detection. If a duplicate is found, the record with the highest encoding level is saved and 949 tags are retained. If you send enriched EDI orders to vendors through Acquisitions, copy this profile to reflect the vendor's name, but leave most of the settings as they are.



The Item Records tab of the Enriched EDI Orders import profile is set to build item records from the data in the 949 tag. If your library and supplier decide to embed the holdings data in a tag other than the 949 tag, you can change the profile to indicate the correct tag.

Tip:
When **Update items (enriched EDI)** is selected, you cannot enter a value in the **Circ Status** box in the Embedded holdings field/MARC subfield mapping list.

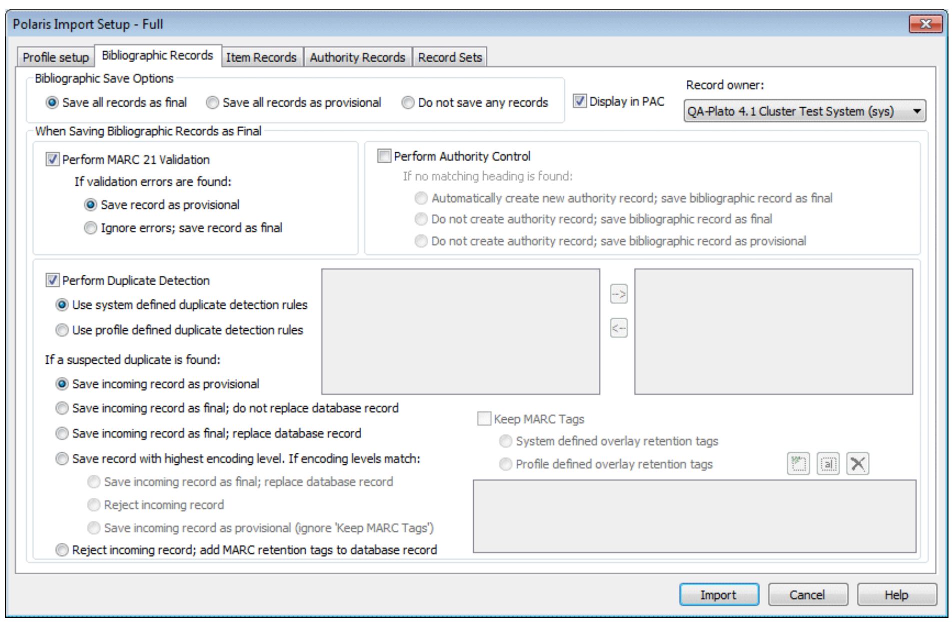


The system matches the content of the 949$e in the incoming bibliographic record to the purchase order line item segment, and the linked on-order item is updated with the full item data from the imported bibliographic record. The updated item is ready to circulate once it is checked in. For more information, see "Enriched EDI Orders and Shelf-Ready Items" in the *Polaris Acquisitions Guide 4.1*.

However, if there are 949 tags with a purchase order line item segment ID in tag 949 $e and a volume designation in 949 $v, a final item record will be created even if no matching on-order item is found. The new final item record is linked to the purchase order line item segment in $e. This allows holds that were placed at the bibliographic level for an on-order set to go to the first volume of the set. See "Set Holds options: PAC, Item, First Available Copy Requests" in the *Polaris Patron Services Administration Guide 4.1*.

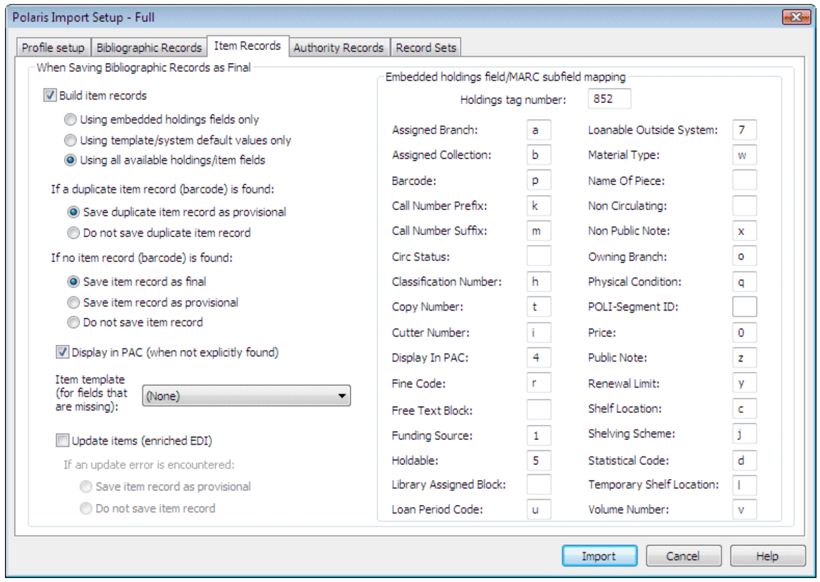
Polaris Default Import Profile

This is a general profile for importing bibliographic records. It is set up to perform MARC validation and duplicate detection, and to save records as provisional if any MARC formatting errors or duplicate records are found.



Polaris Default (with item creation) Import Profile

The Polaris Default (with item creation) import profile has the same settings on the Bibliographic Records tab as the Polaris Default import profile, but the Item Records tab is set to create item records from embedded holdings data in 852 tags. See "Set import options for item records" on page 70.



Importing Bibliographic Records with a Deleted Status

When you import bibliographic records with a LDR/05 of d (deleted), a bibliographic record with a status of deleted is created and saved if the Polaris Administration profile **Retain deleted bibliographic records** is set to **Yes**. If the incoming bibliographic record is a duplicate of an existing record, the incoming record overlays the existing record (unless it has unbreakable links to other records). Both the incoming record with a status of deleted and the existing record with a status of deleted are put into a record set, if one is specified. You can then permanently delete all the records in that record set, or you can use the purge process to remove records with a deleted status from the database. See "Purge cataloging records" on page 203. If the Polaris Administration profile **Retain deleted bibliographic records** is set to **No**, imported records with a deleted status overlay existing duplicate records, and both the incoming and existing record are removed from the database.

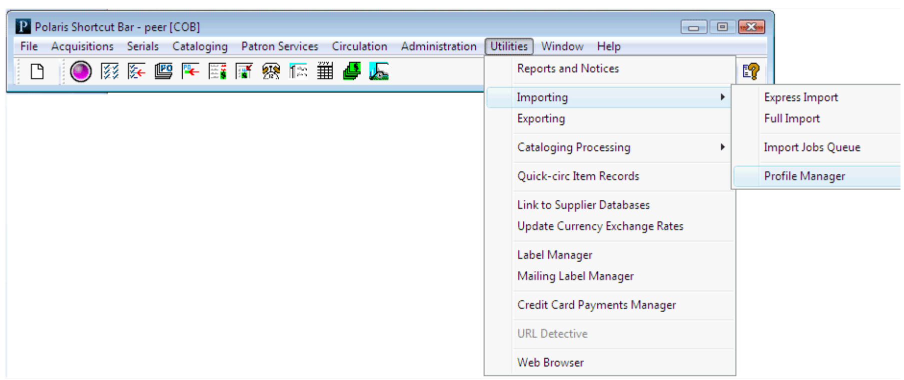
Copy a Polaris read-only import profile

You can start with an existing Polaris read-only import profile and copy it. See “Polaris Read-Only Import Profiles” on page 56 for a list of the Polaris import profiles and their intended purpose. The advantage to starting with one of these existing profiles is that they are already set up to handle duplicate detection, overlay, and other processing. You can rename the profile to make it more descriptive and make slight changes without affecting the overall efficiency of the automatic processing. For information on the permissions required for creating and modifying import profiles, see “Maintain Import Profiles in Import Profile Manager” in the *Polaris Technical Services Administration Guide 4.1*.

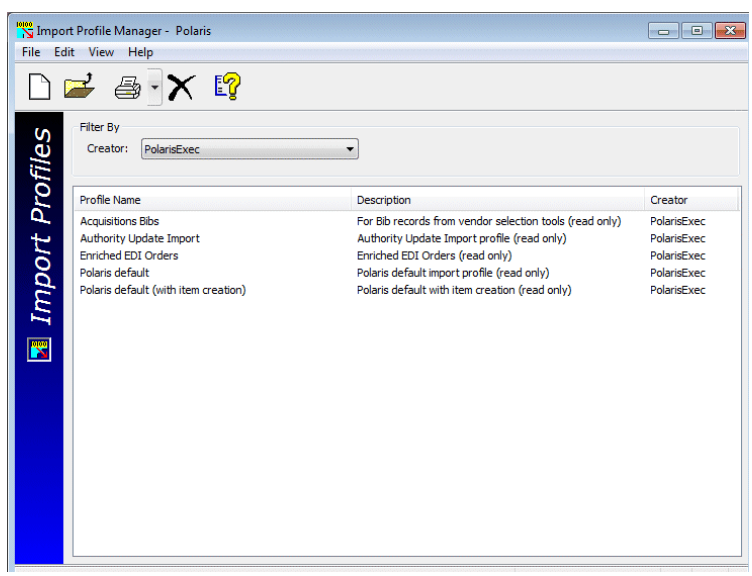
Tip:
You can print an import profile and review all the settings. See “Print an import profile” on page 76.

Follow these steps to create a new import profile from an existing Polaris read-only profile.

1. Select **Utilities**, **Importing**, **Profile Manager** from the Polaris Shortcut Bar.

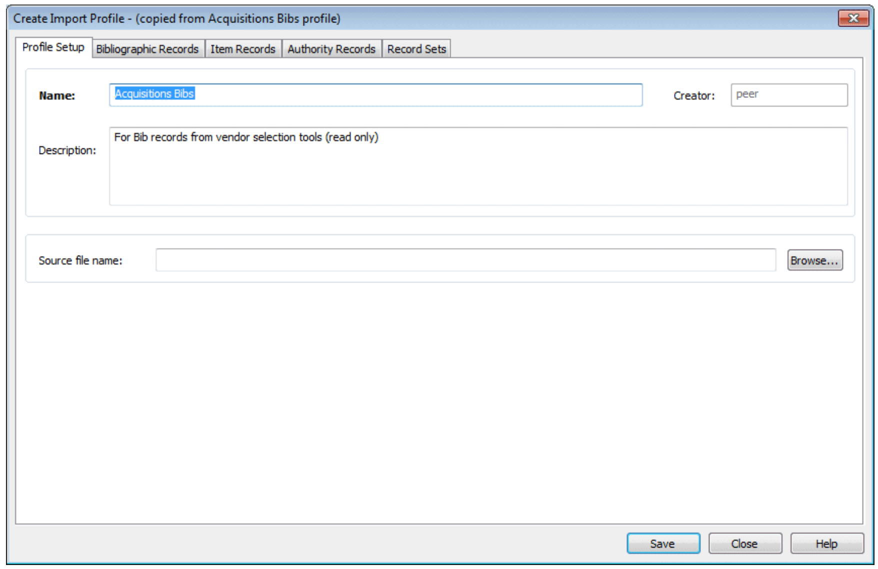


The Import Profile Manager appears.



2. Select the read-only Polaris import profile you want to copy, right-click, and select **Copy**.

   The Create Import profile window appears with the name of the profile you copied.



3. Type a name for the profile in the **Name** box, and a

Tip:
Name the profile so it is easy for users to identify, for example, **LSSIAuthority** or **OCLCBibliographic**. If you are copying the Acquisitions Bibs or Enriched EDI Orders profile, name the profile with the vendor's name, for example **Baker & Taylor**.

4. Type a description for the profile in the **Description** box.
5. (Optional) Click **Browse** and go to a specific file if you want to save the file name in the profile, or go to a directory if you want to save the directory location in the profile. If the file name is saved in the profile, the file will be selected automatically (if it exists) when a cataloger imports records using this profile. If a directory is saved in the profile, the directory location automatically displays when a cataloger clicks the **Add** button to add the files to be imported.

   The file name or directory location appear in the **Source file name** box.
6. Click **Save**.

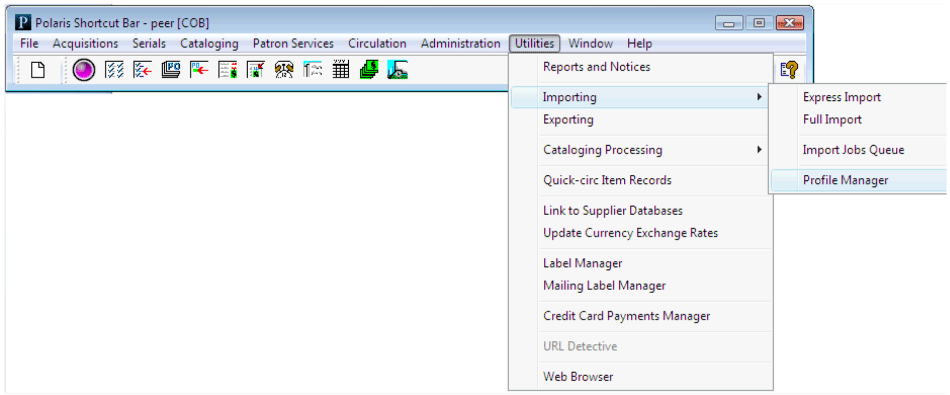
   The profile is saved. The Create Import Profile window remains open.
7. If you need to make changes to the import profile, click the following tabs and set the import options:
   - **Bibliographic Records** - See "Set import options for bibliographic records" on page 65.
   - **Item Records** - See "Set import options for item records" on page 70.
   - **Authority Records** - See "Set import options for authority records" on page 73.
   - **Record Sets** - See "Set import options for record sets" on page 75.
8. When you have finished setting up the relevant import options, click **Save**, and click **Close** to close the saved profile.

Create a new import profile

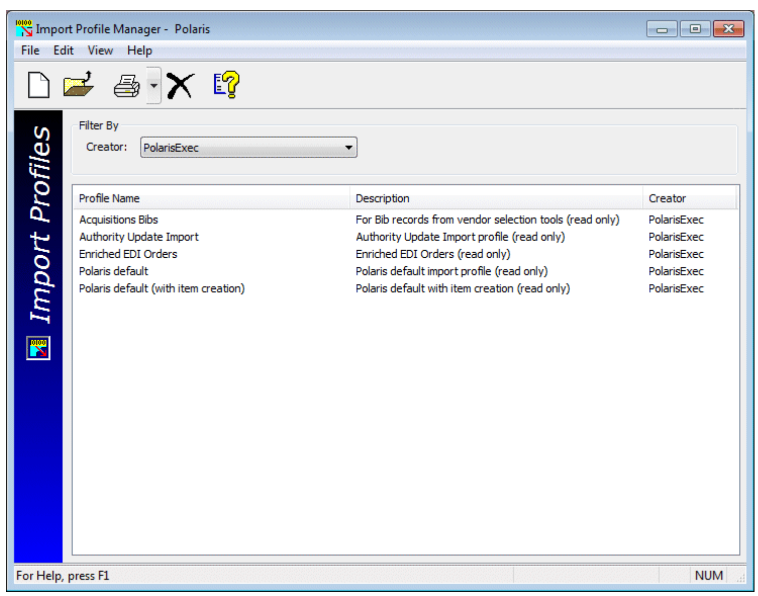
Although it is preferable to start with an existing Polaris read-only import profile and copy it, you can create your own import profiles and set all the options on each tab of the Import Profile window.

Follow these steps to create a new import profile.

1. Select **Utilities, Importing, Profile Manager** from the Polaris Shortcut Bar.

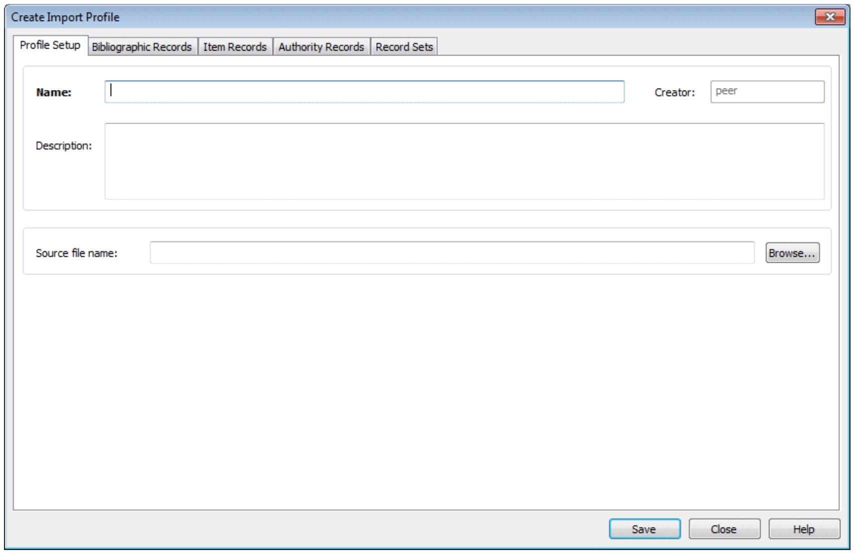


The Import Profile Manager appears.



2. Select **File, New**, press **CTRL+N**, or click .

   The Create Import Profile window appears.



3. Type a name for the profile in the **Name** box.
4. Type a description for the profile in the **Description** box.
5. (Optional) If you want to include a default source file name or directory in the import profile, click **Browse** and locate the source file or directory location.

    Note:
    If the MARC files for this import profile are always saved in the same desktop or network location, you can save the file or directory location in the profile. If a file name is saved in the profile, the file will be selected automatically (if it exists) when a user imports records using this profile. If a directory is saved in the profile, the directory location will automatically display when a user clicks the **Add** button.

6. Click **Save** to save the new import profile.
7. Select the following tabs and set the import options:
    - **Bibliographic Records** - See “Set import options for bibliographic records” on page 65.
    - **Item Records** - See “Set import options for item records” on page 70.
    - **Authority Records** - See “Set import options for authority records” on page 73.
    - **Record Sets** - See “Set import options for record sets” on page 75.
8. After setting up the relevant options on each tab, click **Save** to save the new import profile.
9. Click **Close** to close the saved profile.

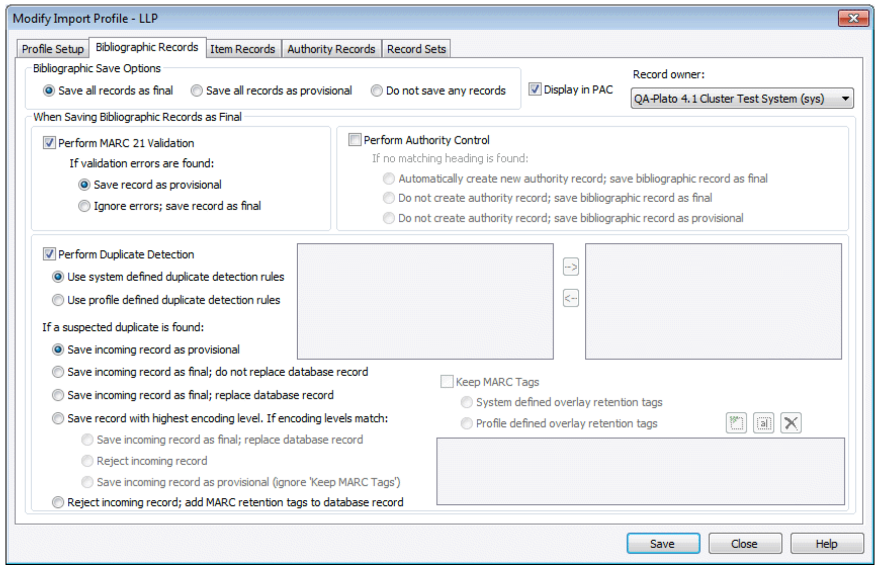
Set import options for bibliographic records

Follow these steps to set the import profile options for bibliographic records.

Tip:
To create item records from embedded holdings when importing bibliographic records, see "Set import options for item records" on page 70.

1. Click the **Bibliographic Records** tab in the Create Import Profile window.

   The Bibliographic Records tabbed page appears.



2. Select the organization that will own the records in the **Record owner** box.

   Note:
   The record owner is the organization that can determine the permissions related to the record.

3. Select one of the following options under **Bibliographic Save Options**:

   - **Save all records as final** to save all the incoming records as final.
   - **Save all records as provisional** to save the incoming records as provisional.
   - **Do not save any records** to reject all incoming bibliographic records.

   Note:
   You could select this option when importing a mixed file with bibliographic and authority records, and you only want to save the authority records.

4. If you do not want the imported records to display in the PAC, clear the **Display in PAC** check box. The **Display in PAC** box is checked by default.

Tip:
If you are importing brief bibliographic records to be used to create purchase orders, select **Ignore errors; save record as final**.

5. To check the MARC format of records you are saving as final, select **Perform MARC 21 Validation**, and choose one of the following options:
   - **Save record as provisional -** Records with MARC format errors are saved as provisional.
   - **Ignore errors; save record as final** - Records are saved as final even when they have MARC format errors.

   Note:
   Bibliographic records must have a Leader and 008 tag to be imported and saved in the Polaris database even if MARC validation is not performed.

Tip:
If your library has a subscription to a remote database of authority records, the remote database is automatically searched when no matching authority record is found. The new authority record is saved in the database and linked to the new bibliographic records.

6. If you select **Perform Authority Control**, select one of the following options:
   - **Automatically create new authority record; save bibliographic record as final** - A new authority record is created, and the bibliographic record is saved as final.
   - **Do not create authority record; save bibliographic record as final** - No authority record is created, and the bibliographic record is saved as final.
   - **Do not create authority record; save bibliographic record as provisional** - No authority record is created, and the bibliographic record is saved as provisional.
7. To check for duplicate bibliographic records that already exist in the Polaris database, select **Perform Duplicate Detection**, and choose one of the following options:
   - **Use system defined duplicate detection rules** - Use the standard duplicate detection rules that are set in Polaris Administration. See “Managing Duplicate MARC Records” in the *Polaris Technical Services Administration Guide 4.1*.
   - **Use profile defined duplicate detection rules** - Use the duplicate detection rules that are set up in the profile. If you select this option, you must define the duplicate detection rules.
8. If you selected **Use profile defined duplicate detection rules**, do the following steps:

   Note:
   Skip this step if you selected **Use system defined duplicate detection rules**.

   a) Select the duplicate detection rules from the **Rules to select list**.

   b) Click  to add the rule to the **Rules to apply (as unique groups)** list.

   Note:
   You can select more than one rule, but these rules are applied as separate groups, so only one of the rules needs to be met for a record to be considered a duplicate. See “Bibliographic Duplicate Detection Rules Reference” in the *Polaris Technical Services Administration Guide 4.1*.

9. If you selected **Perform Duplicate Detection**, indicate how you want Polaris to handle duplicate records by selecting one of the following options under **If a suspected duplicate is found**:

   - **Save incoming record as provisional** - The incoming duplicate record is saved as provisional. Only the resident record with a status of final is indexed.
   - **Save incoming record as final; do not replace database record** - The incoming duplicate record is saved as final but does not replace the database record. Two similar or identical bibliographic records are saved to the database and both are indexed and searchable.
   - **Save incoming record as final; replace database record -** The incoming duplicate record overlays and replaces the database record. You can also select **Keep MARC tags** and select **System defined overlay retention tags** or **Profile defined overlay retention tags**.

Tip:
For information on how records get overlaid based on encoding levels, see "Bibliographic Overlay Based on Encoding Level" on page 93.

   - **Save record with highest encoding level. If encoding levels match:**

     - Save incoming record as final; replace database record - If this option is selected, you can also select **Keep MARC tags** (either system- or profile-defined) to retain specific tags from the replaced database record.

     - Reject incoming record - If this option is selected, you can also select **Keep MARC tags** (either system- or profile-defined) to retain tags from the incoming record that was rejected.

     - Save incoming record as provisional (Ignore 'Keep MARC tags') - If this option is selected, the incoming record is saved provisionally, and the database record remains. Even if the **Keep MARC tags** box is checked, the import ignores the setting.

Tip:
When an existing bibliographic record is overlaid with a new bibliographic record, the links to the item records are maintained and the circulation counts remain. In addition, any holds attached to the old record are transferred to the new record. These requests maintain their position in the holds queue. See "Working with Hold Requests" on page 183.

   - **Reject incoming record; add MARC retention tags to database record** - The incoming duplicate record is deleted, but any system-defined or profile-defined MARC tags are retained from the incoming record and appended to the database record. When you select this option, **Keep MARC tags** is selected automatically. You can select **System defined overlay retention tags** or **Profile defined overlay retention tags**.

10. If not already selected, select **Keep MARC tags** to retain specific tags from records that are overlaid or rejected, and select one of the following options:

    Important:
    When the profile is set to reject incoming duplicate records but retain certain MARC tags, these tags are retained in the database record, and the database record is added to the record set. See "Set import options for record sets" on page 75.

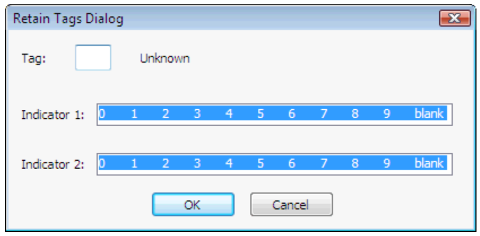
    - **System defined overlay retention tags** - Retains the tags that are defined in the Bibliographic Overlay Retention table in Polaris Administration policy tables. See "Specify tags to retain when records are overlaid" in the *Polaris Technical Services Administration Guide 4.1*.
    - **Profile defined overlay retention tags** - Retains tags that are defined in the profile.

Note:
If you are using a profile that is set to overlay or reject the incoming records and retain 970 tags (such as the Acquisitions Bibs profile), you may want to specify additional tags to retain such as the 020 (ISBN) or 024 (UPC). When these tags are retained from an incoming record that is a duplicate of an existing record, and the existing record has multiple ISBNs or UPCs, the most-recently added ISBN or UPC is at the top of the list in a purchase order line item.

11. If you select **Profile defined overlay retention tags**, do the following steps to specify the tags you want to retain:

a) Click  to add a retention tag.

The Retain Tags dialog box appears.

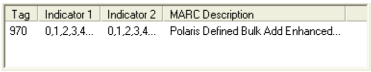


b) In the **Tag** box, type the tag you want to retain from the existing record.

c) Highlight the indicator values in the **Indicator 1** and **Indicator 2** boxes that should be considered to retain a tag.

Note:
Click a highlighted value to remove it from consideration.

d) Click **OK** to add the tag and indicator values to the list of tags to be retained.



12. Click **Save** to save the profile.

13. Click **Close** to close the profile or click another tab to make other settings.

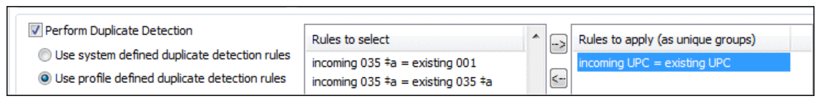
Setting Profile-defined Duplicate Detection Rules

When you select a profile-defined duplicate detection rules, only one rule needs to be met to identify the records as duplicates.

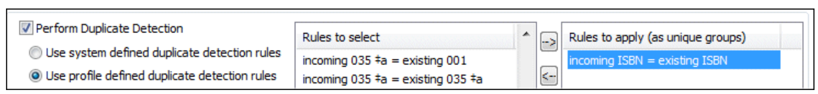
Duplicate Detection on the 024 (Other standard identifier)

If you are importing bibliographic records with an 024, Other Standard Identifier, select the **Profile defined duplicate detection rules** option in the import profile, and select the rules as follows:

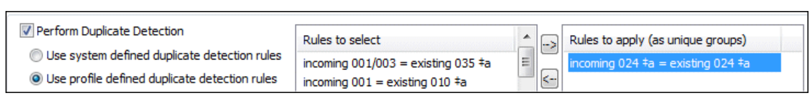
- If the first indicator is 1 - Universal Product Code, select the **incoming UPC = existing UPC** rule.



- If the first indicator is 3 - International Article Number, select the **incoming ISBN = existing ISBN** rule.



- If the first indictor is anything other than 1 or 3, select the **incoming 024$a = existing 024$a** rule.



1-2-3

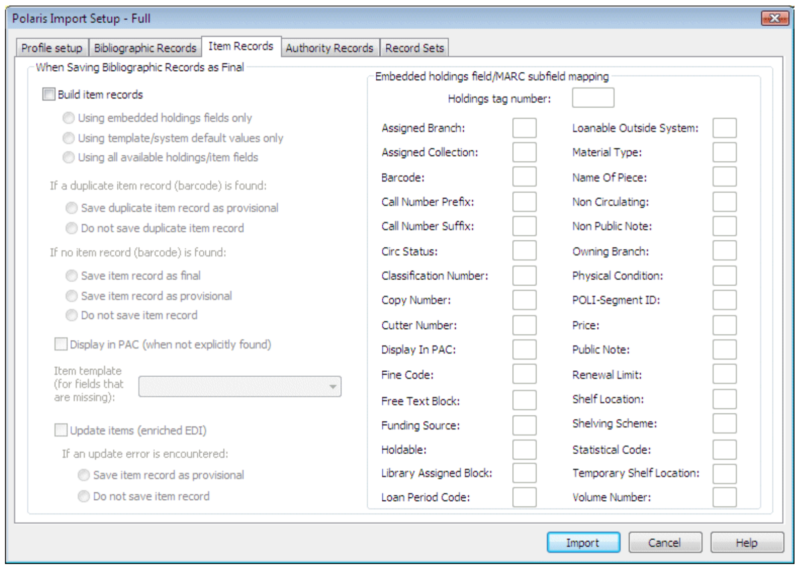
Set import options for item records

Follow these steps to set the import profile options for item records.

Note:
You can select the system import profile **Polaris default with item creation** to create item records using default settings. To make changes to this profile, you can copy it and save it with a different name. If you are copying an import profile, and your vendor does not use a subfield, make sure you remove the subfield mapping from the profile on the Item Records tab. See "Copy a Polaris read-only import profile" on page 61.

1. Click the **Item Records** tab in the Create Import Profile window.

   The Item Records tabbed page appears.



2. To create item records when you import bibliographic records, select the **Build item records** check box.

   The other options for building item records become active when you select **Build item records**.

3. If you selected **Build item records**, select one of the following options for creating item records:
   - **Using embedded holdings fields only** - Items are created from the embedded holdings data in the 852, 949 or other tag in the bibliographic record.
   - **Using template/system default values only** - Items are created from the information in the template and any system defaults for item records. No embedded holdings tags are used to create the item records.
   - **Using all available holdings/item fields** - Items are created from holdings information, if it is available. If the holdings tag does not contain the information but the template does, the field on the item record is filled in from the template.

4. Under **If a duplicate item record (barcode) is found**, select one of the following options to indicate how you want duplicate item record barcodes to be handled:
   - **Save duplicate item record as provisional** to save duplicates as provisional records.
   - **Do not save duplicate item record** if you do not want duplicate item records to be saved.
5. Under **If no item record barcode is found**, select one of the following options to indicate how you want item records without barcodes to be saved.
   - **Save item record as final -** Saves the new item records as final records, even if they do not have barcodes.
   - **Save item record as provisional** - Saves the new items as provisional records if they do not have a barcode.
   - **Do not save item record** - If there is no barcode, the item record is not saved.
6. If you do not want the item records to display in the PAC, clear the **Display in PAC (when not explicitly found)** check box. This option is checked as the default.

   Note:
   If you use a template, the setting for **Display in PAC** in the item template overrides any setting made here.
7. To use a template to fill in information not specified in the holdings data, select **Item template (for fields that are missing)** and select the item template from the list.

   Note:
   The **Update items (enriched EDI)** option is used only if you are importing full MARC records and creating shelf-ready items. The Enriched EDI Order import profile is already set up to update these items. See "Enriched EDI Orders Import Profile" on page 58.
8. Under **Embedded holdings field/MARC subfield mapping**, type the tag number where the holdings data is located in the **Holdings tag number** box.
9. In each item record field box, type the subfield letter or number for the bibliographic subfield in the embedded holdings tag that contains this information.

   Important:
   To create item records from embedded holdings in imported bibliographic records, the data in certain required fields must match the data in Polaris. For example, if your profile has defined 852 tag subfield a for the Assigned Branch, the data in $a must match an ID or abbreviation for a branch in your system, and it must not exceed 15 characters. For information on the data conventions in embedded holdings data, see "Item Records Created from Embedded Holdings Tags" on page 91.
10. Click **Save** to save the import profile.
11. Click **Close** to close the profile or click another tab to make other settings.

Tip:
The data in the circ status subfield of the embedded holdings field is used except if the circ status code would result in a circulation status that is not allowed for new item records. If the circ status in the embedded holdings is a status such as Lost or Held, the template value is used (if a template is specified) or the item circ status gets the default value of In.

Related Information

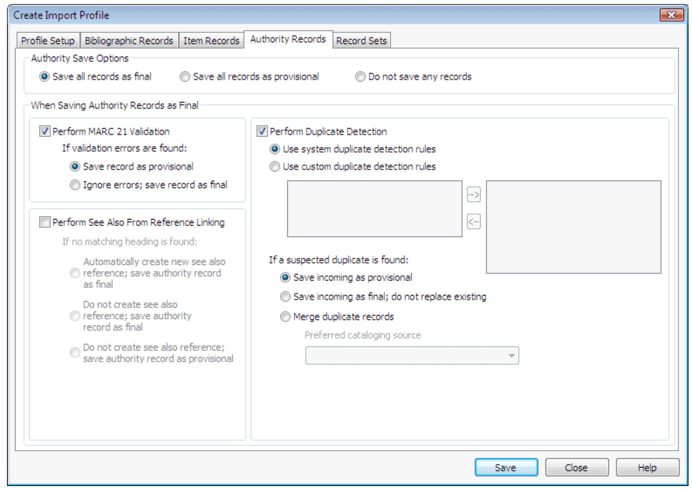
- **Embedded holdings data details and data entry conventions** - See "Item Records Created from Embedded Holdings Tags" on page 91.
- **Holdings tags retained during overlay marked with $9** - If the import profile is set to retain embedded holdings tags (such as the 852 or 949) from overlaid records, the specified tags are retained in the bibliographic record before item records are created. If the bibliographic record also has existing embedded holdings tags, they are marked with a $9 and the text **Tag retained from duplicate overlay**. Item records are not created from embedded holdings tags marked with a subfield $9. See "Bib Tags Marked to Prevent Item Record Creation or Updates" on page 90.
- **Mark embedded holdings tags as processed** - If this Polaris Administration parameter is set to **Yes**, when item records are created successfully from embedded holdings tags, a $9 is inserted into the embedded holdings tags in the bibliographic records with the following automatic processing information: **Item generated mmm dd yyyy hh:mm[AM/PM]**. See "Mark embedded holdings data as processed" in the *Polaris Technical Services Administration Guide 4.1*.
- **Clean up embedded holdings tags marked with $9** - A utility can be set up to delete embedded holdings tags and other tags (970s) marked with a subfield 9 and specific system-generated text. See "Set up the Subfield 9 cleanup utility" in the *Polaris Technical Services Administration Guide 4.1*.
- **Polaris read-only import profiles** - Polaris has read-only import profiles set up to do certain types of processing. You can use these import profiles or rename them while keeping all the settings. See "Polaris Read-Only Import Profiles" on page 56.
- **Shelving scheme** - The shelving scheme comes from the subfield in the **Embedded holdings field/MARC** subfield mapping. If no subfield is specified there, the shelving scheme comes from the template selected in the **Item template (for fields that are missing)** box. If no template is selected, or if the template does not include a shelving scheme, and the embedded holdings are in the 852 tag, the shelving scheme comes from the first indicator of the 852 tag. If the first indicator of the 852 tag has an invalid value, or the embedded holdings are contained in a different tag, use the default shelving scheme defined in the Polaris Administration Cataloging profile **Default shelving scheme for new item records**. See "Setting Item Copy & Save Options" in the *Polaris Technical Services Administration Guide 4.1*.

Set import options for authority records

Follow these steps to set the import profile options for authority records.

1. Click the **Authority Records** tab in the Create Import Profile window.

   The Authority Records tabbed page appears.



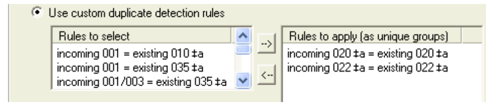
Tip:
You can choose not to save any authority records if you are importing a mixed file with bibliographic and authority records, and you only want to save the bibliographic records. You can also run an import without saving records to see the types of errors encountered.

2. Select one of the following save options:
   - **Save all records as final**
   - **Save all records as provisional**
   - **Do not save any records**

3. If you chose to save the incoming authority records as final, and you want to check the MARC format, select the **Perform MARC 21 Validation** check box, and choose one of the following options:
   - Select **Save record as provisional** to save the record provisionally if errors in MARC format are detected.
   - Select **Ignore errors; save record as final** to save authority records as final when they have errors in MARC format.

4. To check for duplicate authority records that already exist in the Polaris database, select **Perform Duplicate Detection**, and choose one of the following options:
   - Select **Use system duplicate detection rules** to use the standard duplicate detection rules.
   - Select **Use custom duplicate detection rules** to specify what tags will be used to match the incoming records with existing records to identify duplicates.

5. If you selected **Use custom duplication detection rules**, do the following steps:



   a) Select the duplication detection rules from the **Rules to select** list.

   b) Click --> to add the rule to the **Rules to apply (as unique groups)** list.

6. If you selected **Perform Duplicate Detection**, indicate how you want Polaris to handle duplicate records by selecting one of the following options:
   - Select **Save incoming as provisional** to save the incoming duplicate records as provisional.
   - Select **Save incoming as final; do not replace existing** to save the incoming duplicate records as final but not replace the existing records.
   - Select **Merge duplicate records** to merge incoming authority records with duplicate authority records already in your database.
7. If you selected **Merge duplicate records**, select the branch whose preferred cataloging source you want to use in the **Preferred cataloging source for** box.
8. To perform *See Also From* reference linking when no match exists in the database, select the **Perform See Also From Reference Linking** check box, and select one of the following options:
   - Select **Automatically create new see also reference; save authority record as final** to create a new "see also" reference and save the record as final.
   - Select **Do not create see also reference; save authority record as final** if you do not want to create a "see also" reference, and you want to save the record as final.
   - Select **Do not create see also reference; save authority record as provisional** if you do not want to create a "see also" reference, and you want to save the record as provisional.
9. Click **Save** to save the profile, and click another tab or close the profile.

Related Information

- "Authority Duplicate Detection Rules Reference" in the *Polaris Technical Services Administration Guide 4.1*
- "Automatic Processes During Import" on page 90

Set import options for record sets

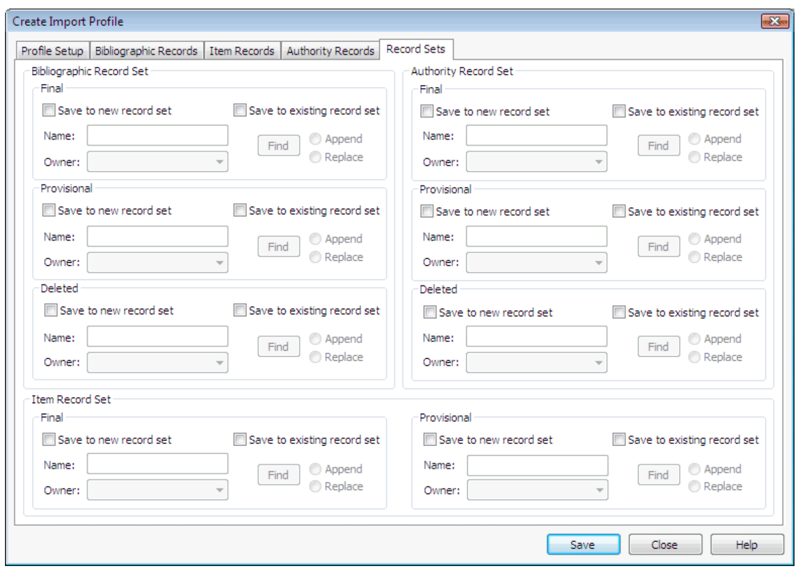
When you are importing records, you can specify that certain types of records are to be grouped in record sets to facilitate record retrieval or bulk processing. If you are importing multiple files in a single import job, each file of MARC records has its own record set. You can set up record sets for grouping the following types of cataloging records: final bibliographic records, provisional bibliographic records, bibliographic records with a deleted status, final authority records, provisional authority records, authority records with a deleted status, final item records, and provisional item records.

Follow these steps to set the profile options for record sets.

Note:
If you specify a bibliographic record set, the imported records are added to it. However, if the profile is set to reject incoming duplicate bibliographic records but retain specific tags from the rejected records, the resident bibliographic record with the retained tags is added to the record set. For example, if you import brief bibliographic records with 970 tags for creating purchase orders, the profile is set to reject incoming duplicate records, but retain the 970 tags. The 970 tags are saved in the resident record, and it is added to the record set. When the record set is bulk-added to a purchase order, the 970 tags automatically create the purchase order line item distribution grid.

1. Click the **Record Sets** tab in the Create Import Profile window.

   The Record Sets tabbed page appears.



Tip:
Name record sets so your staff can easily identify them when searching for records. If you are setting up a profile for importing records to bulk add to purchase orders, name the record set to identify the vendor. See "Creating Purchase Orders" in the *Polaris Acquisitions Guide 4.1*. You can use the profile each time you import records from that vendor. Also, you may want to set the branch as the record set's owner because if the owner is a staff member, only that staff member can modify the record set.

2. For each cataloging record type, choose one of the following options:
   - Select **Save to new record set**, type the name of the record set in the **Name** box, and select the owner in the **Owner** box.
   - Select **Save to existing record set**, click **Find** to locate the record set, and select **Append** or **Replace**.

