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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. 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.

Getting Started in Cataloging	Overview of Polaris cataloging records; methods for creating new records; 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.
Cataloging Ebooks	Methods for cataloging ebooks: using a traditional 856 tag with a link to the vendor's site; using an 856 tag but limit access to the vendor's ebooks by the branches that share the vendor account; importing records automatically from 3M or another integrated ebook vendor.
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.
Setting Up Labels	Setting up labels; customizing labels; defining label content; specifying label printers.
Cataloging Administration	Setting permissions, parameters, and profiles in Polaris Administration to support Cataloging workflows and automatic record processing.
Cataloging Permissions, Parameters, and Profiles	List of Polaris Administration settings that affect Cataloging; the organization level at which the options can be set; and the default settings.
Cataloging Shortcut Keys	List of Cataloging shortcut keys.

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 Guides**
 - *Polaris® Acquisitions Guide*
 - *Polaris® Basics Guide*
 - *Polaris® Serials 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. For more information, see [“Community Records in the Staff Client”](#) in the *Polaris Community Profiles Guide 4.1R2*. 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; bulk change for bibliographic and item records; remote database searching for easy copy cataloging; automatic remote authority control; bibliographic record replacement; and templates to ensure record consistency. Quick navigation between linked records also enhances efficiency.

When you need to create original MARC records, you select from dialog boxes that present the appropriate values based on previous selections. And, you can immediately preview how the title will appear in the PAC.

Your Polaris Administrator can use a variety of options to manage cataloging records and specify how titles are displayed in the PAC. For information on managing the catalog, see [“Cataloging Administration”](#) on page 278. For information on the various options for controlling how titles display in the PAC, see [“Displaying PAC Search Results”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

This unit covers the following topics:

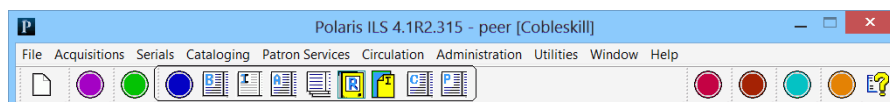
- [“Cataloging Options on the Shortcut Bar”](#) on page 4
- [“Cataloging Records”](#) on page 6
- [“Methods for Adding New Records”](#) on page 18
- [“Finding Cataloging Records”](#) on page 21

Cataloging Options on the Shortcut Bar

From the Polaris Shortcut Bar, you can create new cataloging records, find existing records, and initiate automatic processing of cataloging records. Specific permissions are required for creating, modifying, deleting, and processing cataloging records. For information on the permissions required to do cataloging tasks, see [“Cataloging Permissions”](#) on page 280.

Tip:

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



See the following topics:

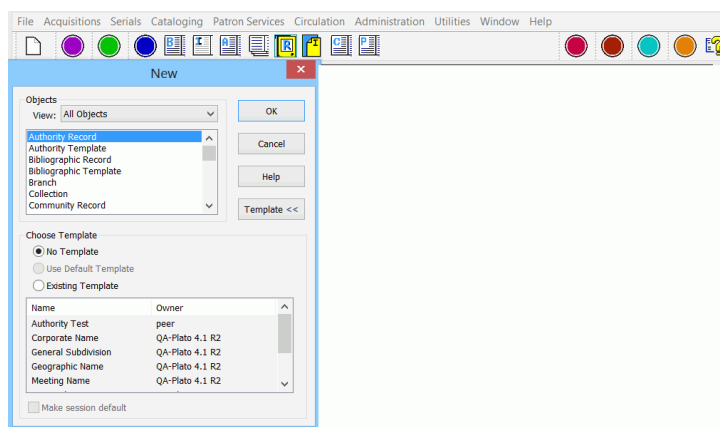
- [“Creating New Cataloging Records”](#) on page 4
- [“Accessing Existing Cataloging Records”](#) on page 5
- [“Start Cataloging Records Processing”](#) on page 5

Creating New Cataloging Records

Tip:

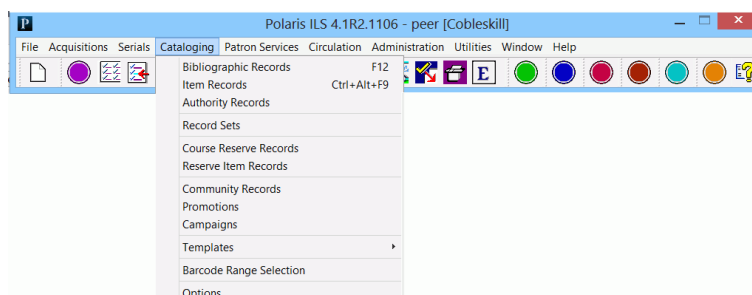
Select **Cataloging Objects** in the **View** box to list only Cataloging records.

To create a new Cataloging record, select **File, New**, press **CTRL+N** or click . The **New** dialog box appears. If the record type has templates defined, you can select **Existing Template** and choose a template to create a new record. 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. If the record type does not have templates defined, or you want to create a new record without a template, click **OK**.



Accessing Existing Cataloging Records

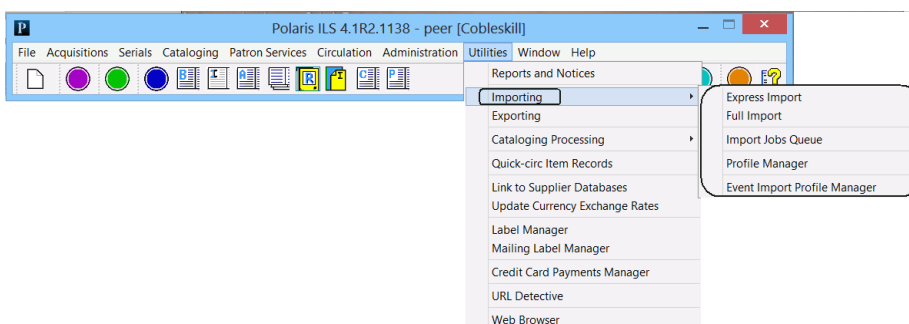
Select **Cataloging** and select a menu option. The Find Tool opens for the selected record type.



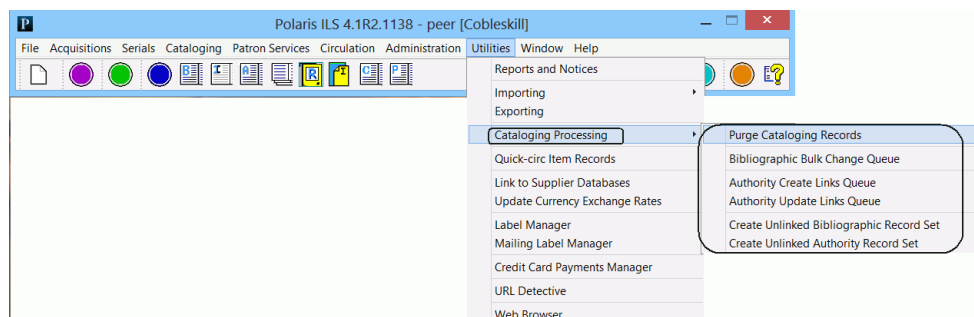
Start Cataloging Records Processing

Select the **Utilities** menu and select one of the processing options:

- **Exporting** - Opens the Export Utility.
- **Importing** - Displays the Importing submenu with the following options: **Express Import**, **Full Import**, **Import Jobs Queue**, **Profile Manager**, and **Event Import Profile Manager**.



- **Cataloging Processing** - Displays the Cataloging Processing submenu with the following options: **Purge Cataloging Records**, **Bibliographic Bulk Change Queue**, **Authority Create Links Queue**, **Create Unlinked Bibliographic Record Set**, and **Create Unlinked Authority Record Set**.



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.

See the following topics:

- [“Bibliographic Records”](#) on page 7
- [“Item Records”](#) on page 13
- [“Authority Records”](#) on page 14
- [“Cataloging Templates”](#) on page 15
- [“Record Sets”](#) on page 15
- [“Promotion Records”](#) on page 16
- [“Community Records”](#) on page 17
- [“Original Cataloging”](#) on page 19

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 30. 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 112. You can create linked item records from the Tools menu on the Bibliographic Record workform. See [“Creating Item Records”](#) on page 130.

Bibliographic Record 414320 - MARC21 - Polaris

File Edit View Links Tools Help

Control number: 414320 Owner: QA-Plato 4.1 R2 (sys) Record status: Final

Title: Harry Potter and the prisoner of Azkaban

☒ Display in PAC ☐ ILL ☐ Do not overlay

Tag	Ind	Data
LDR		cam 22 a 4500
001		414320
005		20100223154545.0
008		990408s1999 nyua J 000 1 eng d
010		\$a99023982
020		\$a9780439136365 (pbk.) :\$c\$8.99
020		\$a9780439136358 :\$c\$22.99
020		\$a0439554926 (hc) :\$c\$24.95
020		\$a0439136369 (pbk.) :\$c\$8.99
020		\$a0439136350 :\$c\$19.95
035		\$aAGG-2466
050	00	\$aPZ7.R79835\$bHam 1999
082	00	\$a[Fic]\$t221
092		\$bRow
099		\$aj Fict\$bRow
100	1	\$aRowling, J. K.
245	10	\$aHarry Potter and the prisoner of Azkaban /\$cby J. K. Rowling ; illustrations by Mary Grandpre.
260		\$aNew York :\$bArthur A. Levine Books/Scholastic,\$c1999.
300		\$a435 p. :\$bIll. :\$c24 cm.
500		\$aSequel to: Harry Potter and the Chamber of Secrets.
520		\$aDuring his third year at Hogwarts School for Witchcraft and Wizardry, Harry Potter must confront the devious and dangerous wizard responsible for his parents' deaths.
550		\$aMizadeh, Firdous

For Help, press F1

NUM

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 do the following in the list of items:

- To sort the list, click on a column header.
- To open an item in the Item Record workform, double-click.
- To perform actions on a single item record, right-click and select an option from the menu.
- To perform actions on multiple item records, multi-select the items, right-click, and select an option from the menu.

Example:

Select the linked item records in the list, right-click, and select **Ad hoc Bulk Change**. The Item Bulk Change dialog box opens. See [“Changing Multiple Item Records”](#) on page 186.

QA-PLATO-R2 - Polaris Database (Bibliographic Record 414320)

LCCN: 99023982
 ISBN: 9780439136365 (pbk) :\$8.99
 9780439136358 :\$22.99
 0439554926 (hc) :\$24.95
 0439136369 (pbk) :\$8.99
 0439136350 :\$19.95

☒ Display In PAC

Other Control No: AGG-2466
Author: Rowling, J. K.
Title: Harry Potter and the prisoner of Azkaban / by J. K. Rowling ; illustrations by Mary Grandpre.
Imprint: New York : Arthur A. Levine Books/Scholastic, c1999.
Description: 435 p. : ill. : 24 cm.
Summary: During his third year at Hogwarts School for Witchcraft and Wizardry, Harry Potter

Total number of active holds: 0 **Grand Total Circulation (lifetime):** 5310

Branch Name	No. of Items	Circ YTD	Circ Prev YTD	Circ Lifetime	In-House
Totals:	270	2	13	5305	
Amsterdam Free Library (AMS)	8	0	0	115	
Argyle Free Library (ARG)	3	0	0	27	

Title	Assign...	Colle...	Ma...	Sh...	Call ...	V...	St...	Barcode	Last Ac...	R.	Cont...
Harry Potter ...								In 000430033...	10/1/2...	F.	204...
Harry Potter ...	Open							In 000430022...	10/23/...	F.	203...
Harry Potter ...	Check In							Lost 000430003...	2/26/2...	F.	202...
Harry Potter ...	Place Hold...							Lost 000430037...	11/3/2...	F.	205...
Harry Potter ...	Print							Lost 000430046...	2/23/2...	F.	205...
Harry Potter ...								In 000430035...	8/29/2...	F.	205...
Harry Potter ...	Add to Record Set							Lost 000430061...	4/2/2007	F.	237...
Harry Potter ...	Add to Route List							Lost 000430035...	3/13/2...	F.	205...
Harry Potter ...	Remove from Route List							In 000260012...	3/31/2...	F.	226...
Harry Potter ...	Ad hoc Bulk Change							In 000260012...	7/30/2...	F.	225...
Harry Potter ...								In 000260003...	9/12/2...	F.	175...
Harry Potter ...	Create							Ml... 000080041...	11/22/...	F.	133...
Harry Potter ...	Links							W... 000080064...	8/2/2007	F.	279...
Harry Potter ...								W... 000080063...	10/2/2...	F.	278...
Harry Potter ...	Delete							In 000080063...	10/2/2...	F.	253...
Harry Potter ...	Undelete							Lost 000080051...	10/11/...	F.	134...
Harry Potter ...	Properties							In 000220016...	7/16/2...	F.	169...
Harry Potter ...								In 000380006...	8/30/2...	F.	195...
Harry Potter ... Bolton... Child... Book					J Fict...			In 000380015...	8/31/2...	F.	196...
Harry Potter ... Bolton... Child... Book					J Fict...			In 000380015...	8/31/2...	F.	196...