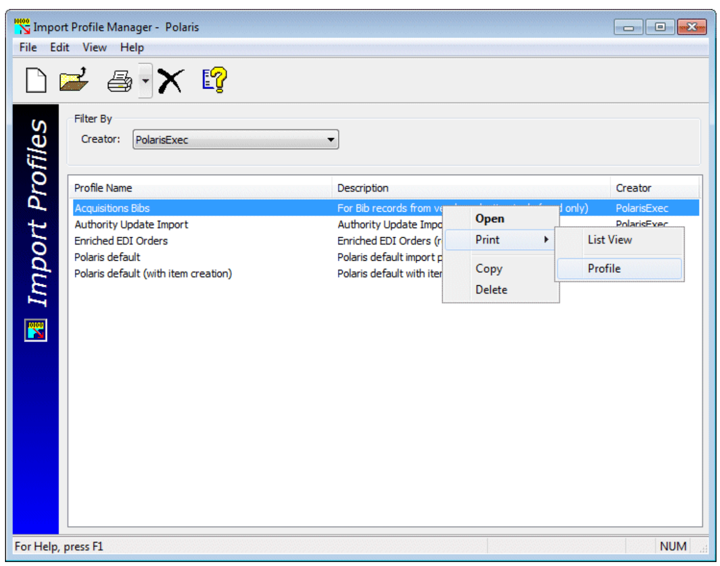
   Note:
   If you have specified a record set for records with a status of Deleted, imported records with a status of Deleted are put in a record set. In addition, existing records that are overlaid by duplicate incoming records are put in the Deleted record set.

3. Click **Save** to save the profile, and click **Close** to close it or click another tab to make other settings.

Print an import profile

Follow these steps to print an import profile.

1. Select **Utilities, Importing, Profile Manager** to open the Import Profile Manager.
2. Select the profile, right-click and select **Print**, **Profile** or click the down arrow next to the printer icon in the toolbar and select **Profile**.



The Import Profile document appears in the report preview window.


Import Profile

Name: Acq. Baker & Taylor2

Description: Baker & Taylor Acquisitions Bibs

Creator: peer Modifier:

Creation date: 10/23/2008 2:10:31 PM Modification date:

Bibliographic save option: Save as final

Record owner: QA-Plato 4.1 Cluster Test System Display in PAC: Yes

MARC validation: No MARC validation

Authority control: No authority control

Duplicate detection: Perform duplicate detection. If errors are found, ignore and enforce encoding level restrictions. If encoding levels match, save incoming record as final; replace database record

Use system duplicate rules: Yes Retain data: Yes Use system retention rules: No

Bibliographic duplicate criteria

Author/Title

ISBN

ISSN

Just Title and

LCCN

Rule group 1

Rule group 2

Title/260 $c

Title/LCCN

Retention tag	Indicator one	Indicator two
970	blank,0,1,2,3,4,5,6,7,8,9	blank,0,1,2,3,4,5,6,7,8,9

Authority save option: Do not save

Item save option: Do not save

Bibliographic final record set:

Name (owner): AcquisitionsBibsFinal (QA-Plato 4.1 Cluster Test System)

New or existing: New

Bibliographic provisional record set:

Name (owner): AcquisitionsBibsProvisional (QA-Plato 4.1 Cluster Test System)

New or existing: New

3. Select **File, Print** from the menu in the report preview window.

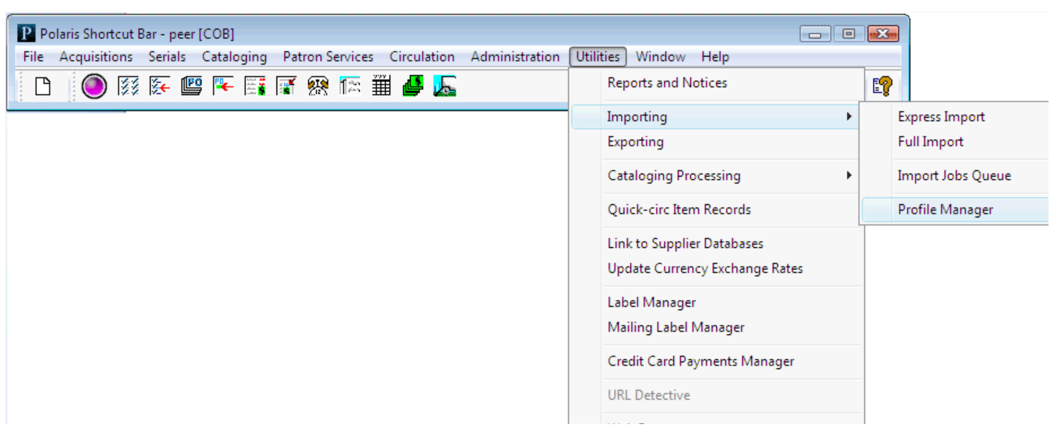
1-2-3

Modify an import profile

If you have the required permissions, you can modify import profiles except for those created by Polaris. These read-only profiles have the creator name **PolarisExec**. You can copy and rename PolarisExec import profiles. See “Copy a Polaris read-only import profile” on page 61.

Follow these steps to modify an import profile other than a PolarisExec profile.

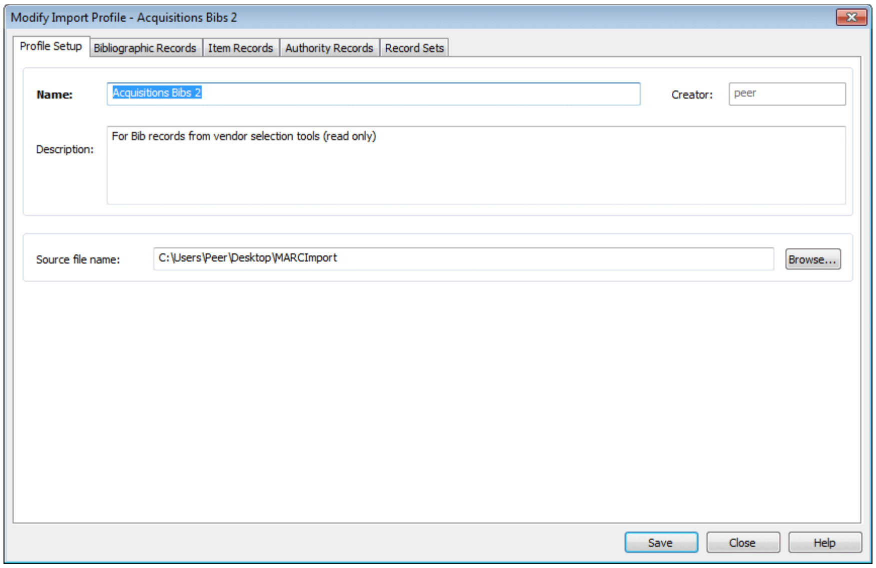
1. Select **Utilities**, **Importing**, **Profile Manager** from the Polaris Shortcut Bar.



The Import Profile Manager appears.

2. Select a username other than PolarisExec in the **Creator** box.
3. Double-click the profile you want to modify, or right-click and select **Open** from the context menu.

   The Modify Import Profile window appears.



4. To change the name of the profile, type the new name in the **Name** box.
5. To change the description of the profile, type the new description in the **Description** box.
6. To change the default directory or source file, click Browse to browse to the new location.
7. Click the tab containing the options you want to modify, and see the following sections for instructions on modifying these import options:
   - "Set import options for bibliographic records" on page 65
   - "Set import options for item records" on page 70
   - "Set import options for authority records" on page 73
   - "Set import options for record sets" on page 75
8. Click **Save** to save the profile when you have finished making modifications.

   Note:
   You can check your settings by printing the profile. See "Print an import profile" on page 76.

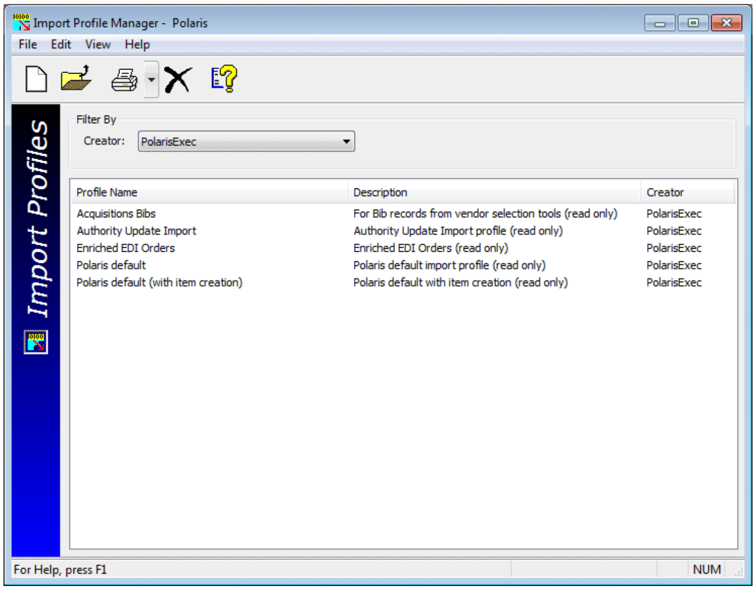
9. Click **Close** to close the profile after you have saved it.

Delete an import profile

Follow these steps to delete an import profile.

1. Select **Utilities**, **Importing**, **Profile Manager** from the Polaris Shortcut Bar.

   The Import Profile Manager appears.



2. Right-click the profile you want to delete, and select **Delete** from the context menu.

   A confirmation message appears.

3. Click **Yes** to delete the profile.

Importing Records

When you select **Utilities, Importing** from the Polaris Shortcut Bar, there are two options for importing: **Express Import** and **Full Import**. If you select **Express Import**, you can change settings on the Profile Setup and Record Set tabs, but you cannot change the settings for bibliographic, authority, or item records. If you select **Full Import**, you can change settings on all the tabs in the Polaris Import Setup window if you have the appropriate permissions.

Note:
Separate permissions control express and full importing. For more information, see "Import Records" in the *Polaris Technical Services Administration Guide 4.1*.

Before you can import MARC records, they must be downloaded from the cataloging source or materials vendor and saved in a file on your computer's desktop or in another location where you can easily find them. To select the file or files to be imported, you click **Add** in the Polaris Import Setup window, and locate the file(s). If the profile was saved with a specific import file name, the file is selected automatically (if it exists). If the profile was saved with a directory location for the source files, the window opens to that directory.

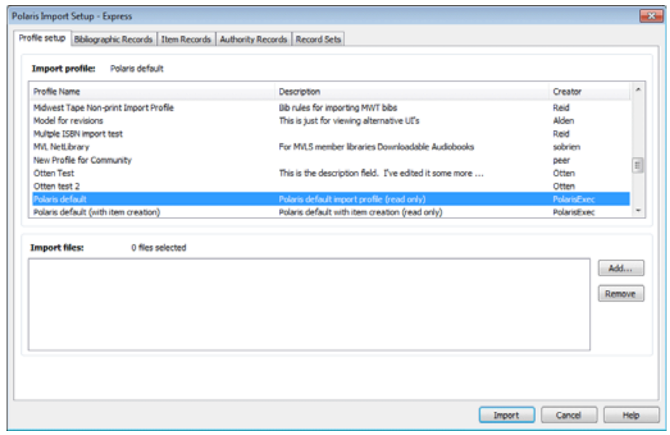
Note:
Importing large quantities of records may slow response times for other processes in Polaris. Therefore, you may want to start the import process when the library is closed and when it will not interfere with scheduled system backups.

Use Express Import to import records

The Express Import option allows staff members to import records using an existing profile that specifies the appropriate importing options. The only settings that can be changed for an express import are the source file name, the report name, and the options on the Record Sets tabbed page. Follow these steps to import records using the Express Import option.

1. Select **Utilities**, **Importing**, **Express Import** from the Polaris Shortcut Bar.

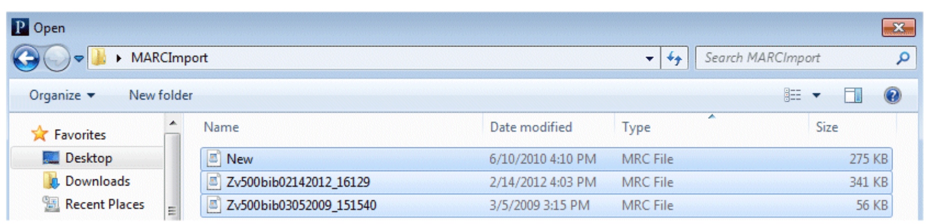
   The Polaris Import Setup window appears.



Tip:
If you are importing authority records from Polaris ZMARC automatic authority updates, select the profile **Authority Update Import**.

2. Select the profile from the list.
3. Click the **Add** button to browse to the import file(s) on the computer desktop or network.

Tip:
If the profile was saved with a specific import file name, the file is selected automatically (if it exists). If the profile was saved with a directory location for the source files, when you click **Add**, the window opens to that directory.

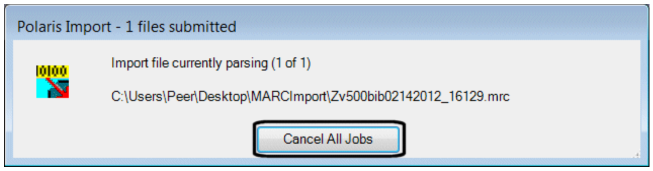


4. Select the MARC file or files, and click **Open**.

   The files are listed in the Import Setup window.

5. To change the defaults for record sets, click the **Record Sets** tab, and follow the steps in "Set import options for record sets" on page 75.
6. Click **Import** to import the records.

   An initializing dialog box displays for a few seconds. If necessary, you can cancel the import by clicking **Cancel** on the message box. Canceled jobs do not appear in the Import Jobs Queue.



When initializing has completed, another message box appears.

7. Click **OK** to see the Import Jobs Queue and the status of your import files.

   Your files may be in a pending status for a few minutes before import processing begins.

Related Information

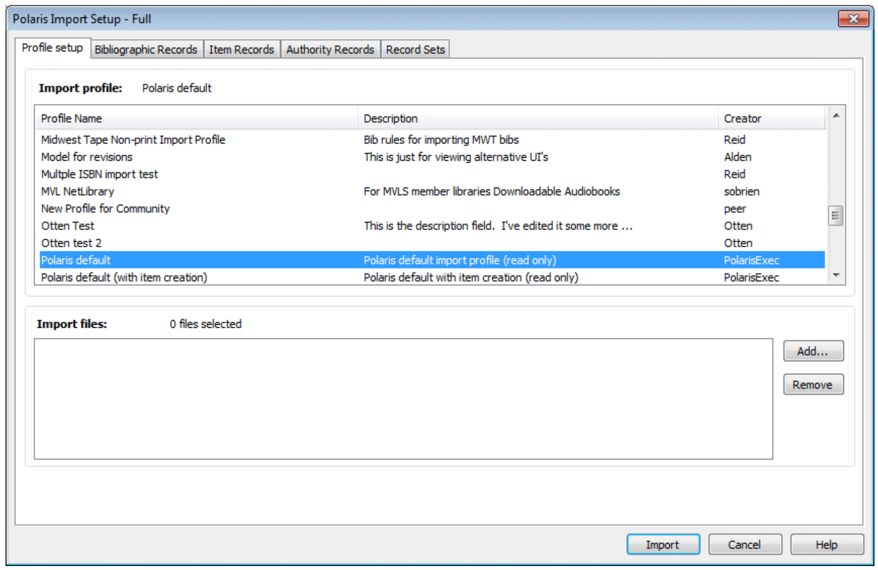
- "View import jobs in the queue" on page 86.
- "Print import reports from the Import Jobs Queue" on page 88

Use Full Import to import records

When you use the Full Import option, you can use a profile and accept all the settings, change the settings, or manually set all options on all tabs of the Polaris Import Setup window. Follow these steps to import records using the Full Import option.

1. Select **Utilities**, **Importing**, **Full Import** from the Polaris Shortcut Bar.

   The Polaris Import Setup - Full window appears.



2. To manually set the import options, see the following topics:
   - "Set import options for bibliographic records" on page 65
   - "Set import options for item records" on page 70
   - "Set import options for authority records" on page 73
   - "Set import options for record sets" on page 75

Tip:
You can start with a profile that is not read-only, and change an option before starting the import.

3. To use a profile, select it from the list.

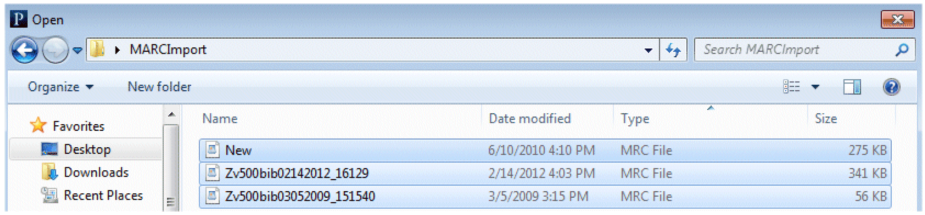
   Note:
   If you are importing authority records from Polaris ZMARC automatic authority updates, select the profile **Authority Update Import**.

4. Select the profile from the list.

Tip:
If you are importing authority records from Polaris ZMARC automatic authority updates, select the profile **Authority Update Import**.

5. Click the **Add** button to browse to the import file(s) on the computer desktop or network.

Tip:
If the profile was saved with a specific import file name, the file is selected automatically (if it exists). If the profile was saved with a directory location for the source files, when you click **Add**, the window opens to that directory.

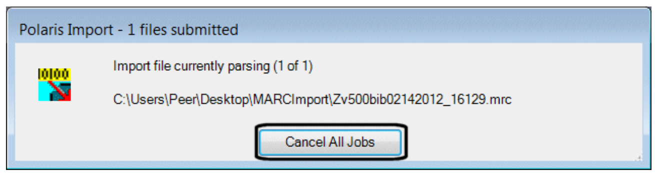


6. Select the MARC file or files, and click **Open**.

   The file or files are listed in the Import Setup window.

7. Click **Import** to import the records.

   An initializing dialog box displays for a few seconds. If necessary, you can cancel the import by clicking **Cancel** on the message box. Canceled jobs do not appear in the Import Jobs Queue.



   When initializing has completed, another message box appears.

8. Click **OK** to see the Import Jobs Queue and the status of your import files.

   Your files may be in a pending status for a few minutes before import processing begins.

Related Information

- "View import jobs in the queue" on page 86.
- "Print import reports from the Import Jobs Queue" on page 88

Using the Import Jobs Queue

The Import Jobs Queue shows import jobs that are currently running, all pending jobs that have not yet run, and jobs that have completed. All import jobs for all clients that use the same server go to a single job queue in the order in which they were added to the queue, with the most recently-added jobs at the end of the queue. You can use the Import Jobs Queue to view jobs, stop jobs, print reports, and delete jobs.

The Import Jobs Queue contains the following columns:

- **Path** - The complete path for the import file
- **File** - The name of the import file
- **Organization** - The organization for which the user is logged in
- **User** - The user who launched the import job
- **Workstation** - The workstation from which the import job was launched
- **Type** - The type of records in the import
- **Status** - The status of the import job (Initializing, Running, Pending, Completed, Stopped, Blacked out)
- **Records Read** - The number of records in the import file
- **Records Created** - The number of records created in the Polaris database
- **Posted** - The date and time the import job was launched

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View import jobs in the queue

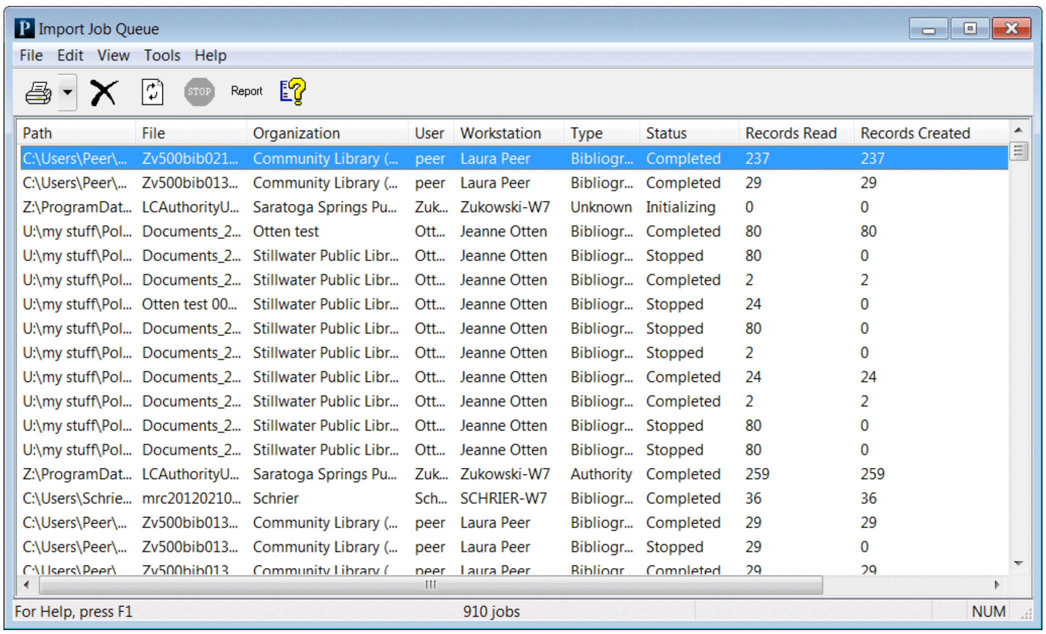
Follow these steps to view import jobs in the Import Jobs Queue.

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. Click any column heading to sort the list.

   Note:
   Pending import jobs have been successfully initialized, but the import processing has not yet begun. Blacked out import jobs have been successfully initialized, or may have started running, but import processing is not currently allowed because a system- or user-defined blackout time is in effect. When the blackout time has ended, processing automatically begins or resumes.



Path	File	Organization	User	Workstation	Type	Status	Records Read	Records Created
C:\Users\Peer\...	Zv500bib021...	Community Library (...	peer	Laura Peer	Bibliogr...	Completed	237	237
C:\Users\Peer\...	Zv500bib013...	Community Library (...	peer	Laura Peer	Bibliogr...	Completed	29	29
Z:\ProgramDat...	LCAuthorityU...	Saratoga Springs Pu...	Zuk...	Zukowski-W7	Unknown	Initializing	0	0
U:\my stuff\Pol...	Documents_2...	Otten test	Ott...	Jeanne Otten	Bibliogr...	Completed	80	80
U:\my stuff\Pol...	Documents_2...	Stillwater Public Libr...	Ott...	Jeanne Otten	Bibliogr...	Stopped	80	0
U:\my stuff\Pol...	Documents_2...	Stillwater Public Libr...	Ott...	Jeanne Otten	Bibliogr...	Completed	2	2
U:\my stuff\Pol...	Otten test 00...	Stillwater Public Libr...	Ott...	Jeanne Otten	Bibliogr...	Stopped	24	0
U:\my stuff\Pol...	Documents_2...	Stillwater Public Libr...	Ott...	Jeanne Otten	Bibliogr...	Stopped	80	0
U:\my stuff\Pol...	Documents_2...	Stillwater Public Libr...	Ott...	Jeanne Otten	Bibliogr...	Stopped	2	0
U:\my stuff\Pol...	Documents_2...	Stillwater Public Libr...	Ott...	Jeanne Otten	Bibliogr...	Completed	24	24
U:\my stuff\Pol...	Documents_2...	Stillwater Public Libr...	Ott...	Jeanne Otten	Bibliogr...	Completed	2	2
U:\my stuff\Pol...	Documents_2...	Stillwater Public Libr...	Ott...	Jeanne Otten	Bibliogr...	Stopped	80	0
U:\my stuff\Pol...	Documents_2...	Stillwater Public Libr...	Ott...	Jeanne Otten	Bibliogr...	Stopped	80	0
Z:\ProgramDat...	LCAuthorityU...	Saratoga Springs Pu...	Zuk...	Zukowski-W7	Authority	Completed	259	259
C:\Users\Schrie...	mrc20120210...	Schrier	Sch...	SCHRIER-W7	Bibliogr...	Completed	36	36
C:\Users\Peer\...	Zv500bib013...	Community Library (...	peer	Laura Peer	Bibliogr...	Completed	29	29
C:\Users\Peer\...	Zv500bib013...	Community Library (...	peer	Laura Peer	Bibliogr...	Stopped	29	0
C:\Users\Peer\...	Zv500bib013...	Community Library (...	peer	Laura Peer	Bibliogr...	Completed	29	29

3. Click the refresh button periodically to see the most recent import jobs.

Related Information

- "Delete an import job from the Import Jobs Queue" on page 87
- "Print import reports from the Import Jobs Queue" on page 88.

Stop an import job from the Import Jobs Queue

If you stop a pending import job, no import processing occurs. If you stop a running import job, any records that may have already been processed are not affected. This may mean that some records have been processed, and others have not, resulting in an incomplete record set and report. You cannot “roll back” records already imported, and stopped jobs cannot be restarted. If you stop a blacked out import job, only those records that have not been imported are affected; any records already imported before the blackout time are not affected.

Follow these steps to stop an import job from the Import Jobs Queue.

> **Important:**
> If you have permission to do importing (either **Import bibliographic, item and authority records: Allow** or **Express importing: Allow**), you can stop or delete your own import jobs from the Import Jobs Queue. However, to stop or delete import jobs initiated by other staff members, you will need the permission **Manage import jobs: Allow** for the branch organization where the job was initiated. Staff members who require control over importing for multiple (or all) branches must be granted the **Manage import jobs: Allow** permission for each branch.

1. Select **Utilities, Importing, Import Jobs Queue**.

   The Import Jobs Queue dialog box displays the details for each import job.

2. Before stopping an import job, refresh the Import Jobs Queue to make sure you are seeing the most recent status of the files.
3. Select the import job, and click the **Stop** button in the toolbar, or right-click, and select **Stop** from the context menu.

   A message informs you that the stopped import job cannot be restarted and asks you to confirm that you want to stop the import job.

4. Click **Yes** to stop the import.

Delete an import job from the Import Jobs Queue

Import jobs remain in the Import Jobs Queue until they are manually deleted by an authorized user when there is no further use for them or the report. Follow these steps to delete a completed import jobs.

1. Select **Utilities, Importing, Import Jobs Queue**.

   The Import Jobs Queue dialog box displays the details for each import job.

2. Select the completed import job that you want to delete.
3. Right-click and selected **Delete** from the context menu.

Print import reports from the Import Jobs Queue

If you want details regarding a specific import job, you can print an import report in pdf format from the Import Jobs Queue. The Import Jobs Queue lists import jobs for both bibliographic and authority records.

Tip:
You can also print the New Titles Imported report from the Cataloging Reports menu. The New Titles Imported report shows the titles that were imported for an organization or organizations within a specific time period. For more information, see "Cataloging Reports" on page 101.

Follow these steps to print details of an import job from the Import Jobs Queue.

1. Select **Utilities, Importing, Import Jobs Queue**.

   The Import Jobs Queue dialog box displays the details for each import job.

2. Double-click the import job you want to print. Or, select the import job and click the **Report** button, or right-click and select **Print Report**.
3. Select **File, Print** from the menu.

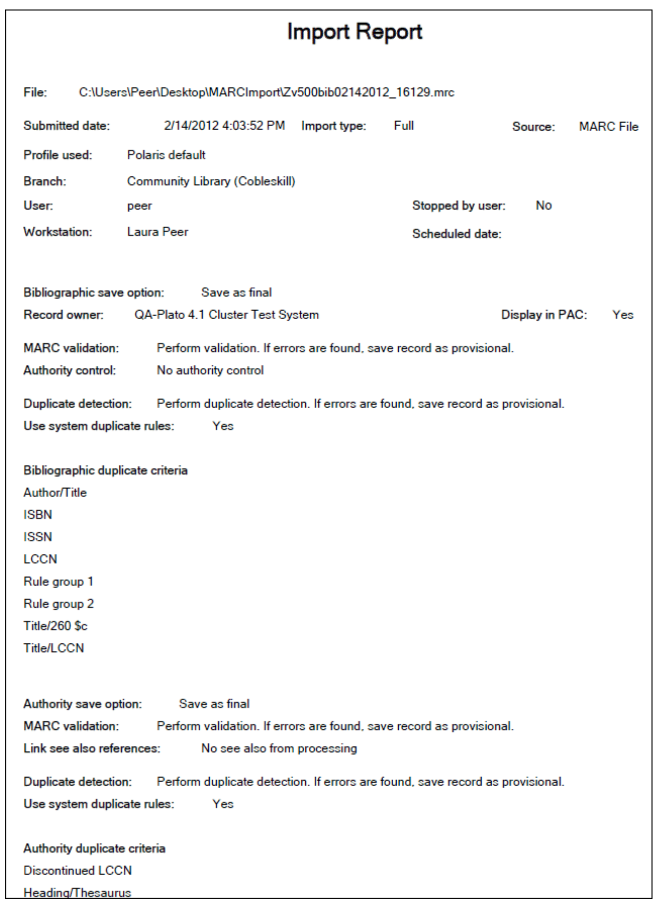
   The Import Report pdf appears in the preview window.

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

Tip:
Import reports are not saved to the local computer. To save a copy of the report, open the report from the Import Jobs Queue, select **File, Save As,** and type a file name and path.

Import Report

The first section of the report lists the selected import options and the user ID of the staff member who imported the files.


Import Report

File: C:\Users\Peer\Desktop\MARCImport\Zv500bib02142012_16129.mrc

Submitted date: 2/14/2012 4:03:52 PM Import type: Full Source: MARC File

Profile used: Polaris default

Branch: Community Library (Cobleskill)

User: peer Stopped by user: No

Workstation: Laura Peer Scheduled date:

Bibliographic save option: Save as final

Record owner: QA-Plato 4.1 Cluster Test System Display in PAC: Yes

MARC validation: Perform validation. If errors are found, save record as provisional.

Authority control: No authority control

Duplicate detection: Perform duplicate detection. If errors are found, save record as provisional.

Use system duplicate rules: Yes

Bibliographic duplicate criteria
Author/Title
ISBN
ISSN
LCCN
Rule group 1
Rule group 2
Title/260 $c
Title/LCCN

Authority save option: Save as final

MARC validation: Perform validation. If errors are found, save record as provisional.

Link see also references: No see also from processing

Duplicate detection: Perform duplicate detection. If errors are found, save record as provisional.

Use system duplicate rules: Yes

Authority duplicate criteria
Discontinued LCCN
Heading/Thesaurus

Following the import options are details for records that were imported and whether there were MARC validation problems, duplicates of existing records, or item records created where default information was used.

Bibliographic record:	867968		
Title:	Utah : the beehive state		
Begin time:	2/14/2012 4:05:03 PM	Record status:	Provisional
End time:	2/14/2012 4:05:04 PM	LDR status:	n

Duplicate	Reason	Title
810775	LCCN;ISBN;Author/Title;Title/260 $c;Just Title and;Title/LCCN	Utah : the beehive state
810776	LCCN;ISBN;Author/Title;Title/260 $c;Just Title and;Title/LCCN	Utah : the beehive state

Bibliographic record:	867969		
Title:	Three stages of amazement : a novel		
Begin time:	2/14/2012 4:05:04 PM	Record status:	Provisional
End time:	2/14/2012 4:05:04 PM	LDR status:	c

Error(s)

Validation: Tag 914 is not defined

Validation: Tag 915 is not defined

Validation: Tag 916 is not defined

Validation: Tag 955 is not defined

The last section lists the import statistics.

No record sets were specified

IMPORT STATISTICS

Begin time: 2/14/2012 4:05:00 PM **End time:** 2/14/2012 4:07:27 PM

Bibliographic records:

Final: 0 **Provisional:** 237 **Deleted:** 0 **Rejected:** 0

Updated: 0

Authority records:

Final: 0 **Provisional:** 0 **Deleted:** 0 **Rejected:** 0

Remote authority control generated: 0 **System generated:** 0

Item records:

Final: 0 **Provisional:** 0 **Updated:** 0 **Rejected:** 0

Total records read from file: 237

Total records created: 237

Automatic Processes During Import

When records are imported, they are processed according to settings in the import profile and in Polaris Administration. Some processing takes place before any records are created or updated, and other processing occurs when the data in the imported records are used to create or update records.

MARC Records Validated

If validation is selected in the import profile, the records are validated according to the following Polaris Administration Cataloging profiles: **MARC validation: Bibliographic** and **MARC validation: Authority**. However, if the incoming records contain indictors or subfields with data that cannot be validated, the data is replaced with the following defaults: Indicators default to **' '** and subfields default to **'?'**. For more information, see "Administering MARC Validation and Display" in the *Polaris Technical Services Administration Guide 4.1*.

Authority Control Performed

If the options to **Perform authority control** and **Automatically create new authority record; save bibliographic record as final** are selected in the Bibliographic Records tab of the import profile, the system searches for an existing authority record for the heading. If no matching authority record is found in the local database, an authority record is created automatically and saved to the database. If your library has a subscription to a remote database of authority records, the remote database is automatically searched when no matching authority record is found. The new authority record is saved in the database and linked to the new bibliographic records.

Bib Tags Marked to Prevent Item Record Creation or Updates

If you are using an import profile that is set to create item records from embedded holdings tags, an automatic process first checks the bibliographic records for the presence of pre-existing holdings tags with the same tag number specified in the import profile. If pre-existing tags are found that match the retained tags under **Keep MARC tags** in the import profile, and these tags do not already have a $9 subfield, then a system-supplied $9 with the text **Tag retained from duplicate overlay** is inserted into the tag. Pre-existing embedded holdings tags that do not already have a $9 subfield are marked automatically without a Polaris Administration parameter.

When embedded holdings tags are used to create new items or to update on-order items to shelf-ready items, a $9 with the text **Item generated** is inserted into the tag if the Polaris Administration Cataloging parameter **MARC embedded holdings tags as processed** is set to **Yes**.

During the import process, item records are not created or updated if the embedded holdings tags are marked as follows:

- **$9 Tag retained from duplicate overlaymmm dd yyyy hh:mm[AM/PM]**

Or

- **$9 Item generated mmm dd yyyy hh:mm[AM/PM]**

Your Polaris Administrator can use a utility to automatically scan for specific tags marked with $9 and remove them. See "Setting Utility to Delete Bib Tags Marked with Subfield 9" in the *Polaris Technical Services Administration Guide 4.1*.

Item Records Created from Embedded Holdings Tags

When you import bibliographic records using an import profile that is set to build item records from embedded holdings tags, the items are created automatically based the holdings tag number and MARC subfield mapping specified on the Item Records tab. This table shows the default settings, requirements, and data entry conventions for item record creation from data in the 852 tag in the **Polaris default (with item creation)** profile. The data entry conventions apply to all profiles.

Polaris Item Record Field (Bold type = Required)	*Subfield*	*Required*	*Data Entry Conventions*
Assigned (branch)	$a	Yes	Must match a branch ID or abbreviation. 15 characters max.
Collection	$b	No	Must match a collection ID or abbreviation.15 characters max.
Barcode	$p	No	20 characters max.
Call Number Prefix	$k	No	60 characters max.
Call Number Suffix	$m	No	60 characters max.
Circ Status	N/A	No	ID or description. 80 characters max. Certain circ statuses are not allowed in new item records, for example **Lost**. If the ID or description in the circ status is not allowed, the circ status is taken from the template or from system defaults for item records.
Classification Number	$h	No	60 characters max.
Copy Number	$t	No	60 characters max.
Cutter Number	$i	No	60 characters max.
Display in PAC	**$4**	**Yes**	**0 = No, 1 = Yes**
Fine code	$r	**Yes**	FineCodeID (ID or description). 80 characters max.
Free Text Block	N/A	No	255 characters max.
Funding Source	$1	No	50 characters max.
Holdable	**$5**	**Yes**	**0 = No, 1 = Yes**

Polaris Item Record Field (Bold type = Required)	*Subfield*	*Required*	*Data Entry Conventions*
Library Assigned Block	N/A	No	ID or description. 80 characters max.
Loan Period Code	**$u**	**Yes**	**LoanPeriodCodeID (ID or description). 80 characters max.**
Loanable Outside System	**$7**	**Yes**	**0 = No, 1 = Yes**
Material Type	**$w**	**Yes**	**MaterialTypeID (ID or description). 80 characters max.**
Name of Piece	N/A	No	255 characters max.
Non Circulating	N/A	No	0=No, 1=Yes
Non-Public Note	$x	No	255 characters max.
Owner (branch)	**$o**	**Yes**	**Must match a branch ID or abbreviation. 15 characters max.**
Physical Condition	$q	No	255 characters max.
POLI-Segment ID	N/A	No	Number
Price	$0	No	Monetary value (Format: **##.##** No '$' should be in the subfield; a decimal should be included where appropriate.)
Public Note	$z	No	255 characters max.
Renewal Limit	**$y**	**Yes**	**0-99**
Shelf Location	$c	No	Must match shelf location (ID or description). 80 characters max.
Shelving Scheme	**$j**	**Yes**	**0=No information,** **2=Library of Congress** **3=Dewey Decimal** **4=National Library of Medicine** **5=Superintendent of Documents** **6=Shelving Control Number** **7=Title** **8=Shelved Separately** **9=Other**
Statistical Code	$d	No	8 characters max (description).
Temporary Shelf Location	$l	No	25 characters
Vol (volume)	$v	No	60 characters max.

Records Checked for Duplicates

If duplicate detection is selected in the profile, duplicates are identified according to the rules in the following Polaris Administration database tables: **Bibliographic Deduplicaton** or **Authority Deduplication.** For more information, see "Change bibliographic or authority deduplication tables" in the *Polaris Technical Services Administration Guide 4.1*. You can also select the option **Use profile defined duplicate detection rules** in the import profile and select the rules to apply.

Duplicate Records Overlaid

If the import profile is set to perform duplicate detection, it can also specify how duplicate records are handled.

Tags Retained from Duplicate Records

The following Polaris Administration policy tables are used to identify tags to retain from duplicate records that are overlaid: **Bibliographic Overlay Retention** or **Authority Overlay Retention**. For more information on these tables, see "Specify tags to retain when records are overlaid" in the *Polaris Technical Services Administration Guide 4.1*. For bibliographic records, you can also select the option **Profile-defined overlay retention tags** in the import profile and select additional bibliographic tags to retain. See "Set import options for bibliographic records" on page 65.

Bibliographic Overlay Based on Encoding Level

If the import profile is set to compare the encoding levels of duplicate records, the value in Leader position 17 is checked. The following table shows the values in the incoming record in Leader position 17 and the values in the existing record that allow or disallow an overlay. If the encoding levels are equal, the records are processed according to the setting in the import profile.

Tip:
Double-click on the Leader in the MARC21 view of the Bibliographic Record workform to see the encoding levels in Leader position 17:

space - Full level
1 - Full level, material not examined
2 - Less than full level, material not examined
3 - Abbreviated level
4 - Core level
5 - Partial (preliminary) level
7 - Minimal level
8 - Prepublication level
E - System-identified MARC error in batchloaded record
I - Full-level input by OCLC participants
J - Deleted record
K - Less-than-full input by OCLC participants
L - Full-level input added from a batch process
M - Less-than-full added from a batch process
u - Unknown
z - Not applicable

Incoming LDR/17 Value	*Can Overlay*	*Cannot Overlay*
space	space	
	1	
	2	
	3	
	4	
	5	
	7	
	8	
	u	
	z	
	E	
	I	
	K	
	L	
	M	
		J
1	1	
	2	
	3	
	4	
	5	
	7	
	8	
	u	
	z	
	E	
	K	
	M	
		space
		I
		L
		J

Incoming LDR/17 Value	*Can Overlay*	*Cannot Overlay*
2	2	
	3	
	4	
	5	
	8	
	u	
	z	
	E	
	K	
	M	
		space
		1
		7
		I
		L
		J
3	3	
	5	
	8	
	u	
	z	
	E	
		space
		1
		2
		4
		7
		I
		J
		K
		L
		M

Incoming LDR/17 Value	*Can Overlay*	*Cannot Overlay*
4	3	
	4	
	5	
	8	
	u	
	z	
	E	
		space
		1
		7
		I
		J
		K
		L
		M
5	5	
	u	
	z	
	E	
		space
		1
		2
		3
		4
		7
		8
		I
		J
		K
		L
		M

Incoming LDR/17 Value	*Can Overlay*	*Cannot Overlay*
7	2	
	3	
	4	
	5	
	7	
	8	
	u	
	z	
	E	
	K	
	M	
		space
		1
		I
		J
		L
8	5	
	8	
	u	
	z	
	E	
		space
		1
		2
		3
		4
		7
		I
		J
		K
		L
		M

Incoming LDR/17 Value	*Can Overlay*	*Cannot Overlay*
u	u	
	z	
	E	
		space
		1
		2
		3
		4
		5
		7
		8
		I
		J
		K
		L
		M
z	u	
	z	
	E	
		u
		space
		1
		2
		3
		4
		5
		7
		8
		I
		J
		K
		L
		M

Incoming LDR/17 Value	*Can Overlay*	*Cannot Overlay*
E	E	
		u
		z
		space
		1
		2
		3
		4
		5
		7
		8
		I
		J
		K
		L
		M
I	space	
	1	
	2	
	3	
	4	
	5	
	7	
	8	
	u	
	z	
	E	
	I	
	K	
	L	
	M	
		J

Incoming LDR/17 Value	*Can Overlay*	*Cannot Overlay*
J		space
		1
		2
		3
		4
		5
		7
		8
		1
		u
		z
		E
		I
		J
		K
		L
		M
K	2	
	3	
	4	
	5	
	8	
	u	
	z	
	E	
	K	
	M	
		space
		1
		7
		I
		J
		L

Incoming LDR/17 Value	*Can Overlay*	*Cannot Overlay*
L	space	
	1	
	2	
	3	
	4	
	5	
	7	
	8	
	u	
	z	
	E	
	I	
	K	
	L	
	M	
		J
M	2	
	3	
	4	
	5	
	8	
	u	
	z	
	E	
	K	
	M	
		space
		1
		7
		I
		J
		L

Overlay of Authority Records Based on Cataloging Source

If the option **Merge duplicate records** is selected when importing authority records, the 040 $a of the incoming record is checked against the entries in the following Administration policy table: **Authority Record Import: Preferred Cataloging Source**. If the (040 $a) code in the incoming record matches an entry in the table, the preference order of the code is checked. The incoming record overlays the database record if it has a higher level of preference than the code in the database record.