Preview the Title Display in the PAC

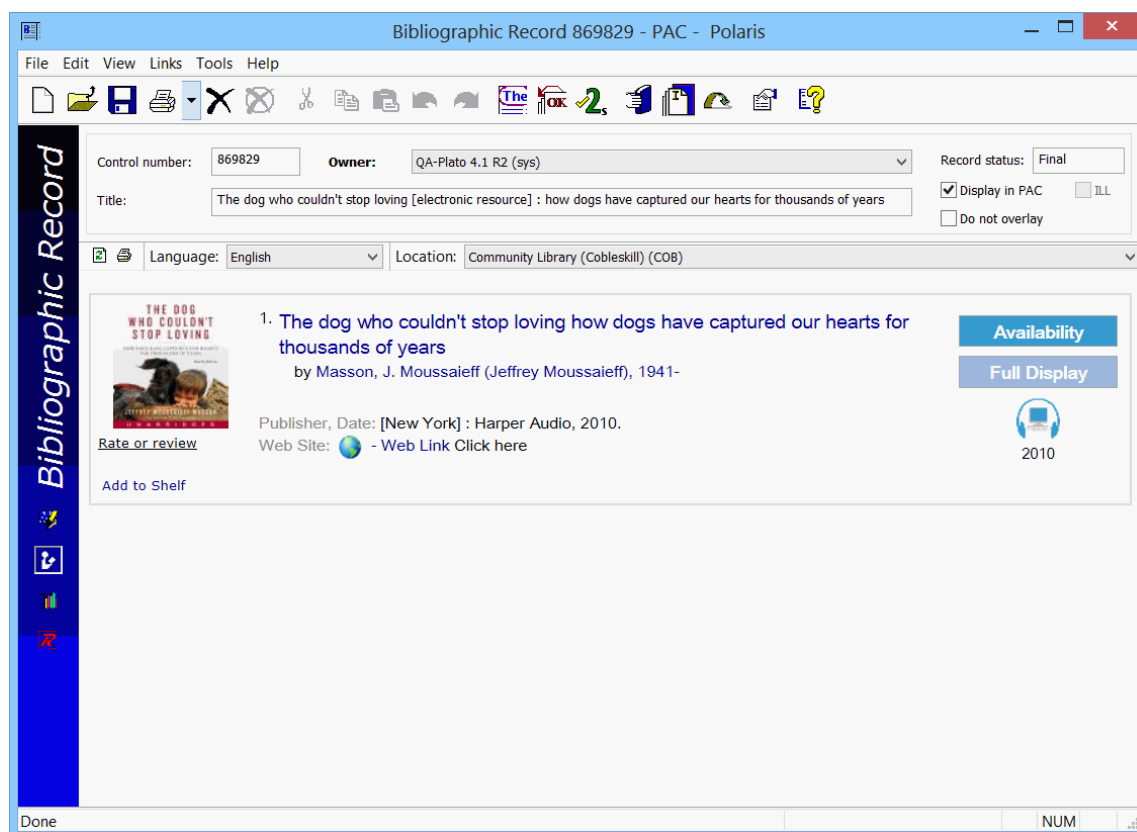
Tips:

Click  to display the PAC view. A Polaris Administration profile can be set to always open the Bibliographic Record workflow to the PAC view. See [“Setting Preferred Workform Views”](#) in the *Polaris Administration Guide 4.1R2*.

Select **View, PAC** to preview the title’s bibliographic data 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 or actions that require the PAC user to log in. Links to external sites open in a new browser window. 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 11.

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 4.1R2*.



The screenshot shows the Polaris Bibliographic Record interface for record 869829. The window title is "Bibliographic Record 869829 - PAC - Polaris". The interface includes a menu bar (File, Edit, View, Links, Tools, Help) and a toolbar with various icons. On the left, there is a vertical sidebar labeled "Bibliographic Record" with several icons. The main content area displays the following information:

- Control number:** 869829
- Owner:** QA-Plato 4.1 R2 (sys)
- Title:** The dog who couldn't stop loving [electronic resource] : how dogs have captured our hearts for thousands of years
- Record status:** Final
- ☒ Display in PAC
- ☐ Do not overlay
- Language:** English
- Location:** Community Library (Cobleskill) (COB)

The main display area shows the title "1. The dog who couldn't stop loving how dogs have captured our hearts for thousands of years" by Masson, J. Moussaieff (Jeffrey Moussaieff), 1941-. Below the title, it lists the publisher and date: "Publisher, Date: [New York] : Harper Audio, 2010." and a web site link: "Web Site: - Web Link Click here". There are buttons for "Availability", "Full Display", and "Add to Shelf". A "Rate or review" link is also present. The bottom status bar shows "Done" and "NUM".

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:

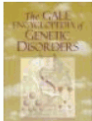
Notes:

For information on the options available for the PAC displays, see [“Configuring the PowerPAC Title Display”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

For information on ebook records, see [“Cataloging Ebooks”](#) in the *Polaris Cataloging Guide 4.1R2*.

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

856 40 http://galenet.galegroup.com/servlet/eBooks?ste=22&docNum=CX340559999&q=nysl_ca_sa

	1. The Gale encyclopedia of genetic disorders	Availability Full Display
	Publisher, Date: Detroit, MI : Gale Group, 2001. Web Site: - Web Link Description: 1345 p. : ill. ; 29 cm.	 2001
	Rate or review Add to Shelf	

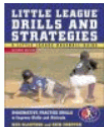
- **856\$y - Link Text** - If the bibliographic record has an **856\$y**, the text in the first occurrence of this tag is used for the Web link display instead of the URL in the 856\$u.

856 4 <http://www.netLibrary.com/urlapi.asp?action=summary&v=1&bookid=135204> [A downloadable audio book accessible through the World Wide Web; click for information](#)

	1. The accidental tourist by Tyler, Anne	Availability Full Display
	Publisher, Date: Prince Frederick, MD : Recorded Books ; [Boulder, Colo. : Made available electronically by] NetLibrary, 2005. Edition: Unabridged. Web Site: Bibliographic record display - A downloadable audio book accessible through the World Wide Web; click for information Description: 1 sound file (13 hr., 15 min.) : digital, wma file. Call Number: Online Resource	 2005
	Rate or review Add to Shelf	

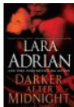
- **856\$3 - Material Specified** - If the bibliographic record does not have an **856\$y**, but it does have an **856\$3**, the text in the first occurrence of this tag is used for the Web link display instead of the URL in the **856\$u**.

856 42 :3Publisher description:uhttp://www.loc.gov/catdir/description/mh031/2002035104.html

 Rate or review Add to Shelf	1. Little League drills and strategies : imaginative practice drills to improve skills and attitude by McIntosh, Ned.	Availability Full Display
	Publisher, Date: Chicago : Contemporary Books, c2003.	 2003
	Edition: Rev. ed.	
	Web Site:  - Publisher description	
	Description: xii, 172 p. : ill. ; 24 cm. Series: Little League baseball guide.	

- **856\$z - Public Note** - If the bibliographic record has an **856\$u** with an **856\$z**, the default text **Web Link** is the clickable link, and the text in subfield z appears after the link.

856 40 :uhttp://palmssprings.lib.overdrive.com/ContentDetails.htm?ID=E405A7FD-109F-4328-925E-B38AA26DD345:zClick here

 User rating Rate or review Add to Shelf	1. Darker after midnight a midnight breed novel by Adrian, Lara.	Full Display
	Publisher, Date: New York : Random House, 2012.	 2012
	Web Site:  Web Link Click here	
	Description: 1 online resource Series: Adrian, Lara. Midnight breed series ; bk. 10.	

Item Records

An item record represents a unique physical or electronic copy of the bibliographic record title to which it is linked. Although information from the linked bibliographic record appears in the Item Record workform's header, item records do not contain MARC 21 data. Several item records, each representing a separate item, may be linked to the same bibliographic record. Item records are not necessary for ebook titles if the ebook vendor does not integrate with Polaris Circulation. See [“Cataloging Ebooks”](#) on page 211.

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 130. If you are creating one record, you can click **OK** to go to the Item Record workform.

Tip:

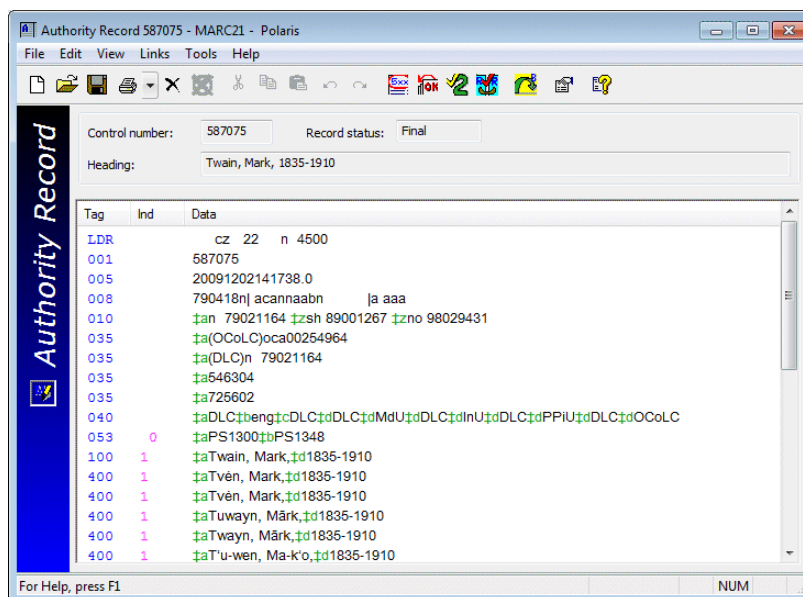
Select **Links, Item Records**, press

CTRL+T or click  to see all the other item records that are linked to the same bibliographic record.

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 4.1R2*.

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 34.



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 115.

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 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 59.

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 56 for more information.

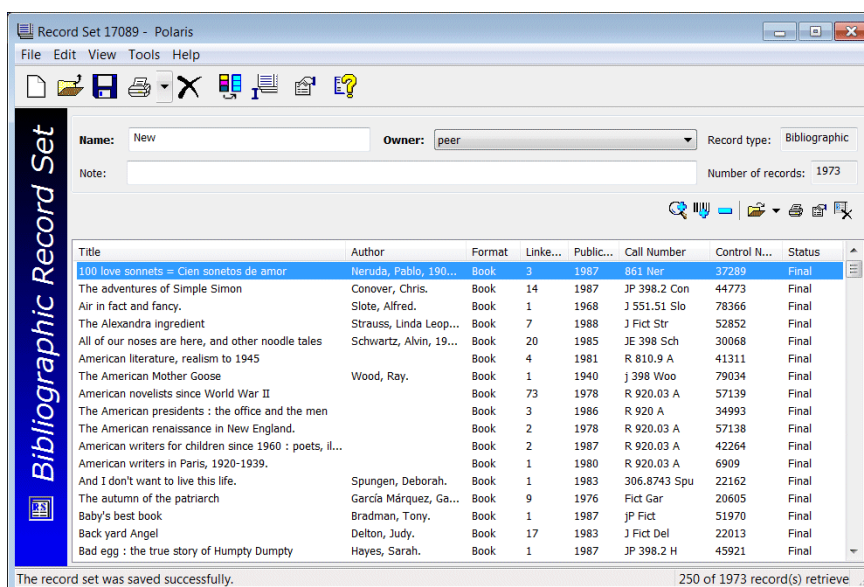
Record Sets

Tip:

You can bulk change item records from lists, such as the Find Tool search results or linked list boxes, without putting the items in a record set. See [“Bulk change item records”](#) on page 187.

Record sets group related records together so you can retrieve them in one step. Bibliographic and item records in a record set can be changed or processed 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 [“Working With Multiple Records”](#) on page 161.

When you import bibliographic or authority records, you can specify a destination record set to group them. This allows for more efficient retrieval and manipulation of the imported records. See [“Set import options for record sets”](#) on page 82.



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, Web sites, community organizations, events, and services. For more information, see [“Creating and Editing Promotion Records”](#) on page 229.

The screenshot shows a web application window titled "Promotion - 1017 - General - Polaris". The window has a menu bar with "File", "Edit", "View", "Links", and "Help". Below the menu is a toolbar with icons for file operations. A vertical sidebar on the left is labeled "Promotion" and contains several icons. The main content area is divided into sections: "Name" (Art Events for Children), "Owner" (QA-Plato 4.1 R2 (sys)), and "Control" (1017). The "Schedule" section includes "Activation date" (3/29/2012) and "Expiration date" (3/ 1/2014). The "Content" section has three text areas: "Headline" (Art Events for Children), "Midline" (Some upcoming local events to promote arts education among children.), and "Footline". At the bottom, a status bar indicates "The record was saved succ" and "NUM OVR".

Promotion - 1017 - General - Polaris

File Edit View Links Help

Name: Art Events for Children Owner: QA-Plato 4.1 R2 (sys) Control: 1017

Schedule

Activation date: 3/29/2012 Expiration date: 3/ 1/2014

Content

Headline: Art Events for Children

Midline: Some upcoming local events to promote arts education among children.

Footline:

The record was saved succ NUM OVR

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 4.1R2*.

Community Record - 1586

File Edit View Links Tools Help

Community Record

Organization name:
Eastside Community Center

Control number:
1586

Owner:
Community Library (Cobleskill) (br)

Record status:
Final

ContentXChange widgets link to:
Community Library (Cobleskill) (br)

Organization type:
Organization or Club

☒ Display in PAC

Profile | More info | Events | Social | Services | Subjects | Organization Rep | Preview | Statistics

Logo

Logo URL:
http://t1.gstatic.com/images?q=tbn:ANd9GcT49LzDDmXyB9KpZr40kQbUo61Jf_hBCdstY17ITvs4VjomM1PU;

Logo description:
Eastside Community Center

* logo size will not exceed 100 pixels X 100 pixels

Primary address | Alternate address

Address:
826 Euclid Ave.

City:
Syracuse

State / Province:
NY

Postal code:
13210

Phone number:
315-111-1111

TTY:

Fax number:

Contact person:
Susan Smythe

E-mail address:
ssmythe@mainst.org

For Help, press F1

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.

Polaris also provides multiple methods for creating 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. In addition, item records can be created automatically by importing bibliographic records with embedded holdings.

See the following topics:

- [“Original Cataloging”](#) on page 19
- [“Importing Records”](#) on page 19
- [“Copying MARC Records from Other Sources”](#) on page 19
- [“Creating Preliminary Bib Records in Acquisitions”](#) on page 19
- [“Creating Multiple Items for a Single Title”](#) on page 19

Original Cataloging

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 30.

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 59.

If your library has a contract with an integrated ebook vendor, such as 3M, the ebook records are imported automatically when they are purchased. For more information, see [“Cataloging Ebooks”](#) on page 211.

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 36.

Creating Preliminary Bib 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 4.1R2*.

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 131.

Automatic Remote Authority Control

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. For more information, see [“Managing Authority Control”](#) on page 326.

Creating Digital-Collection Bibliographic Records in Polaris Fusion

Records created in Polaris Fusion are automatically saved as bibliographic records in the Polaris database with a type of material of digital collection. For more information, see Polaris Fusion online Help.

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 Remote Resource Servers”](#) in the *Polaris Administration Guide 4.1R2*.

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 workflow, 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 4.1R2*.

See the following topics:

- [“Searching Tips”](#) on page 22
- [“Shortcut Keys to Find Bibliographic and Item Records”](#) on page 23
- [“Viewing Serial Item Records in the Polaris Find Tool”](#) on page 23
- [“Access Points for Cataloging Records”](#) on page 23
- [“Searching for Items or Bib Records by RFID Tag”](#) on page 24
- [“Sorting the Results List”](#) on page 24
- [“Automatic Suggestions for Keyword & Phrase Searches”](#) on page 24
- [“Linking Between Records”](#) on page 25

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.

Ignore Initial Articles in Titles

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 4.1R2*. You can clear the **Use Initial Articles Table** check box to help find records where the non-filing indicators are set improperly.

The **Use Initial Articles** check box is active only when the search type is **Exact match** (either implicitly or explicitly truncated), and you are searching for the following records:

- 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 Find Bibliographic and Item Records

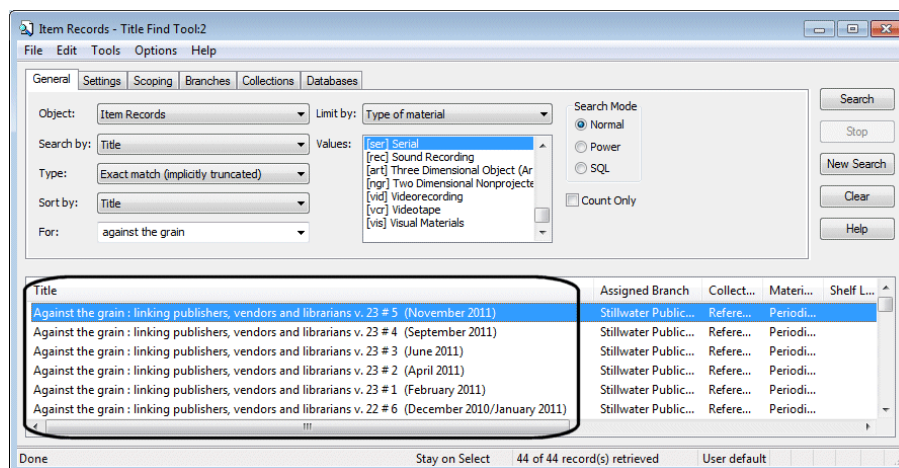
From anywhere in the Polaris application, you can use the following shortcut keys to bring up the Find Tool to search for cataloging records.

- Bibliographic Records - F12
- Item Records - Ctrl+Alt+F9

For a list of other shortcut keys, see [“Cataloging Shortcut Keys”](#) on page 383.

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 Use 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**. See [“Customize the Find Tool by user”](#) on page 38.

Searching for Items or Bib 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

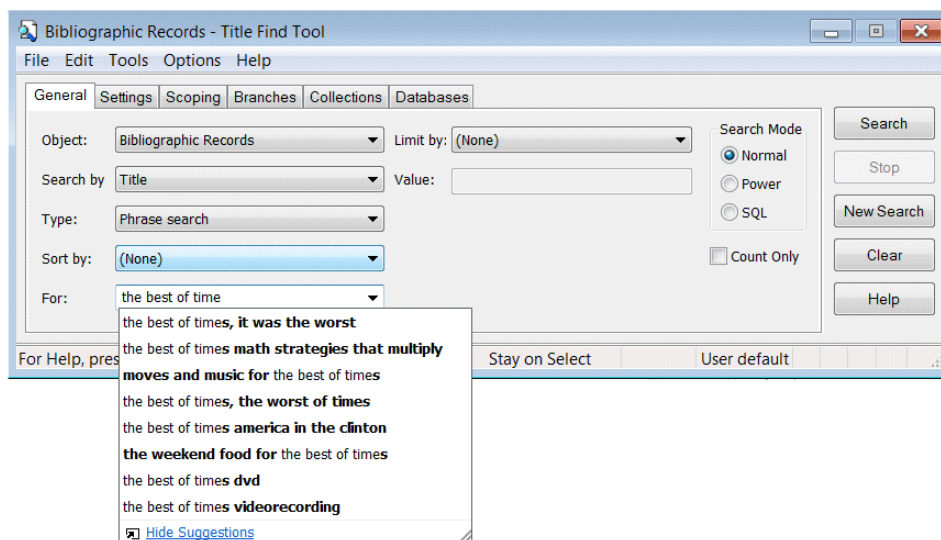
You can select a **Sort by** option to sort the results before they are displayed. The **Sort by** options depend on the type of record selected. For example, you could search for bibliographic records by subject and sort by **Title**, then **Author**, then **Type of Material**. Sorting options can also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

Note:

For more information on searching in Polaris, see “[Finding Polaris Records](#)” in the *Polaris Basics Guide 4.1R2*.

Automatic Suggestions for Keyword & Phrase Searches

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 a workflow menu, or from the right-click menu in a list of records. For more information, see “[Linking to Other Records](#)” in the *Polaris Basics Guide 4.1R2*.

1-2-3

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.

Note:

The available tabs in the Find Tool depend on the type of record selected. For more information, see “[Find Tool Tab Display](#)” in the *Polaris Basics Guide 4.1R2*.

Tip:

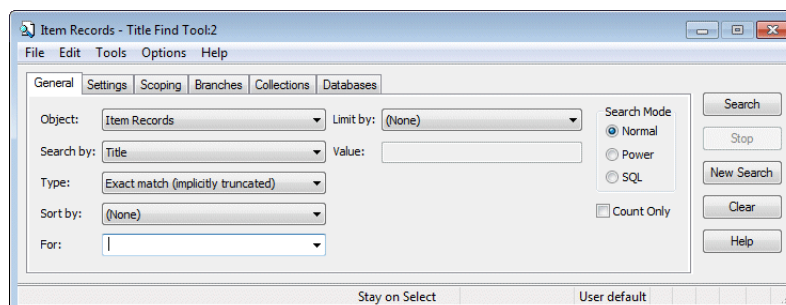
To search for bibliographic records from anywhere in the Polaris application, press **F12**. To search for item records, press **Ctrl+Alt+F9**.

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.
4. 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 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.

Tip:

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

5. To sort the search results, select an option in the **Sort by** box. Sort is not available in Browse searches.
6. Type your search text in the **For** box.
7. 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.
8. If you would typically search for this type of record using the same search criteria, select **Options**, **User Default** to save your search options. To set the option back to the system default, select **Options**, **Revert to System Default**.

Note:

Limit by values selected from a drop-down list are saved in the user default, but free-text values are not saved. For example, if the **Limit by** selection is **Subject** and you enter **history** in the **Values** box, the value is not saved.

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 4.1R2*.
- **Searching databases other than your library's database** - See [“Search multiple and remote databases”](#) in the *Polaris Basics Guide 4.1R2*.
- **Searching using an SQL query** - See [“Do a SQL search”](#) in the *Polaris Basics Guide 4.1R2*.
- **Using the Power Search option** - See [“Do a power search”](#) in the *Polaris Basics Guide 4.1R2*.
- **Using scoping to narrow your search** - See [“Do a search with scoping”](#) in the *Polaris Basics Guide 4.1R2*.
- **Sending all search results to a record set** - See [“Create a record set from all the Find Tool results”](#) in the *Polaris Basics Guide 4.1R2*.

1-2-3

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.

2. Search for the bibliographic record or records. See [“Find cataloging records in your library’s database”](#) on page 25.

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**.

The Preview window opens. For more information, see [“Viewing Circulation Statistics and Linked Item Records”](#) on page 8.

4. 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.

Tip:

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

Tip:

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

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 129.

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 59

This unit covers the following topics:

- [“Creating MARC Records”](#) on page 30
- [“Copying MARC Records”](#) on page 36
- [“Editing MARC Records”](#) on page 40
- [“Browse Headings Display”](#) on page 54

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/ecadhme.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”](#) on page 328.

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 115.

See the following topics:

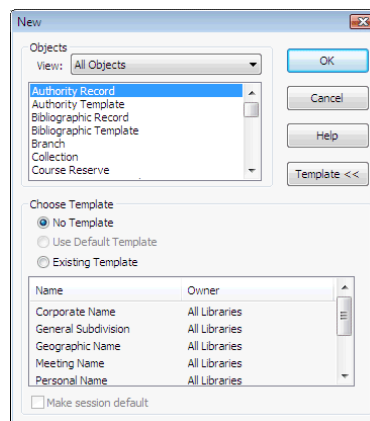
- [“Create a new bibliographic record”](#) on page 31
- [“Create a new authority record”](#) on page 34

1-2-3

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 56.

- 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.

Tag	Ind	Data
LDR		nam 22 4500
008		061229

Tip:

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

7. Enter the values for Leader positions 05, 06, 07, 08, 17, 18, and 19. See [“Change the MARC Leader”](#) on page 41.
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 43 or [“Add 006 and 007 fixed fields”](#) on page 44.

Tip:

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

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

Tip:

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.

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 message for bibs that do not display in PAC”](#) on page 340.

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

Related Information

- [“Preview the Title Display in the PAC”](#) on page 10
- [“Web Links Display in the PAC”](#) on page 11
- [“Editing MARC Records”](#) on page 40
- [“Checking Authority Headings”](#) on page 113
- [“Checking MARC Format”](#) on page 122
- [“Checking for Duplicate Records”](#) on page 124
- [“Cataloging Ebooks”](#) on page 211
- [“Type of Material Codes \(TOMs\)”](#) on page 240
- [“Configuring the PowerPAC Title Display”](#) on page 136

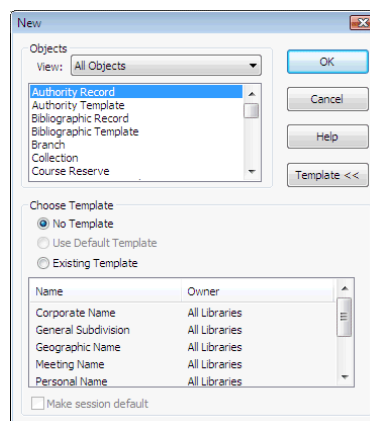
1-2-3

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 56.

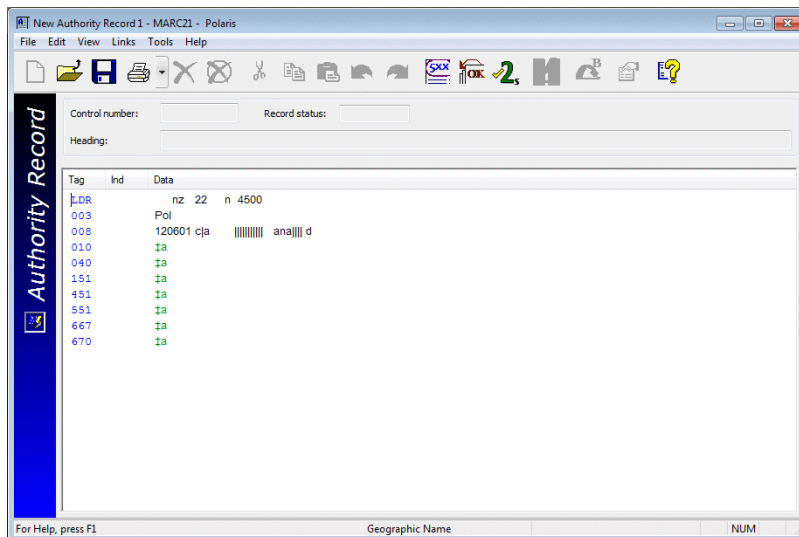
- a) Select **Existing Template**, and select an authority record template from the list.