Note:
For information on setting up this policy table, see "Specify preferred cataloging sources for authority records" in the *Polaris Technical Services Administration Guide 4.1*.

1. The original cataloging agency of the incoming record (tag 040 $a) is matched to entries in the Authority Record Import: Preferred Cataloging Source policy table in Polaris Administration.

Preferred Cataloging Source Table Entries for Importing Library	*Incoming Record Tag 040 $a*	*Import Processing Status*
Has entries	Matches a table entry	Valid for import processing
Has entries	Does not match a table entry	Invalid record is logged in the import report, but is not added to the catalog
Has entries	No tag 040	Invalid record is logged in the import report, but is not added to the catalog
No entries	No tag 040	Incoming record is added to catalog as provisional. Logged in import report. Added to provisional record set if specified. Existing record is not changed.
No entries	Has original cataloging source information	Valid for import processing

2. If the imported authority record is from a preferred cataloging agency, the ranking of the agency is compared with the agency ranking of the existing record.

   The ranking of preferred cataloging agencies is determined by the agency's entry position in the Authority Record Import: Preferred Cataloging Source policy table in Polaris Administration.

Incoming Record Original Cataloging Agency Preference	*Processing Done for Incoming Record*
Higher than the agency for the existing record	Processed according to value in record status (Leader/05)
Equal to the agency for the existing record	Processed according to value in record status (Leader/05)
Existing record does not have a cataloging agency specified	Processed according to value in record status (Leader/05)
Lower than the agency for the existing record	Entry logged in import report. Incoming record is not added to catalog.

3. If the imported record has a higher or equal source preference than the existing record, the duplicate records are processed based on the record status (Leader/05) of the incoming record.
    - If the incoming record has a record status of **n** (new), **c** (corrected or revised), or **a** (increase in encoding level), Polaris does new or update processing.
    - If the incoming record has a record status of **d** (deleted), **s** (deleted with heading split), or **x** (deleted with heading replaced), Polaris does deletion processing.

Authority Records Deleted

If the incoming authority record status (Leader/05) is **d**, **s**, or **x**, the following deletion processing occurs during import:

- If the incoming authority record status is **d** (deleted), the following processing occurs:
    - All bibliographic record links to and from the existing authority record are disconnected.
    - If any authority record has the existing authority record 1xx field as a 4xx field, the cross-reference is logged in the import report.
    - All authority record links to the existing authority record are disconnected.
    - The existing authority record is replaced by the incoming record.
    - The deleted record is logged in the import report.
- If the incoming authority record status (Leader/05) is **s** (deleted; heading split into two or more headings), the following processing occurs:
    - All bibliographic and authority record links to and from the existing authority record are disconnected.
    - All disconnected links are logged in the import report.
    - The existing authority record is replaced by the incoming record.
    - The deleted record is logged in the import report.

- If the incoming authority record status (Leader/05) is **x** (deleted; heading replaced by another heading), the following processing occurs:
  - All bibliographic and authority record links to and from the existing authority record are disconnected.
  - The existing authority record is replaced by the incoming record.
  - The deleted record is logged in the import report.

Checking Cataloging Records

Several checking functions in Polaris Cataloging help you maintain accurate and complete records. When you save or import records, Polaris checks for matching authority headings, validates the MARC format, and checks to see if there are duplicate records already in the database. You can also use these tools to check records at any time.

If you change a heading in an authority record, a dialog box lists the linked records that are affected by the change. You can automatically change the headings in the linked records to match the change in the authority record.

This unit covers the following topics:

Checking Authority Headings

Checking authority headings in bibliographic and authority records ensures consistency in indexing, so retrieval is reliable. Headings are checked when you save the record as final or when you select **Tools, Check Headings** on the Bibliographic Record workform, or **Tools, Check See Also From** on the Authority Record workform.

Note:
The headings check is not done automatically when you save the record as provisional.

If no invalid headings are found, the **Check Complete** message appears or the record is saved. If any unlinked headings are found, the Check Headings Assistant dialog box lists the problem headings. You can correct the problem heading in the record, create a new authority record to match the problem heading, or disregard the problem and leave the heading unlinked. You must have permission set in Polaris Administration to create authority records.

You can also create links automatically from an open authority record to new bibliographic or authority records whose headings match, or are very close to, the heading in the open record. When you make new links to authority records or update links, you can see the changes by selecting **Utilities, Cataloging Processing, Authority Create Links Queue** or the **Authority Update Links Queue**.

Authority Control for Local Headings

Note:
If you do not want authority control performed on these local headings, contact your Polaris Site Manager.

Polaris performs authority control for some local subject headings. Local subject headings must be in 690 and 691 fields, the second indicator must be 7, and the subfields must be similar to those specified in the MARC format for bibliographic 600, 650, and 651 fields. If your data does not meet these requirements, additional data analysis and processing fees may apply during data conversion.

When authority control for local headings is performed, the system attempts to match the local headings in bibliographic records with authority records as follows:

- **690 Subject Heading - Local Topical Subject** field with a second indicator value of ‘7’ (source specified in subfield 2) is matched against authority records containing a 190 tag and a 008/11 value of ‘z’ (other). (The value in subfield 2 is not taken into account.)
- **691 Subject Heading - Local Geographic Name** field with a second indicator value of '7' (source specified in subfield 2) is matched against authority records containing a 191 tag and an 008/11 value of 'z' (other). (The value in subfield 2 is not taken into account.)

If a match is found and all other existing conditions for authority linking on non-local headings are met, a link is established between the bibliographic heading and the matching authority record.

In addition, links are automatically established between authority records as follows:

- **590 See Also From Tracing - Local Topical Term** is matched against an authority record’s 190 tag.
- **591 See Also From Tracing - Local Geographic Name** is matched against an authority record’s 191 tag.

ZMARC Remote Authority Control

If your library subscribes to Polaris ZMARC, the remote ZMARC or OCLC authority database is checked for matching authority records when no match is found in the Polaris database. When you save MARC records, import them, or check their headings, and no matching authority record is found in the local database, the remote database is checked automatically. If an exact match is found in the remote authority database, it is saved to the local database and a link is made to the existing or imported record.

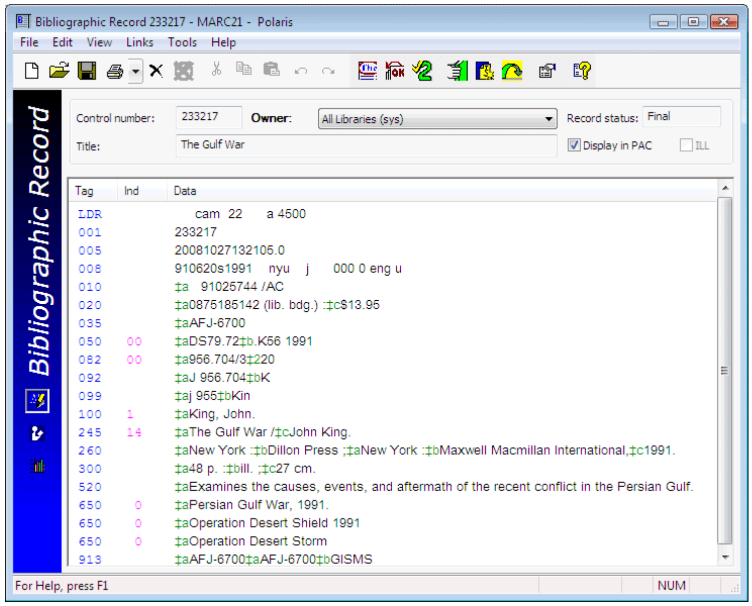
You enable remote automatic authority control through the **Remote automatic authority control** Cataloging profile in Polaris Administration. See “Managing Authority Control” in the *Polaris Technical Services Administration Guide 4.1*.

1-2-3

List and resolve unlinked headings

Follow these steps to check for unlinked headings in a bibliographic or authority record.

1. Open the Bibliographic Record or Authority Record workform.



Tips:

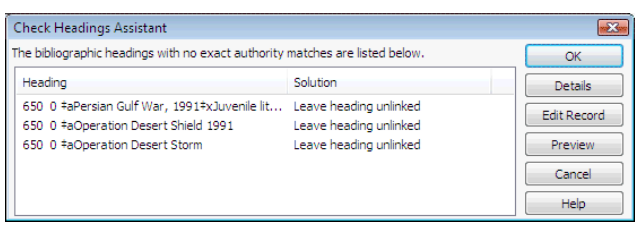
Click  to check headings in the bibliographic record.

Click  to check *see also* references in the authority record.

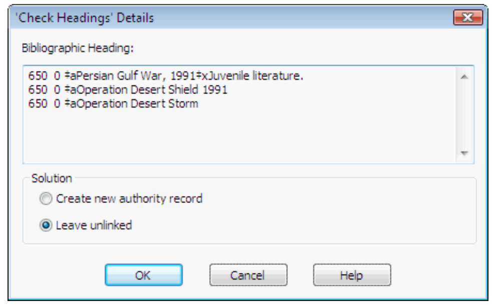
2. Select **Tools, Check Heading(s)** on the Bibliographic Record workform, or select **Tools, Check See Also From References** on the Authority Record workform.

Note:
If the headings are linked, the following message appears: **No heading problems were found**. Click **OK** to acknowledge the message and skip the rest of these steps.

- If you use remote automatic authority control, and there are headings with no matching authority record, a message briefly indicates that the system is searching for a matching authority record in the external database. If an exact match is found, the authority record is saved to the database and the link is automatically made.
- If there are unauthorized headings, the Check Headings Assistant dialog box appears.

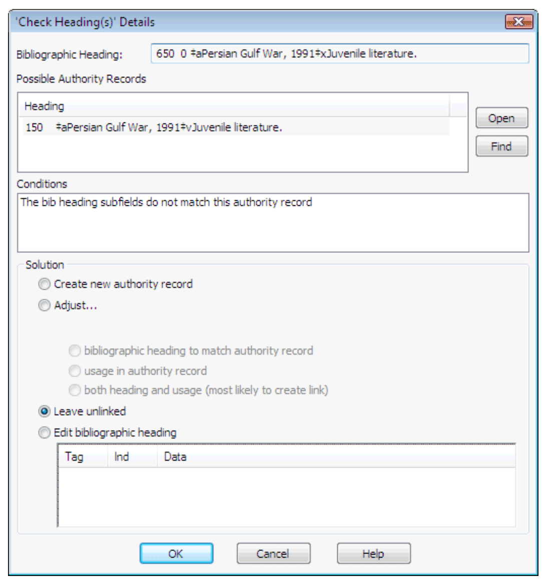


3. Select a single heading or multiple headings to edit:
   - If there are multiple headings and you want to create new headings or leave the bibliographic headings unlinked for all the headings listed, select all the headings and click **Details**. The Check Headings Details dialog box appears with the headings listed.



   Select **Create new authority record** or **Leave unlinked**, and click **OK**.

   - To see more options, select a single heading, and click **Details** on the Check Headings Assistant or Check See Also From References Assistant dialog box. The Check Heading(s) Details dialog box appears with the other options.



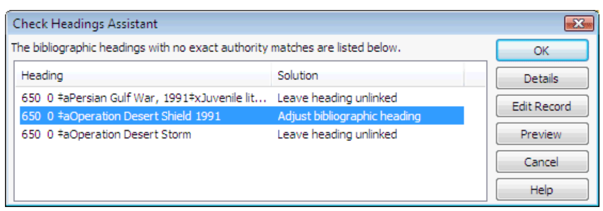
4. Use one of the following options to resolve the unauthorized heading:
   - **Change the heading to match an existing authority record** - If a heading is listed under **Possible Authority Records**, select it. Or, click **Find** and use the Find Tool to search for and select a valid authority record. Then, select **Adjust** on the Check Headings Details dialog box and select one of the following options:

     - **bibliographic heading to match authority record** or **authority see also reference to match heading** - Changes the heading in the record to match the authority heading you selected.

     - **usage in authority record** - Changes the usage of the authority record selected in the Possible Authority Records list to authorize the heading.

     - **both** - Changes both the usage and the heading.
   - **Create a new authority record to match the heading** - If no matching authority record is found, a new authority record can be created based on the heading in the bibliographic record. Select **Create new authority record**.
   - **Leave the heading or reference unlinked to an authority record** - Click **Leave unlinked**.
   - **Manually change the heading** - Click **Edit bibliographic heading** or **Edit authority heading**, and make changes to the heading in the box.
5. Click **OK** to close the Check Heading(s) Details dialog box.

   The Check Headings Assistant dialog box displays the solution.



Tips:
To see how the authority heading appears in the record, click **Preview**. The Preview window appears.
If you created a new authority record, it is listed in a dialog box, and you can double-click to open it in the Authority Record workform.

6. Click **OK** on the Preview window if it is open, and click **Continue Saving** on the Check Headings Assistant dialog box, or just click **OK** on the Check Headings Assistant dialog box.

   The Bibliographic Record workform or the Authority Record workform appears.
7. Select **File, Save**, press **CTRL+S**, or click to save the record.

Related Information

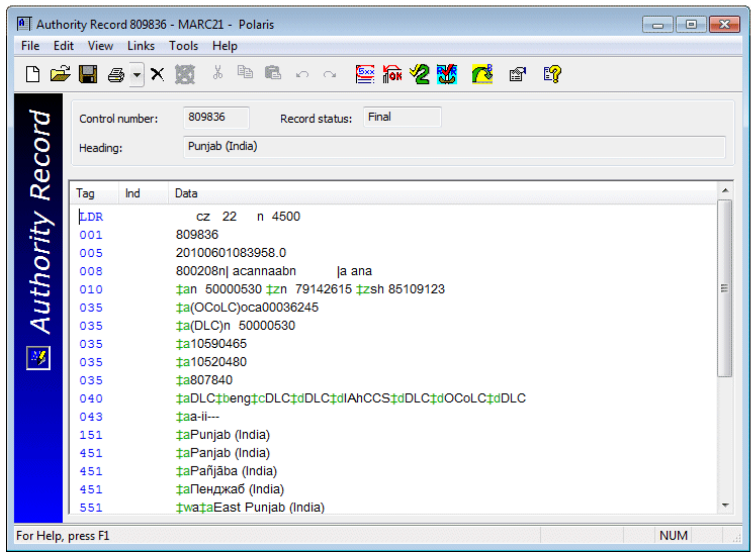
Authority Reports - You can run a report to identify authority records where a *See* reference (4xx field) in one record matches a heading (1xx field) in another record in the database. See "Authority Reports" in the *Polaris Basics Guide 4.1*.

1-2-3

Create links from authority records to other records

You can authorize headings by creating links to bibliographic or authority records from the Authority Record workform. If you have several records with the same headings that are not authorized, you can open the authority record in the Authority Record workform and create the links to the records. Follow these steps to create links from an authority record to a bibliographic record or another authority record.

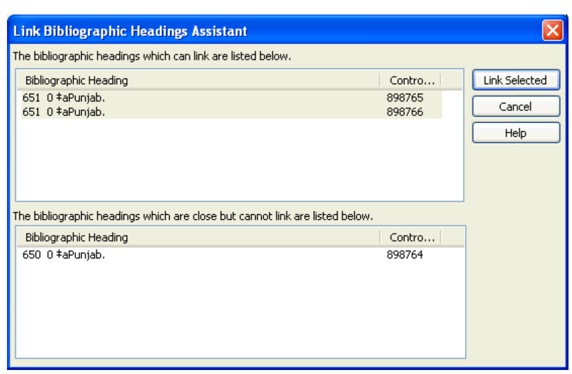
1. Open the Authority Record workform.



2. Select **Tools, Create Links to Bibliographic Records** or **Tools, Create Links to Authority Records.**

   The Link Bibliographic Headings Assistant or Link Authority Headings Assistant dialog box appears with a list of authority headings that can link or are close.

   If the headings can be linked, they are listed in the top of the dialog box.



3. Do one of the following actions:
   - If the headings can be linked, select the headings and click **Link Selected**.
   - If the headings are close, double-click the close headings to open the records, and modify the heading to match the authorized heading. Then select **Tools, Create Links** again, select the fixed headings, and click **Link Selected**.

   The linking process begins.
4. To check the linking job, see "Check the logs of the new or updated authority links" on page 114.
5. To generate a report that lists the new and updated links, see "Check the logs of the new or updated authority links" on page 114.

Edit authority records and update linked records

When you modify and save an authority record, Polaris checks to see if there are bibliographic records with a heading linked to the authority record or cross-referenced headings in other authority records. You can also use the **Check For Linked Records** option on the **Tools** menu to check for linked records before saving the record. If there are linked records, and the heading or usage has changed, you can resolve the discrepancies automatically when you save the record.

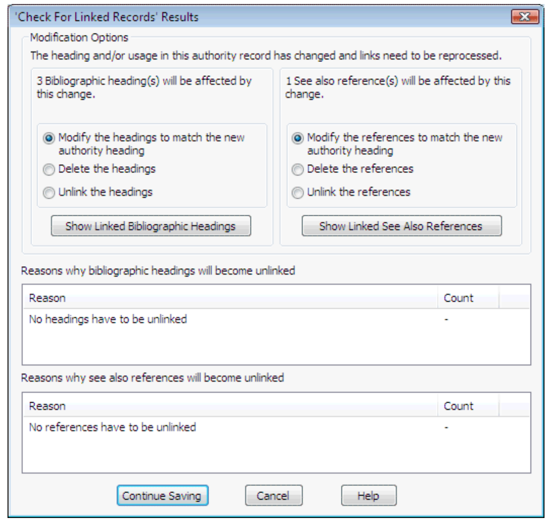
Follow these steps to edit authority records and update linked records.

Tip:
To see a list of the bibliographic records linked to an authority record, select **Links, Bibliographic Records** or click .

1. Open the Authority Record workform.
2. Edit the heading.
3. Save the authority record.

   Note:
   The options for automatically modifying the linked records appear only when you save the authority record.

   If there are affected headings, the Check for Linked Records Results dialog box appears. The dialog box displays the number of bibliographic records and the number of *See also* references that will be affected by this change. It also displays reasons why the headings and/or references will become unlinked.



4. If there are linked bibliographic or authority records that will be affected by the change in the authority record, select one of the following options:
   - To leave the heading links as they are, do not select any option and click **Cancel**.
   - To modify the heading in the bibliographic or authority records to match the new heading in the edited authority record, click **Modify the headings** (or **references**) **to match the new authority heading**.
   - To delete the heading and tag in the bibliographic or authority records to which the edited authority record is linked, click **Delete the headings** (or **references**).
   - To remove links to any bibliographic headings linked to the edited authority record, click **Unlink the headings** (or **references**). The heading remains in the bibliographic or authority record as an unauthorized heading.
5. Click **Continue Saving** to update the linked headings automatically.

Related Information

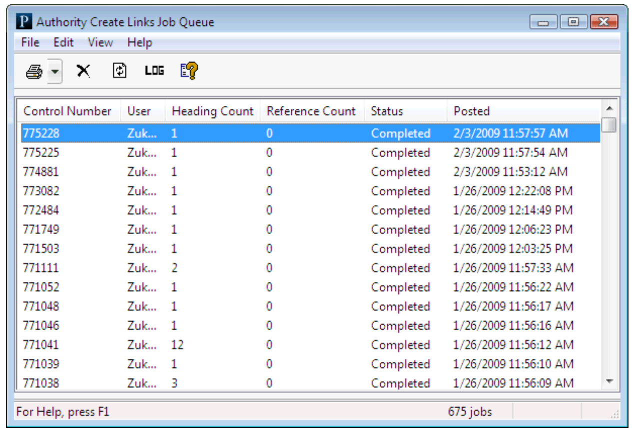
Check headings before saving changes to the authority record - To see the linked headings that would be affected by your changes, select **Tools, Check For Linked Records** or click  from the Authority Record workform. The Check for Linked Records Results dialog box appears if there are linked records that would be affected by the change. If no linked headings or no heading problems were found, a **No records were affected** message appears. You can click **Show Linked Bibliographic Headings** or **Show Linked See Also References** to see a list of the linked records.

Check the logs of the new or updated authority links

Follow these steps to check the updates to the authority linking.

1. On the Polaris Shortcut Bar, select **Utilities, Cataloging Processing, Authority Create Links Queue** or **Authority Update Links Queue**.

   A window lists the new or updated links.



Authority Create Links Job Queue

File Edit View Help

Control Number	User	Heading Count	Reference Count	Status	Posted
775228	Zuk...	1	0	Completed	2/3/2009 11:57:57 AM
775225	Zuk...	1	0	Completed	2/3/2009 11:57:54 AM
774881	Zuk...	1	0	Completed	2/3/2009 11:53:12 AM
773082	Zuk...	1	0	Completed	1/26/2009 12:22:08 PM
772484	Zuk...	1	0	Completed	1/26/2009 12:14:49 PM
771749	Zuk...	1	0	Completed	1/26/2009 12:06:23 PM
771503	Zuk...	1	0	Completed	1/26/2009 12:03:25 PM
771111	Zuk...	2	0	Completed	1/26/2009 11:57:33 AM
771052	Zuk...	1	0	Completed	1/26/2009 11:56:22 AM
771048	Zuk...	1	0	Completed	1/26/2009 11:56:17 AM
771046	Zuk...	1	0	Completed	1/26/2009 11:56:16 AM
771041	Zuk...	12	0	Completed	1/26/2009 11:56:12 AM
771039	Zuk...	1	0	Completed	1/26/2009 11:56:10 AM
771038	Zuk...	3	0	Completed	1/26/2009 11:56:09 AM

For Help, press F1 675 jobs

2. Double-click the links job, or click LOG.

   The log appears in the report preview window.

Authority Create Links Job

Authority Record ID 775228

Requested by Zukowski On 2/3/2009 11:57:56 AM

Processed 1 Of 0 Bibliographic headings

Processed 0 Of 0 Authority references

Bibliographic Record ID	Heading	Description
733824	100 1 ‡aMiller, Marie-Therese.	Record was linked to authority record 775228

3. To print the log, select **File, Print** from the Adobe Acrobat menu.

Checking MARC Format

MARC format checking ensures the consistency and the quality of your MARC records. Polaris automatically checks MARC 21 tags when you save a record as final, but you can also check the MARC format before you save a record. When invalid tags and headings are detected, a list of the formatting problems appears.

Polaris MARC validation uses the rules set in the MARC Validation Bibliographic and MARC Validation Authority profiles. Refer to "Administering MARC Validation and Display" in the *Polaris Technical Services Administration Guide 4.1* for information about changing the validation tables. These system tables are based on rules outlined by the Library of Congress in the *MARC 21 Standard Format For Bibliographic/ Authority Data* (ISBN 0-8444-0809-3). Refer to the appropriate Library of Congress document if you have any questions about MARC 21 format concepts and standards.

Depending on the MARC validation options set by your organization in Polaris Administration, you may or may not see validation messages for required, obsolete, or conditional content designators. You may choose not to correct invalid tags due to time constraints or local library policy.

Note:
The Leader and 008 tag are required when saving or importing bibliographic records, even if MARC validation is turned off.

Check MARC format from a workform

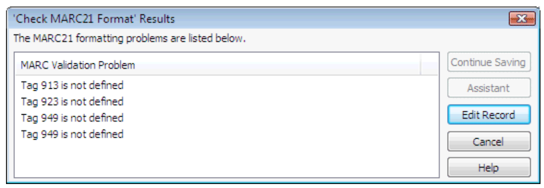
Follow these steps to verify that the catalog record displayed in the Bibliographic Record or Authority Record workform meets the MARC 21 format guidelines.

Tip: 
Click to check the format.

1. Open the Bibliographic Record or Authority Record workform.
2. Select **Tools, Check MARC21 Format** from the workform menu bar.

   Note:
   If the content designators are valid, a **No MARC21 formatting problems were found** message box appears. Click **OK** to acknowledge the message and skip the rest of this procedure.

   The Check MARC21 Format Results dialog box appears if there are formatting problems in the MARC record.



3. If the Check MARC21 Format Results dialog box appears, choose one of the following actions to resolve format issues:
   - To correct the invalid tags, do "Change invalid fields" on page 117.
   - To cancel the Check Tag procedure, click **Cancel**.
   - To continue saving the record without changing invalid tags, click **Continue Saving**. This option is available only when invalid tags are found while saving the record.

Change invalid fields

Tip: 
Click to check the format.

Follow these steps to change invalid content designators in the record.

1. Click **Edit Record** on the Check MARC21 Format Results dialog box.

   The focus changes to the record workform.

2. Make the appropriate changes to the invalid tags.

3. Select **Tools**, **Check MARC21 Format** to restart the MARC 21 check.

   If all content designators are valid, **No MARC21 formatting problems were found** appears, or if the record still contains invalid fields, the Check USMARC Format Results dialog box appears.

4. Do one of the following actions:
   - If **No MARC21 formatting problems were found** is displayed, click **OK** to return to the workform.
   - If the Check MARC21 Format Results dialog box is displayed, repeat steps 2-3 of this procedure until all MARC 21 formatting problems are resolved.

Checking for Duplicate Records

Polaris duplicate detection helps you avoid adding duplicate bibliographic or authority records to your database. Duplicate detection is automatically run when you save a bibliographic or authority record. You can also select **Tools, Replace/Check for duplicates** from the Bibliographic Record workform, or **Tools, Check for Duplicates** on the Authority Record workform. The following Polaris Administration settings control duplicate detection and how records are overlaid in Polaris Cataloging:

- **Bibliographic and authority deduplication database tables**
  The criteria for detecting duplicates are set in the Bibliographic Deduplication and the Authority Deduplication database tables at the system, library or branch levels in Polaris Administration. See "Change bibliographic or authority deduplication tables" in the *Polaris Technical Services Administration Guide 4.1*.
- **Bibliographic and authority overlay retention policy tables**
  When you overlay a record, the 035 tags of the replaced records are saved in the new record as well as any tags specified in the Bibliographic Overlay Retention or Authority Overlay Retention policy tables in Polaris Administration. See "Specify tags to retain when records are overlaid" in the *Polaris Technical Services Administration Guide 4.1*.
- **MARC validation immediately after bib overlay cataloging profile**
  Some of the tags retained from the overlaid records may be non-repeatable tags. You may want to set **MARC validation immediately after bib overlay** to **Yes** so that MARC validation is performed on the new record after the duplicates are overlaid. See "Enable validation when duplicate bibs are replaced" in the *Polaris Technical Services Administration Guide 4.1*.
- **Check headings immediately after bib overlay cataloging profile** - If this profile is set to **Yes** in Polaris Administration, the headings are checked in the retained record after it overlays another bibliographic record or records. See "Enable headings check when replacing bibs" in the *Polaris Technical Services Administration Guide 4.1*.
- **Bibliographic record replace: maximum allowed in one operation Cataloging parameter** - This system-level parameter limits the number of records that can be replaced at once. See "Set the number of bibs that can be replaced at once" in the *Polaris Technical Services Administration Guide 4.1*.

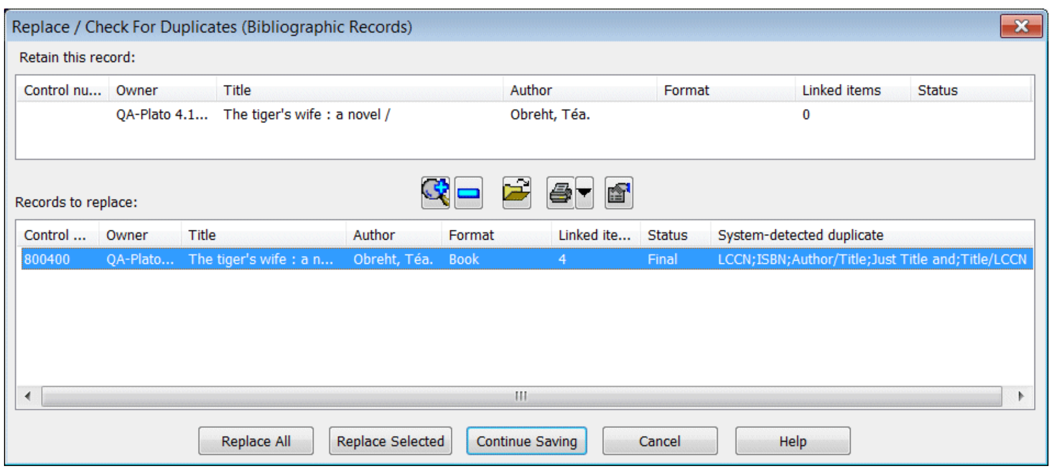
Note:
For information on the duplicate detection process during import, see "Set import options for bibliographic records" on page 65.

Detect duplicates or replace bibliographic records

You can check for duplicate bibliographic records and replace them with a new or existing record. You can also replace records even if they were not determined to be duplicates. When you save a bibliographic record, it is automatically checked for duplicates, and if one or more duplicate records are found, the Replace/Check for duplicates dialog box appears with the duplicate records listed. If no duplicates are found when you save a record, the dialog box does not appear and the bibliographic record is saved.

Follow these steps to check for duplicate bibliographic records and replace them, or replace records that are not determined to be duplicates.

1. Open the Bibliographic Record workform.
2. Do one of the following steps:
   - Select **File, Save**, click , or press **CTRL+S**. If you save the record and no duplicates are detected, the record is saved, and no additional message appears. If you save the record and duplicates are detected, the Replace/Check For Duplicates dialog box appears with the duplicates listed.



   - Select **Tools, Replace/Check for duplicates**, click , or press **Ctrl+I**. If duplicates are detected, the Replace/Check For Duplicates lists them, including the reason they were determined to be duplicates. If no duplicates are detected, the Replace/Check For Duplicates dialog box appears with the message: **No duplicates were found. You can select records to replace with the add button above**.
3. If the Replace/Check for Duplicates dialog box appears, do one of the following:
   - **Close the dialog box if no duplicates were detected** - Click **Cancel**.
   - **Close the dialog box if duplicates were detected** - Click **Continue Saving** to save the duplicate record.

- **Open a record in the Records to replace list** - Select the record or records, and click **Open**.

Tip:
If a bibliographic record has a status of Deleted, it cannot be added to the list of records to replace.

- **Add records to the Records to replace list** - Click to open the Polaris Find Tool. Search for and select single or multiple bibliographic records or bibliographic record sets, right-click and choose **Select.** To see the records in a record set, right-click and select **Open**. When you select a record set, all the member records are added to the list.
- **Remove records from the Records to replace list** - Select the records to remove, and click .
- **Replace the records displayed in the Records to replace list** - Click **Replace All**, or select specific records in this list, and click **Replace Selected**. Click **Yes** to confirm that you want to replace the record or records.

Tip:
If the overlaid records include tags listed in the Bibliographic Overlay Retention Tags policy table, these tags are copied to the new bibliographic record. See “Related Information” on page 120 for more information on what gets saved in the retained record.

Related Information

- **Records that cannot be added to the Records to Replace list**:
  - Records with a Deleted status
  - Records linked to digital media in Polaris Fusion
- **Results of replacing records** - When you choose to replace a record or records in the **Records to replace** list with the record displayed in the Bibliographic Record workform, the saved record has the following characteristics:
  - **Specific tags from overlaid records are retained** - All 035 tags in the replaced records are copied to the new record, as well as any tags listed in the Bibliographic Overlay Retention policy table.
  - **Links from overlaid records are transferred to the newly saved record** - If the duplicate records had links to other records, they are maintained in the new record, including links to:

    hold requests
    item records
    item templates
    authority records
    selection list line items
    selection lists
    promotion records
    purchase order line items
    purchase orders
    invoice line items
    invoices
    serial holdings records
    standing order parts
    subscription records
    record sets

- **Non-MARC settings are specified in the newly saved record** - The **Display in PAC** setting and other non-MARC settings are not copied from the replaced records.
- **First available date is earliest in any of the records** - The new bibliographic record's first available date is the earliest first available date of any of the records, including those that were overlaid. This means that in some situations the creation date of the retained record is after the first available date.
- **Circulation counts increase** - The Lifetime circulation count and Lifetime in-house circulation count are increased by the counts in the replaced records.
- If the **MARC validation immediately after bib overlay** Cataloging profile is set to **Yes**, MARC coding is checked after records are overlaid. This setting also ensures that non-repeatable tags from the overlaid records do not accumulate in the new bibliographic record. See "Enable validation when duplicate bibs are replaced" in the *Polaris Technical Services Administration Guide 4.1*.
- If the **Check headings immediately after bib overlay** Cataloging profile is set to **Yes**, headings are checked in the retained record. If any problems are detected with the headings, the Check headings assistant dialog box appears. For information on fixing the headings, see "Checking Authority Headings" in the *Polaris Cataloging Guide 4.1*.

- **Setting deduplication rules** - The rules that detect duplicates are applied using rules groups in the Bibliographic Deduplication database table or the Authority Deduplication table. For more information, see "Change bibliographic or authority deduplication tables" in the *Polaris Technical Services Administration Guide 4.1*.

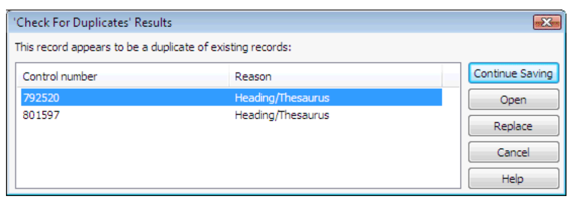
Detect duplicate authority records

You can check for duplicate authority records and replace them with a new record. If any tags in the overlaid records are set to be retained, they are copied to the new record.

Follow these steps to check for existing authority records in the Polaris database that may be duplicates of the record displayed in the Authority Record workform.

1. Open the Authority Record workform.
2. Do one of the following steps:
   - Click or select **Tools, Check for Duplicates**.
   - Select **File, Save**, press **CTRL+S**, or click to save the record.

   Any suspected duplicates are listed in the Check For Duplicate Results dialog box. The reasons the record was identified as a duplicate are displayed in the **Reason** column. They refer to the applicable rule groups as defined in the Authority Deduplication database table.



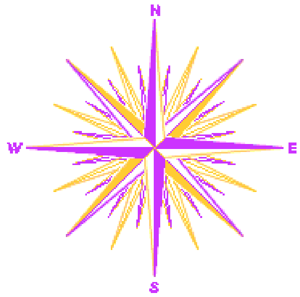
3. If the Check For Duplicates Results dialog box appears, do one of the following:
   - To save the record displayed in the Authority Record workform even though it may be a duplicate of the record or records listed in the dialog box, click **Continue Saving**.
   - To open a suspected duplicate, select the record, and click **Open**.
   - To replace a suspected duplicate with the record displayed in the Authority Record workform, select the record, and click **Replace.** Then, click **OK** to confirm that you want to replace the record or records.
   - Click **Cancel** to cancel and return to the workform.

Tip:
All options are available on the Check for Duplicates dialog box if you saved the record. However, if you selected **Tools, Check for Duplicates** without first saving the record, the only options available are **Open** and **Cancel**.

Related Information

Setting deduplication rules - The rules that detect duplicates are applied using rules groups in the Authority Deduplication database table. For more information, see "Change bibliographic or authority deduplication tables" in the *Polaris Technical Services Administration Guide 4.1*.

Maintaining Item Records



Item records track the physical items in your library collection and show the availability of items in the public catalog. They store the title information, call number, location, copy number, status, circulation parameters, circulation history, holds information, blocks, statistics, and other information for each piece in a library's collection.

By default, the Item Record workform opens to the view that corresponds to the active subsystem. For example, when you are creating a new item record, the workform opens to the Cataloging view. However, you can set a profile in Polaris Administration so that the Item Record workform always opens to a specific view, regardless of how the item record is accessed. See "Set the Item Record workform opening view" in the *Polaris Administration Guide 4.1*.

Each item record is linked to a single bibliographic record, but multiple item records can be linked to the same bibliographic record. For example, your library may have several copies of *War and Peace*, each with its own item record, and all linked to the same bibliographic record. You can also associate item records with other item records, so you can track multi-part items, such as kits.

You can save item records as final or provisional records. When you save an item record as final, it is checked for duplicates in the database, and it appears in the public catalog if you have selected the option. Provisional item records are not checked for duplicates, and they do not appear in the public catalog. For information on deleting item records, see "Delete bibliographic or item records" on page 199.

If your Polaris system includes course reserve functionality, you can reserve items for courses. Information related to course reserves is stored in the Reserves view of the Item Record. When you reserve an item, you can assign circulation settings that are different from the normal settings on the Circulation view of the Item Record. See "Edit item information for course reserves" on page 136.

Note:
To specify how hold requests operate in your library, see "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1*.

This unit covers the following topics:

Creating Item Records

Before you can create an item record, a bibliographic record for the title must exist in the database. You can create item records in these ways:

- Simultaneously create multiple item records linked to the same bibliographic record using the New Item Record Options dialog box. You can use item record templates when you create multiple item records. See “Create multiple item records for a single title” on page 125.
- Import bibliographic records and automatically generate item records based on the holdings data in the 852 tag or in a locally-defined tag. See “Set import options for item records” on page 70.
- Release a purchase order and create on-order items. See “Release a purchase order” in the *Polaris Acquisitions Guide 4.1*.
- Create an item record from another item record. You can start with an existing item record and copy it. Or, you can clear the workform and create a new item record from a blank workform. You can also create an item record using a template. See “Create a single new item record manually” on page 130.
- Create an on-the-fly item at checkout - The on-the-fly (OTF) function creates a minimal-level item record so items can be checked out before they are fully cataloged. See “Create an on-the-fly item at checkout” in the *Polaris Patron Services Guide 4.1*.

You can specify the default shelving scheme to use for all new item records for your organization. See “Setting Item Copy & Save Options” in the *Polaris Technical Services Administration Guide 4.1*.

Create multiple item records for a single title

Follow these steps to create one or more item records linked to the same bibliographic record.

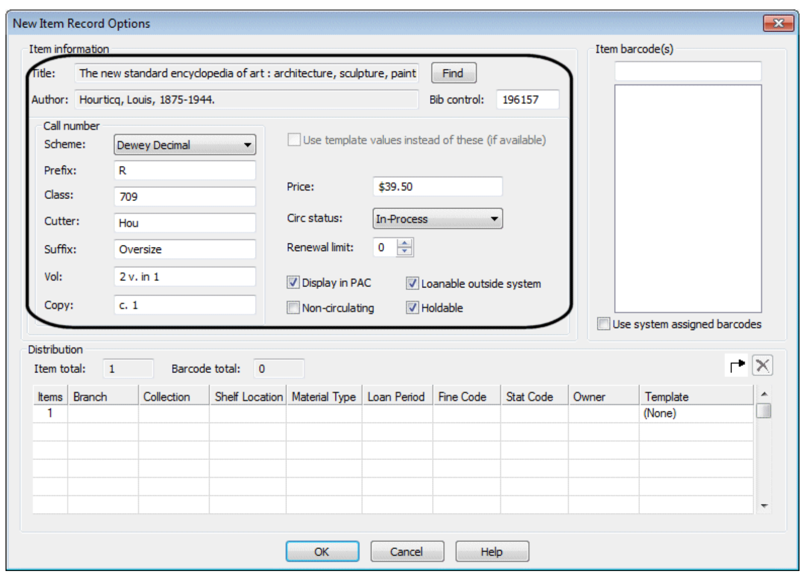
Note:
Item records can be created automatically when importing bibliographic records with embedded holdings data. See "Set import options for item records" on page 70.

Tip:
If you are creating all items using the same template, you can select it on the New dialog box. If you are creating items using different templates, do not select a template on the New dialog box. Click **OK** without selecting a template and go to the New Item Record Options dialog box where you can select a different template for each item.

1. Do one of the following actions:
   - From the Polaris Shortcut bar, select **File, New**, press **CTRL+N**, or click and select **Item Record** from the New dialog box. Then, select a template or click **OK**.
   - Press **F12** to open the Bibliographic Record Find Tool, search for the bibliographic record and open it in the Bibliographic Record workform. Then, select **Tools, Create Item Record**, or click .
   - From the Item Record workform, select **Tools, Create Item Record**.

   The New Item Record Options dialog box appears.

2. Click **Find** and select a bibliographic record if you started from the new dialog box or you want to change the bibliographic information.



The title, author, and bib control number boxes are copied from the bibliographic record to the New Item Record Options dialog box. If the bibliographic record contains call number information, it is also copied from the bibliographic record to the New Item Record Options dialog box if the **Bring call number fields from bib to item record when link is made** is set to **Yes** in Polaris Administration. The price is copied from the bibliographic record to the New Item Record Options dialog box if the profile **Bring price from bib to item record when link is made** is set to **Yes** in Polaris Administration.

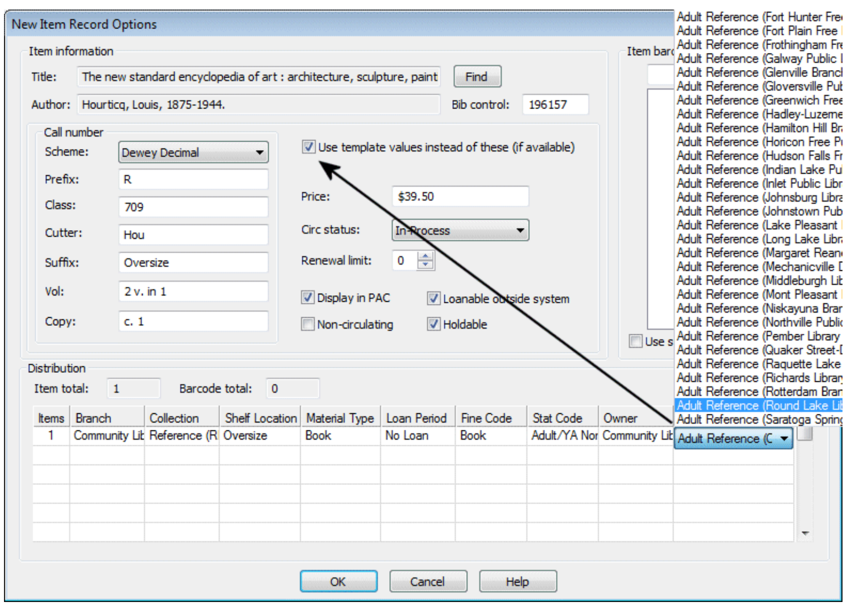
The Item Create Call Number Hierarchy and the Item Price Hierarchy database tables specify the order in which the tags in bibliographic records are checked for the call number and price.

Tip:
If you know the bibliographic control number, you can type it in the bib control number box, and press **Tab**. If you press **Enter**, the dialog box closes.

3. If you want to use item templates, click in the **Template** column on the first row of the distribution grid, and select a template from the list.

   Note:
   When a template is selected, the information from the template pre-fills the distribution information in the grid row. The **Use template values instead of these (if available)** check box is selected automatically. If this check box remains checked, the values from the template will be used in the new item records instead of the values in the New Item Record Options dialog box. If the template is missing information in any of these fields, the values in the New Item Record Options dialog box will be used.

   However, the classification and cutter numbers are pulled from the template if at least one is found. If the template does not contain a classification or cutter number, and the shelving schemes are the same in the template and the dialog box, the classification and cutter numbers are pulled from the dialog box. If the shelving schemes are different, and the template does not have a classification or cutter number, the shelving scheme from the template is used and the classification and cutter numbers are pulled from the bibliographic record.



4. If you are creating multiple items for the same destination branch and collection, type the number of items in the **Items** column in the distribution grid.

5. Continue selecting templates in each row of the distribution grid.

Tip:
Each call number field can contain up to 60 characters.

6. If you are not using templates or you want to include information that may be missing in the item template or templates, do the following steps:

Notes:
If an item template is not selected, or the template does not have call number information, the call number information is copied from the dialog box. If both the selected template and the dialog box have call number information, the information is copied from the template if the **Use template values instead of these (if available)** check box is selected.

The classification and cutter numbers are always copied as a group from either the bibliographic record or the item template. The other elements of the call number (prefix, suffix, volume, and copy) are copied independently. For example, the classification and cutter numbers can be copied from the bibliographic record and the prefix can be copied from the item template.

a) Select the shelving scheme for the new item in the **Scheme** box.

Tip:
You can set the **Default shelving scheme for new item records** Cataloging profile in Polaris Administration to set the default shelving scheme in the New Item Record Options dialog box. See "Specify the default shelving scheme for item/holdings records" in the *Polaris Technical Services Administration Guide 4.1*.

b) Type the prefix for the call number in the **Prefix** box.

c) Type the class number in the **Class** box.

d) Type the cutter number in the **Cutter** box.

e) Type the suffix for the call number in the **Suffix** box.

f) Type the volume number in the **Vol** box if you are creating an item record for a volume in a multi-part monographic set.

Important:
If you enter a volume number, be sure to format it according to your library's standard. A consistent format ensures that volume numbers are sorted correctly in the Find Tool. In addition, if your library allows first available copy holds for parts of multi-part titles, the items attached to the multi-part title must have consistently-formatted volume numbers. This is because first available copy hold requests for multi-part titles depend on a character-for-character match on the volume number.

Internal spaces and all punctuation affect a match -

Vol 1 and **Vol1** do not match.

Vol.1 and **Vol1** do not match.

Case does not matter.

Vol.1 and **vol.1** match.

Beginning and trailing spaces are ignored.

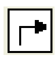
[space] v.1 and **[no space] v.1** match

v.1 [space] and **v.1 [no space]** match

For more information, see "First Available Copy Requests and Multi-Part Titles" in the *Polaris Patron Services Administration Guide 4.1*.

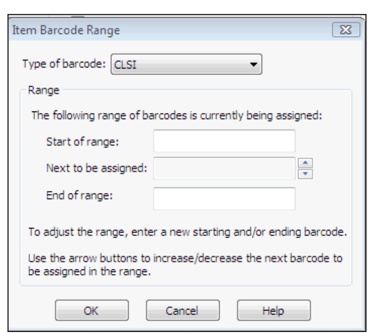
g) Type the copy number in the **Copy** box if you are creating an item record with copy information.

7. (Optional) If the price is not filled in, type the dollar amount in the **Price** field. If the bibliographic record contains a price, it is filled in automatically.

8. If you are not using templates, or the templates are missing information that you want in the item records, fill in the fields above the distribution grid.
   - Select the circulation status in the **Circ status** box.
   - Select the renewal limit in the **Renewal Limit** box.
   - To display the item records in the PAC, check the **Display in PAC** box.
   - If the item should not circulate, select **Non-circulating**.
   - To allow the items to be loaned outside of your library system, select **Loanable outside system**.
   - To allow holds to be placed on this item, select **Holdable**.
9. If you did not use templates, enter the item distribution information in the grid under **Distribution** as follows:
   - Type the number of copies for the branch and location in the Items box.
   - Type the number of items in the **Items** box, select the **Branch, Collection, Shelf location, Material Type, Loan Period, Fine Code, Statistical Code,** and **Owner**.
10. Click  to add the next blank row.
11. To enter barcodes for the item records, do one of the following steps:
   - Move the cursor into the **Item Barcode(s)** field, and scan the item barcodes.

     The **Barcode total** displays the number of barcodes, and the **Item total** displays the total number of items that will be created.

     Note:
     You can create items without barcodes.
   - Select **Use system assigned barcodes**.
12. Click **OK** to create the new item records.
13. If you selected **Use system assigned barcodes**, enter the following information on the Item barcode range dialog box:



a) Select the type of barcode in the **Type of barcode** box.

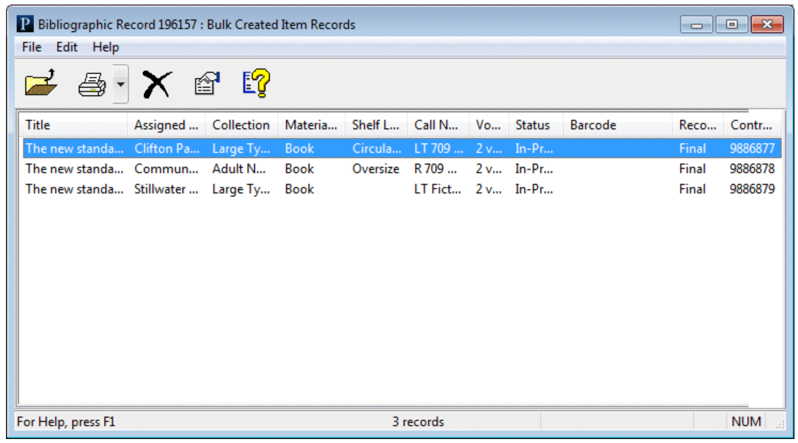
b) Type the beginning barcode number in the **Start of range** box.

c) Type the ending barcode number in the **End of range** box.

d) Use the up or down arrows to specify the next barcode number to be assigned after the starting number in the **Next to be assigned** box.

e) Click **OK**.

The new item records are listed in the Bulk Created Item Records dialog box.



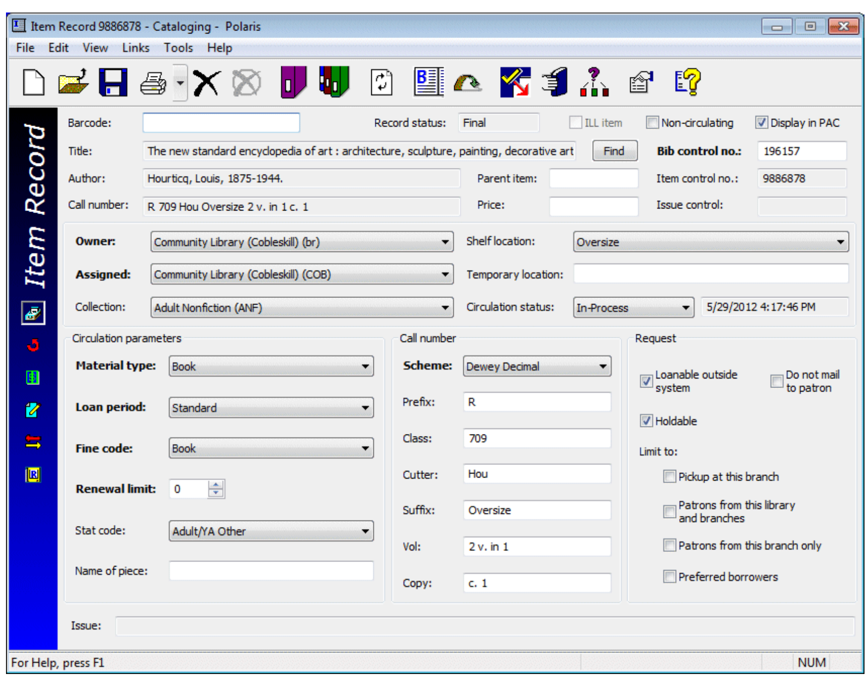
14. To print labels for the item records, select the item records in the dialog box, right-click, and select **Print, Labels**.

The Label Manager appears. For information about Label Manager, see "Printing Cataloging Labels" on page 146.

15. To open an item record in the list, double-click the item or right-click and select **Open** from the context menu.

Tip:
You can right-click an item in the list, add it to a record set, place a hold, or link to other records from the context menu.

The item record opens in the Item Record workform.



Tip:
To edit several item records, press **CTRL+S** to save the current record and **CTRL+E** to move to the next record in the list without closing the Item Record workform.

16. Edit the item record, if necessary, and save it.
17. Select **View, Next Record** from the Item Record workform to open the next record in the Item Record workform.

Related Information

If the system detects an invalid item barcode, a message appears. You can continue saving the item record if you have the system-level Cataloging permission **Override invalid item barcode message: Allow**.

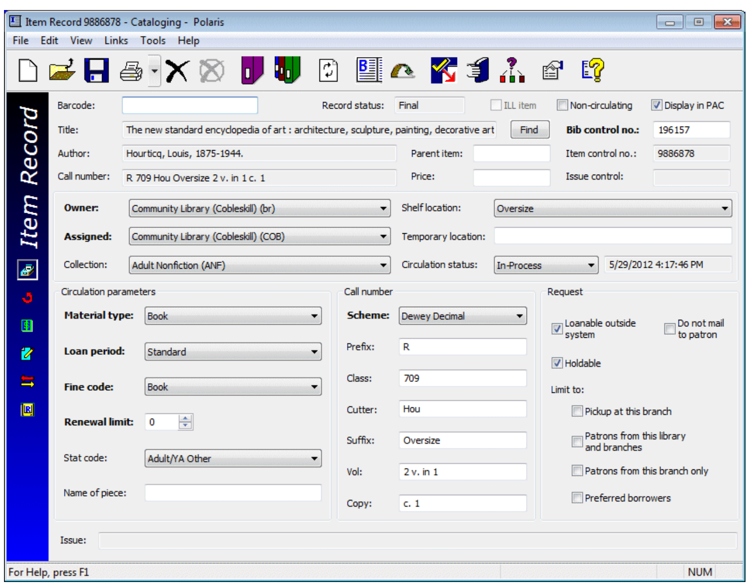
Create a single new item record manually

Follow these steps to create a new item record manually.

1. Open the Item Record workform.
2. Select **File, New**, press **CTRL+N**, or click .

   The New Item record dialog box appears.
3. Select one of the following options:
   - **Clear Work Form** - Create a new item record without any information filled in.
   - **Copy Existing Work Form** - Create a new item record with the same information as the item record you have open.
   - **Use Existing Template** - Create a new item record with information from a template. When you select **Use Existing Template**, select the template from the list.

The new Item Record workform, Cataloging view appears.



4. Enter information for the item record by following the steps in “Enter basic information for an item record” on page 131.

Enter basic information for an item record

The basic or header information on the Item Record workform remains the same on every view of the Item Record workform. The header information includes title information from the bibliographic record and identification information for the item.

Follow these steps to enter the item record's bibliographic and identifying information.

Tip:
You may not need to enter information in these fields if you created the item record by copying or using a template, but you can change the copied information.

1. Create a new item record by following the steps in "Create a single new item record manually" on page 130.
2. Scan the barcode or enter the item's barcode in the **Barcode** box.
3. Select the **Display in PAC** check box to display the item in the public catalog, or clear the **Display in PAC** check box to display the item for staff only.
4. If you do not want the item to circulate, select the **Non-circulating** box.
5. Click **Find** to search for and select the bibliographic record to which you want to link this item record.

   The **Title** and **Author** boxes are filled in.
6. (Optional) Type the price for the item in the **Price** box if it is not filled in automatically from the link to the bibliographic record.

   Note:
   The price is pulled from the bibliographic record to an item record if the staff member's Cataloging profile **Bring price from bib to item record when link is made** is set to **Yes**. The Item Price Hierarchy database table in Polaris Administration specifies which bibliographic tags are checked for the price and in what order. For more information, see "Modify the Item Create Price Hierarchy table" in the *Polaris Technical Services Administration Guide 4.1*.
7. Enter the item's location and identifying information as follows:

   Note:
   The owning branch controls permissions based on ownership of the record. The assigned branch governs the circulation policies applied to transactions involving this item and its display in the PAC.

   a) Select the item's owner in the **Owner** box.

   b) Select the item's assigned branch in the **Assigned** box.

   c) Select the collection to which the item will be assigned in the **Collection** box.

   d) Select the location for the item in the **Shelf location** box.

   e) To indicate a temporary location, type the location in the **Temp location** box.

   f) Select the circulation status for the item in the **Circ status** box.
8. Enter the item's circulation information. See "Enter circulation information for an item record" on page 132.

Enter circulation information for an item record

Follow these steps to enter the item record’s circulation parameters, call number, and hold request information for an item record.

1. Open the Item Record workform.
2. Select **View, Cataloging** or click .

   The Cataloging view of the Item Record workform is displayed.
3. Enter the circulation parameters for the item as follows:
   - Select the item material type in the **Material type** box.
   - Assign a loan period for the item in the **Loan period code** box.
   - Assign a fine code for the item in the **Fine code** box.
   - Specify the number of times this item may be renewed in the **Renewal limit** box.
   - Assign a statistical code for the item in the **Stat code** box.

   Note:
   The **Scheme** box displays the default shelving scheme for your organization. See “Specify the default shelving scheme for item/holdings records” in the *Polaris Technical Services Administration Guide 4.1*.
4. If the call number is not filled in, enter the information in the following fields:
   - **Prefix**
   - **Class**
   - **Cutter**
   - **Suffix**

   Note:
   The call number fields are automatically copied from the linked bibliographic record if the staff member’s Cataloging profile **Bring call number fields from bib to item records when link is made** is set to **Yes** in Polaris Administration. The Call Number Hierarchy database table defines which bibliographic tags are checked for the call number information and the order in which they are checked. The Call Number Hierarchy table may also define the subfields for the volume and copy numbers. See “Modify the Item Create Call Number Hierarchy table” in the *Polaris Technical Services Administration Guide 4.1*. If the item record was created using a template, and the template has call number fields that are not in the bibliographic record, the template values are used.

5. Type the volume and copy numbers in the **Vol** and **Copy** boxes.

   Important:
   If you enter a volume number, be sure to format it according to your library's standard. A consistent format ensures that volume numbers are sorted correctly in the Find Tool. In addition, if your library allows first available copy holds for parts of multi-part titles, the items attached to the multi-part title must have consistently-formatted volume numbers. This is because first available copy hold requests for multi-part titles depend on a character-for-character match on the volume number.

   Internal spaces and all punctuation affect a match.

   Vol 1 and **Vol1** do not match.

   Vol.1 and **Vol1** do not match.

   Case does not matter.

   Vol.1 and **vol.1** match.

   Beginning and trailing spaces are ignored.

   [space] v.1 and **[no space] v.1** match

   v.1 [space] and **v.1 [no space]** match

   To enable first available copy hold requests for multi-part titles, go to **Polaris Administration, Parameters, Requests, Holds Options**. For more information, see "Set Holds options: PAC, Item, First Available Copy Requests" in the *Polaris Patron Services Administration Guide 4.1*.

6. Specify how the item is to be held by checking or clearing the check boxes under **Request**:
   - **Loanable outside system** - If checked, the item can be loaned outside your library system. If unchecked, the item cannot be loaned outside your library system.
   - **Do not mail to patron** - If checked, the item cannot be mailed to a patron using **Borrow By Mail** circulation. See "Borrow By Mail Circulation" in the *Polaris Patron Services Guide 4.1*.
   - **Holdable** - If checked, hold requests can be placed on the item. If unchecked, no hold requests can be placed on the item. To indicate limits on the holds, use the check boxes under **Limit to**:

     - Pickup at this branch - Limits the item to filling hold requests only where the item's assigned branch is the pick-up library. When you select this option you can also select **Patron from this library and branches** or **Patrons from this branch only.**

     - Patron from this library and branches - Limits the item to filling hold requests from patrons registered at the item's assigned branch and other branches associated with the same parent library. When you select this option, you can also select **Pickup at this branch.**

     - Patrons from this branch only - Limits the item to filling hold requests only from patrons registered at the item's assigned branch. When you select this option, you can also select **Pickup at this branch.**

     - Preferred borrowers - Limits the item to filling hold requests only where the patron's pick-up library is on the **Preferred borrowers** list in the **Holds** options dialog box in Polaris Administration. When you select this option, you cannot select any other **Limit to** options.

7. Select one of the following save options for this item:
   - If the item record is complete and the item is ready for circulation, select **File, Save**, and respond per library policy to any detected duplicate messages.
   - If more work is needed to prepare the record or item for circulation, select **File, Save Provisionally**. Item records that are saved provisionally are not checked for duplicates, nor do they display in the public catalog.

     Note:
     The option to save an item provisionally is disabled if the item has a duplicate barcode, and the **Item records: Records with duplicate barcodes can be saved provisionally** profile is set to **No**. See “Specify if items with duplicate barcodes can be saved provisionally” in the *Polaris Technical Services Administration Guide 4.1*.

Related Information

When you save an item record, the following types of messages may appear:

- **Warning messages** - These depend on the profiles that are set in Polaris Administration. See “Displaying Warning Messages for Bibs and Items” in the *Polaris Technical Services Administration Guide 4.1*.
- **Invalid barcode message** - If the system detects an invalid item barcode, a message appears. You can continue saving the item record if you have the system-level Cataloging permission **Override invalid item barcode message: Allow**.

Enter notes and blocks for an item record

Follow these steps to enter notes according to your library’s policy; notes are optional.

1. Open the Item Record workform.
2. Select **View, Notes and Notices** or click .

   The Notes and Notices view of the Item Record workform is displayed.
3. Type notes in the following fields, if applicable:
   - **Public note** box - The notes will be displayed in the PAC for this item.
   - **Non-public note** box - The notes are intended for library staff only.
   - **Physical condition** box - The notes describe the physical condition of the item.

Tip:
If you add blocks or non-public notes to the item record, the Notes view icon turns red .

4. To place a block on the item record, specify the type of block as follows:
   - To place a library-defined circulation block on the item, select the block in the **Library-assigned** box. Library-assigned blocks are set in Polaris Administration. See "Defining Item Blocks" in the *Polaris Patron Services Administration Guide 4.1*.
   - To place a block on the item for any reason not covered by a library-assigned block, type up to 255 characters as the explanation for a block in the **Free text** box.
5. Select **File, Save**, press **CTRL+S**, or click to save the item record.

Enter acquisitions information for an item record

> **Note:**
> The fund, order date, price, and purchase order number are automatically filled in on the Source and Acquisition view of the Item Record workform if on-order item records were created when the purchase order was released. If the item was purchased with a donor fund, the donor information also appears. You can track the items that were paid for with donor funds in Acquisitions using the Items Ordered by Donor Fund report. See "Acquisitions Reports" in the *Polaris Basics Guide 4.1*. The invoice number appears on this view when the invoice is paid.

Follow these steps to enter source and acquisition information for an item record if the information was not copied from the purchase order and fund records in Acquisitions.

> **Note:**
> This view also displays circulation statistics for the item.

1. Open the Item Record workform.
2. Select **View, Source and Acquisition** or click .
3. If the information is not carried over from a purchase order that uses a donation fund, specify the acquisitions information for the item as follows:
   - Type the name for the fund used to purchase the item in the **Funding** box.
   - If the item was purchased using donated funds, type the donor's name in the **Donor first name**, **Middle**, and **Last name** boxes. Or, if it was an organization that donated the funds, type the name in the **Donor organization** box.

   > **Note:**
   > If the item was created automatically from the embedded holdings information in an imported bibliographic record, the **Import date**, **Bib record**, and **Source** boxes are filled in.
4. Select **File, Save**, press **CTRL+S**, or click .

Edit item information for course reserves

Follow these steps to edit information for items that are reserved for academic courses.

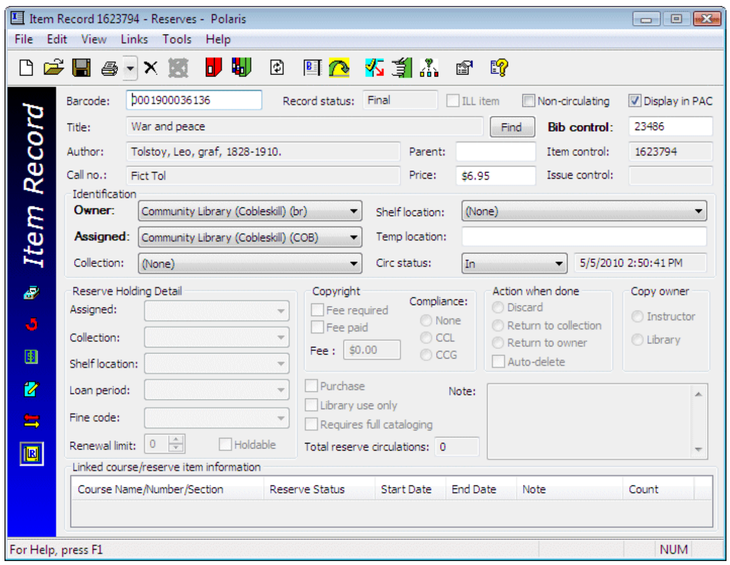
Note:
Course reserve functions are available by specific contract.

1. Open the Item Record workform.

2. Select **View, Reserves** or click .

   The Reserves view appears.

Note:
The course reserves information appears only if you have course reserve functionality and the item is on reserve.



3. To change the reserve circulation information, select from the options in the following fields:

   Note:
   These settings can be different from the normal settings in the Circulation view of the item record.

   - **Assigned**
   - **Collection**
   - **Shelf location**
   - **Loan period**
   - **Fine code**
   - **Renewal limit**

4. Select **Holdable** to allow holds on the item while it is reserved.

5. Select **Purchase** if the library needs to purchase additional copies of this title.

6. Select **Library use only** if the item should not leave the library.

7. Select **Requires full cataloging** if the item and bibliographic record have not been fully cataloged.
8. For photocopies, indicate the copyright information as follows:
    - Select **Fee required** if there is a fee associated with the item.
    - Select **Fee paid** and type the amount in the **Fee** box if the fee was paid.
    - Select **None** if the reserve item is not a photocopy.
    - Select **CCL** if the photocopies comply with copyright law.
    - Select **CCG** if the photocopies comply with copyright guidelines.
9. Indicate what to do with the item when the reserve is over:
    - Select **Discard** to discard the item after the item is taken off reserve.
    - Select **Return to collection** to return the item to its normal collection.
    - Select **Return to owner** if the item is owned by an instructor, and you want it returned to the instructor.
    - Select **Auto-delete** to delete the item record and associated bibliographic record when the item is taken off reserve. This option is often used for temporary items such as photocopies and items that belong to instructors.
10. Indicate the copy owner as follows:
    - Select **Instructor** if the instructor owns the copy.
    - Select **Library** if the library owns the copy.
11. To enter information regarding this item's course reserve, type the note in the **Note** box.

    Note:
    At the bottom of the Reserves view, you can see information on the courses to which the item is linked, including the course, the reserve status, the dates of the reserve, and the count of circulations (check-outs and renewals) of the item while on reserve for that course. You can double-click the course to open the Course Reserve workform.

12. Select **File, Save** press **CTRL+S**, or click  to save the changes to the course reserve information.

Related Information

- "Setting Up Course Reserves" in the *Polaris Patron Services Administration Guide 4.1*
- "Managing Course Reserves" in the *Polaris Patron Services Guide 4.1*

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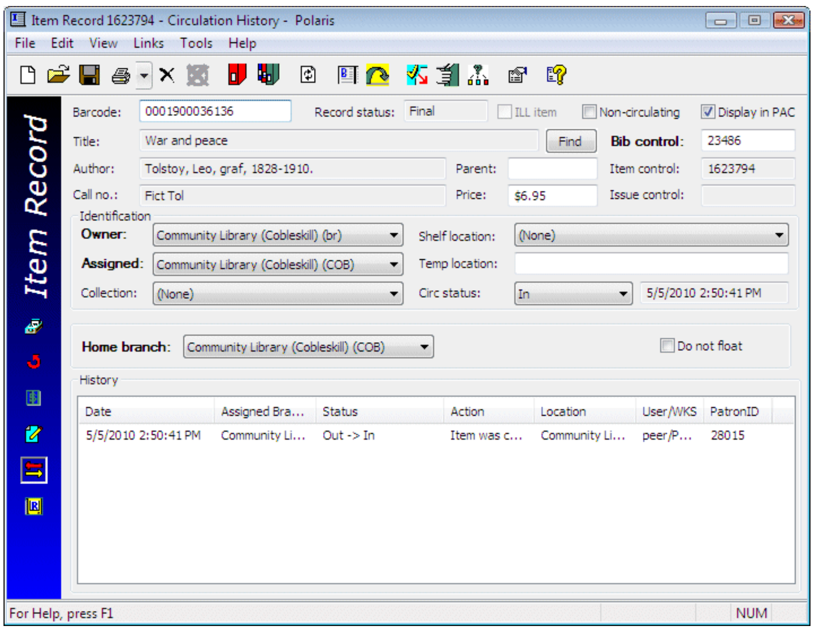
View an item's circulation history and change floating options

The Circulation view of the Item Record workform displays the status changes for an item record. In addition, you can change the item's home branch, and allow or prevent floating to another library's collection. Follow these steps to view an item's circulation history and change the home branch and floating option.

1. Open the Item Record workform.
2. Select **View, History**, or click .

   The Circulation History view appears.



3. To change the item's home branch, select another branch in the **Home branch** box. The home branch determines the branches to which the item can float (if the **Do not float** box is unchecked).
4. If you have the permission **Item records: Modify History view**, change the **Do not float** option by selecting the check box to prevent the item from floating to another branch, or uncheck the box to enable the item to float.

Related Information

- For more information on floating collections, see "Setting Up Floating Collections" in the *Polaris Patron Services Administration Guide 4.1*.
- Status changes that display on the Circulation History view of the Item Record workform:
  - **Item created via Acquisitions**
  - **Item created via Circulation**
  - **Item created via Serials**
  - **Item created via Acquisitions PO Line Item processing**
  - **Item created via Acquisitions Invoice processing**
  - **Item updated via PO Line Item Receive processing**
  - **Item updated via PO Line Item Segment Undo Receive processing**
  - **Item created via ILL processing**
  - **Item created via Cataloging**
  - **Item created via NCIP create processing**
  - **Item modified via Bulk Change from record set**
  - **Item modified via Cataloging**
  - **Item modified via NCIP accept item processing**
  - **Item was checked in**
  - **Item was checked in which was lost**
  - **Item was checked out**
  - **Item was declared lost**
  - **Item claim was deleted**
  - **Claim was made on Item**
  - **Item status modified after check in via manage item dialog**
  - **Item shelf location modified after check in via manage item dialog**
  - **Item returned via ILL processing**
  - **Item send in transit via Removing from Course Reserve**
  - **Item modified via PO Line Item Segment Receive processing**
  - **Item was checked in when it was not already Out**
  - **Item modified by automatic billed to lost processing**
  - **Item modified because item was held and request pickup branch was modified**
  - **Item status changed to Routed by creation of linked route list piece**
  - **Item modified by modification of linked route list piece**
  - **Item modified via Floating Collections processing**
  - **Item was checked out for renewal**
  - **Item record marked for deletion**
  - **Item record undeleted**
  - **Item updated via Receive Shipment**
  - **Linked to new bib via Serials**

Create a subordinate (child) item record

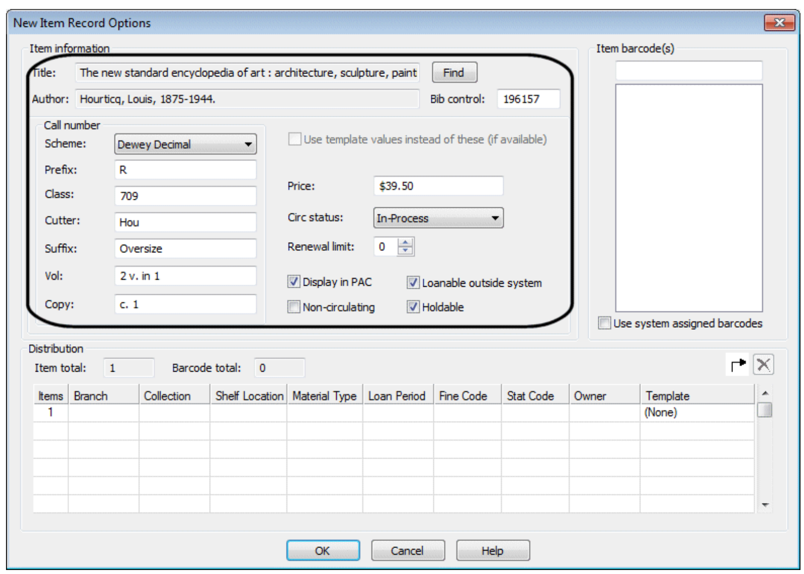
Follow these steps to create a subordinate (child) item record automatically linked to a primary (parent) item record. Use this procedure for creating subordinate items in a multiple-part holding. This procedure links all item records in the multiple-part holding to the same bibliographic record. To link the items to different bibliographic records, see "Link subordinate items to different records" on page 141.

Example:
A library has a *Learn Russian In Seven Days* language kit containing an audio recording, a textbook, and an English-Russian dictionary. The kit container is assigned an item record and a barcode. If the library chooses to also create and assign individual item records and barcodes to the recording, textbook, and dictionary, the three item records can be linked as *children* to the kit container's *parent-item* record.

Tip:
Select **Create, Child Item Record** on the context menu for the primary item record, and go to step 3 of this procedure.

1. Open the Item Record workform for the primary item of the multiple-part holding.
2. Select **Tools, Create, Child Item Records** on the Item Record workform.

   The New Item Record Options dialog box appears.



3. Enter information for the subordinate item (see "Create multiple item records for a single title" on page 125).
4. Click **OK**.

Note:
When your circulation staff is checking out a multi-part holding, such as a kit, checking out the primary item does not automatically check out the subordinate items. All items in the kit must be checked out.

Link subordinate items to different records

Follow these steps to link a primary (parent) item and related subordinate (child) item records to different bibliographic records. This procedure can also be used to create an item record where you manually link the new item to a bibliographic record. You may need to link items to different bibliographic records when the items are in a different medium. To do this, you need to know the item control number of the primary item record.

Note:
See "Create a subordinate (child) item record" on page 140 to link the primary and subordinate item records to the same bibliographic record.

1. Open the Item Record workform for the item to which you want to link the subordinate item.
2. Note the item control number of the primary item record.
3. Select **File, New**, press **CTRL+N**, or click from the Polaris Shortcut Bar.

   The New dialog box appears.
4. Select **Item Record** in the Objects list.

   The New Item Record Options dialog box appears.
5. Enter the information for the subordinate item in the New Item Record Options dialog box, and click **OK**. See "Create multiple item records for a single title" on page 125.

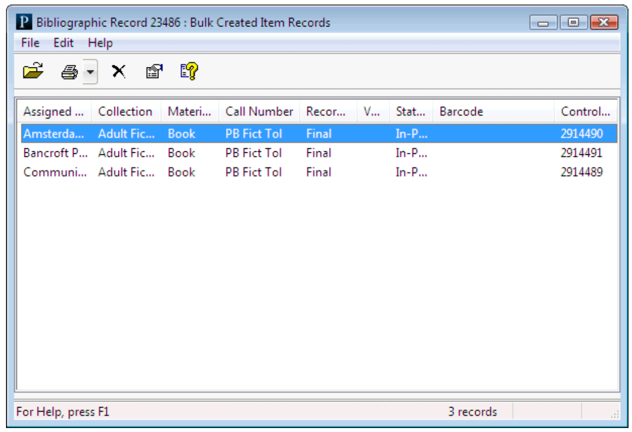
   The Item Record workform appears.
6. In the **Parent item** box, enter the item control number of the primary item record to which you are linking the subordinate item record.
7. Select **File, Save,** press **CTRL+S**, or click to save the record.

View other item records linked to the same bib

Follow these steps to see a list of all the other item records linked to the same bibliographic record.

1. Open the Item Record workform.
2. Select **Links, All Item Records** or click .

   The Linked Item Records dialog box appears.



3. Double-click any item in the list to open the item record.

View the linked bib from an item record

Follow these steps to see the linked bibliographic record from an item record.

1. Open the Item Record workform.
2. Select **Links, Bibliographic Record,** press **CTRL+G,** or click .

   The Bibliographic Record workform appears.

Related Information

You can also view the linked bibliographic record from an item record displayed in the Find Tool results list or in a linked list box. Right-click the item record in the list, and select **Links, Bibliographic Record**.

Changing Item Records

You can change an existing item record by opening it in the Item Record workform. To make the same change in multiple item records, you can use the Bulk Change process; see "Changing Multiple Item Records" on page 180.

When you change an item record and save it, a warning message may appear, depending on the information you changed and the following profiles in Polaris Administration:

- **Item records: Warning if changing assigned or home branch** - If this profile is set to **Yes** for your organization, and you change the assigned or home branch, a warning message appears.
- **Item records: Warning for items saved with modified barcode** - If this profile is set to **Yes** for your organization, and you change the item's existing barcode, a warning message appears.
- **Item records: Warning for items saved with Display in PAC unchecked** - If this profile is set to **Yes** for your organization, and you save the item record with the **Display in PAC** check box unchecked, a warning message appears.
- **Item records: Warning for items saved without barcodes** - If this profile is set to **Yes** for your organization, and you save the item record without a barcode, a warning message appears.

Note:
For information on setting these Cataloging profiles, see "Displaying Warning Messages for Bibs and Items" in the *Polaris Technical Services Administration Guide 4.1*.

Change an existing item record from the workform

Follow these steps to change an existing item record

1. Open the Item Record workform.
2. Edit the fields in the Item Record workform.
3. Select **File, Save**, press **Ctrl+S** or click .

   If no message box appears, **The record was saved successfully** appears in the status bar of the Item Record workform.

Related Information

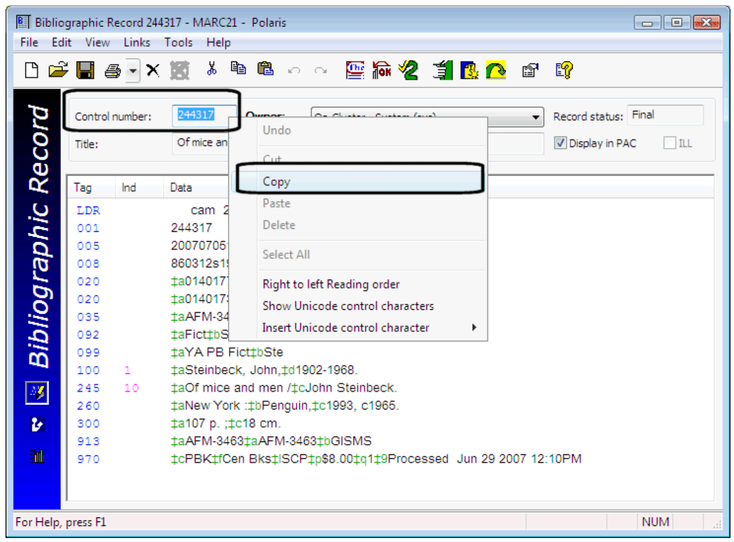
See "Cleaning Up the Catalog" on page 197 for information on deleting item records.

Change an existing item record's linked bib

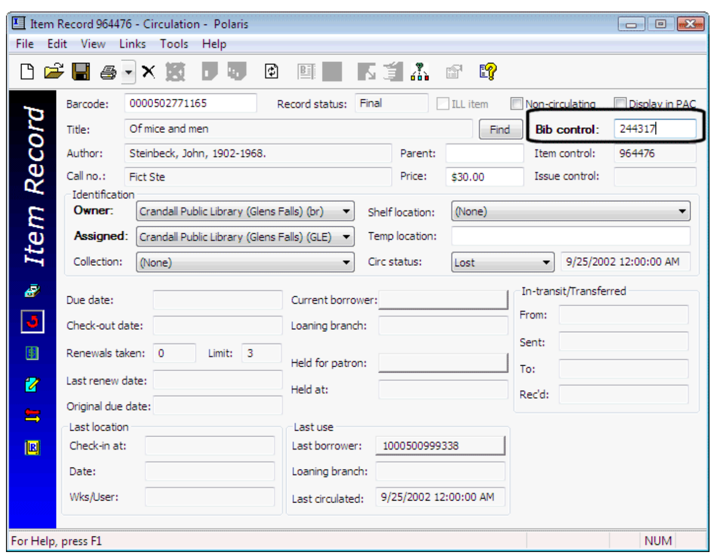
Follow these steps to link an existing item record to a different bibliographic record.

Tip:
If you need to change the linked bibliographic record for multiple items, put the item records in a record set and change the control number using bulk change. See "Changing Multiple Item Records" on page 180.

1. Open the Item Record workform.
2. Open the bibliographic record you want to link to the item record.
3. Select the control number on the Bibliographic Record workform, right-click, and select **Copy** from the context menu.



4. Paste the new control number in the **Bib control** box on the Item Record workform.



5. Save the item record.

   The item record will be linked to the bibliographic record you selected.

Related Information

- If you change the bibliographic record linked to a serial holdings record, and there are item records linked to retained serial issues for that serial holdings record, the item records are linked to the new bibliographic record.
- Any holds that were placed on item records linked to the old bibliographic record are updated with the new bibliographic information.

Printing Cataloging Labels

The default cataloging label type and the settings for printing labels are defined at the system, library, and branch levels using the following Staff Client profiles in Polaris Administration:

Note:
See "Setting Label Profiles" in the *Polaris Technical Services Administration Guide 4.1*.

- **Labels: Automatically generate labels for each item record created** - If this profile is set to **Yes**, labels are generated automatically whenever a new item record is created.
- **Labels: Cataloging label type** - Specifies the default label type for cataloging (item) labels.
- **Labels: Cataloging print method** - Select **On Demand**, **Batch**, or **Quick Print** as the default printing method for cataloging labels. If **On Demand** is selected, the Label Manager appears when the user requests a label. If **Quick Print** is selected, the label is printed without opening Label Manager. If **Batch** is selected, the label is generated when the user requests a label, but it is not printed until the user opens Label Manager and selects **Print**. The **Batch** option works well for creating sheets of labels for multiple items.

To change the default label type and print method without using Polaris Administration profiles, select **Cataloging, Options** from the Polaris Shortcut Bar, and make the changes on the Cataloging Options dialog box. See "Change label options from Cataloging" on page 147.

Other settings, such as the font, dimensions, and content of the labels, are defined in the Label Configuration dialog box that you can access from the Label Manager. See "Configuring Existing Label Types" in the *Polaris Technical Services Administration Guide 4.1*. If your library system or consortium processes materials centrally, all libraries and branches should agree on the same label stock, content, and configuration.

To use the label file again, you can save the labels in a .dat file format with a name and location you specify. When you want to access this label file, you can locate it and open it in Label Manager.

Some label stock contains sets of labels intended for a single item. For example, a label set may contain a spine label and two pocket labels. All three labels are attached to a single item, and they can be printed together.

To print labels you must set up your printing preferences on the computer where you are doing the cataloging or serials processing. The label printer must be set up in Microsoft Windows, and it must be connected to the workstation or the same local area network as the workstation.

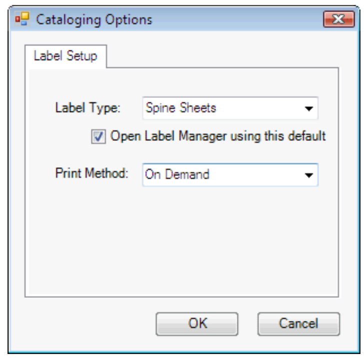
Change label options from Cataloging

You can change the print method and the default label type at the staff level without setting profiles in Polaris Administration. However, once you change the settings, your staff member login no longer inherits the settings made at the system, library, or branch level in Polaris Administration.

Follow these steps to change label options from Cataloging.

1. Select **Cataloging, Options** from the Polaris Shortcut Bar.

   The Cataloging Options dialog box appears.



2. Select the label type from the **Label Type** box.

   If you always want Label Manager to open using this label type, select **Open Label Manager using this default**.

3. Select the printing method for Cataloging labels in the **Print Method** box.
   - **On Demand** - Users must request a label for each item.
   - **Quick Print** - Labels are printed without opening Label Manager.
   - **Batch** - Multiple labels are generated when the user requests them, but they are not printed until the user opens Label Manager and prints them.

4. Click **OK**.

   The Cataloging labels settings are changed for your staff member login. When you log in to Polaris, labels will be generated and printed according to the settings you made.

1-2-3

Tip:
If you are printing labels for multiple items using label sheets, set the profile **Labels: Cataloging print method** to **Batch**. See "Change label options from Cataloging" on page 147.

Print spine and pocket labels from an item record

Follow these steps to print a spine or pocket label.

1. Open the Item Record workform.
2. Complete the item record information required for your labels.
3. Select **File, Label Request**, and select one of the following options:
   - **Single Label** or click - Print a single label (typical).
   - **Multi-Label** or click - Print multiple labels (this option is used when cataloging item sets such as encyclopedias). See "Create multiple copies of a label" on page 153.

   If the printing method for cataloging labels is set to **On Demand**, the Label Manager appears with the labels you requested.