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.

Tip:

Click to save the record as complete.

4. Use the MARC Editor commands to add tags and subfields as needed. See “Editing MARC Records” on page 40.

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 112).

- 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 122
- “Checking for Duplicate Records” on page 124
- “Checking Authority Headings” on page 113

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 Staff Client”](#) on page 182. To subscribe to the Polaris ZMARC database, contact your Polaris Site Manager.

If you want to remove specific MARC tags from remote records when they are saved to your library’s local database, the tags must be defined in the Bibliographic Tags to Retain/Delete policy table, and the **Delete MARC tags when saving Z39.50 records to local database** profile must be set to **Yes**. See [“Deleting MARC Tags from Incoming Bibs”](#) on page 293.

See the following topic:

- [“Copy a MARC record from a remote source”](#) on page 36

1-2-3

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.

<i>Most likely to return results</i>	<i>May not be indexed in target catalog, so may not return results</i>	
• 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:

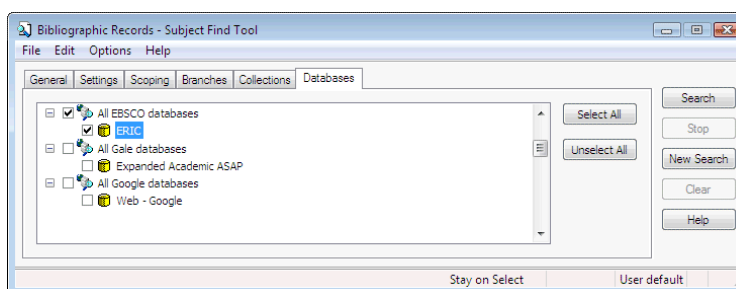
The target database may not allow some of the Find Tool search types. Many remote catalogs support only keyword searches. Also, sorting search results may not work with remote databases.

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

Note:

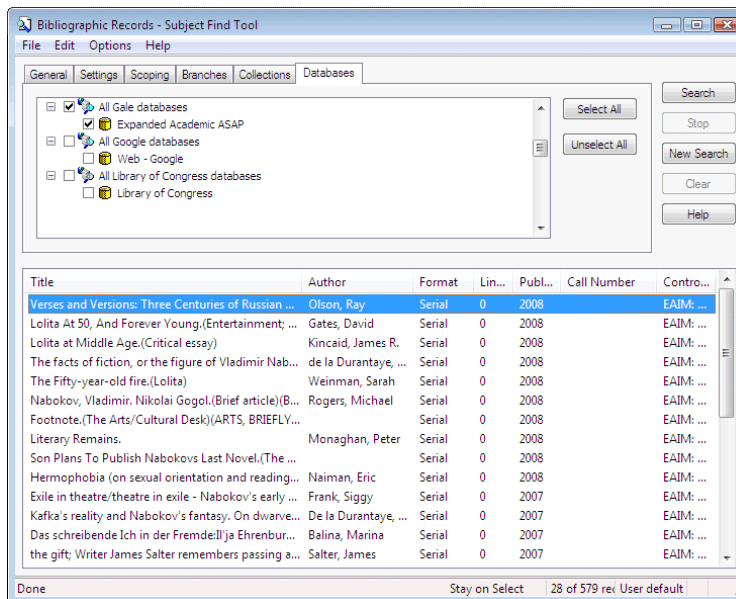
Implicit truncation is not supported when searching remote databases. End the search for text with the wild card symbol (*) if you are unsure of an exact match. For example, type **Asimov, Isaac***.

5. Select **Databases** to display the remote databases.
6. Select the check box next to the remote database or databases you want to search.



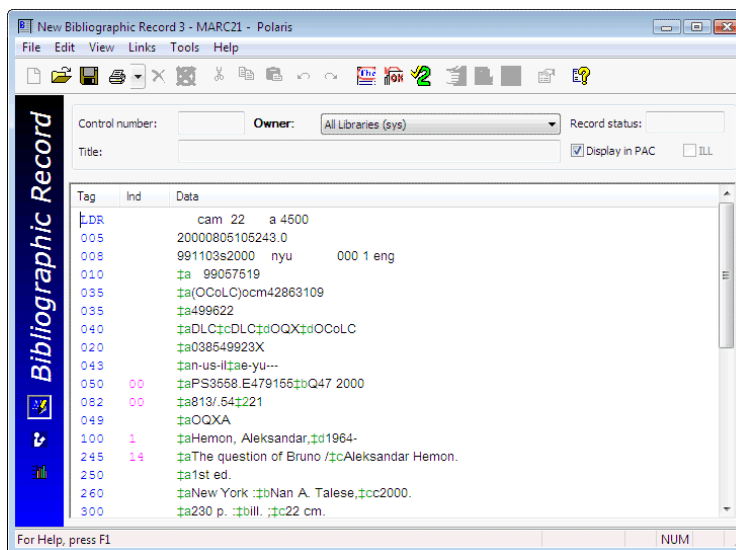
7. Click **Search** to start the catalog search.

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 124).
- 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 113 for detailed instructions on checking headings.
- To check MARC format, select **Tools, Check MARC21 Format**. See [“Checking MARC Format”](#) on page 122 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 [“Set up a server record for a Z39.50 or other search server”](#) on page 171.
- **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 113.

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 240.

- **Shortcut key combinations** - See [“Cataloging Shortcut Keys”](#) on page 383.
- **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”](#) on page 297.
- **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”](#) on page 297.
- **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 112.
- **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/characters using an IME keyboard”](#) on page 46. The Polaris catalog supports full UTF-16 Unicode.

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.

See the following topics:

- “Change the MARC Leader” on page 41
- “Edit the 008 field in a MARC record” on page 43
- “Add 006 and 007 fixed fields” on page 44
- “Add a MARC tag to a record” on page 45
- “Insert a subfield in a MARC record” on page 45
- “Move a block of text” on page 45
- “Enter diacritics/characters using an IME keyboard” on page 46
- “Choose characters/diacritics from a chart” on page 48
- “Insert a character/diacritic using a code” on page 50
- “Record a macro” on page 50
- “Apply a macro” on page 52
- “Change a macro” on page 53
- “Delete a macro” on page 53

1-2-3

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.

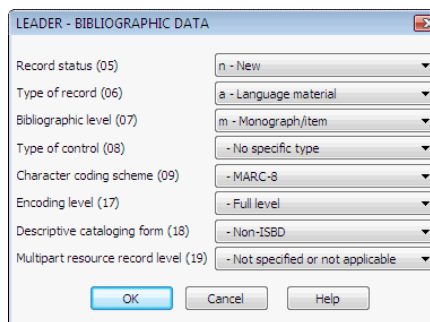
Tip:

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.

Tag	Ind	Data
LDR		nam 22 4500
008		061229

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.

Coding the MARC Leader for Digital Collections

If you are creating the MARC record to be used in Polaris Fusion, select **m** Computer File in LDR 06 and **c** Collection in LDR 07. For more information, see Polaris Fusion online Help.

1-2-3

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.
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.

Tip:

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

008--BOOKS (LDR/06 value a with LDR/07 values a, c, d, m and LDR/06 value t)

Entry date (00-05)	090127	Nature of contents (24-27)	
Type of date (06)	- No attempt to code	Government pub (28)	- No attempt to code
Date 1 (07-10)		Conference pub (29)	- No attempt to code
Date 2 (11-14)		Festschrift (30)	- No attempt to code
Place of pub (15-17)	- Fill Character	Index (31)	- No attempt to code
Illustrations (18-21)	- No attempt to code	Literary form (33)	- No attempt to code
Audience (22)	- No attempt to code	Biography (34)	- No attempt to code
Form of item (23)	- No attempt to code	Language (35-37)	- No attempt to code
		Modified record (38)	- No attempt to code
		Cataloging source (39)	- No attempt to code

OK Cancel Help

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.

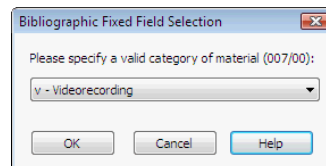
1-2-3

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.

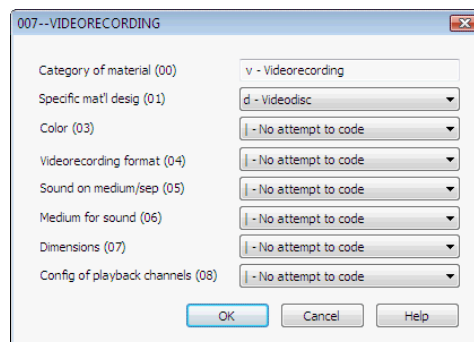
1. Open the Bibliographic Record workform.
2. Position the cursor after the Leader or at the end of any line.
3. Press **Enter** to insert a new line.
4. In the **Tag** column, type one of the following codes:
 - Type **007** for a physical description fixed field.
 - Type **006** for an additional material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

1-2-3

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.

1-2-3

Insert a subfield in a MARC record

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.

1-2-3

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.
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.

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.

1-2-3

Enter diacritics/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 characters/diacritics from a chart”](#) on page 48.

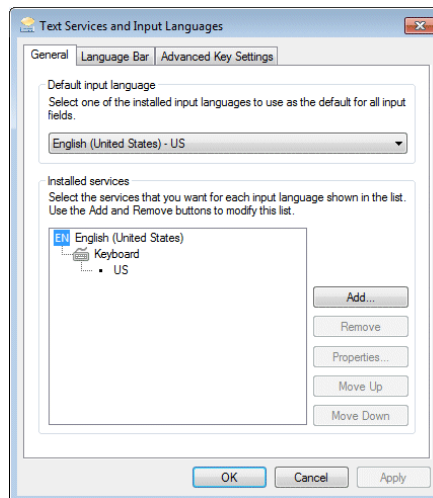
Follow these steps to enter diacritics or non-Roman characters using an Input Method Editor (IME) keyboard.

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**.

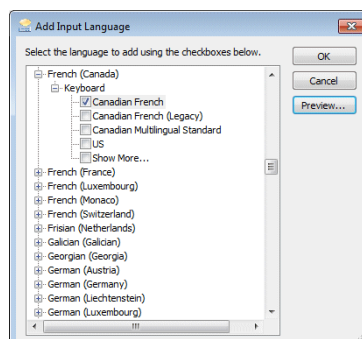
The Text Services and Input Languages dialog box appears.



2. Click the **Add** button.

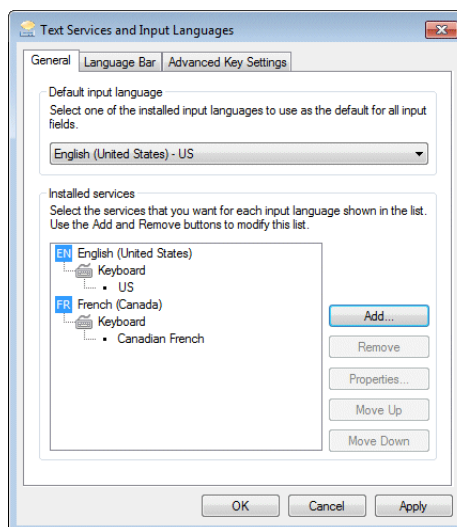
The Add Input Language dialog box appears.

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 workflow 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.

1-2-3

Choose characters/diacritics 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.

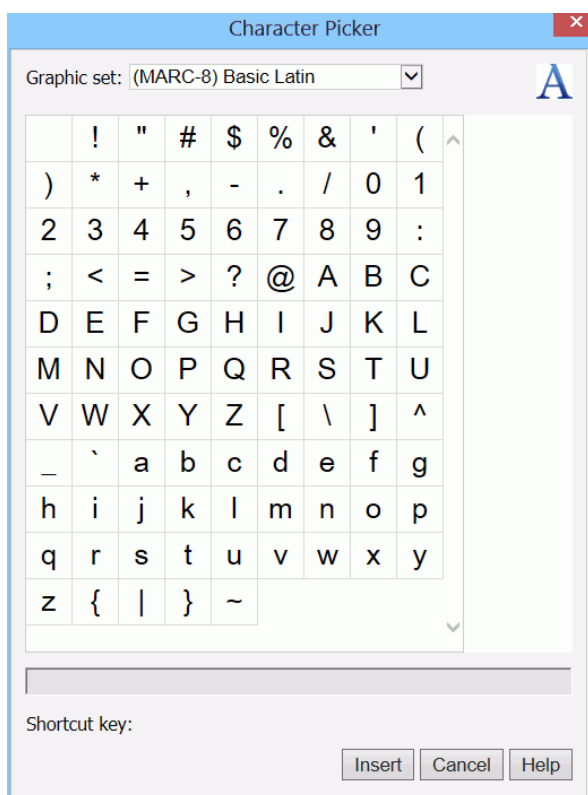
Tip:

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/characters using an IME keyboard”](#) on page 46.