   If the printing method is set to **Batch**, the Label Manager does not automatically appear. Continue cataloging items, and select **Utilities, Label Manager** from the Polaris Shortcut Bar when you want to print all the labels.

   Note:
   You cannot generate more than 500 labels at a time in Label Manager.
4. To make changes to the label, see "Edit labels" on page 150.
5. If Label Manager is open, select **File, Exit** to close it.

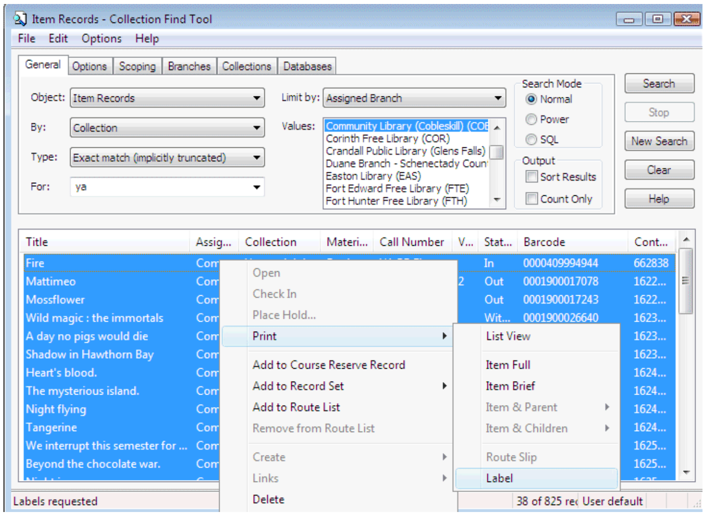
Related Information

- **Editing labels** - See "Edit labels" on page 150.
- **Setting Polaris Administration profiles for labels** - See "Set label profiles in Polaris Administration" in the *Polaris Technical Services Administration Guide 4.1*.
- **Configuring labels** - See "Set up label types" in the *Polaris Technical Services Administration Guide 4.1*.
- **Specifying content for labels** - See "Define the label content" in the *Polaris Technical Services Administration Guide 4.1*.

Print labels from Find Tool, record sets, or list boxes

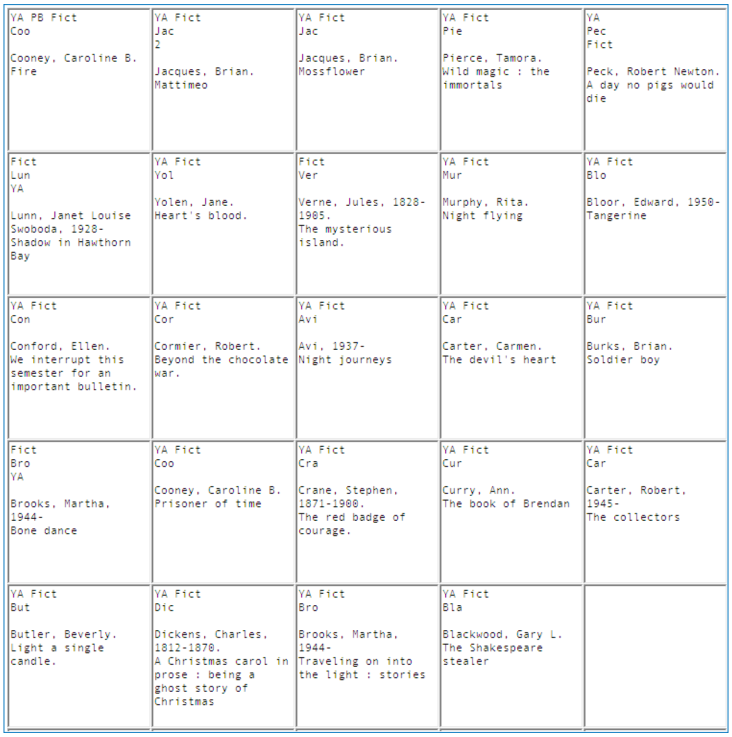
Follow these steps to print labels from the Find Tool, an item record set, or an item record list box.

1. Select the item or items in the Find Tool results list, an item record list box, or an item record set.
2. Right-click, and select **Print, Labels**.



Tip:
You can select **Quick Print** as the print method in the Cataloging Options dialog box to print all the labels without opening the Label Manager. See "Change label options from Cataloging" on page 147.

The Label Manager appears.



YA PB Fict Coo Cooney, Caroline B. Fire	YA Fict Jac 2 Jacques, Brian. Mattimeo	YA Fict Jac Jacques, Brian. Mossflower	YA Fict Pie Pierce, Tamora. Wild magic : the immortals	YA Pec Fict Peck, Robert Newton. A day no pigs would die
Fict Lun YA Lunn, Janet Louise Swoboda, 1928- Shadow in Hawthorn Bay	YA Fict Yol Yolen, Jane. Heart's blood.	Fict Ver Verne, Jules, 1828-1905. The mysterious island.	YA Fict Mur Murphy, Rita. Night flying	YA Fict Blo Bloor, Edward, 1950- Tangerine
YA Fict Con Conford, Ellen. We interrupt this semester for an important bulletin.	YA Fict Cor Cormier, Robert. Beyond the chocolate war.	YA Fict Avi Avi, 1937- Night journeys	YA Fict Car Carter, Carmen. The devil's heart	YA Fict Bur Burks, Brian. Soldier boy
Fict Bro YA Brooks, Martha, 1944- Bone dance	YA Fict Coo Cooney, Caroline B. Prisoner of time	YA Fict Cra Crane, Stephen, 1871-1900. The red badge of courage.	YA Fict Cur Curry, Ann. The book of Brendan	YA Fict Car Carter, Robert, 1945- The collectors
YA Fict But Butler, Beverly. Light a single candle.	YA Fict Dic Dickens, Charles, 1812-1870. A Christmas carol in prose : being a ghost story of Christmas	YA Fict Bro Brooks, Martha, 1944- Traveling on into the light : stories	YA Fict Bla Blackwood, Gary L. The Shakespeare stealer	

3. Select **File, Print** from the Polaris Label Manager menu.

Edit labels

Follow these steps to edit an existing label.

Note:
If the profile **Labels: Cataloging Print Method** is set to **Quick Print**, the label is printed without opening Label Manager.

Tip:
To modify a label type so that it has the same characteristics each time you use it, select **Tools, Label Settings and Content** and change the label configuration. See "Configuring Existing Label Types" in the *Polaris Technical Services Administration Guide 4.1*.

1. Access the Label Manager:
   - From the Polaris Shortcut Bar, select **Utilities, Label Manager**.
   - In Cataloging, from the Item Record workform, select **File, Label Request, Single**, or click . The Label Manager appears if you have the profile **Labels: Cataloging Print Method** set to **On Demand** in Polaris Administration.
   - In Serials, from the Issue, Part, or Check In workform, select **File, Label Request, Single**, or click .The Label Manager appears if you have the profile **Labels: Serials Print Method** set to **On Demand**.

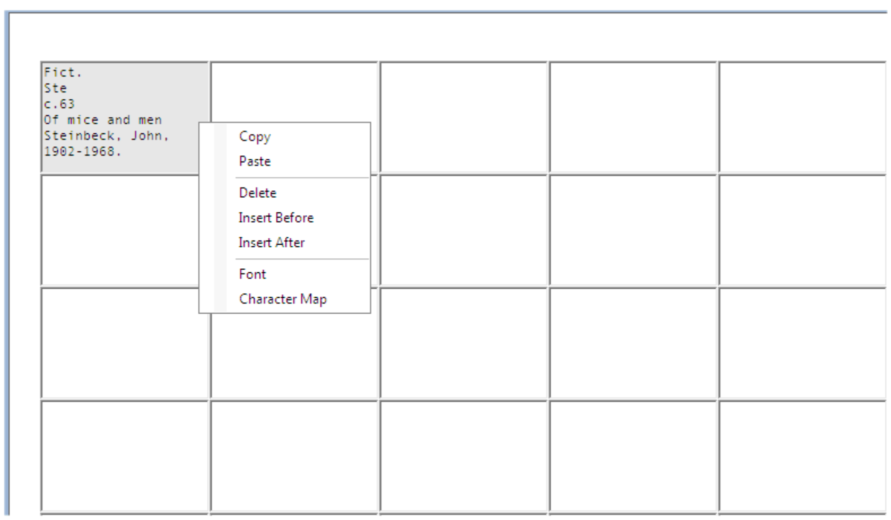
   Note:
   If you are requesting labels from a serial or item record, and the print method is set to **Batch**, go to **Utilities, Label Manager** to see the labels you created.

   The Label Manager opens with the most recently generated label request displayed.

Tip:
You can also type text directly into the label.

2. Select the label you want to modify and right-click.

   The context menu appears.



3. Select from the following options on the context menu:
   - **Copy** - Select the text that you want to copy. The selected text is copied to the clipboard, and you can paste it into another label.
   - **Paste** - If you have copied text to the clipboard, you can paste it into the label.
   - **Delete** - Select the text and select **Delete**.
   - **Insert Before** - To insert labels before the label you selected, type the number of labels in the Insert Blank Label box.
   - **Insert After** - To insert labels after the label you selected, type the number of labels in the Insert Blank Label box.
   - **Font** - The Font dialog box appears. You can change the font size, font family, and font characteristics. This changes the font for the label where the cursor is located.
   - **Character Map** - The Character Map dialog box appears. Use the Character Map dialog box to insert special characters into the label. See "Insert diacritics or special characters into a label" on page 152.
4. Select **File, Save,** press **CTRL+S**, or click to save your changes.

Tip:
To change the font for all the labels, go to the **Tools, Label Settings and Content** to open the Label Configuration dialog box. Then locate the type of label, change the font for the type of label you are using and save. Then click to refresh the labels. Different fonts can be used on individual labels within a label set.

Insert diacritics or special characters into a label

If diacritics or special characters are included in the MARC record in fields that are printed on the label, for example in the **Title** or **Author** fields, they appear in the label. It is not necessary to add the characters in the label unless they are not part of the MARC record.

Tip:
For information on using an international keyboard to enter diacritics or special characters, see “Enter diacritics or non-Roman characters using an IME keyboard” on page 41.

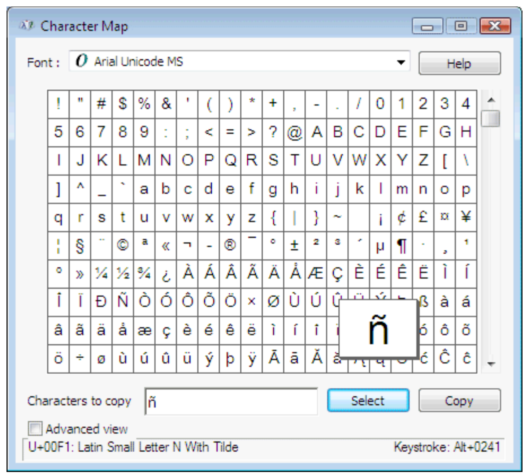
Follow these steps to insert diacritics or special characters into a label in the Label Manager.

1. Right-click in a label in the Label Manager, and select **Character Map** from the context menu.

   The Character Map dialog box appears.

2. Select the font to use in the **Font** box.

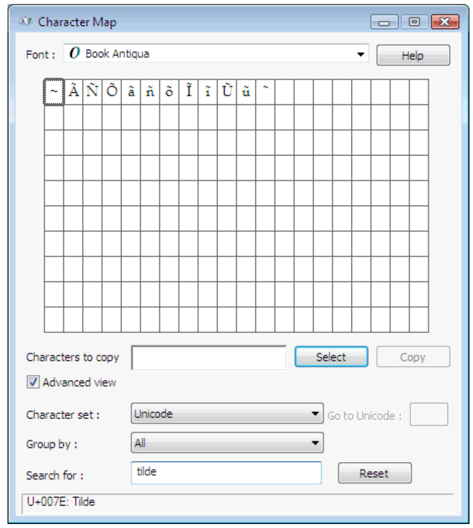
3. Do one of the following steps to select the character:
   - If the character is visible, double-click the character or select it and click **Select**.



   - If you do not see the character, select **Advanced view**.

     The Character Map dialog box expands to display more options.

     Select **Unicode** in the Character set box, select **All**, and type either the four-digit value for the character or the name of the character in the **Search for** box. The characters that match the search criteria appear in the dialog box. Double-click the character, or select it and click **Select**.

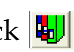


4. The characters you selected appear in the **Characters to copy** box.
5. Click **Copy**.

   The Label Manager appears. Position the cursor where you want to insert the characters, right-click and select **Paste**. The character or characters are inserted into the label.

Create multiple copies of a label

You can create multiple labels from a single basic label when you have several volumes in a set (such as an encyclopedia) that have the same call number. Follow these steps to create multiple copies of a label.

1. Open the Item Record workform.
2. Select **File, Label Request, Multi-Label** or click .

   The Insert Multiple Labels dialog box appears.

3. Type a number in the **Number of labels to insert** box and click **OK**.

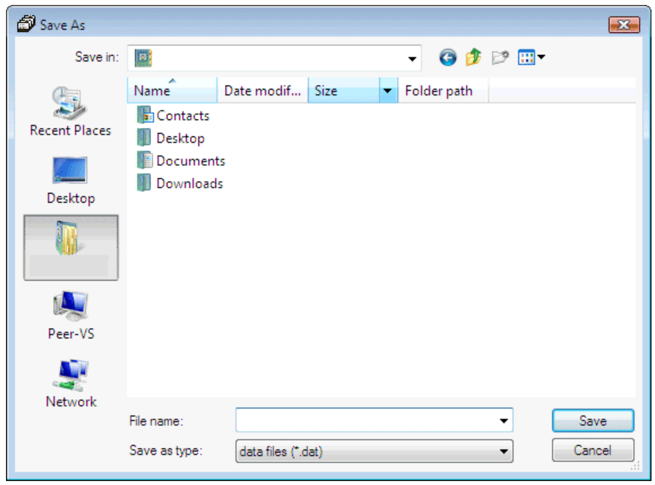
   The Label Manager appears.
4. To preview the layout of the labels, select **File, Print Preview**.
5. To edit the labels, see "Edit labels" on page 150.
6. Select **File, Print** or click  to print the labels.

Save a label file

You can save a label file in a .dat file format, and reopen the file at another time. Follow these steps to save a label file.

1. Select **Utilities, Label Manager** from the Polaris Shortcut Bar, and set up labels.
2. Select **File, Save As**.

   The Save As dialog box appears.

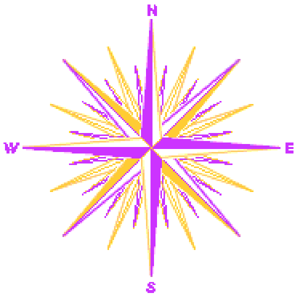


3. Specify the location for the label file, and type the label file name in the **File name** box.

   The label file is saved, and you can open it to use it again.

   Note:
   To open the saved label file, open Label Manager, select **File, Open** from the Label Manager menu, locate the label file with the .dat extension, and double-click it. The labels appear in Label Manager.

Working With Multiple Records



Record sets group related cataloging records together for a particular purpose, but they do not actually contain the records. Since a record set merely points to the records within it, removing a record from a record set does not delete the record itself.

You can create record sets for bibliographic, authority, or item records, but you cannot mix record types in the same record set. Grouping cataloging records in record sets makes it easier to retrieve records, apply changes to multiple records (bulk change), or add multiple titles to a purchase order.

Record sets can also help you maintain your catalog. For example, you can gather all unlinked bibliographic or authority records into a record set, and then delete them or do other processing. If you want to make changes to multiple bibliographic or item records at once, you can gather the records into a record set and then change them using the Bulk Change dialog box. You can also make bulk changes to multiple item records from linked list boxes without putting them in a record set. This **Ad hoc Bulk Change** option can be used to quickly update on-order items by assigning barcodes and call numbers so the items can circulate.

In addition, you can create record sets to group titles together and make them readily accessible in the PAC. One method is to publish the URL to the record set on the Polaris PowerPAC portal page, a page dashboard, or a Web site page. Another method is to use record sets to create visual representations of titles in a “content carousel” that displays on the PowerPAC portal page or a Community Profile page (if your library has Polaris Community Profiles). See “Use record sets to display titles in Polaris PowerPAC” on page 164.

This unit covers the following topics:

Creating and Using Cataloging Record Sets

You can create item, bibliographic or authority record sets using various methods, such as: adding cataloging records from Find Tool results; creating record sets of linked records from another cataloging record set; sending imported records directly to a record set; and creating record sets of unlinked records. For general information on creating record sets, see “Creating and Using Record Sets” in the *Polaris Basics Guide 4.1*.

Note:
If you are using Polaris Inventory Manager (PIM), you can automatically create record sets of items for weeding or other processing. If you are using SimplyReports, you can automatically create record sets of bibliographic, item, or authority records.

Tip:
The icon next to an authority record listed in a record set indicates that the authority record is not linked to any other record.

After cataloging record sets are created, you can use them to maintain and update cataloging records by bulk changing item or bibliographic records; deleting unlinked records; processing imported records; and grouping records for retrieval and review.

Cataloging record sets can also be used to make certain titles readily accessible in Polaris PowerPAC by publishing a URL link to the record set that patrons click to see the titles, or displaying a “content carousel” of titles. See “Use record sets to display titles in Polaris PowerPAC” on page 164.

Open an existing cataloging record set

Do one of the following actions to open an existing cataloging record set:

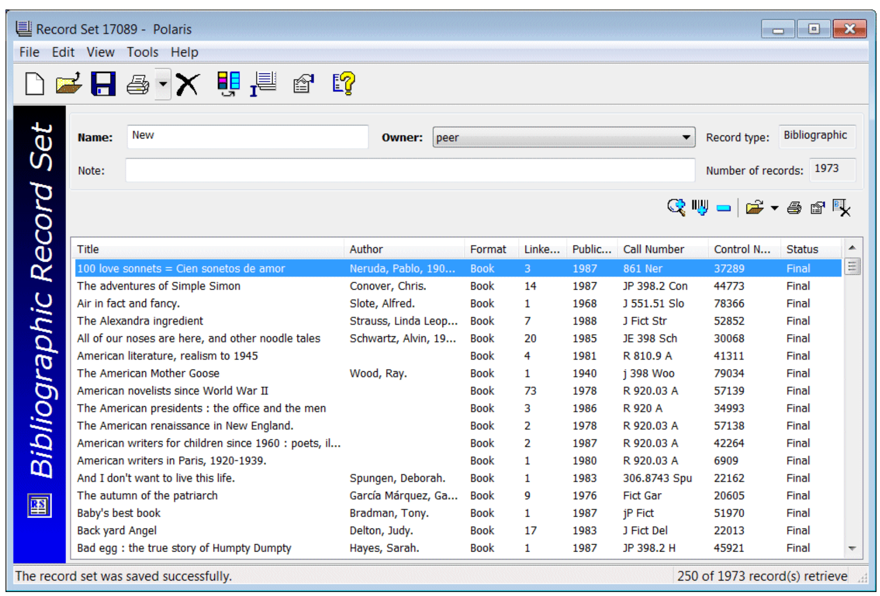
- Select **Cataloging, Record Sets** from the Polaris Shortcut Bar, and use the Polaris Find Tool to search for and open an existing record set. You can limit the search by
- Right-click a cataloging record in the Find Tool's results list, and select **Links, Record sets** from the context menu (the record must be in a record set).
- Select **Links, Existing, Record Sets** from a cataloging record workform. If the record belongs to a record set, the record set opens. If the record belongs to more than one record set, a list of the record sets appears. Select a record set in the list.

The record set workform appears for the type of record you selected.

Create an item record set from bib record set

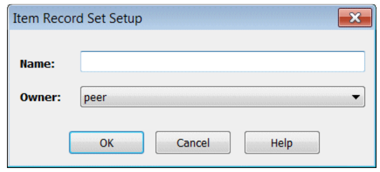
Follow these steps to create a record set of the linked item records from a bibliographic record set.

1. Open the Bibliographic Record Set workform.



2. Select **Tools, Create Item Record Set**, click , or press **Ctrl+T**.

   The Item Record Set Setup dialog box appears.



3. Type a name for the item record set in the **Name** box, select a different record set owner in the **Owner** box to change it, and click **OK**.

   The Item Record Set workform appears with the name and creation date/time in the **Name** box, and the name of the bibliographic record set from which it was created in the **Note** box.

Create a bib record set from an item record set

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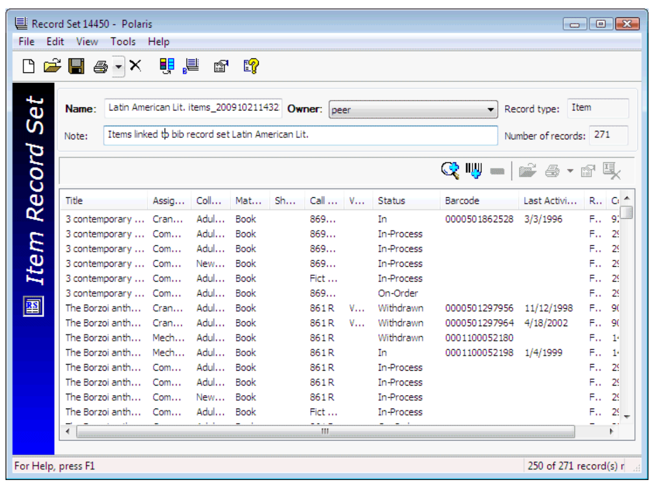
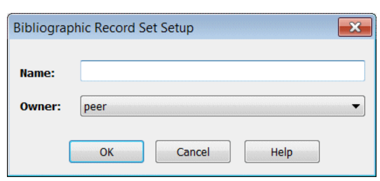
Follow these steps to create a record set of the linked bibs from an item record set.

1. Open the Item Record Set workform.



2. Select **Tools, Create Bibliographic Record Set**, click , or press **Ctrl+T**.

   The Bibliographic Record Set Setup dialog box appears.



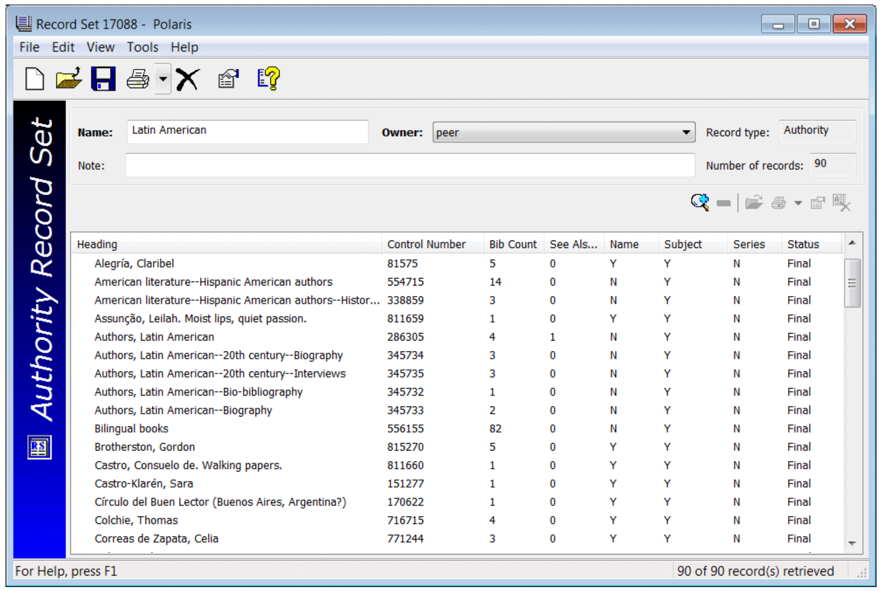
3. Type a name for the bibliographic record set in the **Name** box, select a different record set owner in the **Owner** box to change it, and click **OK**.

   The Bibliographic Record Set workform appears with the name and creation date/time in the **Name** box, and the name of the item record set from which it was created in the **Note** box.

Create a bib record set from an authority record set

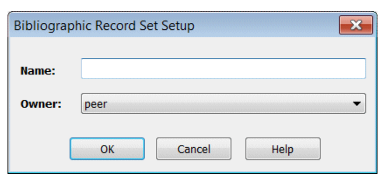
Follow these steps to create a record set of the linked bibliographic records from an authority record set.

1. Open the Authority Record Set workform.



2. Select **Tools, Create Bibliographic Record Set**.

   The Bibliographic Record Set Setup dialog box appears.



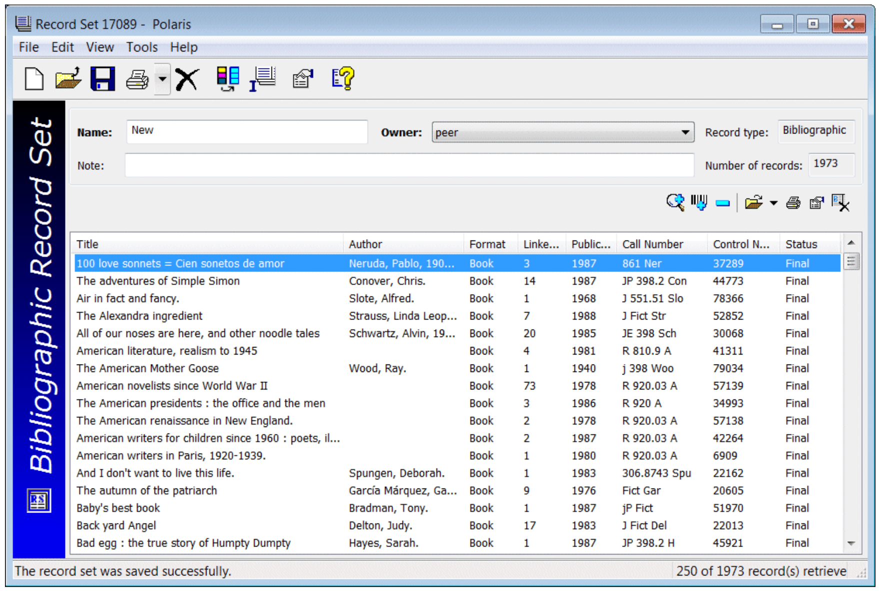
3. Type a name for the bibliographic record set in the **Name** box, select a different record set owner in the **Owner** box if you want to change the owner, and click **OK**.

   The Bibliographic Record Set workform appears with the name and creation date/time in the **Name** box, and the name of the authority record set from which it was created in the **Note** box.

Create an authority record set from a bib record set

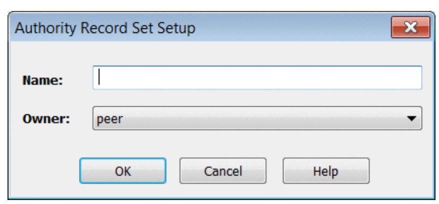
Follow these steps to create a record set of the linked authority records from a bibliographic record set.

1. Open the Bibliographic Record Set workform.



2. Select **Tools, Create Authority Record Set**.

   The Authority Record Set Setup dialog box appears.



3. Type a name for the authority record set in the **Name** box, select a different record set owner in the **Owner** box if you want to change the owner, and click **OK**.

   The Authority Record Set workform appears with the name and creation date/time in the **Name** box, and the name of the bibliographic record set from which it was created in the **Note** box.

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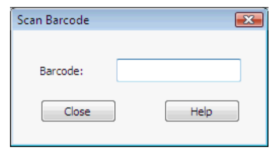
Tip:
You can search for records and add all the records in the Find Tool results list to a new or existing record set. See "Create a record set from all the Find Tool results" in the *Polaris Basics Guide 4.1*.
Or, you can select specific records in the Find Tool results list and add them to a new or existing record set.

Add records to an item or bibliographic record set

Follow these steps to add records to a new or existing record set.

1. Open the Item Record Set or Bibliographic Record Set workform for a new or existing record set.
2. Use one of the following methods to add the records:
    - Select **Tools, Add**, press **CTRL+E**, or click . The Polaris Find Tool appears. Search for the record, and select it from the results list.
    - Select **Tools, RFID Read Tags**. When this option is selected from an item record set, all tags for all items on the RFID pad are read, and the associated item records are added to the record set.
    - Select **Tools, Add, Scan**, press **CTRL+K**, or click .

      The Scan Barcode dialog box appears, in which you scan the barcode (or type the barcode and press **ENTER**).



   The selected record is listed in the Item Record Set workform, or the linked bibliographic record is listed in the Bibliographic Record Set workform. The **Number of records** box increments.

3. Repeat the previous step to add additional records.
4. If you scanned records, click **Close** on the Scan Barcode dialog box when you are done scanning.

   Record added appears in the status bar.

5. Select **File, Save**, press **CTRL+S**, or click to save the record set.

Related Information

- "Remove records from a record set" in the *Polaris Basics Guide 4.1*
- "Delete member records from the database" in the *Polaris Basics Guide 4.1*
- "Delete one or more record sets from the Find Tool" in the *Polaris Basics Guide 4.1*
- "Delete a record set from the Record Set workform" in the *Polaris Basics Guide 4.1*

Retrieve records using a record set

When you group records in a record set, you can easily retrieve the records for further review. You might want to create a record set of provisional records when importing and then make the necessary changes to each record. For more information on creating records sets while importing, see “Set import options for record sets” on page 75.

Follow these steps to retrieve records from a record set.

1. Select **Cataloging, Record Sets** from the Polaris Shortcut bar.

   The Polaris Find Tool appears with **Record Sets** selected in the **Objects** box.

Tip:
You can also search for a record set by owner.

2. Select an option in the **Search by** box.
3. To sort the results, select a **Sort by** option.
4. To limit the results, select a **Limit by** option and enter a value.
5. Type the search term in the **For** box.
6. Click **Search**.

   The record sets that meet your search criteria appear in the results list.
7. Double-click the record set you want to open.

   The record set appears in the Record Set workform.
8. Double-click any record listed in the Record Set workform.

   The record appears in the appropriate workform.

Print a list of cataloging records from a record set

Tips:
You can also select a single record, right-click and print it. If you select an item record that has child records, or is a child record linked to a parent record, you can print its associated records. You can also print item labels from an item record set. If the item is linked to a serial issue on a route list, you can print the routing slip from the record set.

Follow these steps to print a list of records from a record set.

1. Open the item, bibliographic, or authority record set.

   Note:
   You can sort the records by clicking on the record set column headings. The record set will be printed in the order in which it was sorted.
2. To print a list of all the records in the record set, do one of the following steps:
   - Select **File, Print, Record Set** from the record set workform menu.
   - Select **File, Print, List view** from the record set workform menu.
   - Right-click in the list of records, and select **Print, List view**.

   Note:
   If you select **Record Set**, the record set appears in a Adobe pdf preview window, and you select **File, Print** to print the pdf. You can select specific pages to print. If you select **List view**, the Print dialog box appears without the preview window.

3. To print from a bibliographic record set, do the following:

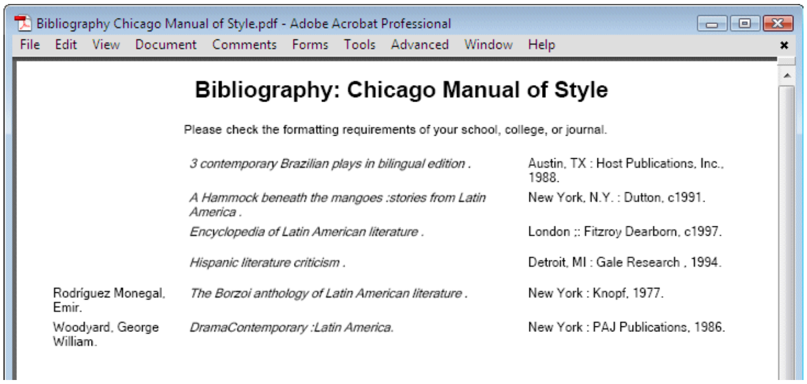
a) Select **Edit, Select All** or press **Ctrl+A** to select all the records in the list, or select specific records. The records you selected are highlighted.

b) Right-click in the list of highlighted records, and select one of the following options:

- **Bibliographic Full**
- **Bibliographic Brief**
- **Chicago Manual of Style**
- **American Psychological Assoc.**

Important:
When you format the list in a bibliographic style, check the formatting requirements of the school, college or journal for which you are creating the bibliography.

An Adobe pdf viewer window appears with the records in the format you selected.



4. Select **File, Print** from the Adobe pdf viewer to print the record list.

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Use record sets to display titles in Polaris PowerPAC

You can create record sets and then make the titles readily accessible in Polaris PowerPAC using several methods. One method is to create a URL link to the record set and publish it as a Web part in Polaris PowerPAC. Another method for publishing content in Polaris PowerPAC is to display visual representations of titles or “content carousels” on the portal page. And, if your library has Polaris Community Profiles, you can display content carousels in community records in Polaris PowerPAC.

Publish a URL link to a Record Set in PAC Web Part

1. Create the record set containing the titles you want to make available in Polaris PowerPAC.
2. Define a URL link to the record set that references the record set(s) by control number or by name. See “Searching Record Sets (Polaris PowerPAC)” in the *Polaris Public Access Administration Guide 4.1*.

   Examples:

   (single record set by number)

   http://{PowerPACURL}/view.aspx?brs=1234

   (multiple record sets by number)

   http://{PowerPACURL}/view.aspx?brs=1234,12345,123456

   (single record set by number)

   http://{PowerPACURL}/view.aspx?brsn='bibrecordsetname'

   (multiple record sets by name)

   http://{PowerPACURL}/
   view.aspx?brs='TotSummer','TeenSummer','AdultSummer'

3. Create a custom web part for the record set URL. See “Create a custom Web part” in the *Polaris Public Access Administration Guide 4.1*.
4. Assign the custom web part to a specific page. See “Assign Web parts to public pages” in the *Polaris Public Access Administration Guide 4.1*.

Tip:
To find a record set that appears in Polaris PowerPAC, select it to display the URL in the top of the window. Then select and copy the bibliographic record set ID that appears after the equal (=) sign. For example, select **13221** in this URL: http://qa-orion/view.aspx?brs=13221.
Then, search for the record set in the staff client Find Tool: select **Record set ID** in the **Search by** box, and paste the record set ID in the **For** box.

Display Record Set Titles in PAC Content Carousels

1. Create the record set containing the titles you want to include in the content carousel.

   Note:
   For content carousels to include cover images, enriched data options for cover images must be set in Polaris Administration. See “Enabling Enriched Data” on page 155.

2. Search for and select the record set in the **Portal page content carousels** PowerPAC profile in Polaris Administration. See “Set up content carousels” in the *Polaris Public Access Administration Guide 4.1*.

Display Record Set Titles in Community Content Carousels

1. Create the record set containing the titles you want to include in the community record's content carousel.

   Note:
   For content carousels to include cover images, enriched data options for cover images must be set in Polaris Administration. See "Enabling Enriched Data" on page 155.

2. Create or open a community record in the Polaris staff client.
3. Search for and select the record set on the Social tab of the Community Record workform. See "Enter community social links in the staff client" in the *Polaris Community Profiles Guide 4.1*.

Changing Multiple Bibliographic Records

You can gather multiple bibliographic records in a record set and simultaneously change specific data in all the bibliographic records in the record set using the Bulk Change process. The changes to the records are made via a Bulk Change job, and you can check the status of the job in the Bulk Change Job Queue. When the job is completed, you can run a report that displays the start and end time of the bulk change job, the number of records that were changed, and any exceptions where records could not be changed.

Use the bulk change process to change the following information in multiple bibliographic records at once:

Tip:
You must have the permission **Access bibliographic bulk change: Allow** to do any bulk changes of bibliographic records. To bulk change values in the LDR, 006, 007, 008 (control fields), you must have the additional permission **Access bibliographic fixed fields bulk change: Allow**.

- **Non-MARC data** - Change the indicator in the bibliographic records so that all the records display (or do not display) in the PAC. You can also change the owner of the records from one owner to another. See "Bulk change non-MARC data in bibliographic records" on page 168.
- **Data Fields** - Insert or delete tags, subfields, and indicators. You can change, insert or delete specific values in tags, subfields, and indicators. You can also check and correct non-filing indicator values. See "Bulk change data fields in bibliographic records" on page 169.
- **Leader** - Change values in the Leader for all the records in the record set. If the Leader/06 is changed, a message warns the user to make appropriate changes to the 008 tag. See "Bulk change the Leader in bibliographic records" on page 171.
- **006 Tag** - Change the 006 tag (material characteristics). The code in the 006/00 (form of material) determines the data elements you can define for subsequent character positions. In addition, the codes in field 006/00 correspond to those in Leader 06 (type of record). You can change, insert, and delete values in the 006 tag. See "Bulk change the 006 tag in bibliographic records" on page 172.
- **007 Tag (1)** and **007 Tag (2)** - Change the 007 tag (the physical description). The codes in the 007 tag are defined by position, and the number of character positions depends on the code contained in 007/00. You can insert, delete, and create tags and change the category of material. You can also change a value to another value. "Bulk change the 007 tag in bibliographic records" on page 174.

- **008 Tag** - Change the 008 tag that provides coded information about the record as a whole as well as special bibliographic aspects of the item, such as the target audience. "Bulk change the 008 tag in bibliographic records" on page 177.

Records are skipped when they do not contain the criteria specified for the bulk change. Records are added to a cleanup record set if they contain the criteria specified, but they could not be changed for other reasons.

You cannot use bulk change to modify values in the following fields:

- Polaris record status
- Bibliographic control number (001)
- Standard numbers used in deduplication routines (010$a, 020$a, 022$a, 024$a, 028$a, 035$a, 037$a).
- LDR values in positions other than 05, 06, 07, 08, 09, 17, 18, 19 (the values in these positions can be changed). You cannot change the Leader/05 to a value of "d".
- 008, positions 008/7-10 (beginning date of publication) because it is used in deduplication routines.

When you change a field that is under authority control and the change invalidates the existing link, the link to that authority record is broken, and a background process attempts to re-link and re-index the record. If the change is made to a field subject to authority control, but the change does not invalidate the link, the link is not broken. The most efficient way to make changes for subfields in fields under authority control is to change the authority record. Then the changes filter down to the linked bibliographic records. See "Edit authority records and update linked records" on page 112.

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Bulk change non-MARC data in bibliographic records

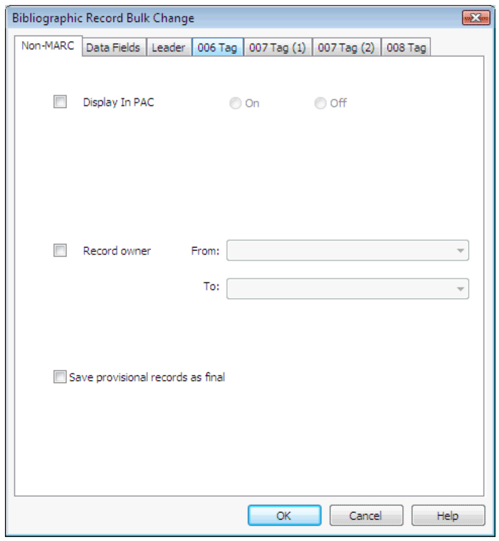
Follow these steps to change non-MARC data in multiple bibliographic records.

Note:
The records you want to bulk change must be in a record set.

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

1. Open the Bibliographic Record Set workform.
2. Select **Tools, Bulk Change**.

   The Bibliographic Bulk Change dialog box appears with the non-MARC tabbed page displayed.



3. Choose any of the following options:
   - To display (or not display) the records in the PAC, select **Display in PAC**, and select **On** or **Off**.
   - To change the owner of the records, select **Record owner**, select the current owner in the **From** box, and select the new owner in the **To** box.
   - To change provisional bibliographic records to final records, select **Save provisional records as final**.
4. Click **OK** to initiate the bulk change process, or click another tab to make other changes to the records.

   If you click **OK**, the Summary of Changes dialog box appears.
5. Click **Continue** on the Summary of Changes dialog box to continue with the bulk change. See “Check the bulk change queue and run the report” on page 179.

Bulk change data fields in bibliographic records

You can make the following types of bulk changes to data fields in bibliographic records:

Note:
The following tags/subfields cannot be modified or deleted because they are used in duplicate detection: 10$a, 20$a, 22$a, 24$a, 28$a, 35$a, and 37$a.

- Insert a new tag
- Insert a subfield in a tag in any location within that tag, or insert a subfield before or after a specific subfield
- Delete the first or last instance of a tag
- Delete a subfield with any data, with specific data, or delete the last instance of the subfield
- Change a specific tag's subfield code without changing the data in the subfield
- Replace a tag's subfield data with specific data
- Change a tag's indicator only
- Correct non-filing indictors

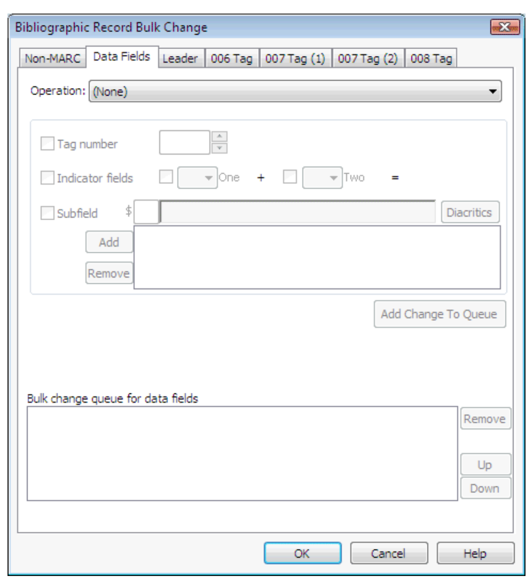
Follow these steps to bulk change data fields in multiple bibliographic records.

Note:
The records you want to bulk change must be in a record set.

1. Open the record set that contains the bibliographic records you want to change.
2. Select **Tools, Bulk Change**.
3. Select the **Data Fields** tab.

   The Data Fields tabbed page appears.

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



4. In the **Operation** box, select the operation you want the bulk change to perform on the data fields you specify.

   Note:
   The options available depend on the operation you selected. If you selected **Correct non-filing indicator values (initial articles 'a', 'an', or 'the')**, skip to step 10.

5. In the **Tag number** box, select the number of the tag to insert, delete, replace, or identify.

6. Select the first and/or second indicators in the **Indicator fields**, **One** and **Two** boxes.

7. Type a subfield code in the **Subfield $** box, and type a value for the subfield in the larger box to the right of the code.

   Note:
   You must specify at least one subfield when you are inserting a tag.

8. Enter or select other criteria depending on the option you chose. For example, if you selected **Replace a tag's subfield (with specific data)**, enter the data you want to change to in the **Change to** box.

Tip:
You can use diacritics in subfields. For example, the author's name includes diacritics, but some of your bibliographic records do not have the correct name. You can **select Replace a tag's subfield (with specific data)**, type the existing author's name in the **Subfield** box and insert diacritics in the author's name in the **Change to** box by clicking on the **Diacritics** button. Select the character in the Character Picker box.

9. When you are finished specifying the changes, click **Add Change to Queue**.

   The changes appear under **Bulk change queue for data fields**. You can move the changes up or down in the queue by selecting the change, and clicking the **Up** or **Down** buttons. To remove a change, select it, and click **Remove**.

10. Click **OK** to initiate the bulk change process, or click another tab to make other changes to the records.

    If you click **OK**, the Summary of Changes dialog box appears.

11. Click **Continue** on the Summary of Changes dialog box to continue with the bulk change. See "Check the bulk change queue and run the report" on page 179.

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Bulk change the Leader in bibliographic records

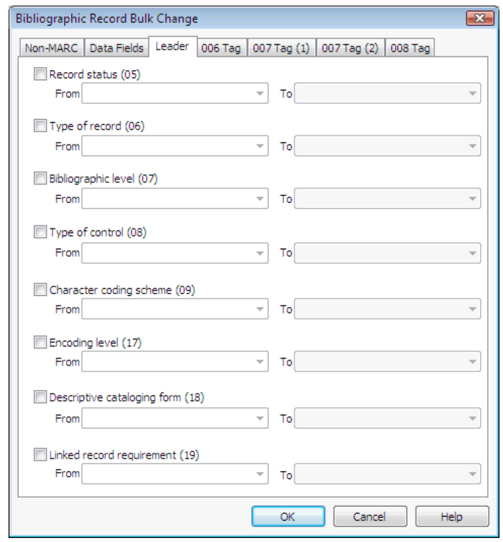
Follow these steps to bulk change the Leader in multiple bibliographic records.

Note:
The records you want to bulk change must be in a record set.

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

1. Open the Bibliographic Record Set workform.
2. Select **Tools, Bulk Change**.
3. Select the Leader tab.

   The Leader tabbed page appears.



4. Select the position you want to change.

   Note:
   When you select the LDR/06, a message reminds you to make the appropriate changes to the 008.

   The **From** and **To** boxes become active when you select the position.
5. In the **From** box, select the value to change.
6. In the **To** box, select the value to put in the selected position.
7. Select any other positions you want to change in the 008 tag, and specify the **From** and **To** values.
8. Click **OK** to initiate the bulk change process, or click another tab to make other changes to the records.

   If you click **OK**, the Summary of Changes dialog box appears.
9. Click **Continue** on the Summary of Changes dialog box to continue with the bulk change. See "Check the bulk change queue and run the report" on page 179.

Tip:
If you are correcting invalid values, you can type an invalid value for the position in the **From** box, or you can select **All invalid values** from the list. The bulk change process will replace the invalid values with the selection in the **To** box.

Bulk change the 006 tag in bibliographic records

Follow these steps to bulk change the 006 tag in multiple bibliographic records.

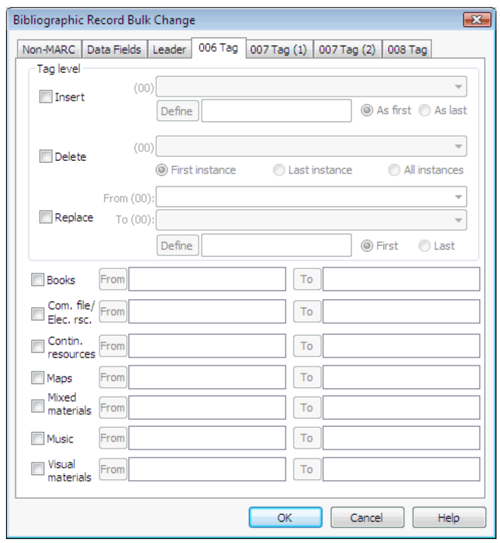
Note:
You can insert or delete 006 tags, but you cannot replace an existing 006 tag. The code you specify in the Form of material position (006/00) determines the data elements you can define for subsequent character positions.

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

1. Open the Bibliographic Record Set workform.
2. Select **Tools, Bulk Change.**

   The Bibliographic Record Bulk Change dialog box appears.
3. Select the **006 Tag** tab.

   The 006 Tag tabbed page appears.

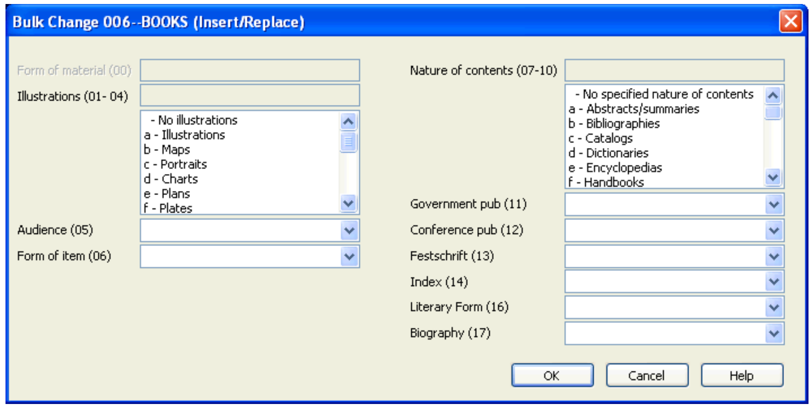


4. To insert or replace an entire 006 tag, select **Insert** or **Replace**, and do the following steps:

   a) Select the form of material code in the **(00)** box.

   b) Click **Define**.

   The appropriate dialog box appears, depending on the form of material.



c) Define the subsequent positions in the 006 tag by selecting the appropriate codes from the lists in the dialog box.

d) Click **OK** when you have finished defining the character positions.

The results of your selections appear to the right of the **Define** button.

e) If you are inserting a new 006 tag, select **As first** if you want the tag to be the first 006 tag, or select **As last** if you want the tag to be the last 006 tag. If you are replacing a specific 006 tag, select **First** or **Last**.

5. To delete a specific 006 tag, select **Delete** and do the following steps:

a) In the **(00)** box, select the value that matches the 006 tag you want to delete.

b) Select **First instance** to delete only the first 006 tag that contains that value, **Last instance** to delete the last occurrence of the tag, or **All instances** to delete all 006 tags with this value.

6. To change a specific value in the Form of material **(00)** code in the 006 tag, do the following steps:

a) Select the check box that corresponds to the form of material you want to change, for example **Books**.

b) In the **From** box, select the value to change.

c) In the **To** box, select the value to put in this position.

7. Click **OK** to initiate the bulk change process, or click another tab to make other changes to the records.

If you click **OK**, the Summary of Changes dialog box appears.

8. Click **Continue** on the Summary of Changes dialog box to continue with the bulk change. See “Check the bulk change queue and run the report” on page 179.

1-2-3

Tip:

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

Bulk change the 007 tag in bibliographic records

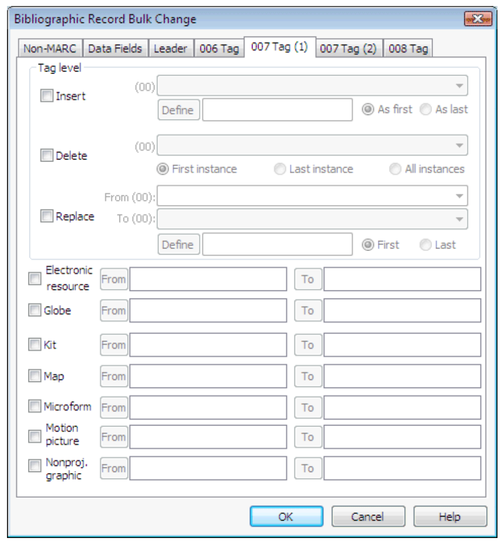
Follow these steps to bulk change the 007 tag in multiple bibliographic records.

1. Open the Bibliographic Record Set workform.

2. Select **Tools, Bulk Change.**

   Select the 007 (1) or 007 (2) tab.

   The 007 Tag (1) or 007 Tag (2) tabbed page appears.

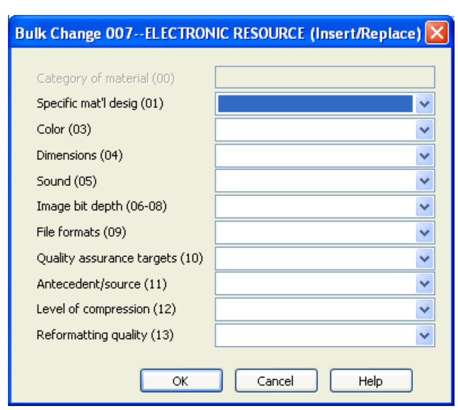


3. To insert or replace an entire 007 tag, select **Insert** or **Replace**, and do the following steps:

   a) Select the category of material code in the **(00)** box.

   b) Click **Define**.

   The appropriate dialog box appears, depending on the category of material.



c) Define the subsequent positions in the 007 tag by selecting the appropriate codes from the lists in the dialog box.

d) Click **OK** when you are finished defining the character positions.

The Insert/Replace dialog box closes, and the results of your selections appear to the right of the **Define** button on the Bulk Change dialog box.

e) If you are inserting a new 007 tag, select **As first** if you want the tag to be the first 007 tag, or select **As last** if you want the tag to be the last 007 tag. If you are replacing a specific 007 tag, select **First** or **Last**.

4. To delete a specific 007 tag, select **Delete** on the Bibliographic Bulk Change dialog box, and do the following steps:

a) In the **(00)** box, select the value that matches the 007 tag you want to delete.

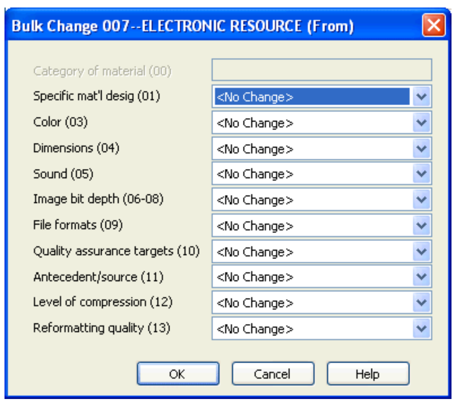
b) Select **First instance** to delete only the first 007 tag that contains that value, **Last instance** to delete the last occurrence of the tag, or **All instances** to delete all 007 tags with this value.

5. To change a specific value in the Category of material **(00)** code in the 007 tag, select the **007 Tag 1** or **007 Tag 2** tab on the Bibliographic Bulk Change dialog box, and do the following steps:

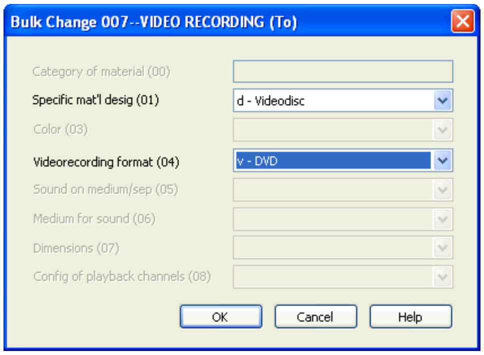
a) Select the check box that corresponds to the category of material you want to change, for example **Video recording** (007 Tag 2 tab).

b) Click the **From** button.

A dialog box appears with the values for that category of material.



c) In the **To** box, select the value to put in this position.



6. Click **OK** to initiate the bulk change process, or click another tab to make other changes to the records.

   If you click **OK**, the Summary of Changes dialog box appears.

7. Click **Continue** on the Summary of Changes dialog box to continue with the bulk change. See "Check the bulk change queue and run the report" on page 179.

1-2-3

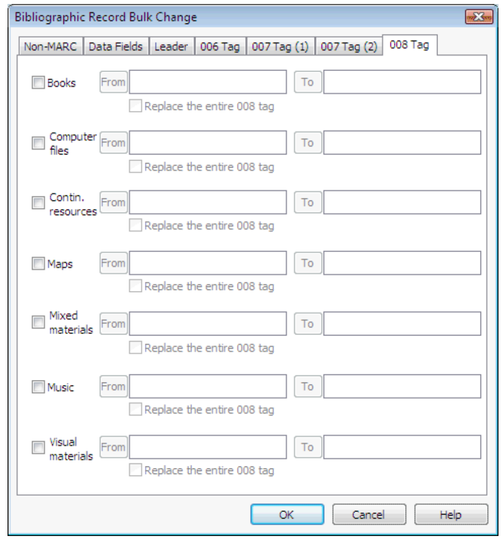
Tip: Click to open the Bulk Change dialog box, or press **CTRL+B**.

Bulk change the 008 tag in bibliographic records

Follow these steps to bulk change the 008 tag in multiple bibliographic records.

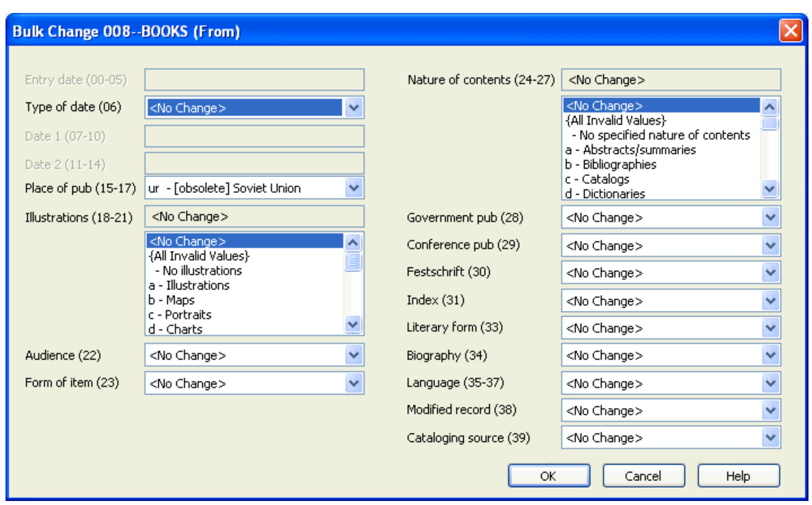
1. Open the Bibliographic Record Set workform.
2. Select **Tools, Bulk Change**.
3. Select the **008 Tag** tab.

   The 008 Tag tabbed page appears.



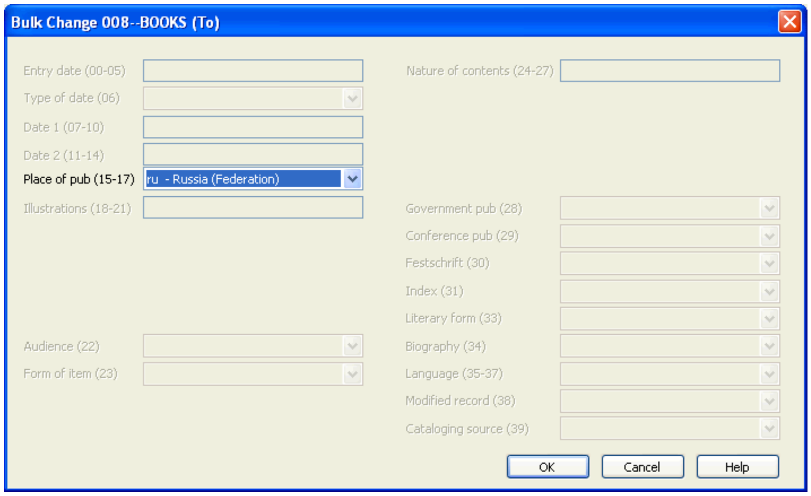
4. Select the check box that corresponds to the 008 tag you want to change.
5. Click **From**.

   The Bulk Change 008 -- (From) box appears based on the check box you selected.



6. Select the positions you want to change in the 008 tag of all records in the record set.
7. Click **OK** to return to the Bibliographic Record Bulk Change dialog box.
8. Click **To**.

   The Bulk Change 008 -- To dialog box appears based on selections you made in the Bulk Change 008 -- From dialog box. For example, if you specified a change to the Language (35-37), you can select only the Language in the Bulk Change 008 --From dialog box. If there were multiple selections in the **From** box, you can select multiple values for the **To** box.



9. Click **OK** to return to the Bibliographic Record Bulk Change dialog box.
10. Click **OK** to initiate the bulk change process, or click another tab to make other changes to the records.

    If you click **OK**, the Summary of Changes dialog box appears.
11. Click **Continue** on the Summary of Changes dialog box to continue with the bulk change. A message tells you the change was added to the bulk change queue. See "Check the bulk change queue and run the report" on page 179.

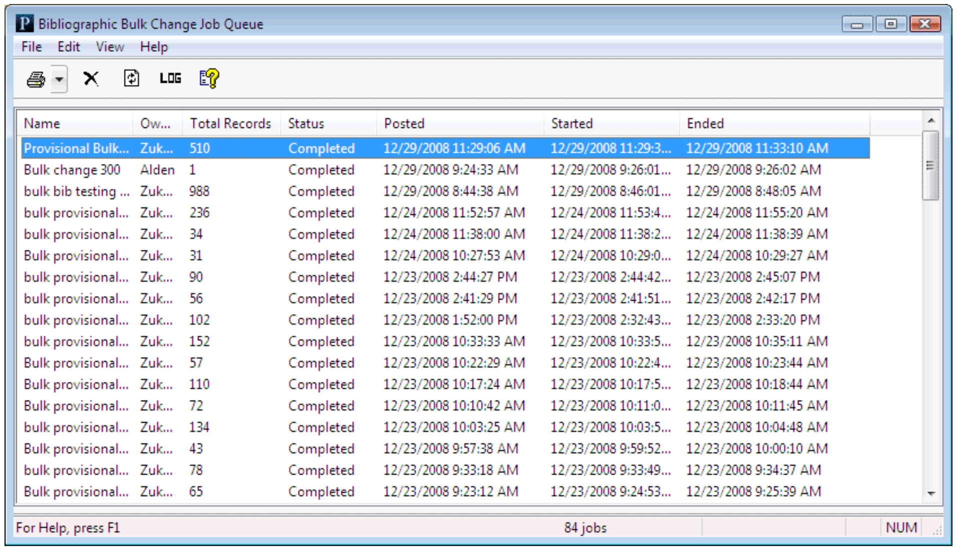
Check the bulk change queue and run the report

After you submit the bulk change, you can confirm that it was processed, and you can run a report. Follow these steps to open the bibliographic bulk change queue and run the report.

1. Select **Utilities, Cataloging Processing, Bibliographic Bulk Change Queue**.

   The Bibliographic Bulk Change Job Queue dialog box appears.

Tip:
To delete a pending or completed bulk change job, select it and click **Delete**. When a job is running, you cannot cancel or delete it. If you delete a pending job, the bulk changes are not processed. After a job is deleted, you cannot run reports on that bulk change job.

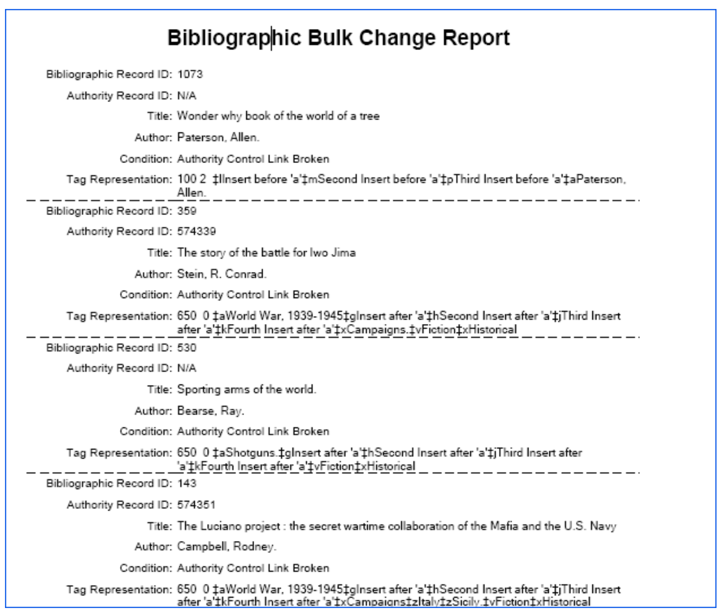


2. Select **File, View, Report** to run the report.

   The Bibliographic Bulk Change Report appears in the preview window.

Tip:

Click LOG to run the Bibliographic Bulk Change Report.



Bibliographic Bulk Change Report

Bibliographic Record ID: 1073
Authority Record ID: N/A
Title: Wonder why book of the world of a tree
Author: Paterson, Allen.
Condition: Authority Control Link Broken
Tag Representation: 100 2 ‡lInsert before 'a'‡mSecond Insert before 'a'‡pThird Insert before 'a'‡aPaterson, Allen.

Bibliographic Record ID: 359
Authority Record ID: 574339
Title: The story of the battle for Iwo Jima
Author: Stein, R. Conrad.
Condition: Authority Control Link Broken
Tag Representation: 650 0 ‡aWorld War, 1939-1945‡gInsert after 'a'‡hSecond Insert after 'a'‡jThird Insert after 'a'‡kFourth Insert after 'a'‡xCampaigns.‡vFiction‡xHistorical

Bibliographic Record ID: 530
Authority Record ID: N/A
Title: Sporting arms of the world.
Author: Bearse, Ray.
Condition: Authority Control Link Broken
Tag Representation: 650 0 ‡aShotguns.‡gInsert after 'a'‡hSecond Insert after 'a'‡jThird Insert after 'a'‡kFourth Insert after 'a'‡vFiction‡xHistorical

Bibliographic Record ID: 143
Authority Record ID: 574351
Title: The Luciano project : the secret wartime collaboration of the Mafia and the U.S. Navy
Author: Campbell, Rodney.
Condition: Authority Control Link Broken
Tag Representation: 650 0 ‡aWorld War, 1939-1945‡gInsert after 'a'‡hSecond Insert after 'a'‡jThird Insert after 'a'‡kFourth Insert after 'a'‡xCampaigns‡zItaly‡zSicily.‡vFiction‡xHistorical

Changing Multiple Item Records

To make bulk changes to multiple item records at once, you can either gather the records in a record set and bulk change them, or you can select the **Ad hoc Bulk Change** option from a linked items list box. This option is available in the item linked list box when you select **Links, Items** from a bibliographic record, a purchase order, a purchase order line item, or a purchase order line item segment. This allows you to quickly update a purchase order's linked on-order items to full, barcoded items with call numbers without first putting the items in a record set.

Note:
For more information on using cataloging record sets, see "Creating and Using Cataloging Record Sets" on page 156.

With either method, you can change the location, circulation information, bibliographic information, notes, and other information for multiple item records using the check boxes and free-text fields in the Bulk Change Item Record dialog box. When you are changing notes or other free-text fields, you can replace the text, add to the end of the text, or add to the beginning of the text.

Certain circulation statuses cannot be modified using bulk change because of the effect these changes might have in other records and processes. For example, you cannot use bulk change to change the circulation status of **Out** to **In** because some of the items might fill a hold request or be overdue. If an item with holds changed from **Out** to **In**, the patron record and the hold request record would need to be updated and notification sent. Any fines would need to be resolved and the item might need to go in-transit. In addition, in-transit slips, hold slips and fine receipts might need to be generated. The following table lists the circulation statuses that can be changed using bulk change.

From Circulation Status	*To Circulation Status*	
Bindery	In, In Repair, Missing	Unavailable Withdrawn
In	Bindery, In Repair, Missing	Unavailable Withdrawn
In-Process	Bindery, In, In Repair	Missing Unavailable Withdrawn
In Repair	Bindery, In, Missing	Unavailable Withdrawn
Missing	Bindery, In Missing	Unavailable Withdrawn
Unavailable	Bindery, In In Repair	Missing Withdrawn

Bulk change item records

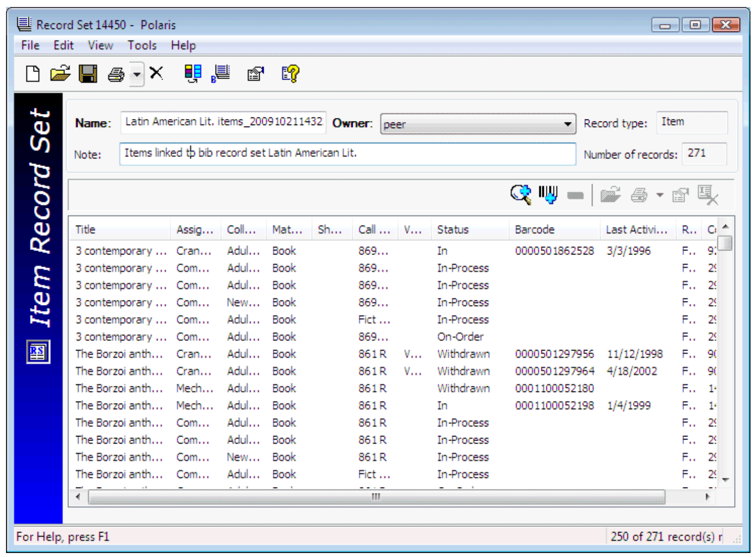
You can gather items for bulk change in a record set, and then bulk change them. Or, you can bulk change items by selecting them in a linked list box from a bibliographic record, purchase order, purchase order line item, or purchase order line item segment.

Note:
To bulk change item records for a branch or library, you need the **Access bulk change** permission, and you need the **Item record: Bulk change permission** set for each item's owning branch. For example, if the record set contains items from North Branch and South Branch, you will need to have the **Item record: Bulk change permission** set for North Branch and South Branch.

Tip:
You can create an item record set from a bibliographic record set by clicking [icon] on the Bibliographic Record Set workform. The item record set will contain all the items linked to the bibliographic records in the record set.

1. Select the item records to change, and open the Bulk Change dialog box using one of the following methods:

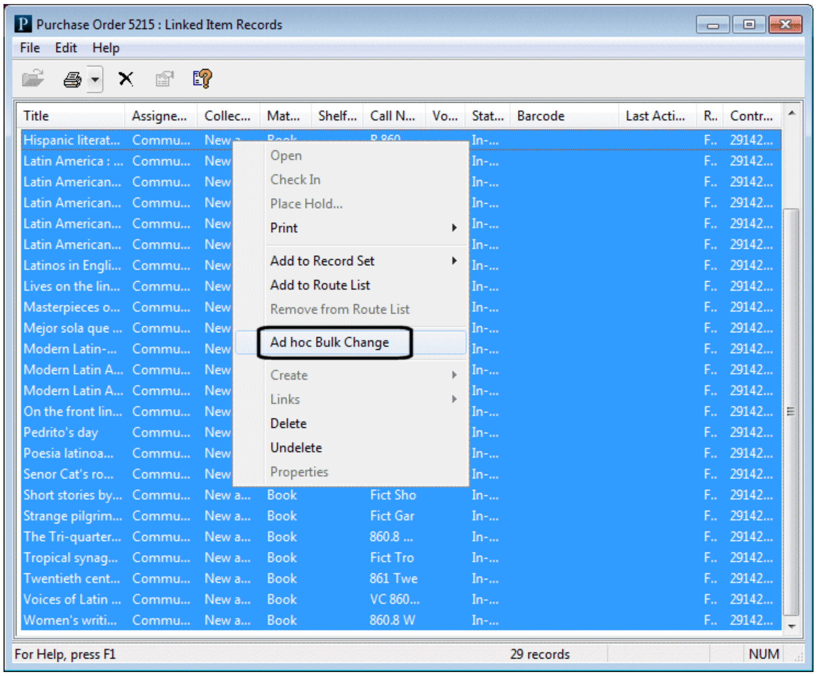
a) If the items are in a record set, open the record set, and select **Tools, Bulk Change**, press **CTRL+B,** or click [icon].



b) If the items you want to change are not in a record set, access the item linked list box by one of the following methods:

- Select **Links, Item records** from the workform menu on the Bibliographic Record, Purchase Order, or Purchase Order Line Item workform.
- Select a purchase order line item from the Purchase Order workform, Line Items view, or from the Find Tool results list, right-click and select **Links, Item Records** from the context menu.
- Select a segment in the Purchase Order Line Item workform, right-click and select **Links, Item records** from the context menu.

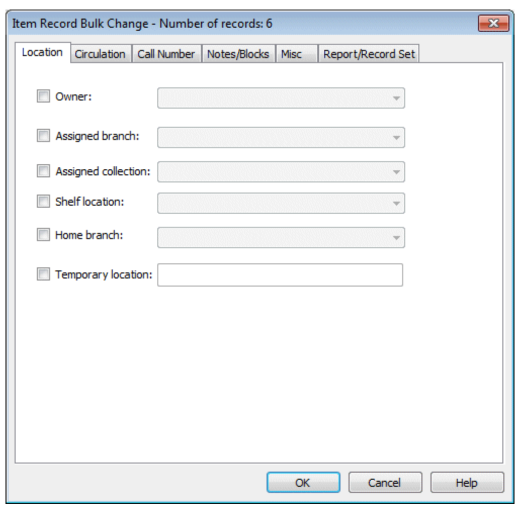
Then, select the items to bulk change in the item list box, right-click and select **Ad hoc Bulk Change**.



The Bulk Change dialog box appears.

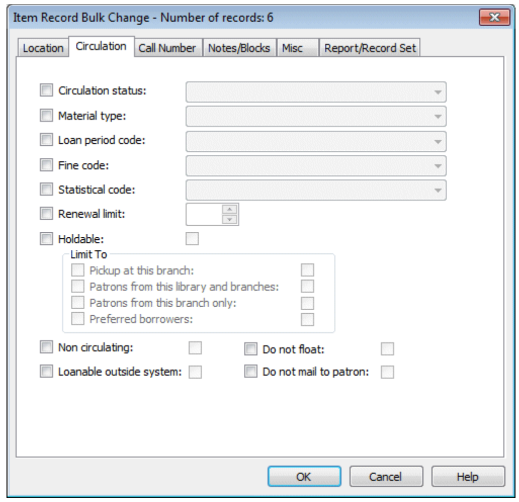
2. Select one of the following tabs to change fields for all the item records in the record set or for all the items selected in the linked list box:

a) **Location** - Use this tab to change the item records' location information.



- To change the items' location information, select the **Owner**, **Assigned branch**, **Assigned collection**, **Shelf location**, or **Home branch** box, and select a corresponding value from the list.
- To enter a temporary location for the items, select **Temporary location**, and type the location. If you leave the text field blank, the **Temporary location** will be blank in all the item records in the record set.

b) **Circulation** - Use this tab to change the item records' circulation information.

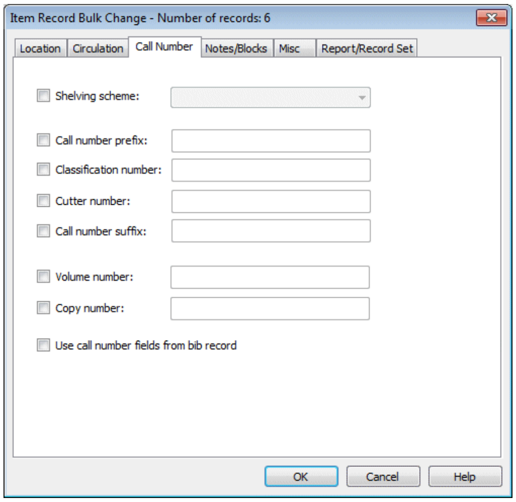


- To change basic circulation information, select the **Circulation status**, **Material type**, **Loan period code**, **Fine code**, **Statistical code**, or **Renewal limit** box and select a corresponding value from the list.
- To allow or disallow holds on the items, select the **Holdable** box. Then, select the check box to allow holds on the items, or leave the check box blank to prevent holds on the items.
- To change hold limits, select the **Holdable** box and select the check box to allow holds. Then, select one of the hold limit settings, and select the check box to the right of the setting to limit the holds, or leave the right check box empty to deselect the limit. For more information on these limits, see "Restricting Holds on Specific Items" in the *Polaris Patron Services Administration Guide 4.1*.

  Example:
  To allow all items in the record set to be held and then picked up at any library, select the **Holdable** check box, select **Pickup at this branch**, but leave the check box to the right empty. This will clear the **Pickup at this branch** setting for all items in the record set that have this limit setting selected.
- To change the **Non circulating** setting for all item records, select the **Non circulating** box, and either select the check box to the right or leave it blank. If you select the check box, all the items in the record set will not circulate. If you leave the check box blank, all the items will have the **Non circulating** check box unchecked, allowing them to circulate.
- To change the **Do not float** setting for all item records, select the **Do not float** box, and either select the check box to the right or leave it blank. If you select the check box, all the items in the record set will not float to other branches' collections. If you leave the check box blank, the items are eligible to float to other branches' collections. For more information, see "Floating Collections and Check-In" in the *Polaris Patron Services Guide 4.1*.

- To change the **Do not mail to patrons** setting for all item records, select the **Do not mail to patrons** box, and either select the check box to the right or leave it blank. If you select the check box, all items in the record set will not be mailed to patrons. If you leave the check box blank, the items can be mailed to patrons. For more information, see "Borrow By Mail Circulation" in the *Polaris Patron Services Guide 4.1*.
- To change the **Loanable outside the system** setting for all items in the record set, select the **Loanable outside the system** box, and either select the check box to the right, or leave it blank. If you select the check box, the items can be loaned outside the system. If you leave the check box blank, the items cannot be loaned outside the system.

c) **Call Number** - Use this tab to change the item records' call number information, or to assign call numbers to the item records.



Tip:
If you select **Use call number fields from bib record** and also enter a new bib control number on the Misc tab, the call number is taken from the new bibliographic record.

- To assign or change call numbers by taking the call number from each item's linked bibliographic record, select **Use call number fields from bib record**. To use this option, the Polaris Administration profile **Bring call number fields from bib to item record when link is made** must be set to **Yes**. If it is set to **No**, the check box is disabled.

  If the **Use call number fields from bib record** box is selected, the call number fields are copied subfield-by-subfield. If the bibliographic record has the subfield, it is copied to the item record. If the bibliographic record does not have the call number subfield, the field does not change in the linked item record.

  If the shelving scheme is left blank in the dialog box, the shelving scheme from the item record is used to determine the tags and subfields to copy from the bibliographic record. This allows the bulk change process to copy the call number information from linked bibliographic records even when the items have different shelving schemes.
- To change the shelving scheme for all the items in the record set, select **Shelving scheme**, and select a value from the list.

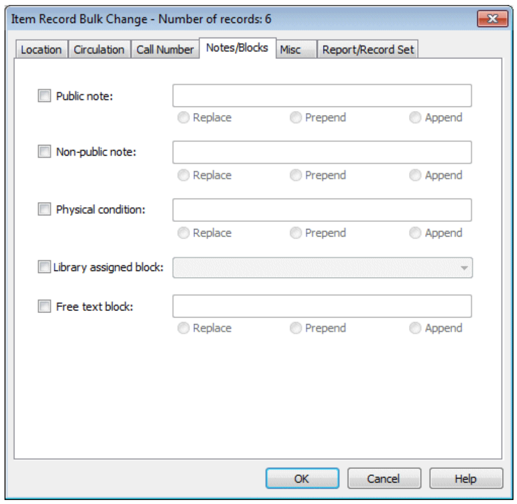
Note:
If you enter a shelving scheme and the **Use call number fields from bib record** box is also selected, the shelving scheme is copied to the item records unless there are no tags in the item's linked bibliographic record that are consistent with the shelving scheme in the dialog box. In this case, neither the call number nor the shelving scheme are changed, and the following error message appears on the report: **No call number for the selected shelving scheme was found in bib record.**

- To change the call number information for all the items in the record set (without copying from the linked bibliographic record), select **Call number prefix**, **Classification number**, **Cutter number**, or **Call number suffix**, and type a value in the corresponding box.

Tip:
If the **Use call number fields from bibliographic record** box is selected, you cannot select the check boxes for any of the six call number fields (prefix, class, cutter, suffix, volume, copy).

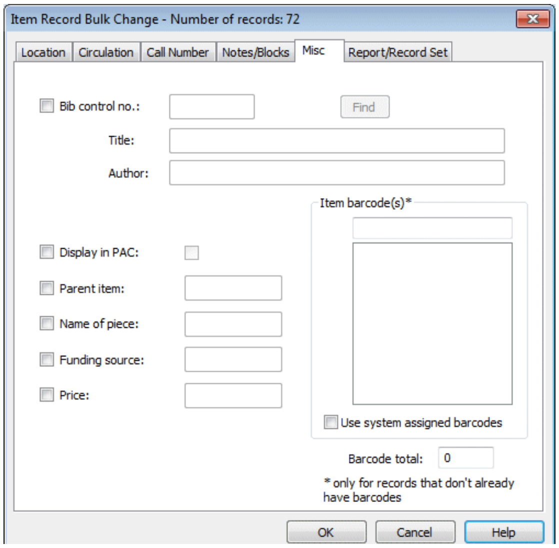
- To change the volume or copy number for all the items in the record set, select **Volume number** or **Copy number**, and type a value in the corresponding box.

d) **Notes/Blocks** - Use this tab to change the item records' notes and blocks.



- To change the notes information for all item records in the record set, select **Public note**, **Non-public note**, or **Physical condition**, and type the text in the box to the right of the note you selected. Then, select **Replace** to replace any existing notes with the note you typed, **Prepend** to add the notes to the beginning of any existing notes, or **Append** to add the notes to the end of any existing notes.
- To change a library-assigned block, select the **Library assigned** check box, and select a value from the list box to the right.
- To change a free-text block, select the **Free text block** check box, and type the text for the free-text block you want to add. Then, select **Replace** to replace the text for any free-text blocks, **Prepend** to add the text to the beginning of any existing free-text blocks, or **Append** to add the text to the end of any existing free-text blocks.

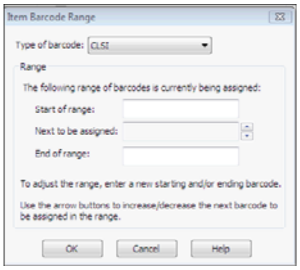
e) **Misc** - Use this tab to change miscellaneous information on the item records, or to assign barcodes to items that do not have a barcode.



- To change the bibliographic control number for all item records, select **Bib control no.** Then, if you know the bibliographic control number, enter it in the box and press **Tab**, or click **Find**, and search for the bibliographic record. All item records in the record set will be linked to this bibliographic record.
- To change the **Display in PAC** setting for all item records in the record set, select the **Display in PAC** box, and select the check box to the right, or leave it blank. If you select the check box, all the item records will have the **Display in PAC** setting checked, which means they will all display in the PAC. If you leave the check box blank, all the item records will have the **Display in PAC** setting unchecked, which means none of the items will display in the PAC.
- To change the parent item for all the records in the record set, select **Parent item**, and type a value in the box to the right. If you leave the text field blank, the **Parent item** field will be blank in all the item records in the record set.
- To change the funding source for all the item records in the record set, select **Funding source**, and type a value. If you leave the text field blank, the **Funding source** field will be blank in all items in the record set.
- To change the price of all the items, select **Price** and type the price. If you leave the text field blank, the **Price** field will be blank in all the items in the record set.
- To assign barcodes to all the items that do not have barcodes, enter the barcode range by selecting the **Use system assigned barcodes** box, or by scanning (or typing) the barcodes into the **Item barcode(s)** box. The number of barcodes is displayed in the **Barcode total** box.

Tip:
If an item already has a barcode, it is not changed.

Note:
If you selected **Use system assigned barcodes**, enter the following information on the **I**tem barcode range dialog box: select the barcode type, type the beginning and ending barcodes, and specify the next barcode to be assigned.

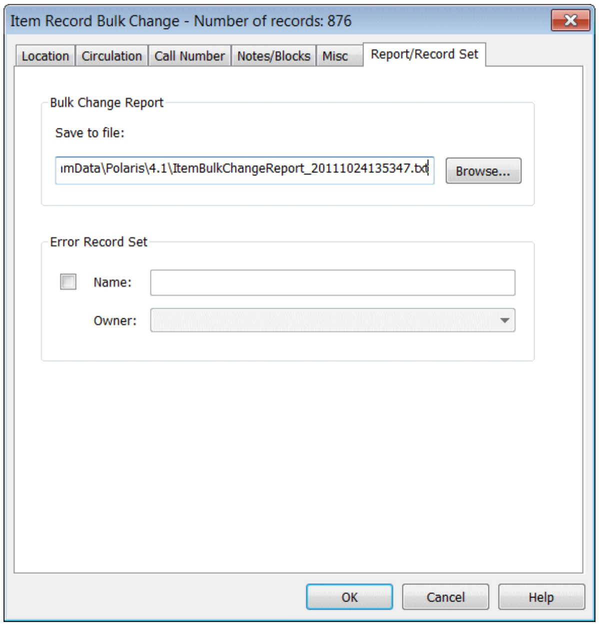


Barcodes are automatically assigned to the item records in the order in which they are sorted in the linked item list box, or in the order in which they appear in the record set. If all the records have not been loaded into the record set at the time the bulk change is launched, the items are processed in item record control number order.

If a duplicate barcode is encountered, the process skips that barcode and goes to the next one. If there are not enough barcodes, a message appears on the error report: **No barcode was assigned because not enough barcodes were specified in the range**.

Note:
You can skip step 3 if you do not want to create a record set of the items that did not get changed or rename the report. If you do not enter a report name, a default report name is used: ItemBulkChange__ with a 16-character representation of the current date/time.

3. Click **Report/Record Set** tab to specify the bulk change report and error record set.



a) If you want to change the default report name, type the location and file name, or click **Browse** to locate the file. The default report name

The report also shows errors for items that could not be bulk changed either due to their status or lack of permissions. See “Bulk Change Report Details” on page 189.

b) To create a record set of the items for which the changes could not be made, select the box under **Error Record Set**, type a name for the record set in the **Name** box and select an owner in the **Owner** box.