Important:

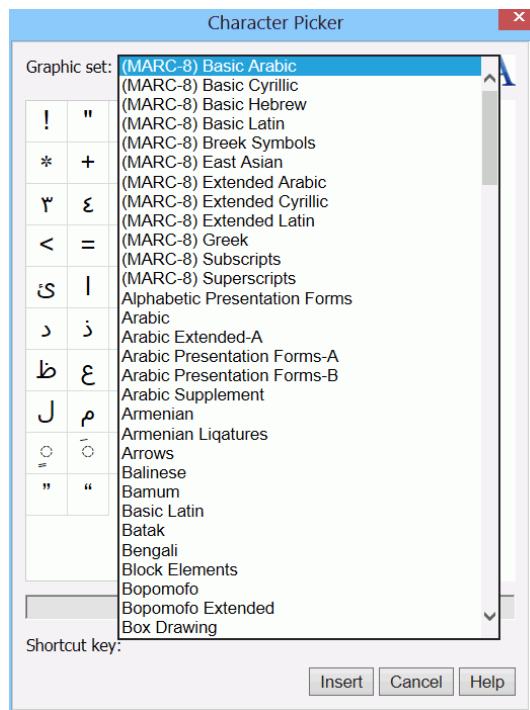
When you enter a combining diacritic mark next to a subfield designator, insert the base character before the combining mark.

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. Or, press **ALT+D**. The Character Picker dialog box opens with the (MARC-8)Basic Latin code chart displayed and a space selected.



4. Select the graphic set in the **Graphic set** box.

The Graphic set drop-down list contains the traditional MARC 8 code ranges and most Unicode code charts.



The characters belonging to the selected graphic set appear in the Character Picker.

5. Position the cursor where you want to insert the character.
6. Double-click the character, or select the character and click **Insert**.

The selected character is displayed in the MARC 21 view. If a particular character cannot be displayed using the fonts that are available to the workstation, a missing glyph box displays where the character would normally appear. When the missing glyph box is displayed, the correct Unicode character is stored in the record.

1-2-3

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.

Tip:

To see the Unicode value of a character already in the MARC record, select the character in the MARC 21 view, and press **Alt+Shift+X**. Press **Alt+X** to re-display the character.

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 (Ö), 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.

1-2-3

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.

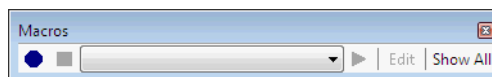
Note:

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

Tip:

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

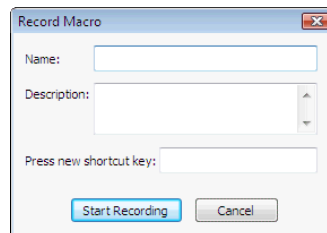
1. Open the Bibliographic Record or Authority Record workform.
2. Select **Tools, Macros** to display the Macros tool bar.



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.

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.

Tip:

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

Related Information

- [“Apply a macro”](#) on page 52
- [“Change a macro”](#) on page 53
- [“Delete a macro”](#) on page 53
- **Print macros** - You can print reports that list authority record and bibliographic record macros. See [“Outreach Services Reports”](#) on page 136.

1-2-3

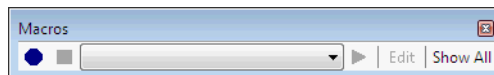
Apply a macro

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:

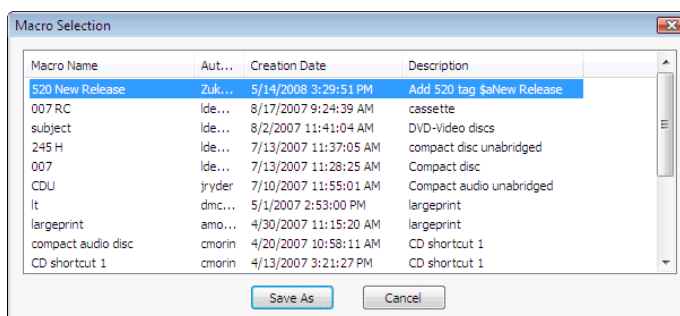
If you know the keyboard shortcut, you can quickly apply the macro.



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.

1-2-3

Change a macro

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

Note:

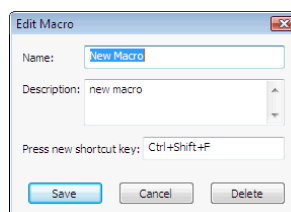
You cannot change the recorded contents of the macro.

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. 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.

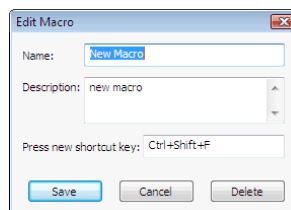
1-2-3

Delete a macro

Follow these steps to delete a macro.

1. Open the Bibliographic Record or Authority Record workform.
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**.

Tip:

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

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.

See the following topic:

[“Update a browse display heading”](#) on page 54

1-2-3

Update a browse display heading

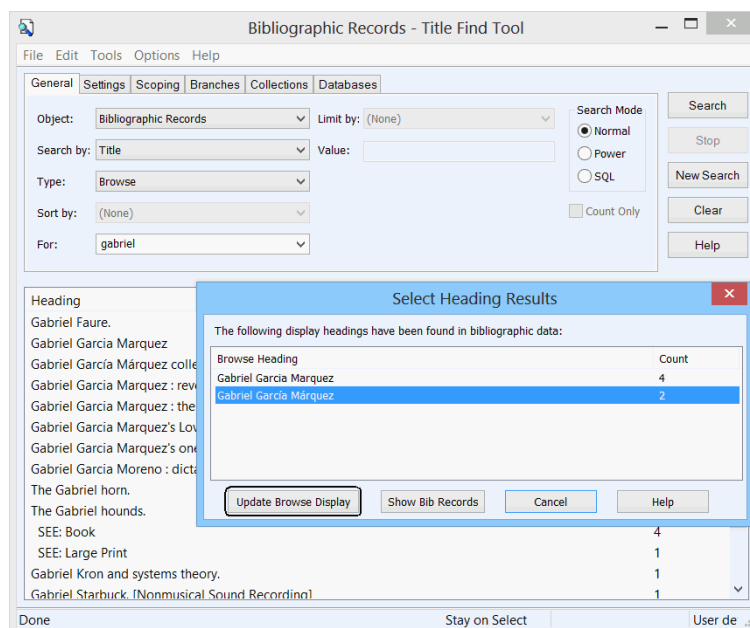
Follow these steps to update a browse display heading.

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 update, right-click and choose **Select display heading** from the context menu.

The Select Heading Results dialog box appears.



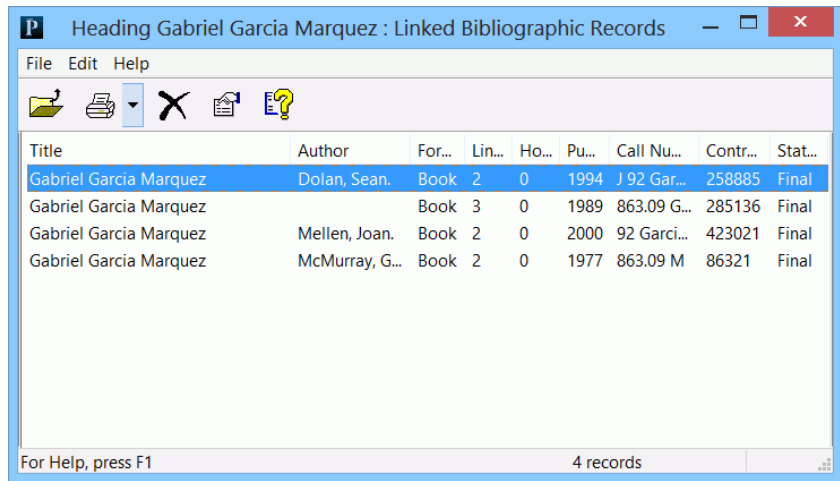
3. Select the heading you want to display, and click the **Update Browse Display** button.

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.



Title	Author	For...	Lin...	Ho...	Pu...	Call Nu...	Contr...	Stat...
Gabriel Garcia Marquez	Dolan, Sean.	Book	2	0	1994	J 92 Gar...	258885	Final
Gabriel Garcia Marquez		Book	3	0	1989	863.09 G...	285136	Final
Gabriel Garcia Marquez	Mellen, Joan.	Book	2	0	2000	92 Garci...	423021	Final
Gabriel Garcia Marquez	McMurray, G...	Book	2	0	1977	863.09 M	86321	Final

For Help, press F1

4 records

- c) Double-click on the bibliographic records to open them, change the records to match the preferred heading, and save them.

Using Cataloging Templates



Using templates to create 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. You can create a template by renaming an existing template or by saving an item, bibliographic, or authority record as a template.

Note:

If you have a contract with an ebook vendor that integrates with Polaris, ebook item records are created automatically using an ebook item template. See [“Set up the item template for the integrated ebooks”](#) on page 354.

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 240.

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 4.1R2*.
- **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 4.1R2*.
- **On-the-fly item templates** - Used for circulating uncataloged materials. See [“Create on-the-fly item templates”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **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 4.1R2*.

This unit covers the following topics:

- [“Save an existing record as a template”](#) on page 57
- [“Create a template from the Shortcut Bar”](#) on page 57

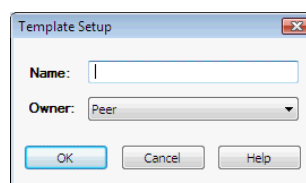
1-2-3

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 and make any other changes.
8. Select **File, Save** to save the template.

1-2-3

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

**Tip:**

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

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 62 for a list of the PolarisExec import profiles and their uses.

Staff members with the appropriate permissions can set the following automatic processing options, among others, in the Import Setup window:

- 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 tags
- Specify tags to delete using system- or profile-defined tags
- Check the preferred cataloging source when merging duplicate authority records
- Create or update item records from embedded holdings data in the bibliographic records
- Protect the incoming records from being overlaid in the future
- Group the imported records in record sets for easy retrieval and bulk processing.

Before you can import bibliographic or authority records, the MARC or MARCXML 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”](#) on page 325.

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 208. 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.

This unit covers the following topics:

- [“Setting Up Import Profiles”](#) on page 61
- [“Importing Records”](#) on page 87
- [“Using the Import Jobs Queue”](#) on page 91
- [“Automatic Processes During Import”](#) on page 96

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, copy the profile and rename 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 83.

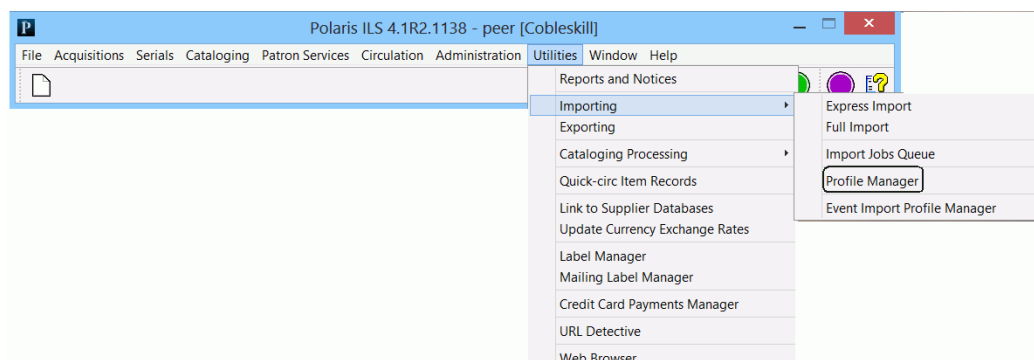
The following permissions, set at the System level, control who can work with import profiles: **Import profiles: Access, Create, Delete, and Modify.**

See the following topics:

- [“Polaris Read-Only Import Profiles”](#) on page 62
- [“Copy a Polaris read-only import profile”](#) on page 68
- [“Create a new import profile”](#) on page 70
- [“Set import options for bibliographic records”](#) on page 72
- [“Set import options for item records”](#) on page 77
- [“Set import options for authority records”](#) on page 80
- [“Set import options for record sets”](#) on page 82
- [“Print an import profile”](#) on page 83
- [“Modify an import profile”](#) on page 84
- [“Delete an import profile”](#) on page 86

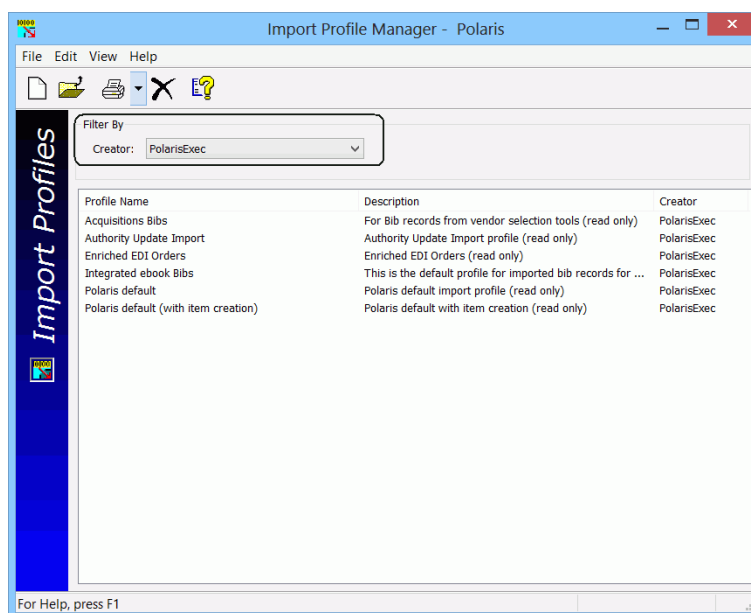
Polaris Read-Only Import Profiles

To see the Polaris read-only import profiles defined for specific types of import processing, select **Utilities, Importing, Profile Manager**.



The Import Profile window opens.

Select PolarisExec in the **Creator** box to limit the list to only the 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, Authority Update Import, Enriched EDI Orders, Integrated ebook Bibs, Polaris default, and Polaris default (with item creation). The Integrated ebook Bibs import profile is used exclusively for API-driven imports of ebook bibliographic records. See [“Importing Integrated Ebook Bibs”](#) on page 212.

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.

Modify Import Profile - Acquisitions Bibs

Profile Setup | **Bibliographic Records** | Item Records | Authority Records | Record Sets

Bibliographic Save Options

- ☒ Save all records as final
- ☐ Save all records as provisional
- ☐ Do not save any records
- ☒ Display in PAC
- ☐ Do not overlay
- ☐ Delete MARC Tags on incoming record
- ☐ System defined deletion tags
- ☐ Profile defined deletion tags

Record owner: QA-Plato 4.1 R2 (sys)

When Saving Bibliographic Records as Final

☐ Perform MARC 21 Validation

If validation errors are found:

- ☐ Save record as provisional
- ☐ Ignore errors; save record as final

☐ Perform Authority Control

If no matching heading is found:

- ☐ Automatically create new authority record; save bibliographic record as final
- ☐ Do not create authority record; save bibliographic record as final
- ☐ Do not create authority record; save bibliographic record as provisional

☒ Perform Duplicate Detection

- ☒ Use system defined duplicate detection rules
- ☐ Use profile defined duplicate detection rules

If a suspected duplicate is found:

- ☐ Save incoming record as provisional
- ☐ Save incoming record as final; do not replace database record
- ☐ Save incoming record as final; replace database record
- ☐ Save record with highest encoding level. If encoding levels match:
 - ☐ Save incoming record as final; replace database record
 - ☐ Reject incoming record
 - ☐ Save incoming record as provisional (ignore 'Keep MARC Tags')
 - ☒ Reject incoming record; add MARC retention tags to database record

☒ Keep MARC Tags

- ☐ System defined overlay retention tags
- ☒ Profile defined overlay retention tags

Tag	Indicator 1	Indicator 2	MARC Description
970	0,1,2,3,4,...	0,1,2,3,4,...	Polaris Defined Bulk Add Enhanced Data

Save Close Help

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 4.1R2*.

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.

Modify Import Profile - Authority Update Import

Profile Setup | Bibliographic Records | Item Records | **Authority Records** | Record Sets

Authority Save Options

☒ Save all records as final ☐ Save all records as provisional ☐ Do not save any records

When Saving Authority Records as Final

☒ **Perform MARC 21 Validation**

If validation errors are found:

☐ Save record as provisional

☒ Ignore errors; save record as final

☒ **Perform See Also From Reference Linking**

If no matching heading is found:

☐ Automatically create new see also reference; save authority record as final

☒ Do not create see also reference; save authority record as final

☐ Do not create see also reference; save authority record as provisional

☒ **Perform Duplicate Detection**

☒ Use system duplicate detection rules

☐ Use custom duplicate detection rules

If a suspected duplicate is found:

☐ Save incoming as provisional

☐ Save incoming as final; do not replace existing

☒ Merge duplicate records

Preferred cataloging source for:

QA-Plato 4.1 R2 (sys)

Save Close Help

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”](#) on page 318.

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.

Modify Import Profile - Enriched EDI Orders

Profile Setup | Bibliographic Records | **Item Records** | Authority Records | Record Sets

Bibliographic Save Options

- ☒ Save all records as final
- ☐ Save all records as provisional
- ☐ Do not save any records
- ☒ Display in PAC
- ☐ Do not overlay
- ☐ Delete MARC Tags on incoming record
- ☐ System defined deletion tags
- ☐ Profile defined deletion tags

Record owner: QA-Plato 4.1 R2 (sys)

When Saving Bibliographic Records as Final

- ☒ Perform MARC 21 Validation
 - If validation errors are found:
 - ☐ Save record as provisional
 - ☒ Ignore errors; save record as final
- ☒ Perform Authority Control
 - If no matching heading is found:
 - ☐ Automatically create new authority record; save bibliographic record as final
 - ☒ Do not create authority record; save bibliographic record as final
 - ☐ Do not create authority record; save bibliographic record as provisional

Perform Duplicate Detection

- ☒ Use system defined duplicate detection rules
- ☒ Use profile defined duplicate detection rules
- If a suspected duplicate is found:
 - ☐ Save incoming record as provisional
 - ☐ Save incoming record as final; do not replace database record
 - ☐ Save incoming record as final; replace database record
 - ☒ Save record with highest encoding level. If encoding levels match:
 - ☒ Save incoming record as final; replace database record
 - ☐ Reject incoming record
 - ☐ Save incoming record as provisional (ignore 'Keep MARC Tags')
 - ☐ Reject incoming record; add MARC retention tags to database record

Rules to select

- incoming 001/003 = existing 035 +a
- incoming 001 = existing 010 +a
- incoming 001 = existing 035 +a
- incoming 1xx +a = existing 1xx +a
- incoming 022 +a = existing 022 +a
- incoming 024 +a = existing 024 +a

Rules to apply (as unique groups)

- incoming 010 +a = existing 010 +a
- incoming 035 +a = existing 001
- incoming ISBN = existing ISBN
- incoming UPC = existing UPC

Keep MARC Tags

- ☒ Keep MARC Tags
- ☐ System defined overlay retention tags
- ☐ Profile defined overlay retention tags

Tag	Indicator 1	Indicator 2	MARC Description
949	0,1,2,3,4,...	0,1,2,3,4,...	

Save Close Help

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.

Modify Import Profile - Enriched EDI Orders

Profile Setup | Bibliographic Records | Item Records | Authority Records | Record Sets

When Saving Bibliographic Records as Final:

- ☒ Build item records
 - ☐ Using embedded holdings fields only
 - ☐ Using template/system default values only
 - ☐ Using all available holdings/item fields
- If a duplicate item record (barcode) is found:
 - ☐ Save duplicate item record as provisional
 - ☐ Do not save duplicate item record
- If no item record (barcode) is found:
 - ☐ Save item record as final
 - ☐ Save item record as provisional
 - ☐ Do not save item record
- ☐ Display in PAC (when not explicitly found)
- Item template (for fields that are missing):

Update items (enriched EDI)

If an update error is encountered:

- ☒ Save item record as provisional
- ☐ Do not save item record

Embedded holdings field/MARC subfield mapping

Holdings tag number: 949

Assigned Branch:	a	Loanable Outside System:	
Assigned Collection:	b	Material Type:	w
Barcode:	p	Name Of Piece:	
Call Number Prefix:	k	Non Circulating:	s
Call Number Suffix:	m	Non Public Note:	x
Circulation Status:		Owning Branch:	o
Classification Number:	h	Physical Condition:	q
Copy Number:	t	POL1-Segment ID:	e
Cutter Number:	i	Price:	0
Display In PAC:	f	Public Note:	z
Fine Code:	r	Renewal Limit:	y
Free Text Block:		Shelf Location:	c
Funding Source:		Shelving Scheme:	j
Holdable:	g	Statistical Code:	d
Library Assigned Block:		Temporary Shelf Location:	l
Loan Period Code:	u	Volume Number:	v

Save Close Help

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 4.1R2*.

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 4.1R2*.

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.

Embedded holdings field/MARC subfield mapping	
Holdings tag number:	852
Assigned Branch:	a
Assigned Collection:	b
Barcode:	p
Call Number Prefix:	k
Call Number Suffix:	m
Circulation Status:	
Classification Number:	h
Copy Number:	t
Cutter Number:	i
Display In PAC:	4
Fine Code:	r
Free Text Block:	
Funding Source:	1
Holdable:	5
Library Assigned Block:	
Loan Period Code:	u
Loanable Outside System:	7
Material Type:	w
Name Of Piece:	
Non Circulating:	
Non Public Note:	x
Owning Branch:	o
Physical Condition:	q
POL1-Segment ID:	
Price:	0
Public Note:	z
Renewal Limit:	y
Shelf Location:	c
Shelving Scheme:	j
Statistical Code:	d
Temporary Shelf Location:	l
Volume Number:	v

1-2-3

Copy a Polaris read-only import profile

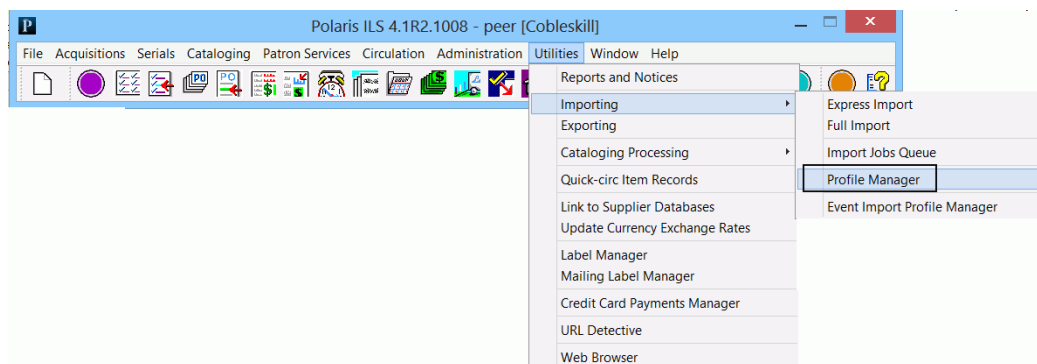
You can start with an existing Polaris read-only import profile and copy it. See [“Polaris Read-Only Import Profiles”](#) on page 62 for a list of the Polaris import profiles and their intended purpose. The advantage to starting with one of these existing profiles is that they are already set up to handle 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”](#) on page 285.

Tip:

You can print an import profile and review all the settings. See [“Print an import profile”](#) on page 83.

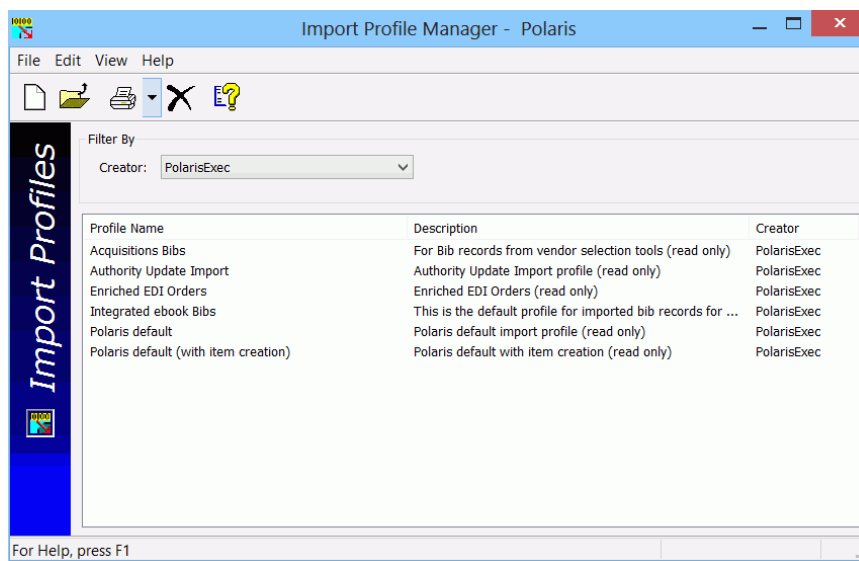
Follow these steps to create a new import profile from an existing Polaris read-only profile.

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



The Import Profile Manager appears.

2. In the **Creator** box, select **PolarisExec** to limit the view to only the Polaris read-only profiles.



3. 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.

4. Type a name for the profile in the **Name** box, and an optional description 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 72.
 - **Item Records** - See [“Set import options for item records”](#) on page 77.
 - **Authority Records** - See [“Set import options for authority records”](#) on page 80.
 - **Record Sets** - See [“Set import options for record sets”](#) on page 82.
8. When you have finished setting up the relevant import options, click **Save**, and click **Close** to close the saved profile.

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**.