> **Note:**
> An error record set is not required. However, specifying an error record set makes it easier to locate the item records that have errors. If no errors are found, no error record set is created.

4. Click **OK** or press **Enter** to start the bulk change process.

   The Summary of Changes message box displays the following details:

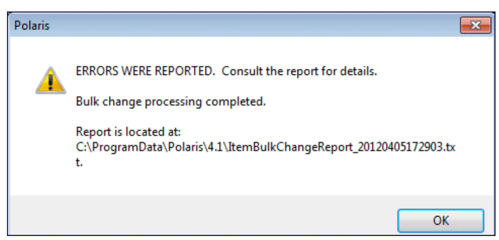
   - The number of item records to be changed
   - The name and owner of the record set that contains the item records being changed
   - The error record set name and owner, if the error record set is requested
   - The path and file name specified for the bulk change report
   - A summary of all the fields to be changed and their new values

Tip:
To return to the Item Record Bulk Change dialog box to change any of your settings, click **Cancel**.

5. Click **Continue**.

   The bulk change process applies the changes to the item records.

   A message informs you when the bulk change process is finished and indicates if there were errors.



6. Click **OK** to close the message box.

   After the bulk change process, the list display is updated as follows depending on whether changed the items from a record set or from a list:

   - **Record set** - The record set workform is refreshed and sorted by the default sort order. You can re-sort the list in barcode order.
   - **Item list using Ad hoc Bulk Change** - The list view is refreshed immediately after the Ad hoc Bulk Change, and you can see the results of the bulk change to fields that display in the list view. If the bib control number was changed, the new title displays in the list view.

Bulk Change Report Details

The default name of the bulk change report is **ItemBulkChange__** with a 16-character representation of the current date and time. It shows the total number of records in the record set, the number of records that were changed, and the number of records that were not changed. Below the statistics are details about the records that could not be changed and the reason they were not changed. It also shows warning messages for item records when the assigned and home branches are different, and item records that will not display in the PAC.

If you have attempted to assign barcodes in the Item Bulk Change dialog, and barcodes could not be assigned for any or all of the items, the summary information displays the number of items for which barcodes could not be created and the reason:

Example: **(Barcodes not assigned)**

Number of barcodes not assigned because of detected duplicates:

Number of barcodes not assigned because of incorrect format:

Number of items not assigned a barcode because not enough barcodes specified:

Number of items not assigned a barcode because item already had a barcode:

The detailed section lists each item for which barcodes could not be assigned and the reason.

The following are examples of errors where items could not be changed because the circulation status prevented the change, or the user lacked permissions:

Example: **(Lack of permissions)**

BULK CHANGE REPORT

5/9/2011 1:56:17 PM

Filename: C:\Documents and Settings\User 1\Desktop\BulkChangePer.txt

GENERAL INFORMATION

User name: User 1

Processed record set name: bulk change permission testing

Processed record set owner: User 1

Error record set name: BulkChangePermissionTestOne

Error record set owner: User 1

SUMMARY OF CHANGES:

Display in PAC: No

STATISTICS:

Processing time: 00 hours 00 minutes 02 seconds

Number of items in record set: 40

Number of items changed: 38

Number of errors: 2

Number of items unchanged due to 'lack of permission' error: 2

****

ERROR DETAILS:

****

Item Record: 1895964

Barcode number: 0003500045236

Title: A new guide to better fishing: over 200 fishing techniques that will help you catch more fish, more often

Reason(s) for error: User does not have permission to bulk change item records owned by 'Cambridge Public Library'

Item Record: 1982897

Barcode number: 0004100044306

Title: Magic and the night river

Reason(s) for error: User does not have permission to bulk change item records owned by 'Green Library'

Example: (Item's status prevents the change)

BULK CHANGE REPORT

5/10/2011 11:29:33 AM

Filename: C:\Users\Peer\Desktop\POLARIS 4.x PROJECT LIST\ItemBulkChangeReport_20090710112504.txt

GENERAL INFORMATION:

User name: peer

Processed record set name: Bulk change

Processed record set owner: peer

Error record set name:

Error record set owner:

****

SUMMARY OF CHANGES:

Circulation status: In

****

STATISTICS:

Processing time: 00 hours 00 minutes 01 seconds

Number of items in record set: 27

Number of items changed: 24

Number of errors: 3

****

ERROR DETAILS:

****

Item Record: 1641186

Barcode number: 0001900246677

Title: 1 2 3

Reason(s) for error: Circulation status change violation: Status was 'Lost'

Item Record: 1622822

Barcode number: 0001900024157

Title: 10 lb. penalty

Reason(s) for error: Circulation status change violation: Status was 'Out'

Item Record: 1621873

Barcode number: 0001900011196

Title: 1 Ragged Ridge Road

Reason(s) for error: Circulation status change violation: Status was 'Withdrawn

Maintaining Your Catalog

Various features in Polaris help you maintain your catalog and ensure that the records in your database are accurate and current. An export utility lets you export records to report your library's holdings to OCLC or to a consortium. You can easily identify records without links by automatically creating a record set. Records that are no longer used can be deleted immediately, or marked for deletion and removed from the database in batch at a later date. To maintain your authority records, you can subscribe to a weekly update service that checks your existing authority records, matches them to updated records from the Library of Congress, and provides the records to be imported. For more information, see "Setting Up Import Profiles and Importing Records" on page 55.

This unit covers the following topics:

Exporting Cataloging Records

You can export records to report your library's holdings to a union database (such as OCLC) or to a consortium. You configure the export once when you export records for the first time.

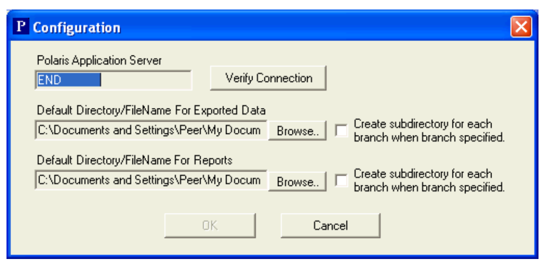
Configure the export process

Note:
If you have SimplyReports and Export Express, you can set up specific export jobs and export records in several output formats. See SimplyReports Help for information.

Follow these steps to configure the export.

1. Select **Utilities, Exporting** from the Polaris Shortcut Bar.

   The Export Configuration dialog box appears.



2. Type the name of the server in the **Polaris Application Server** box.
3. Click **Verify Connection** to check the connection to the Polaris Application server.
4. Click **Browse**, and select the destination for the exported data.
5. To create a subdirectory for the exported data file for branches, select the **Create subdirectory for each branch when branch specified** box.
6. Click **Browse**, and select the location for the export report.

   When you select the location for the export report, it appears in the **Default Directory/Filename for Reports** box.
7. To create a subdirectory for the branch reports, select the **Create subdirectory for each branch when branch specified** box.
8. Click **OK**.

   The Polaris Database Export Utility workform appears. See "Export cataloging records" on page 195.

Export cataloging records

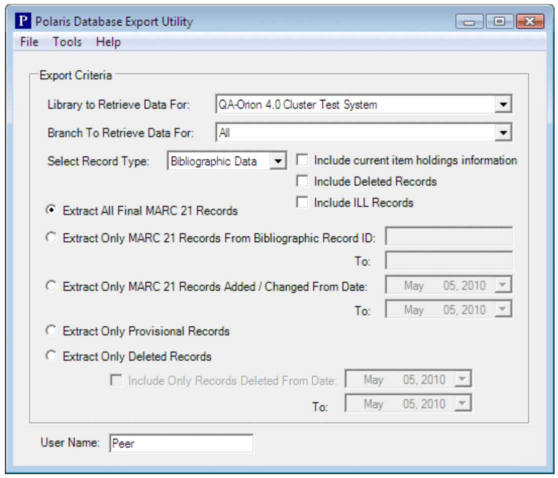
Note:
If you are exporting records for the first time, you first need to configure the export. See "Configure the export process" on page 194.

Follow these steps to export cataloging records.

Tip:
You can export records only in MARC format using this utility. If you have Polaris SimplyReports and ExportExpress, you can export records in Dublin Core or LibraryThing formats as well as create custom profiles for exporting MARC records.

1. Select **Utilities, Exporting** from the Polaris Shortcut Bar.

   The Polaris Database Export Utility dialog box appears.



2. Select the library with the data to be exported in the **Library to Retrieve Data For** box.
3. Select the branch with the data to be exported in the **Branch to Retrieve Data For** box.
4. Select the type of records to include in the export in the **Select Record Type** box and select from the following options:
5. To include holdings information in the export, select **Include current item holdings information**. For more information on embedded holdings data, see "Item Records Created from Embedded Holdings Tags" on page 91.
6. To include records with a deleted status, select **Include Deleted Records**
7. To include interlibrary loan records, select **Include ILL Records**.
8. To include all final MARC 21 records, select **Extract All Final MARC 21 Records**.

Tip:
Exporting all your final MARC 21 records may take a long time. Specifying other criteria, such as a date range or a bibliographic ID number range, reduces the amount of time for the export.

9. To export MARC 21 records within a range of bibliographic record identification numbers, type the beginning number in the **Extract Only MARC 21 Records From Bibliographic Record ID** box, and type the ending number in the **To** box.
10. To extract MARC 21 records that were added or changed within a certain date range, enter the beginning date in the **Extract Only MARC 21 Records Added/Changed From Date** box, and enter the end date in the **To** box.

11. To extract only provisional records, select **Extract Only Provisional Records**.
12. To extract only deleted records, select **Extract Only Deleted Records**.
13. To extract only record deleted within a specific time period, select the **Include Only Records Deleted From Date** box, and enter the from and to dates.
14. Select **Tools, Export** to export the records.

Cleaning Up the Catalog

Various automated processes identify records that are no longer linked to other records, delete records, retain records after deleting them, and purge deleted records from the database. To identify records that may need to be deleted, you can search for records that meet certain criteria and gather them in a record set automatically. For example, you could search for item records for materials that have not circulated in several years, gather them in a record set, and delete them after removing the materials from the shelves. See “Send search results to a record set” in the *Polaris Basics Guide 4.1*.

If you are looking for records that are not linked to any other records, you can create record sets of unlinked bibliographic or authority records automatically. See “Create a record set of unlinked records” on page 198. Then, you can delete the records right from the record set if they are no longer needed.

You can also use cataloging and circulation reports to identify records that may need to be deleted. See “Cataloging Reports” in the *Polaris Basics Guide 4.1*, and “Circulation Reports” in the *Polaris Basics Guide 4.1*.

The Polaris Administration Cataloging profiles **Retain deleted bibliographic records**, **Retain item records**, and **Retain authority records** control whether records are immediately removed from the database or marked with a status of deleted and retained until they are permanently removed from the database using a batch purge. See “Retain deleted records” in the *Polaris Technical Services Administration Guide 4.1*. To permanently delete the retained records, you must set up purge criteria in a Purge record. See “Purge cataloging records” on page 203.

Note:
If the item record is linked to a serial issue record, and the Polaris Serials/ Acquisitions parameter **Delete linked issue/part when serial item is deleted** is set to **Yes**, the issue or part is deleted when you delete the item.

In addition to cleaning up unused records, you can remove tags from bibliographic records after they are marked as processed. These processing tags include 970 tags for building purchase orders, and 852, 949 or other tags used in building item records from embedded holdings tags. See “Setting Utility to Delete Bib Tags Marked with Subfield 9” in the *Polaris Technical Services Administration Guide 4.1*.

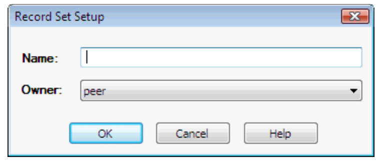
Create a record set of unlinked records

Follow these steps to create a record set of unlinked bibliographic or authority records.

Tip:
Authority records are considered unlinked when there are no bibliographic or *see also* links; they could have *see also from* links.

1. Select **Utilities, Cataloging Processing, Create Unlinked Bibliographic Record Set**, or **Create Unlinked Authority Record Set**.

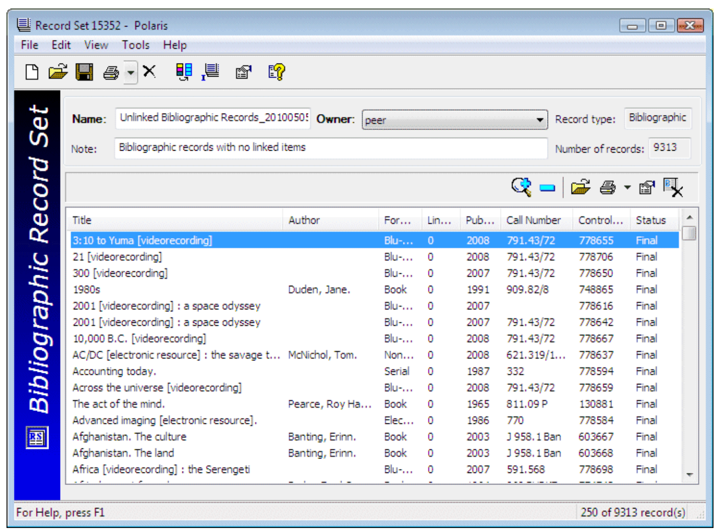
   The Record Set Setup dialog box appears.



2. Type a name for the record set, and click **OK**.

   The new record set appears.

   Note:
   Unlinked authority records appear with an unlinked icon .



Related Information

- "Delete bibliographic or item records" on page 199
- "Purge cataloging records" on page 203

1-2-3

Delete bibliographic or item records

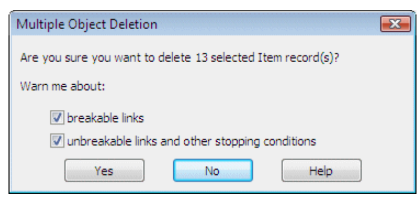
Follow these steps to delete bibliographic or item records.

Tip:
After you have deleted all the records within the record set, you can delete the record set. See "Delete one or more record sets from the Find Tool" in the *Polaris Basics Guide 4.1*.

1. Use one of the following methods to delete cataloging records:
   - To delete a record displayed in a workform, select **File, Delete** on the workform, or click ✕.
   - To delete a record directly from the Find Tool results list, right-click the record, and select **Delete** from the context menu.
   - To delete cataloging records in a record set, open the record set, choose **Edit, Select All**, and click ✕ to delete all the records. Or, select specific records, right-click, and select **Delete** from the context menu. You can automatically gather unlinked authority or bibliographic records in a record set; see "Create a record set of unlinked records" in the *Polaris Cataloging Guide 4.1*.

   Note:
   If the record already has a Deleted status, and you delete it again, it will be removed from the database, even if the **Retain deleted records** profile is set to **Yes**.

2. If you are deleting multiple bibliographic or item records, the Multiple Deletion dialog box appears.



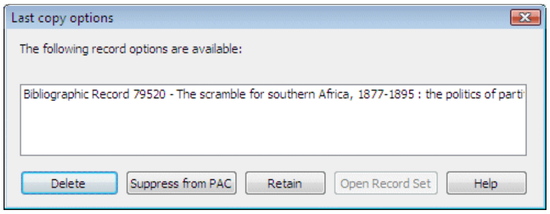
3. If you want to delete the records without stopping for warning messages, you can suppress these messages by clearing one or both of the following boxes:

   Note:
   You must have the required permissions to prevent the warning messages from appearing. See "Related Information" on page 200.

   - **breakable links** - The records with breakable links will be deleted without any warning messages.
   - **unbreakable links and other stopping conditions** - The records with unbreakable links are skipped over and not deleted, but no warning messages appear.

4. Click **Yes** to delete the selected records. If you decide not to delete the record, click **No** or close the dialog box.

   If a record you are deleting is the last record linked to another record or records, the Last Copy Options dialog box appears.



5. If the Last Copy Options dialog box appears, select one of the following options:
    - Click **Delete** to delete the record if it does not have unbreakable links or other conditions that prevent deletion.
    - Click **Suppress From PAC** to retain the record but prevent it from appearing in the PAC
    - Click **Retain** to retain the record without changes.

Related Information

- **Permissions for suppressing warning messages:**
    - **Suppress warnings for breakable links when deleting multiple bibliographic records: Allow**
    - **Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple bibliographic records: Allow**
    - **Suppress warnings for breakable links when deleting multiple item records: Allow**
    - **Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple item records: Allow**
- **Unbreakable links or conditions that prevent item deletion:**
    - Item is a parent item with child records linked to it
    - Item is checked out
    - Item-level hold request attached to it
    - Item has been shipped to fill a hold request
    - Item is linked to a routed serial issue
- **Unbreakable links or conditions that prevent bib deletion**:
    - The bib is final and it is linked to final/provisional items
    - The bib is deleted and the linked items are deleted
    - Linked to active hold requests
    - Linked to serial holdings records
    - Linked to purchase order lines with a status of Pending
    - Linked to invoice lines with a status of Open
    - Linked to issue records
    - Linked to subscription records
    - Linked to resource records (digital media)
- **Deletion of ILL requests -** When Ill requests are deleted, the bibliographic and item records are deleted unless both the Cataloging profiles **Retain deleted bibliographic records** and **Retain deleted item records** are set to **Yes**.

Delete authority records

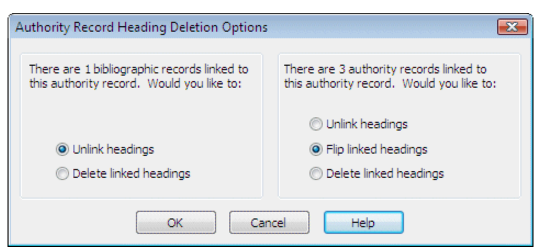
Tip:
After you have deleted all the records within the record set, you can delete the record set. See "Delete one or more record sets from the Find Tool" in the *Polaris Basics Guide 4.1*.

Follow these steps to delete authority records.

1. Use one of the following methods to delete authority records:
   - To delete a single authority record displayed in a workform, select **File, Delete** on the Authority Record workform, or click X.
   - To delete a single authority record directly from the Find Tool results list, select the record, right-click, and select **Delete** from the context menu.
   - To delete authority records displayed in a record set, open the record set, choose **Edit, Select All**, and click X to delete all the records. Or, select specific authority records, right-click, and select **Delete** from the context menu. You can automatically gather unlinked authority or bibliographic records in a record set; see "Create a record set of unlinked records" in the *Polaris Cataloging Guide 4.1*.
   - To delete authority records from a linked list box, select the record or records, right-click and select **Delete**.

   Note:
   If the record already has a Deleted status, and you delete it again, it will be removed from the database, even if the **Retain deleted records** profile is set to **Yes**.

2. If the authority record is linked to other bibliographic or authority records, the Authority Record Heading Deletion Options dialog box appears. The options for handling linked authority records are active only when other authority records are linked to the one you are deleting.



3. If the Authority Record Heading Deletion Options dialog box appears, select from the following options:

   For linked bibliographic records -
   - To delete the heading and tag in the linked bibliographic records - Select **Delete linked headings** (bibliographic)
   - To break links to any bibliographic headings linked to the authority record - Select **Unlink headings** (bibliographic). The heading remains in the bibliographic record as an unauthorized heading.

For linked authority records -

- To delete the linked authority headings - Select **Delete linked headings** (authority).
- To break links to any authority records linked to this authority record - Select Unlink headings (authority).
- To convert the 5XX tag in linked authority records to a 4XX tag - Select **Flip the linked authority headings**. This converts the 5XX tag (See Also From reference) in the linked records to a 4XX (See reference).

Restore (undelete) a deleted cataloging record

If you have the Polaris Administration profile **Retain deleted** *record type* **records** for the type of record you want to restore set to **Yes**, you can restore or undelete records with a deleted status.

Follow these steps to undelete a cataloging record with a status of deleted.

Tip:
Click to undelete the record.

Tip:
You can search for item records by a record status of **Deleted**. Then, multi-select the records in the Find Tool results list, and select **Undelete**.

1. Open the deleted item record, bibliographic record, or authority record.

   Select **File, Undelete** from the menu.

   A message tells you the record's status will be changed to Final, and if there were links to other records, they need to be reestablished.

2. Click **OK** to close the message box.

   The record's status changes to **Final**.

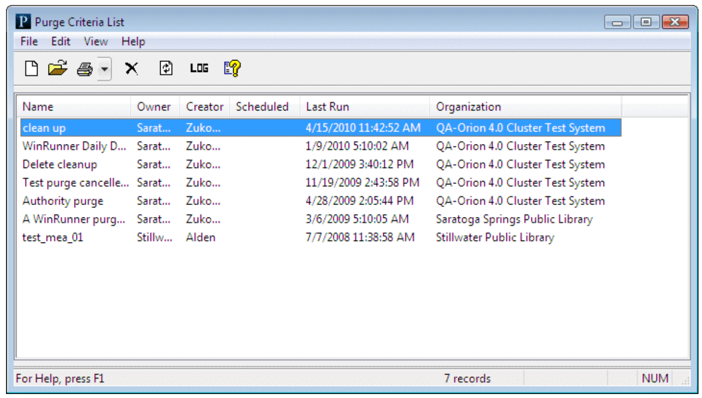
Purge cataloging records

If your library retains deleted cataloging records, you must set up a Purge record that specifies the criteria by which these retained records are automatically removed from the database. Follow these steps to create a Purge record.

Tip:
For information on the Polaris Administration profiles for retaining deleted records, see "Retain deleted records" in the *Polaris Technical Services Administration Guide 4.1*.

1. Select **Utilities, Cataloging Processing, Purge Cataloging Records** from the Polaris Shortcut Bar.

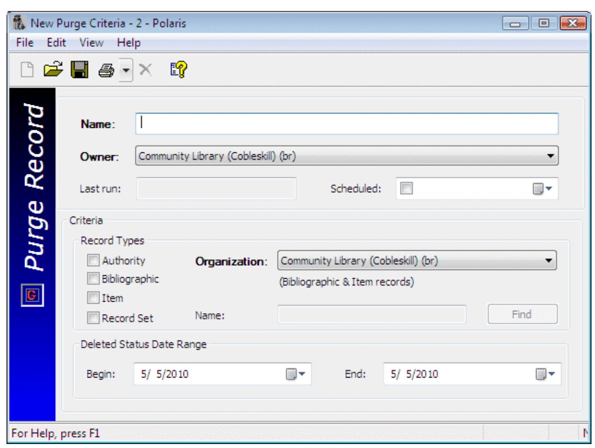
   The Purge Criteria List appears if there are purge records already set up.



Tip:
You can also right-click an existing purge record in the list, and select **New** from the context menu.

2. Select **File, New**, press **CTRL+N**, or click [new icon] to create a new purge record.

   The Purge Record workform appears.



3. Type a name to identify the purge record in the **Name** box.
4. Select the purge record's owner in the **Owner** box.
5. Enter a date to purge the records in the **Scheduled** box.
6. Select the cataloging record types (**Authority, Bibliographic, Item, Record Set**) that you want to purge in the **Record types** boxes.

7. If you selected **Record Sets**, click **Find** to search for and select the record set you want to purge.

   The record set's name appears in the **Name** box.

8. Select the organization for which you want to purge the records in the **Organization** box.

9. Select a date in the **Begin** and **End** boxes to purge records that were deleted within this date range.

10. Select **File, Save**, press **CTRL+S**, or click to save the purge record.

    The records will be purged from the Polaris database on the date you specified.

11. To print a log of the purge processing job after it is completed, select a job in the Purge Criteria list, and click LOG.

Tip:
A log is available until the Purge Record is deleted.

The preview window displays the Purge Processing Log. The log shows details about the titles that were deleted, the date and time the purge job was run, the number of titles purged, and other information.


Purge Processing Log

Purge Criteria: WinRunner Daily Deletes; Record Types: Authority/Bibliographic/Item; Record Set Name:
Date Range: Mar 1 2012 12:00AM - Jun 1 2012 11:59PM; Scheduled Date: Jun 1 2012 12:00AM; Requester: Zukowski

Item Record Details

Bibliographic Record Details

Organization: QA-Plato 4.1 Cluster Test System; OrgID: 1

Bibliographic Record: 913257; Title = The Genealogist's all-in-one a; Author = was purged.

Bibliographic Record: 913258; Title = Murder, she said videorecordin; Author = was purged.

Authority Record Details

Authority Record: 14385; Heading = Foster, Harold R. was purged.

Authority Record: 18183; Heading = Hickey, Edward S. was purged.

Authority Record: 28012; Heading = Finkelstein, Norman, 1954- was purged.

Authority Record: 36978; Heading = Kagle, Steven E. was purged.

Authority Record: 50940; Heading = Sato", Nobuyuki, 1929- was purged.

Authority Record: 52465; Heading = Lindsey, Terence, 1941- was purged.

Authority Record: 52815; Heading = King, J. K. (John Kenneth), 19 was purged.

Authority Record: 57757; Heading = Wood, Annette. Teaching art & was purged.

Authority Record: 60064; Heading = Wolf, Hugo, 1860-1903. Mo"rike was purged.

Page 1 of 30 Report printed: 6/1/2012 12:46:37 PM

12. Click to print the log.

Note:
You can also generate standard cataloging reports that identify records with problems, list records that do not display in the PAC, and gather other information. See "Cataloging Reports" in the *Polaris Basics Guide 4.1*.

Managing Promotions

With Feature It, a separately-licensed product, the library can display featured resources in a dashboard on the PowerPAC search results screen when specific search queries are entered. These featured resources may be library materials, web sites, or community organizations/events. Your library must also have a license for Community Profiles to feature community organizations or events. Promotion records are linked to the featured community or bibliographic record.

To feature these resources in the PAC, you create Promotion records in the Polaris staff client that specify the resources to feature and the conditions under which the resources will display. Polaris Administration settings determine the location and display of these featured resources in PowerPAC. See “Feature It Promotions” in the *Polaris Public Access Administration Guide 4.1*.

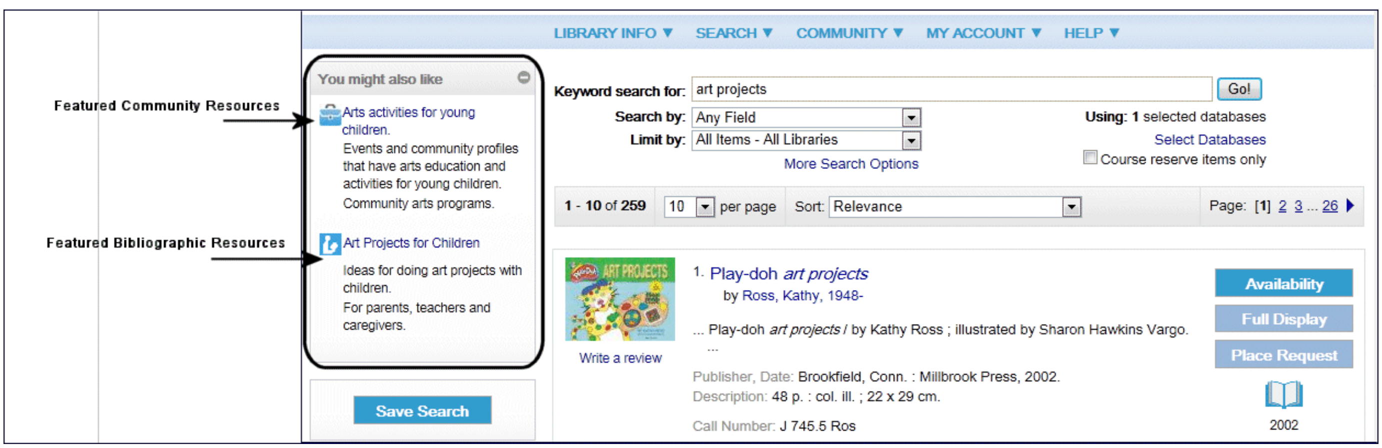
Note:
Feature It is not available in Polaris Mobile PAC or Polaris PowerPAC Children’s Edition.

This unit covers the following topic:

Creating and Editing Promotion Records

Promotion records in Polaris Cataloging are used to feature bibliographic materials, web sites, or community resources and events (if your library has a license for Community Profiles in addition to Feature It). Multiple resources can be featured in the same promotion record, but they must be of the same type. For example, if the promotion record features a title in your library's catalog, you can add other bibliographic records to feature, but not URLs or community organizations/events. The following Cataloging permissions, set at the system, library or branch level, control who can work with these records: **Promotion records: Access, Create, Modify**, and **Delete**.

To feature multiple resources of different types, you can create several promotion records linked to different types of resources, then enter the same set of search terms that will trigger the featured resources. For example, you could feature bibliographic records and a community organization/event by creating two promotion records, each with the same search triggers.

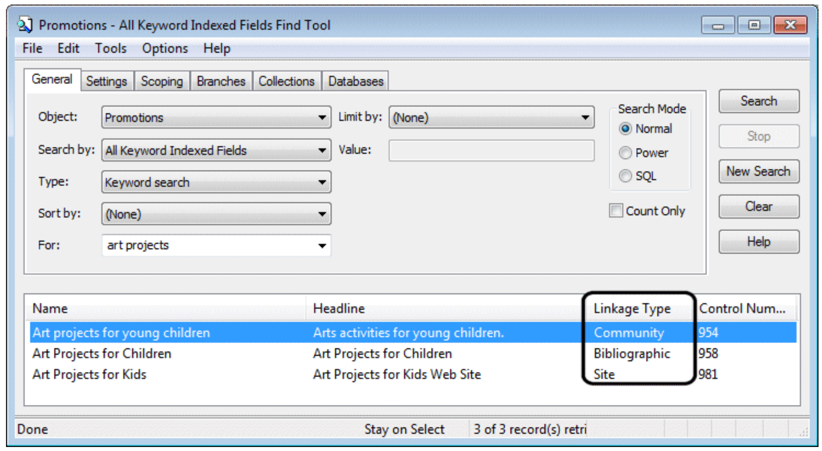


Find an existing promotion record

Follow these steps to search for an existing promotion record.

1. Select **Cataloging, Promotions** from the Polaris Shortcut Bar.
2. The Find Tool opens with **Promotions** selected in the **Object** box.
3. Select the search criteria, and enter the search term in the **For** box.
4. Click the **Search** button.
5. The promotion records meeting your search criteria appear in the list.

   The **Linkage Type** column displays the type of featured resource.



6. Double-click the promotion record, or select the record, right-click and select **Open**.

   The selected record opens in the Promotion workform.

Create a new promotion record from the Shortcut Bar

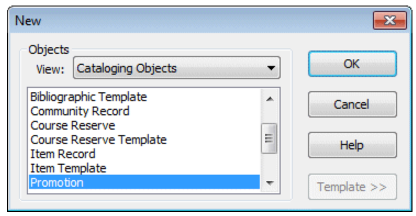
Follow these steps to create a new promotion record from the Polaris Shortcut Bar.

Tip:
Press **CTRL+N** to display the New dialog box.Type the first letter of the record type to go to all records that begin with that letter. For example, type **p** to go to **Promotion.**To limit the record types in the **Objects** list, select Cataloging in the **View** box.

1. Select **File, New** from the Shortcut Bar.

   The New dialog box appears.

2. Select **Promotion** in the **Objects** list.



3. Click **OK**.

   The Promotion workform opens.

4. Enter information in the workform. See the following topics:

   - "Enter or edit general promotion information" on page 210
   - "Enter the resource(s) to feature" on page 211
   - "Enter search terms to trigger the featured resources" on page 212
   - "Enter demographic targeting for promotions" on page 216

5. Select **File, Save** to save the record.

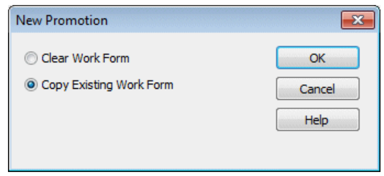
   A message in the status bar indicates the record was saved.

Create a new record from the Promotion workform

Follow these steps to create a new promotion record from the Promotion workform.

1. Use the Polaris Find Tool to locate and display an existing promotion record.
2. Select **File, New**, or press **CTRL+N** from the workform menu bar.

   The New Promotion dialog box appears.



3. Select one of the following options:
   - **Clear Work Form** - The data is cleared from the workform, and a new, blank workform appears.
   - **Copy Existing Work Form** - The original workform closes, and a copy of the workform appears.
4. Click **OK**.
5. The new record appears in the Promotion workform.
6. Enter or modify the information in the Promotion workform.
   - "Enter or edit general promotion information" on page 210
   - "Enter the resource(s) to feature" on page 211
   - "Enter search terms to trigger the featured resources" on page 212
   - "Enter demographic targeting for promotions" on page 216
7. Select **File, Save** or press **CTRL+S** to save the record.

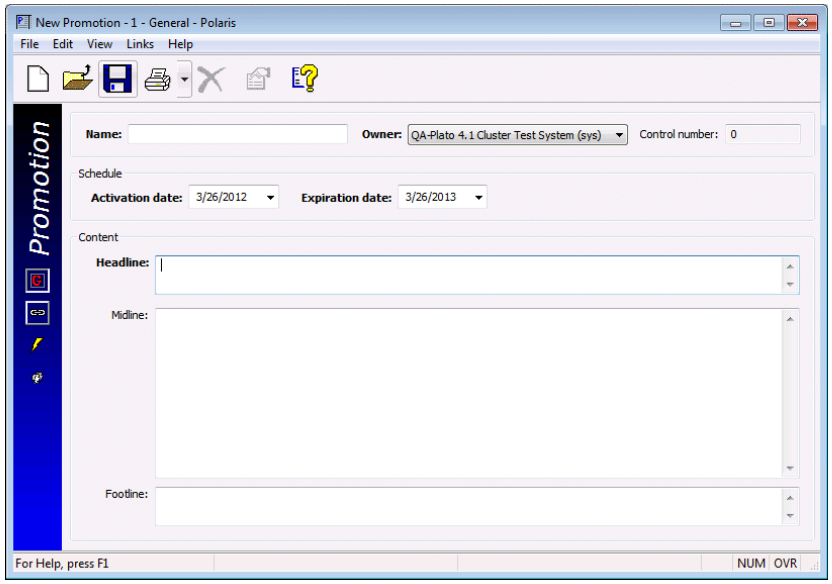
   A message in the status bar indicates the record was saved.

1-2-3

Enter or edit general promotion information

Follow these steps to add general promotion information.

1. Open the Promotion workform, and go to the General view.



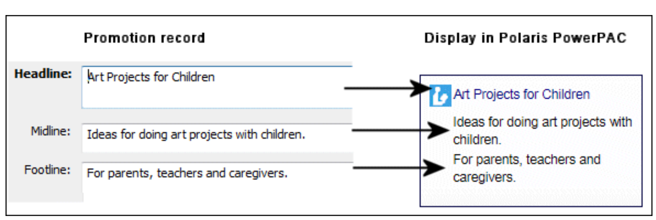
2. Enter the promotion record's name (required).
3. Select the promotion record's owner (required).
4. Select the promotion's activation date and expiration date (required).

   Note:
   If no expiration date is entered in the promotion record, the featured resources continue to display in PowerPAC. When the expiration date passes in the promotion record, the promotion record remains in the database, but it is deactivated and the featured resources do not display in PowerPAC.

5. Type the promotion record's headline, midline, and footline. The headline is required; the midline and footline are not required. The maximum length for each is 255 characters.

   The headline, midline, and footline text describe the featured resource in PowerPAC.

   Example:



6. Select **File, Save**.

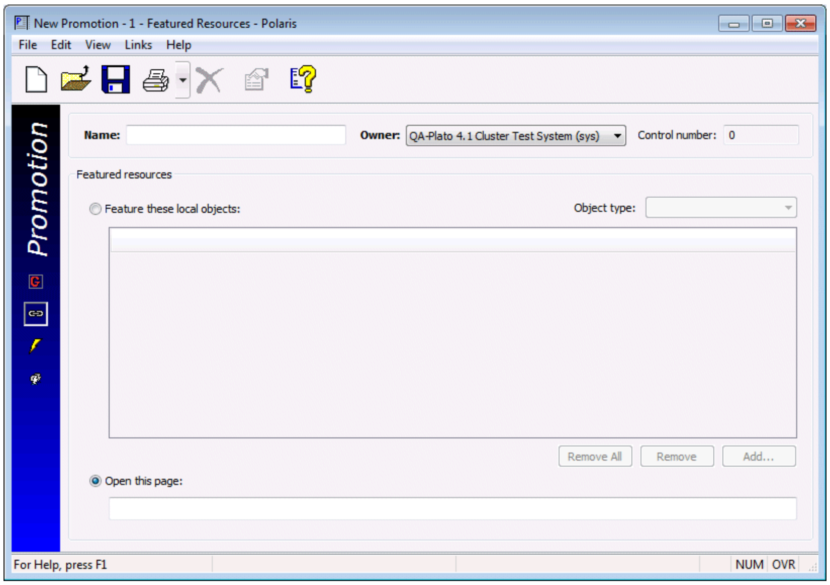
1-2-3

Enter the resource(s) to feature

Follow these steps to feature bibliographic records, community organizations and/or events, or URLs.

Note:
The same promotion record can contain multiple bibliographic, community, or web resources to feature, but it cannot contain resources of different types. For example, you cannot add both community and bibliographic records to the same promotion workform. Promotion records are linked to the bibliographic or community records they feature.

1. Open the Promotions workform, and select the Featured Resources view.



2. To feature bibliographic or community records, do the following steps:

   a) Select **Feature these local object(s)** and select **Bibliographic** or **Community** in the **Objects** box.

   b) Click the **Add** button, and search for the bibliographic or community resource in the Find Tool. The option to select other databases is disabled on the Remote databases tab of the Find Tool.

   c) Select the bibliographic or community record to add. You can add more than one community or bibliographic record, but not a mixture of record types.

3. To feature a web site or a library resource (bibliographic record or record set) via a URL, select **Open this page**, and type the URL in the box.

   Note:
   For information on entering a URL to a record set, see "Searching Record Sets (Polaris PowerPAC)" in the *Polaris Public Access Administration Guide 4.1*.

4. Select **File, Save**.

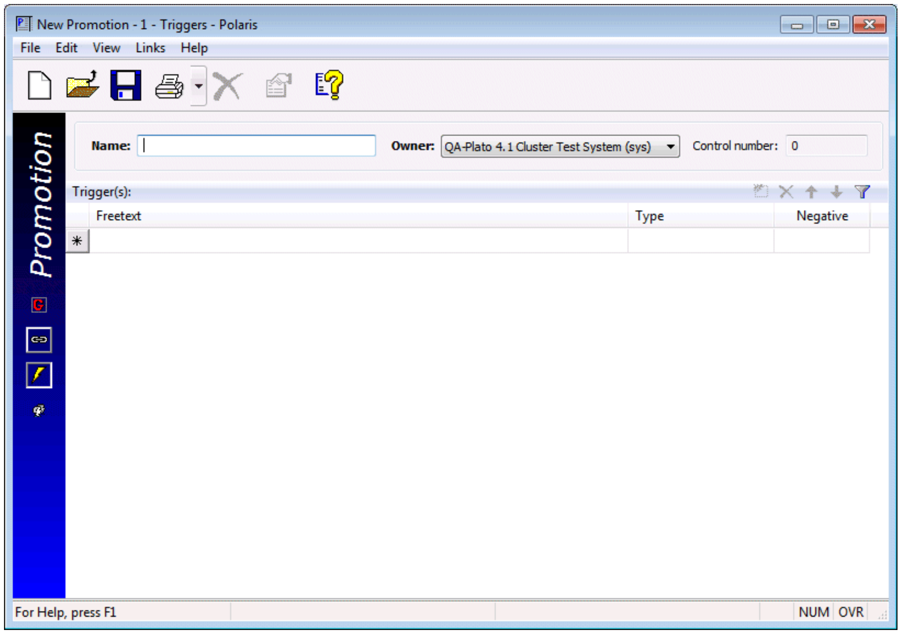
1-2-3

Enter search terms to trigger the featured resources

The featured resources appear only if the keywords contained in the user's search term match those defined as a positive trigger for the featured resource. You can also specify words or phrases as negative triggers that will prevent the display of the featured resource. For more information, see "Promotion Triggers and PAC Searches" on page 214.

Follow these steps to enter promotion triggers.

1. Open the Promotions workform, and go to the Triggers view.



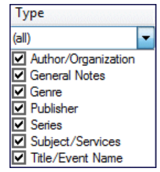
2. In the **Freetext** column, type the text that triggers the display of the featured resource as follows:
   - Enter a single keyword per line. The PAC user must enter any or all of the keywords for the resource to be featured.
   - Enter a phrase on a line. The PAC user must enter the entire phrase for the resource to be featured. If the phrase has double quotes around it, the PAC user must enter the entire phrase in the same order without any other words. If the phrase is not in quotes, the PAC user must enter all the words, but they can be in any order.

Tips:
Wild card characters, such as an asterisk, are not supported for triggers.

The trigger words should not match words already in the record being featured so that the same record does not appear in search results and as a featured resource.

It may be useful to think of a Boolean OR between triggers, a Boolean AND for multiple words within a single unquoted trigger, and a Boolean AND with a proximity value of '1' (ordered) for multiple words within a quoted trigger.

3. In the **Type** column, select the box to open the list of search types.



Note:
If your library has a license for Community Profiles, the following types appear in the list:

Author or Organization

General Notes

Genre

Publisher

Series

Subject or Services

Title or Event Name

If your library does not have a license for Community Profiles, the following types appear in the list:

Author

General Notes

Genre

Publisher

Series

Subject

Title

4. Select the type(s) of searches to which the search terms apply.
5. If the search terms entered should prevent the resource from being featured, select the **Negative** box.

Note:
The promotion record must have at least one positive trigger in order for a negative trigger to operate. For more information, see "Promotion Triggers and PAC Searches" on page 214.

6. Type in the next available line to enter more search terms.
7. To move a trigger up or down in the list, select it and click the up or down arrow.

Note:
The order of the triggers on the workform does not affect processing or relevancy ranking.

8. To normalize (remove un-indexable characters) from a search term, select it and click . When search terms are normalized, you can see the actual keywords.
9. Select **File, Save**.