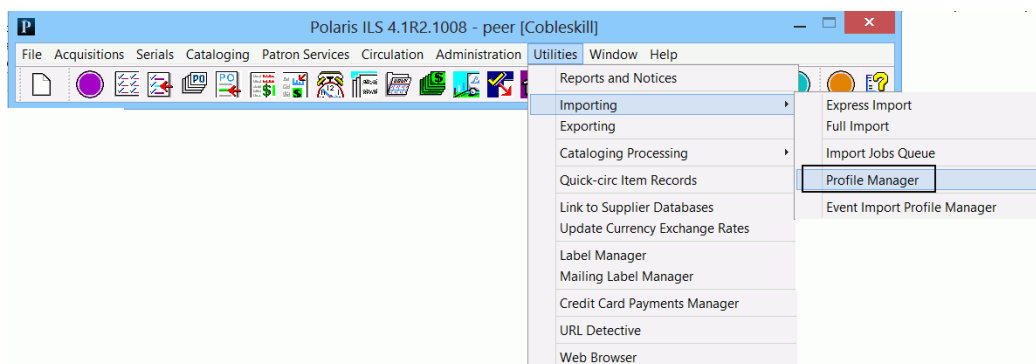
1-2-3

Create a new import profile

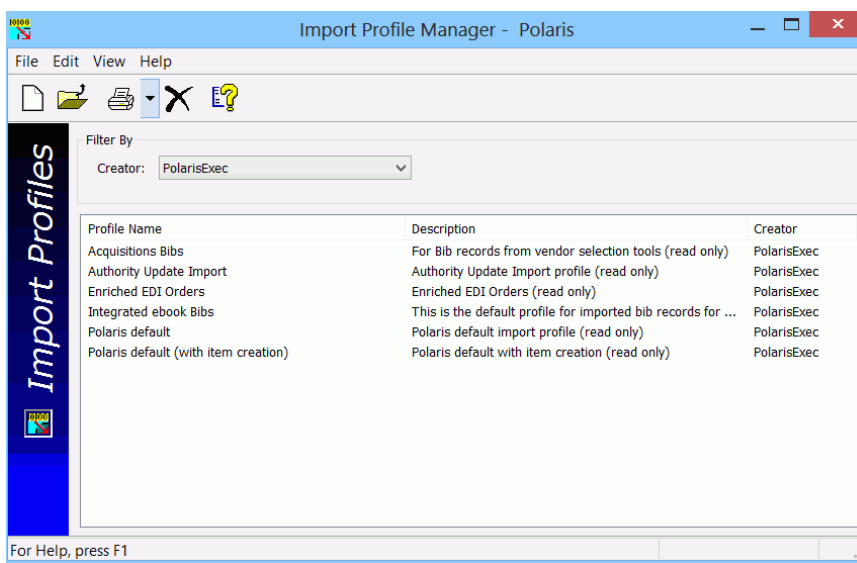
Although it is preferable to start with an existing Polaris read-only import profile and copy it, you can create your own import profiles and set all the options on each tab of the Import Profile window.

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.

The screenshot shows the 'Create Import Profile' window. The 'Profile Setup' tab is selected. The 'Name' field is empty. The 'Creator' dropdown is set to 'peer'. The 'Description' field is empty. The 'Source file name' field is empty, and the 'Browse...' button is visible. The 'Vendor account' dropdown is set to '(None)'. The 'Save', 'Close', and 'Help' buttons are at the bottom right.

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 or MARXML 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.

Note:

The **Vendor account** is used only when you are setting up an import profile for an ebook vendor. See [“Importing Integrated Ebook Bibs”](#) on page 212.

7. Select the following tabs and set the import options:
 - **Bibliographic Records** - See [“Set import options for bibliographic records”](#) on page 72.
 - **Item Records** - See [“Set import options for item records”](#) on page 77.
 - **Authority Records** - See [“Set import options for authority records”](#) on page 80.
 - **Record Sets** - See [“Set import options for record sets”](#) on page 82.
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.

1-2-3

Set import options for bibliographic records

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

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

The Bibliographic Records tabbed page appears.

Note:

To create item records from embedded holdings when importing bibliographic records, see “[Set import options for item records](#)” on page 77.

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.

5. To protect all incoming records that are saved to the database so that they cannot be overlaid in future processing, select the **Do not overlay** box. All other import processing defined in the import profile is performed first, and only records that are saved to the database are flagged with the **Do not overlay** check box that prevents the records from being overlaid.
 6. To delete specific MARC tags from incoming records as they are saved to the database, select the **Delete MARC Tags on incoming records** check box, and select one of the following options:
 - **System defined deletion tags** - Deletes the tags that are defined in the Bibliographic Tags Retain/Delete policy table in Polaris Administration.
 - **Profile defined deletion tags** - Deletes tags that are defined in the import profile.
 7. If you select **Profile defined deletion tags**, do the following steps to specify the tags you want to delete:
 - a) Click  to add a deletion tag.

The Delete Tags dialog box appears.
 - b) In the **Tag** box, type the tag you want to delete from the incoming record.
 - c) If you want all indicator values included, leave all the values in the **Indicator 1** and **Indicator 2** boxes highlighted.
- Note:**
Click a highlighted indicator value to remove it.
- d) Click **OK** to add the tag and indicator values to the list of tags to be deleted.
8. 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.

Tip:

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

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.

Records in MARC XML format are validated using the **MARC validation: Bibliographic** profile in Polaris Administration. In addition, the XML structure of the file is checked to ensure it conforms to the MARC XML standard. If the file does not conform to the standard, the records are not imported, and an error appears in the import report.

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.

9. 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.
10. 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”](#) on page 307.
 - **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.
11. 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”](#) on page 310.
12. 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.

Tip:

The import report indicates if any database records that would have been replaced are protected from being overlaid because they are flagged with a **Do not overlay** check box.

Tip:

For information on how records get overlaid based on encoding levels, see [“Bibliographic Overlay Based on Encoding Level”](#) on page 101.

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 206.

- **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**.
- **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.
- **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**.

- 13.** 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 82.

- **System defined overlay retention tags** - Retains the tags that are defined in the Bibliographic Tags to Retain/Delete policy table in Polaris Administration policy tables. See [“Specify tags to retain from overlaid bibs”](#) on page 314.
- **Profile defined overlay retention tags** - Retains tags that are defined in the profile.

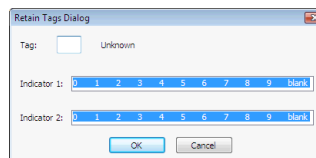
Note:

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.

- 14.** 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) If you want all indicator values included, leave all the values in the **Indicator 1** and **Indicator 2** boxes highlighted.

Note:

Click a highlighted indicator value to remove it.

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

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

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

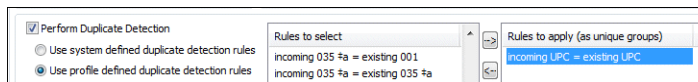
Setting Profile-defined Duplicate Detection Rules

Only one rule needs to be met to identify the records as duplicates.

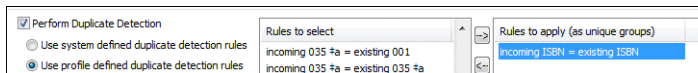
Duplicate Detection on the 024 (Other standard identifier)

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:

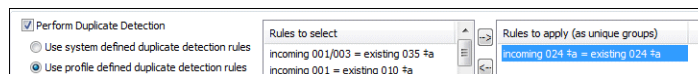
- If the first indicator is 1 - Universal Product Code, select the **incoming UPC = existing UPC** rule.



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



- If the first indicator 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.

Tip:

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 68.

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 65.

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 99.

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 99.
- **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 Creation/Updates of Items”](#) on page 97.
- **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”](#) on page 343.
- **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”](#) on page 344.
- **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 62.
- **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”](#) on page 335.

1-2-3

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.

The screenshot shows the 'Create Import Profile' window with the 'Authority Records' tab selected. The window has a title bar with a close button (X). Below the title bar are tabs: 'Profile Setup', 'Bibliographic Records', 'Item Records', 'Authority Records', and 'Record Sets'. The 'Authority Records' tab is active.

Under 'Authority Save Options', there are three radio buttons:

- ☒ Save all records as final
- ☐ Save all records as provisional
- ☐ Do not save any records

Below this is the 'When Saving Authority Records as Final' section, which contains two main areas:

- Perform MARC 21 Validation:**
 - ☒ Perform MARC 21 Validation
 - If validation errors are found:
 - ☒ Save record as provisional
 - ☐ Ignore errors; save record as final
- Perform See Also From Reference Linking:**
 - ☐ Perform See Also From Reference Linking
 - If no matching heading is found:
 - ☐ Automatically create new see also reference; save authority record as final
 - ☐ Do not create see also reference; save authority record as final
 - ☐ Do not create see also reference; save authority record as provisional

On the right side of the 'When Saving Authority Records as Final' section:

- Perform Duplicate Detection:**
 - ☒ Perform Duplicate Detection
 - ☒ Use system duplicate detection rules
 - ☐ Use custom duplicate detection rules
- If a suspected duplicate is found:**
 - ☒ Save incoming as provisional
 - ☐ Save incoming as final; do not replace existing
 - ☐ Merge duplicate records
- Preferred cataloging source for:** (A dropdown menu is shown below this label.)

At the bottom right of the window are three buttons: 'Save', 'Close', and 'Help'.

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”](#) on page 312
- [“Automatic Processes During Import”](#) on page 96

1-2-3

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.

The screenshot shows the 'Create Import Profile' window with the 'Record Sets' tab selected. The window is divided into two main columns: 'Bibliographic Record Set' and 'Authority Record Set'. Each column contains three sections: 'Final', 'Provisional', and 'Deleted'. Each section has a 'Save to new record set' checkbox, a 'Save to existing record set' checkbox, a 'Name' text field, a 'Find' button, and a 'Replace' radio button. The 'Owner' field is a dropdown menu. At the bottom of the window are 'Save', 'Close', and 'Help' buttons.

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 4.1R2*. 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.

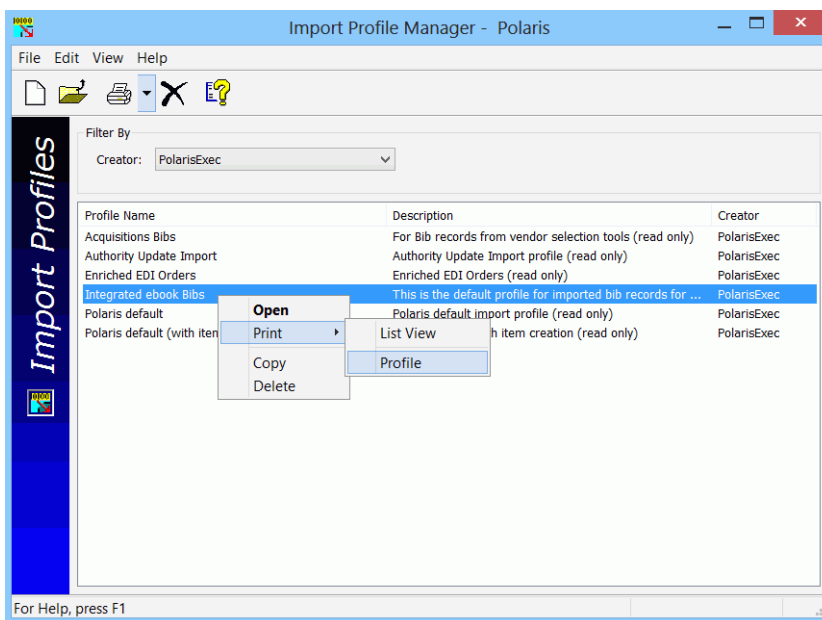
3. Click **Save** to save the profile, and click **Close** to close it or click another tab to make other settings.

1-2-3

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 date:	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):	Acquisitions:BibFinal (QA-Plato 4.1 Cluster Test System)		
New or existing:	New		
Bibliographic provisional record set:			
Name (owner):	Acquisitions:BibProvisional (QA-Plato 4.1 Cluster Test System)		
New or existing:	New		

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

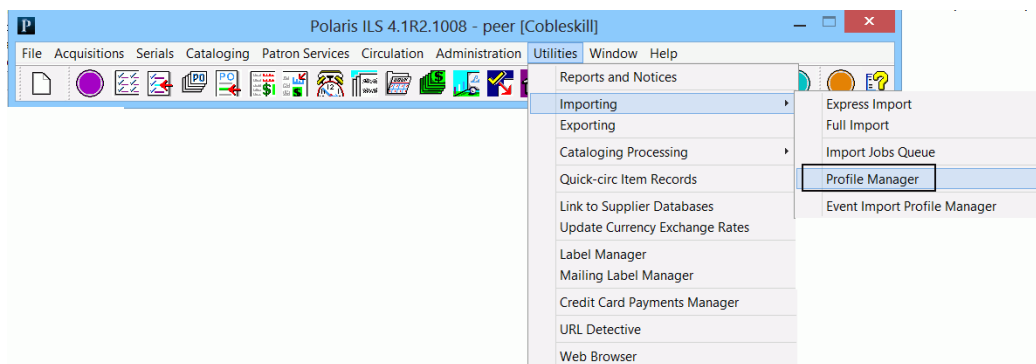
1-2-3

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 68.