Promotion Triggers and PAC Searches

How Polaris matches promotion triggers to PAC searches:

1. When a PAC user enters a search query, all search terms are extracted and normalized. Keyword, phrase and exact match search queries are all treated the same way.
2. An ordered keyword list is created that contains up to 16 normalized keywords.
3. If the ordered keyword list matches one or more positive promotion triggers (and zero negative triggers), the search query matches the promotion.

Positive and Negative Triggers

When looking for matching promotions, Polaris first looks for a matching trigger (keyword, quoted phrase, unquoted phrase) and then considers whether the trigger is positive or negative. At least one positive trigger must be entered for a negative trigger to operate.

If a trigger type is checked and the library patron searches by that access point or by the "any field" access point (KW) for either bibliographic or community records, then Polaris attempts to find matching promotions.

Example:

Promotion has 6 positive triggers and 1 negative trigger. The triggers are:

Quilting - (all) - positive

Knitting - (all) - positive

Crochet - (all) - positive

Sewing - Title/Event Name - negative

Crocheting - (all) - positive

Quilters - (all) - positive

Needlework - (all) - positive

The PAC user does a keyword Subject search for Knitting Sewing. The promotion should be returned because of the positive filter Knitting (all). Sewing is a negative filter but just for Title/Event Name and since the search was a subject search, Sewing was not a matching trigger.

If a trigger is restricted to a subset of trigger types, then it applies when the access point is KW (regardless of whether the trigger is positive or negative). In other words, if SEWING is a negative trigger restricted to the Title/Event Name, then it applies when the access point is TI or KW.

Normalizing Triggers

When you click the Normalize icon un-indexable characters are removed from the display of the trigger so the user can see how the string will be indexed in the database.

Example:

"***race*** [Car] Driver" would normalize to "race car driver".

"**$%#" would normalize to "". In this case the trigger would be ignored and/or removed automatically.

The normalization rules used here are the same as those used for keyword normalization in bibliographic records.

These are some of the characters that are retained:

- Double quotes
- Diacritics and most Unicode characters
- Apostrophes
- Hyphens

These are some of the characters that are removed and replaced with a space:

- Asterisk
- Dollar sign
- Percent sign
- Pound sign
- Opening and closing square brackets

Additional indexing rules may apply to some forms of punctuation:

Example:
The normalized form of *dog's bone* retains the apostrophe, but the user can search on either *dog's bone* or *dogs bone* and get a match.

For words that contain characters that are stripped out by the normalization rules, enter two triggers: one with the original spelling, and one with the equivalent characters:

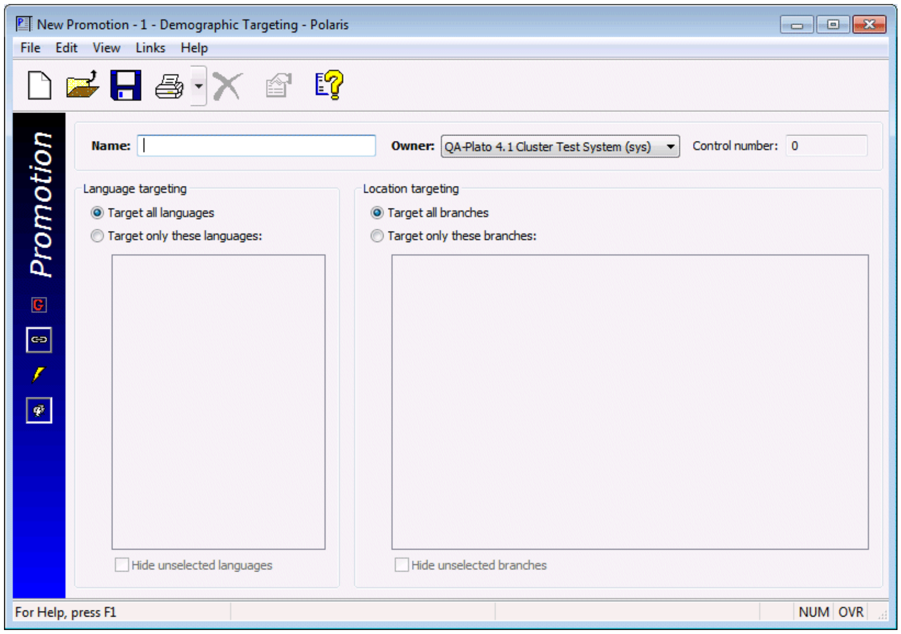
Example:
For the search term *Kei$ha*, enter two triggers: *keisha* and *kei$ha*. This way, a match will occur when the user searches for either version of the name.

1-2-3

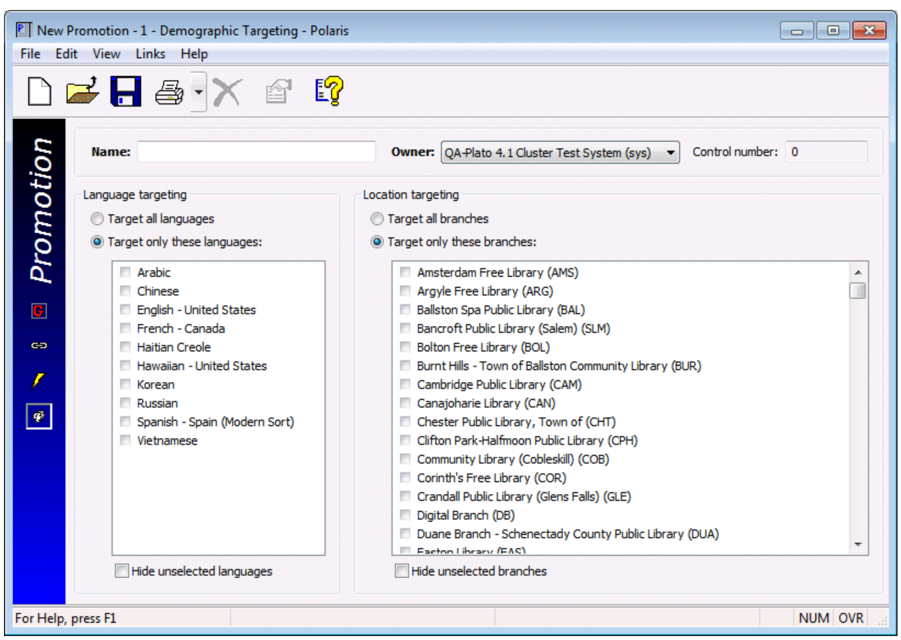
Enter demographic targeting for promotions

Follow these steps to enter languages or branches to target for promotions.

1. Open the Promotion workform, and go to the Demographic Targeting view.



2. Select one or both of the following options to display the lists.
   - **Target only these languages**
   - **Target only these branches**



3. Select the check boxes next to the language(s) or branch(es) you want to target.

Note:
The list of languages contains only those languages for which the library has a license from Polaris.

- If a languages or languages are selected, the featured resources appear only when the PAC user has switched the PowerPAC interface to a targeted language (from the **Languages** tab at the top of the PowerPAC window).
- If a branch or branches are selected, the featured resources appear only when the PAC user is connected to one of the targeted branches in PowerPAC.

4. Select **File, Save**.

Type of Material Codes (TOMs)

When you import, copy, or manually create new bibliographic records, Polaris checks the LDR/06, LDR/07, the 006 tag, the 007 tag, and other combinations of codes to determine the record's primary Type of Material code or TOM. This generates the material type icon in Polaris PowerPAC and enables searching for bibliographic records using the TOM in the staff client and PAC.

Tip:
For more information on the TOM display in the PAC, see "Setting Up Search Filters (Limit By)" in the *Polaris Public Access Administration Guide 4.1*.

Tip:
From the Bibliographic Record workform, select **View, PAC** or click to see the icon that displays in the PAC.

If a single bibliographic record contains values indicating more than one material type, only one TOM icon is displayed in Polaris PowerPAC. For example, a single record could contain codes indicating it is a motion picture, video recording, and a DVD. The primary type of material code (and icon) for that record would be DVD. However, the record could be retrieved in the staff client and Polaris PowerPAC by searching for any of its TOM codes. See "Multiple TOMs - Order of Precedence" on page 227.

Note:
If the bibliographic record's primary TOM is **elr** (electronic resource), and it has at least one 856 tag, and there are no item records linked to it, hold requests cannot be placed for that title in the PAC.

You can opt to suppress request and availability options for all records with a specific primary TOM, or only those with specific primary TOMs that have at least one 856 in the bib record. By default, Electronic resources (**elr**) and Digital collection (**dmc**) are selected for suppressing request and availability options. The option **Records with an 856** is selected by default except **dmc**, where **All records** is selected. See "Suppressing Request and Availability Options" in the *Polaris Public Access Administration Guide 4.1*.

You can run the Bibliographic Records With No Format report to identify any bibliographic records in your catalog that do not have a TOM code assigned. See "Cataloging Reports" in the *Polaris Basics Guide 4.1*.

TOMs and MARC Coding

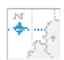
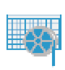
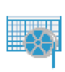
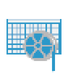
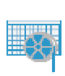
Note:
The **(Polaris)** note under the format indicates it is a Polaris TOM. **Or** is implied between the columns, except in the case where *AND* appears. For example, an audio book can be coded with **a** in LDR/06 OR **a** in 006/00.

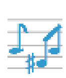
)

Format/Icon	*Code*	*LDR/06*	*LDR/07*	*006*	*007*	*008*
Abstract **(Polaris)** 	**abs**	**a**	*AND* **i**			*AND* **/21=d** *AND* **/24=a** *AND* **/25=a**
Archival/mixed materials 	**mix**	**p**		**/00=p**		
Audio books **(Polaris)** 	**abk**	**a**		**/00=a**	*AND* **/00=s**	
AudioEbook **(Polaris)** 	**aeb**	**i**		*AND* **/00=m** **/09=h**	*AND* two 007s needed 1st 007: **/00=s** *AND* **/12=e** *AND* **/13=d** ____________ 2nd 007: **/00=c** *AND* **/01=r** *AND* **/05=a**	*AND* **/23=s** *Or* **o**
Blu-ray Disc **(Polaris)** 	**brd**	**g**			**/00=v** *AND* **/01=d** *AND* **/04=s** *AND* **/05=a** *AND* **/06=i** *AND* **/07=z**	*AND* **/33=v**
Book 	**bks**	**a** *OR* **t**	**and NOT b** *OR* **s** *OR* **i**	**/00= a** *OR* **t**	**/00=t**	

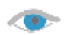
Format/Icon	*Code*	*LDR/06*	*LDR/07*	*006*	*007*	*008*
Book + Cassette (Polaris)	**bcs**	**i** *OR* **a**		*AND* **/00=a**	*AND* **/00=s** *AND* **/01=s** *AND* **/13=e**	
Book + CD (Polaris)	**bcd**	**i** *OR* **a**		*AND* **/00=a**	*AND* **/00=s** *AND* **/01=d** *AND* **/12=e** *AND* **/13=d**	
Braille - 3 ways to determine	**brl**	**a, c, d, p** *OR* **t**		**/00=a, c, d, p** *OR* **t**		*AND* **/23=f**
Braille	**brl**		**b** *OR* **s**	**/00=s**		*AND* **/23=f**
Braille	**brl**	**e, f, g, k,** *OR* **r**		**/00=e, f, g, k,** *OR* **r**		*AND* **/29=f**
Cartographic material	**cmt**	**e** *OR* **f**		**/00=e** *OR* **f**		
Digital collection (Polaris)	**dmc**	**m**	**c**			

Format/Icon	*Code*	*LDR/06*	*LDR/07*	*006*	*007*	*008*
DVD (Polaris) 	**dvd**				**/00=v** *AND* **/01=d**	
Ebooks 	**ebk**	**a**		**/00=m**	**/00=c** *AND* */01=r*	*AND* **/23=o**
Electronic resources 	**elr**	**m**		**/00=m**	**/00=c**	
Globe 	**glb**				**/00=d**	
Kit 	**kit**	**o**		**/00=o**	**/00=o**	
Large print - 3 ways to determine 	**lpt**	**a, c, d, p,** *OR* **t**		**/00=a, c, d, p,** *OR* **t**		*AND* **/23=d**
Large print 	**lpt**	**e, f, g, k** *OR* **r**		**/00=e, f, g, k** *OR* **r**		*AND* **/29=d**
Large print 	**lpt**		**b** *OR* **s**	**/00=s**		*AND* **/23=d**

Format/Icon	*Code*	*LDR/06*	*LDR/07*	*006*	*007*	*008*
Manuscript cartographic material 	**mcm**	**f**		**/00=f**		
Map 	**map**				**/00=a**	
Manuscript material 	**mss**	**d, f,** *OR* **t**		**/00=d, f,** *OR* **t**		
Manuscript music 	**mmu**	**d**		**/00=d**		
Microform - 4 ways to determine 	**mic**				**/00=h**	
Microform 	**mic**		**b** *OR* **s**	**/00=s**		*AND* **/23=a, b, or c**
Microform 	**mic**	**a, c, d, p** *OR* **t**		**/00=a, c, d, p** *OR* **t**		*AND* **/23=a, b,** *OR* **c**
Microform 	**mic**	**e, f, g, k** *OR* **r**		**/00=e, f, g, k** *OR* **r**		*AND* **/29=a, b,** *OR* **c**

Format/Icon	Code	LDR/06	LDR/07	006	007	008
Motion picture 	**mot**				**/00=m**	
Music CD (Polaris) 	**mcd**	**j**		**/00=j**	*AND* **/00=s** *AND* **/01=d**	
Musical sound recording 	**msr**	**j**		**/00=j**		
Nonmusical sound recording 	**nsr**	**i**		**/00=i**		
Newspaper 	**new**	**a**	**b** *OR* **s**	**and /00=s**		*AND* **/21=n**
Periodical 	**per**	**a**	**b** *OR* **s**	**and /00=s**		*AND* **/21=p**
Printed or manuscript music 	**mus**	**c** *OR* **d**		**/00=c** *OR* **d**	**/00=q**	
Printed music 	**pmu**	**c**		**/00=c**		

Format/Icon	*Code*	*LDR/06*	*LDR/07*	*006*	*007*	*008*
Printed cartographic material 	**pcm**	**e**		**/00=e**		
Projected medium 	**pgr**	**g**		**/00=g**	**/00=g**	
Sound recording 	**rec**	**i** *OR* **j**		**/00=i** *OR* **j**	**/00=s**	
Serial 	**ser**		**b** *OR* **s**	**/00=s**		
Two dimensional nonprojected graphic 	**ngr**	**k**		**/00=k**	**/00=k**	
Three dimensional object (Artifact) 	**art**	**r**		**/00=r**		
Videorecording 	**vid**				**/00=v**	

Format/Icon	*Code*	*LDR/06*	*LDR/07*	*006*	*007*	*008*
Videotape (Polaris) 	**vcr**				**/00=v** *AND* **/01=c** *OR* **f**	
Visual material 	**vis**	**g, k** *OR* **r**		**/00=g, k** *OR* **r**	**/00=f** *OR* **g,** *OR* **k,** *OR* **m**	

Multiple TOMs - Order of Precedence

For records with more than one TOM, the following order of precedence determines which TOM and icon are displayed. For examples of MARC coding to produce certain TOMs and icons, see "Coding Examples" on page 229. To see which icon will appear in Polaris PowerPAC, select **View, PAC** from the Bibliographic Record workform.

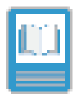
Order of Precedence	*Format/Type of Material*	*Code*
1	Blu-Ray Disc	brd
2	AudioEbook	aeb
3	Book + CD	bcd
4	Book + Cassette	bcs
5	Abstract	abs
6	Digital collection	dmc
7	DVD	dvd
8	Videotape	vcr
9	Videorecording	vid
10	Motion picture	mot
11	Projected medium	pgr
12	Two-dimensional nonprojected graphic	ngr
13	Three-dimensional object	art
14	Visual materials	vis
15	Music CD	mcd
16	Audio books	abk
17	Musical sound recording	msr
18	Nonmusical sound recording	nsr
19	Sound recording	rec
20	Printed music	pmu
21	Manuscript music	mmu
22	Printed or manuscript music	mus
23	Map	map
24	Globe	glb
25	Printed cartographic material	pcm
26	Manuscript cartographic material	mcm
27	Cartographic material	cmt
28	Ebooks	ebk
29	Kit	kit
30	Mixed materials	mix

Order of Precedence	*Format/Type of Material*	*Code*
31	Newspaper	new
32	Periodical	per
33	Serial	ser
34	Electronic resources	elr
35	Large print	lpt
36	Braille	brl
37	Manuscript material	mss
38	Microform	mic
39	Books	bks

Coding Examples

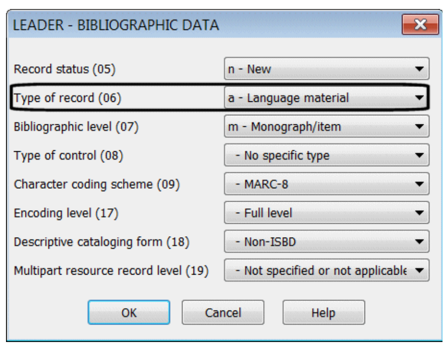
The following examples show some ways to set up Bibliographic Records to produce the appropriate TOM code and the TOM icon in Polaris PowerPAC. You can set up bibliographic templates with these codes to ensure that the correct TOM and icon appear. For example, you could set up a bibliographic record template coded to produce the e-book TOM and icon.

Note:
If the bibliographic record contains other fixed fields in addition to those shown in the examples, a different TOM and icon may result according to the order of precedence. See "Multiple TOMs - Order of Precedence" on page 227.

E-book 

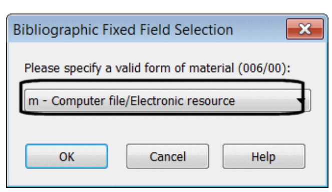
An e-book (short for electronic book, also written eBook or ebook) is the digital equivalent of a printed book that you read on a computer screen, e-book reader, or cell phone.

LDR 06=**a-Language material**



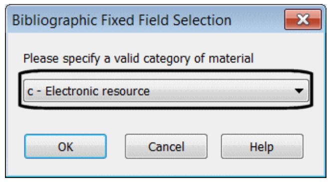
AND

006/00 = **m - Computer file/Electronic resource**



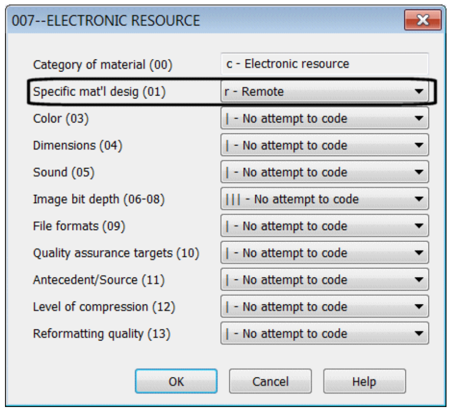
AND

007/00= **c - Electronic resource**



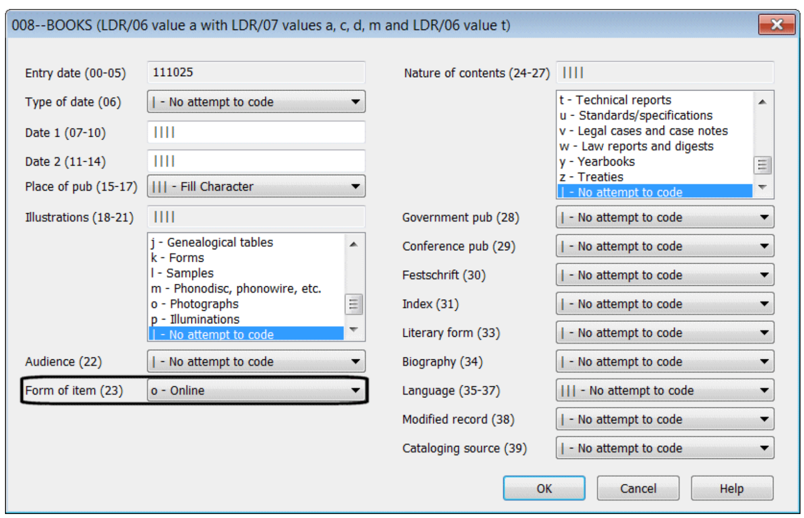
AND

007/01= **r - Remote**



AND

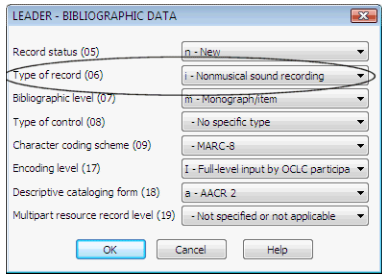
008/23=o - online



Audio E-book

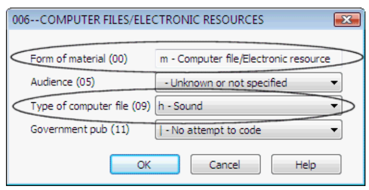
A downloadable electronic sound file of a recorded book.

LDR 06=**i-Nonmusical sound recording**



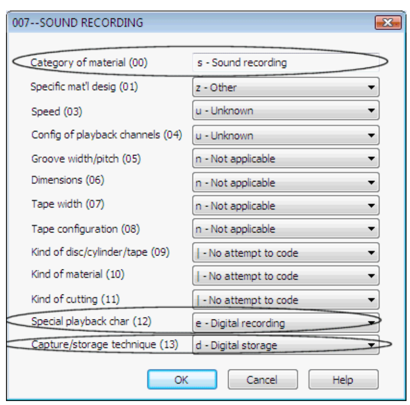
AND

006 /00=**m-Computer file/Electronic resource** *AND* /09=**h-Sound**

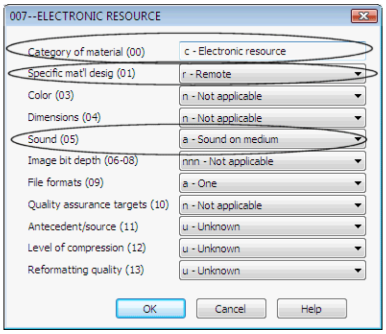


AND Two 007s needed:

1st 007: /00=**s-Sound recording** *AND* /12=**e-Digital recording** *AND*/13=**d-Digital storage**

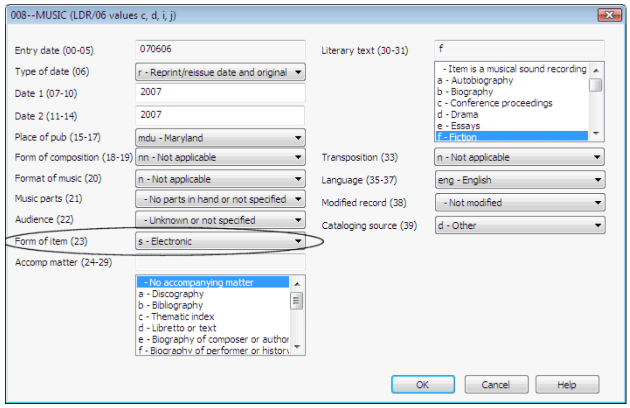


2nd 007: /00=**c-Electronic resource** *AND* /01=**r-Remote** *AND* /05=**a-Sound on medium**



AND

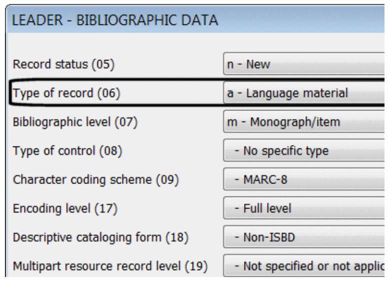
008 /23=**s-Electronic** *Or* **o-online**



Audio Books

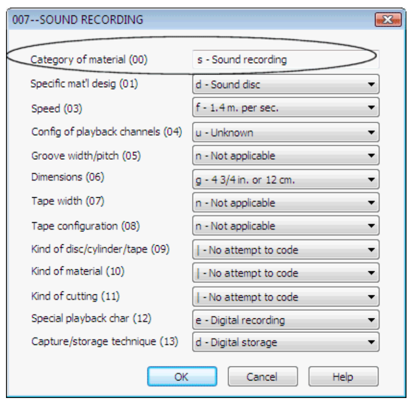
Sound recording of a book being read aloud - can be on a diskette or a CD.

LDR 06=**a-Language material**



AND

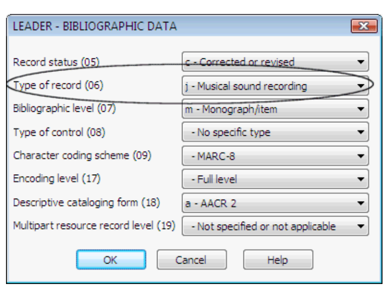
007 /00=**s-Sound recording**



Music CD

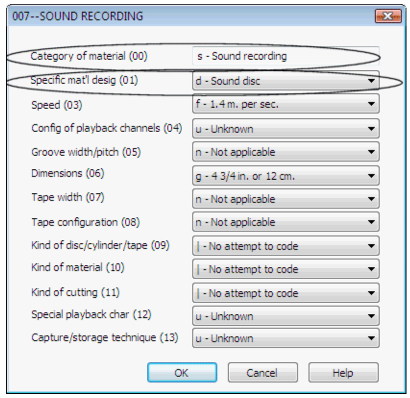
Musical sound recording on a compact disc.

LDR 06=**j-Musical sound recording**



AND

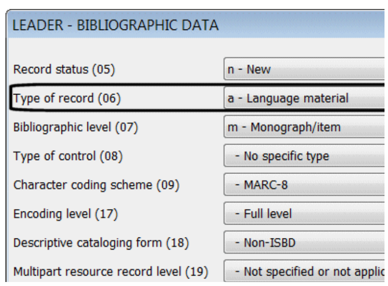
007 /00=**s-Sound recording** *AND 007* /01=**d-Sound disc**



Book and CD

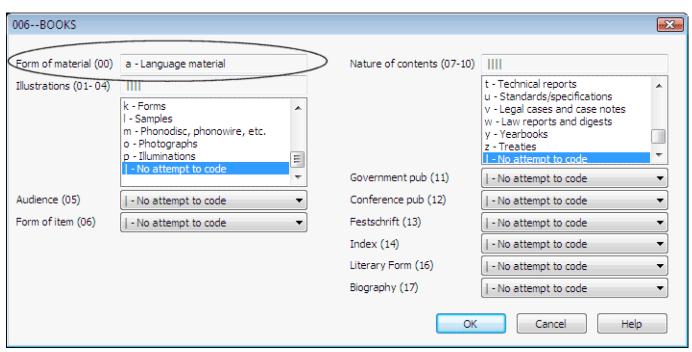
A book with a sound recording on CD.

LDR /06=**a-Language material** *Or* LDR 06=**i-Nonmusical sound recording**



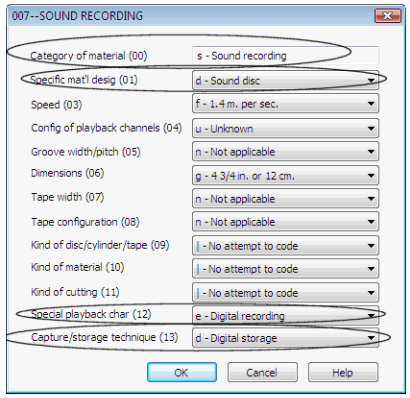
AND

006 /00=**a-Language material**



AND

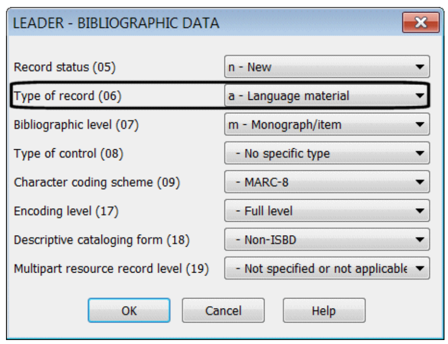
007 /00=**s** AND /01=**d** AND /12=**e** AND /13=**d**



Book and Cassette

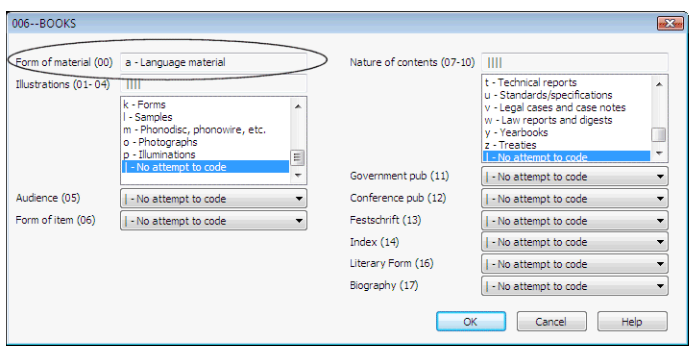
A book with a sound recording on cassette.

LDR /06=**a-Language material** *Or* LDR 06=**i-Nonmusical sound recording**



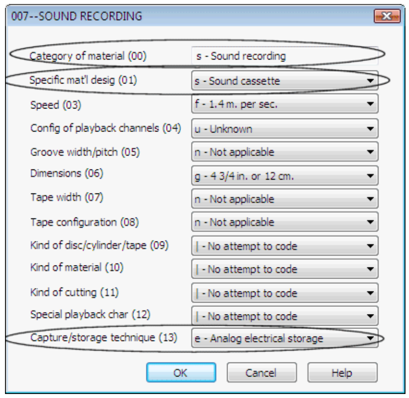
AND

006 /00=**a-Language material**



AND

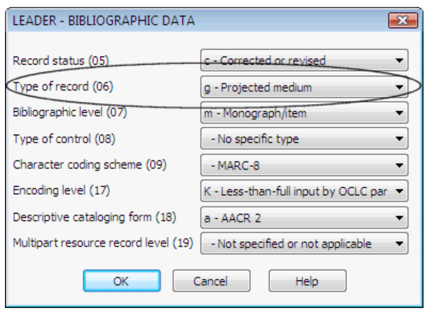
007 /00=**s-Sound recording** AND /01=**s-Sound cassette** AND /13=**e-Analog electrical storage**



Blu-ray Disc

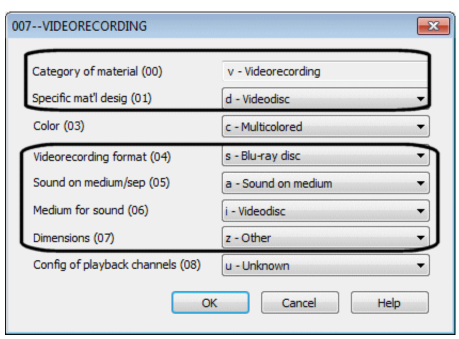
The Blu-ray Disc (BD) is a high density optical disc recorded with a blue laser.

LDR/06=**g - projected medium**

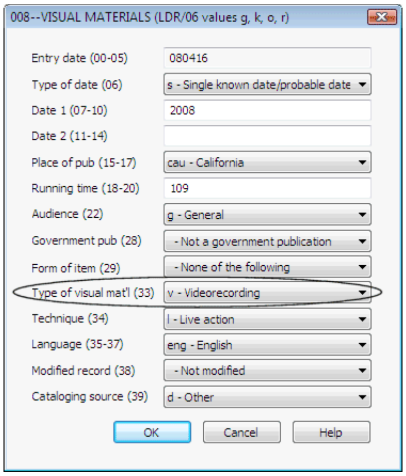


AND

007 /00=**v - Videorecording** AND /01=**d -Videodisc**, AND 007/04=**s - Blu-ray** AND 007/05=**a - Sound on medium**, AND 007/06=**i - Videodisc**, AND 007/07=**z-Other**



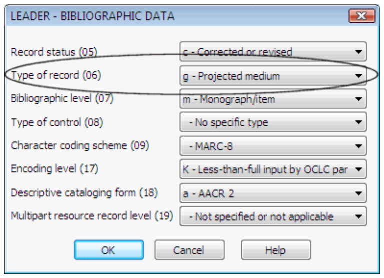
AND 008/33=**v -videorecording**



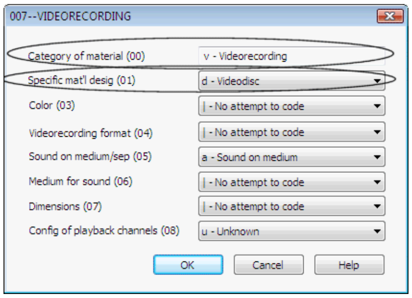
DVD 

An abbreviation of digital videodisc that stores a video recording.

LDR/06=**g - projected medium**

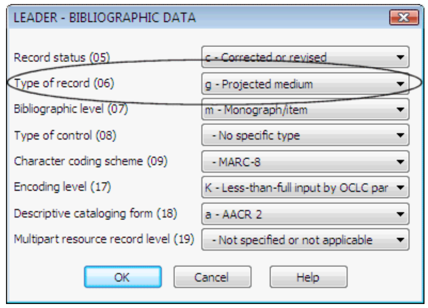


007 /00=**v-Videorecording** *AND* /01=**d-Videodisc**



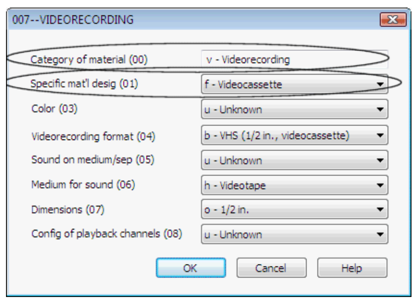
Videotape

LDR/06=**g - projected medium**



AND

007 /00=**v** *AND* /01=**c** *or* **f**

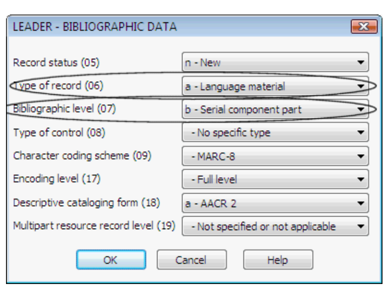


Serial

A publication in any medium issued under the same title in a succession of discrete parts, usually numbered (or dated) and appearing at regular or irregular intervals with no predetermined conclusion. Serial publications include print periodicals and newspapers, electronic magazines and journals, annuals (reports, yearbooks, etc.), continuing directories, proceedings and transactions, and numbered monographic series cataloged separately.

LDR /06=**a-Language material** AND

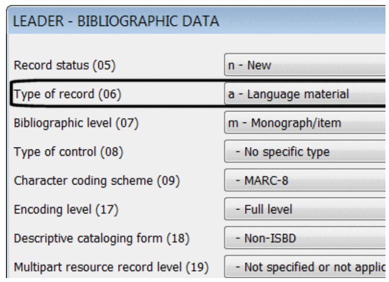
LDR /07=**s - Serial** *OR* LDR /07=**b Serial component part**



Periodical

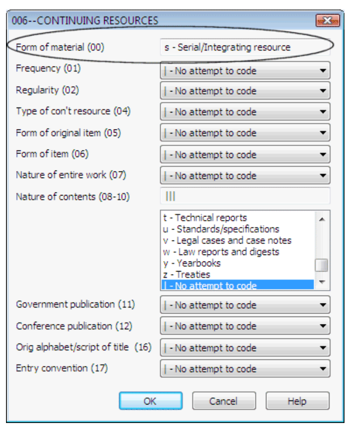
A serial publication (such as a magazine or journal) with its own distinctive title, containing a mix of articles, editorials, reviews, columns, short stories, poems, or other short works written by more than one contributor, issued in soft cover more than once, generally at regular stated intervals of less than a year.

LDR /06=**a-Language material**



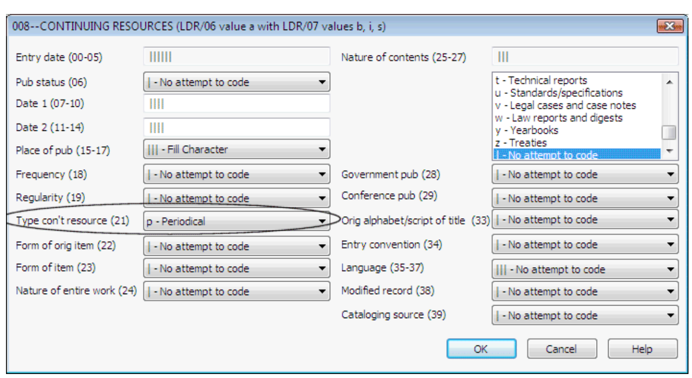
AND

006 /00=**s-Serial/Integrating resource**



AND

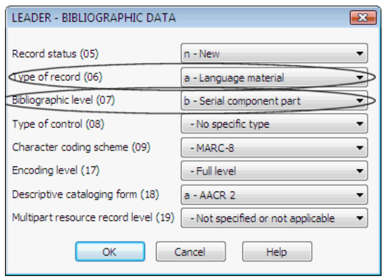
008/21**=p-Periodical**



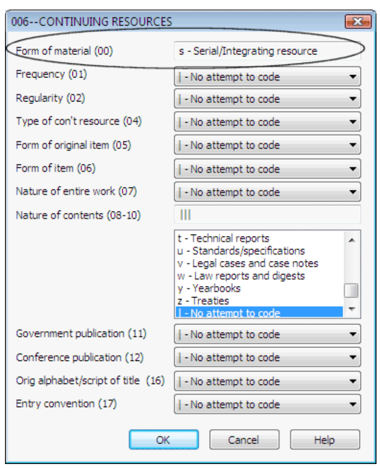
Newspaper

A serial publication, usually printed on newsprint and issued daily, on certain days of the week, or weekly, containing news, editorial comment, regular columns, letters to the editor, cartoons, advertising, and other items of current and often local interest to a general readership.

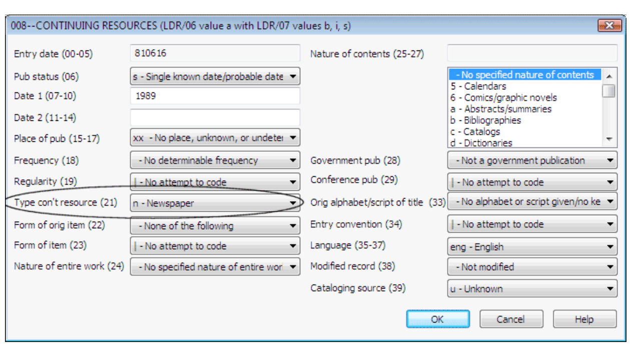
LDR /06=**a-Language material** AND LDR /07=**s - Serial** *OR* LDR /07=**b Serial component part**



AND
006 /00=**s - Serial/Integrating resource**



AND
008 /21=**n - Newspaper**



Cataloging Shortcut Keys

This appendix contains charts with the shortcuts you can use with Polaris cataloging workflows. The cards are designed to be photocopied, trimmed, and put into transparent sleeves that can be attached to the computer monitor. You can order these sleeves from vendors such as Axzo Press at the following Web site:

http://www.axzopress.com/Products/Products_FlipCARDS.aspx

- “Record Operations” on page 242
- “Navigation Actions” on page 243
- “MARC Editor (Keyboard)” on page 243
- “Select Actions (Keyboard)” on page 243

Record Operations

Workform Help	**F1**
Print current view	**CTRL+P**
Save the record	**CTRL+S**
Check for duplicates	**CTRL+I**
Check headings	**CTRL+J**
Display MARC description	**CTRL+L**
Check MARC format	**CTRL+M**
Display Macros tool bar	**ALT+F8**
Display Find Tool with Item Records selected	**CTRL+F9**
Display Find Tool with Bibliographic Records selected	**F12**
Check Authority headings	**ALT+S**
Check for linked records	**ALT+C**
Bulk change records	**CTRL+B**
Add records to record set	**CTRL+E**
Remove records from a record set	**CTRL+R**
Create record set of linked items from the Bibliographic Record Set workform	**CTRL+T**
Create record set of linked bibliographic records from the Item Record Set workform	**CTRL+T**
Print labels from the Item Record workform	
Single label	CTRL+ALT+L
Multiple labels	CTRL+ALT+M

Navigation Actions

Move cursor up	**up arrow**
Move cursor down	**down arrow**
Move cursor left	**left arrow**
Move cursor right	**right arrow**
Beginning of word	**CTRL+left arrow**
End of word	**CTRL+right arrow**
Previous subfield	**SHIFT+Tab**
Next subfield	**Tab**
Next tag	**CTRL+down arrow**
Previous tag	**CTRL+up arrow**
Beginning of record	**CTRL+Home**
End of record	**CTRL+end**
Beginning of line	**Home**
End of line	**End**
Previous screen	**Page-up**
Next screen	**Page-down**

MARC Editor (Keyboard)

Insert blank line	**Enter**
Insert subfield delimiter	**CTRL+Q**
Insert fill character	**SHIFT+I**
Insert blank character	**Space**
Sort fields	**CTRL+N**
Delete highlighted text	**Delete**
Delete character left	**Backspace**
Delete character right	**Delete**
Delete word left	**CTRL+Backspace**
Delete word right	**CTRL+Delete**
Cut highlighted text	**CTRL+X**
Copy highlighted text	**CTRL+C**
Paste text	**CTRL+V**
Insert mode	**Insert**
Undo last action	**CTRL+Z**
Redo last action	**CTRL+Y**
Unicode to character	**ALT+X**

Select Actions (Keyboard)

Select all lines	**CTRL+A**
Select to end of word	**SHIFT+CTRL+right arrow**
Select to beginning of word	**CTRL+SHIFT+ left arrow**
Select to end of line	**SHIFT+end**
Select to beginning of line	**SHIFT+home**
Select entire tag	**SHIFT+CTRL+ down arrow**
Select multiple lines	**SHIFT+ down arrow**
Select or extend a block of text	**SHIFT+arrow keys**

Select Actions (Pointer)

Select the entire word	**Double-click the word**
Select the entire subfield	**Double-click the subfield delimiter**
Select the entire line	**Click the left margin next to the tag number**
Select the entire tag field	**Double-click the first column next to the tag number**
Select multiple lines	**Drag the cursor along the left margin**
Select a block of text	**Drag the cursor over the text to highlight**

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