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

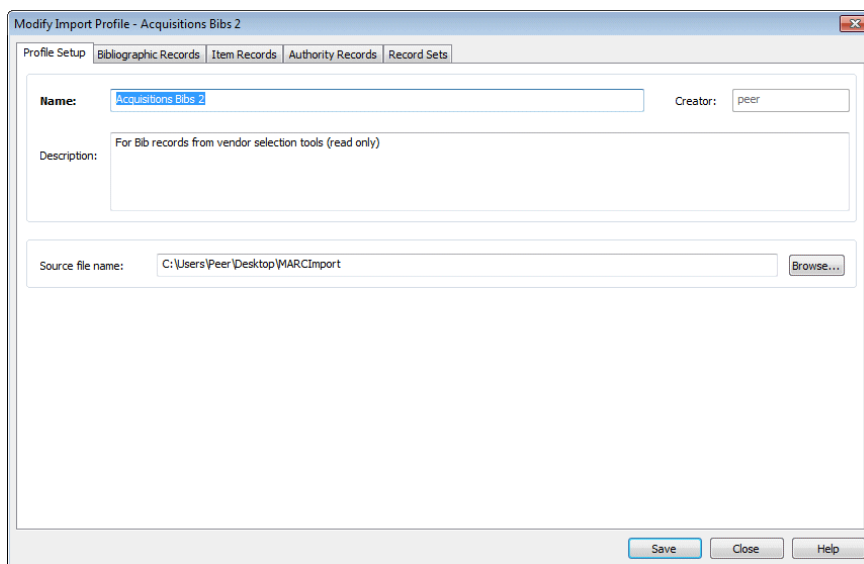
1. Select **Utilities, Importing, Profile Manager** from the Polaris Shortcut Bar.



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 72
 - [“Set import options for item records”](#) on page 77
 - [“Set import options for authority records”](#) on page 80
 - [“Set import options for record sets”](#) on page 82
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 83.

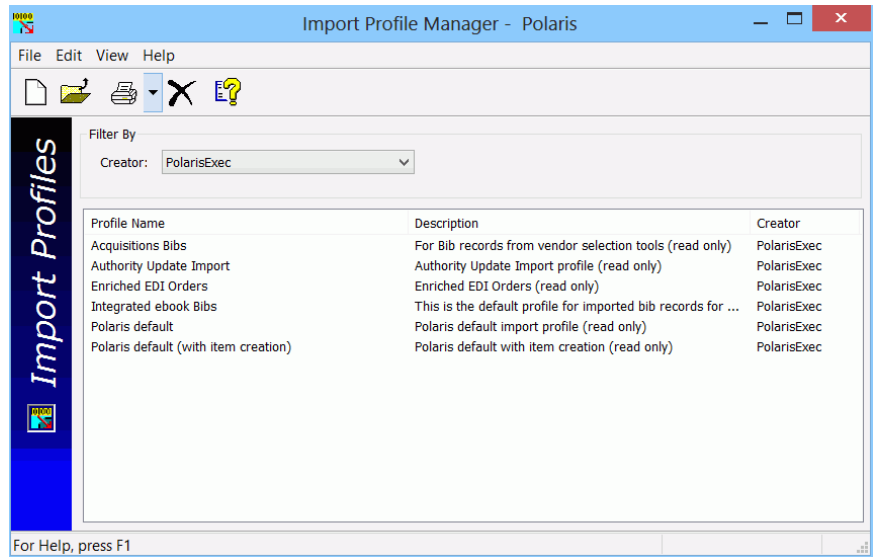
9. Click **Close** to close the profile after you have saved it.

1-2-3

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”](#) on page 285.

Before you can import MARC or MARCXML 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.

See the following topics:

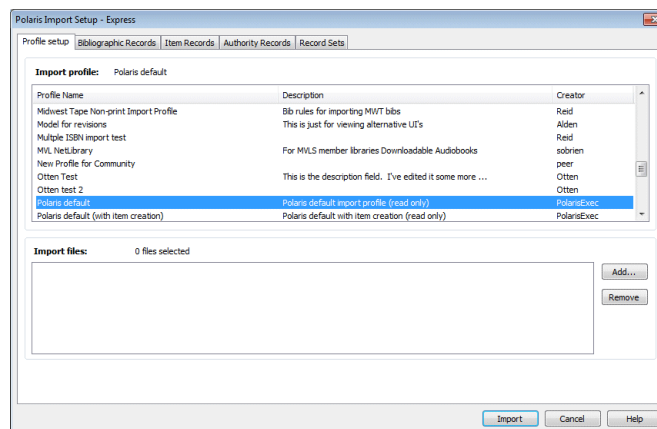
- [“Use Express Import to import records”](#) on page 88
- [“Use Full Import to import records”](#) on page 89

1-2-3

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.



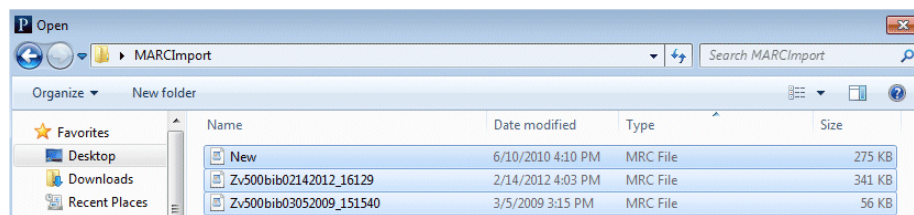
Tip:

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

Tip:

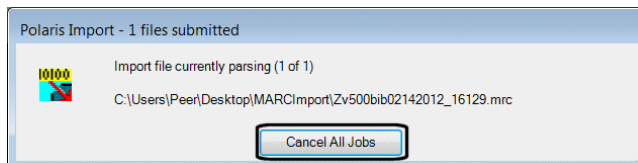
If the profile was saved with a specific import file name, the file is selected automatically (if it exists). If the profile was saved with a directory location for the source files, when you click **Add**, the window opens to that directory.

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.



4. Select the MARC or MARCXML 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 82.
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 92.
- [“Print import reports from the Import Jobs Queue”](#) on page 94

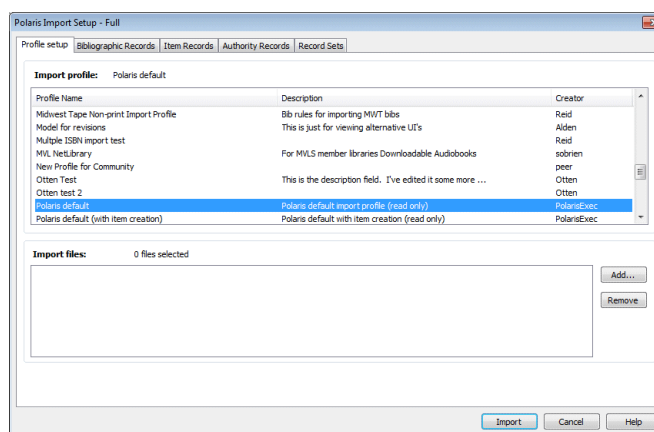
1-2-3

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 72
 - [“Set import options for item records”](#) on page 77
 - [“Set import options for authority records”](#) on page 80
 - [“Set import options for record sets”](#) on page 82

Tip:

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

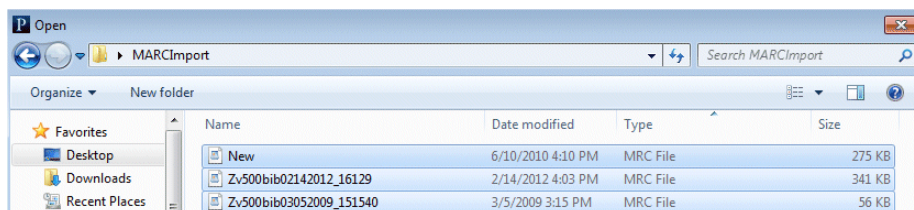
Tip:

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

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.

3. To use a profile, select it from the list.
4. Select the profile from the list.
5. Click the **Add** button to browse to the import file(s) on the computer desktop or network.



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

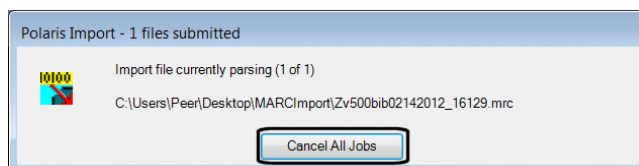
Note:

You can import MARC and MARCXML files in the same import job.

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 92.
- [“Print import reports from the Import Jobs Queue”](#) on page 94

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

See the following topics:

- [“View import jobs in the queue”](#) on page 92
- [“Stop an import job from the Import Jobs Queue”](#) on page 93
- [“Delete an import job from the Import Jobs Queue”](#) on page 93
- [“Print import reports from the Import Jobs Queue”](#) on page 94

1-2-3

View import jobs in the queue

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

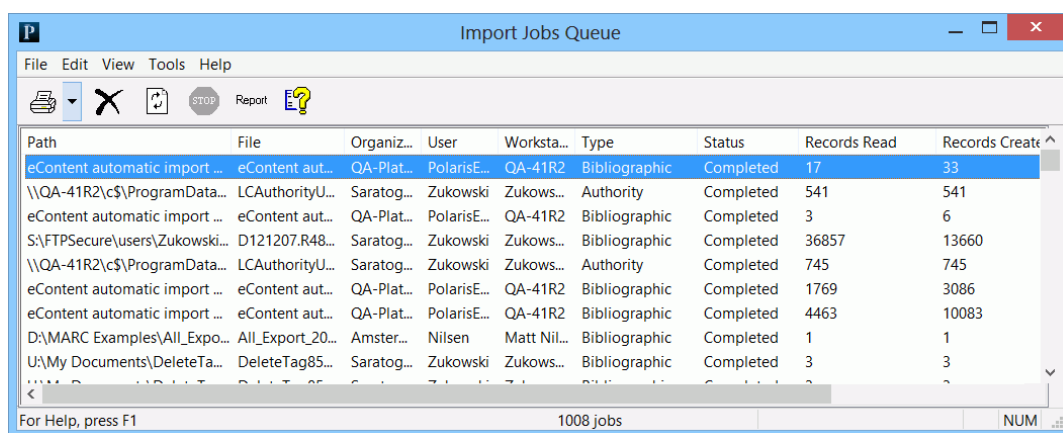
1. Select **Utilities, Importing, Import Jobs Queue** to open the Import Jobs Queue window.

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. Automatic API-driven imports are also listed. For more information, see [“Cataloging Ebooks”](#) on page 211.

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	Organiz...	User	Worksta...	Type	Status	Records Read	Records Create
eContent automatic import ...	eContent aut...	QA-Plat...	PolarisE...	QA-41R2	Bibliographic	Completed	17	33
\\QA-41R2\c\$\ProgramData...	LCAuthorityU...	Saratog...	Zukowski	Zukows...	Authority	Completed	541	541
eContent automatic import ...	eContent aut...	QA-Plat...	PolarisE...	QA-41R2	Bibliographic	Completed	3	6
S:\FTPSecure\users\Zukowski...	D121207.R48...	Saratog...	Zukowski	Zukows...	Bibliographic	Completed	36857	13660
\\QA-41R2\c\$\ProgramData...	LCAuthorityU...	Saratog...	Zukowski	Zukows...	Authority	Completed	745	745
eContent automatic import ...	eContent aut...	QA-Plat...	PolarisE...	QA-41R2	Bibliographic	Completed	1769	3086
eContent automatic import ...	eContent aut...	QA-Plat...	PolarisE...	QA-41R2	Bibliographic	Completed	4463	10083
D:\MARC Examples\All_Exp...	All_Export_20...	Amster...	Nilsen	Matt Nil...	Bibliographic	Completed	1	1
U:\My Documents\DeleteTa...	DeleteTag85...	Saratog...	Zukowski	Zukows...	Bibliographic	Completed	3	3

For Help, press F1

1008 jobs

NUM

3. Click  or press **F5** periodically to refresh the queue and see the most recent import jobs.

Related Information

- [“Delete an import job from the Import Jobs Queue”](#) on page 93
- [“Print import reports from the Import Jobs Queue”](#) on page 94
- [“Importing Integrated Ebook Bibs”](#) on page 212

1-2-3

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 need the permission **Manage import jobs for this organization: Allow** for the system or 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 for this organization: Allow** permission at the system level.

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.

1-2-3

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.

1-2-3

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 [“Outreach Services Reports”](#) on page 136.

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.

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.

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.

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\ \Downloads\DeleteTagTest.mrc		
Import type:	Full	Source:	MARC File
Submitted date:	3/21/2013 1:37:48 PM		Scheduled date:
Profile used:	Polaris default		
Branch:	Saratoga Springs Public Library		
User:	User:	Stopped by user:	No
Workstation:		Stopped by system:	No
Vendor account:	(None)		
Bibliographic save option:	Save as final		
Record owner:	QA-Plato 4.1 R2	Display in PAC:	Yes
Delete data:	Yes	Use system deletion rules:	Yes
		Do Not Overlay:	No
MARC validation:	Perform validation. If errors are found, ignore and save record as final.		
Authority control:	No authority control		
Duplicate detection:	Perform duplicate detection. If errors are found, ignore and save record as final.		
Use system duplicate rules:	Yes		
Deletion tag	Indicator one	Indicator two	
19	blank,0,1,2,3,4,5,6,7,8,9	blank,0,1,2,3,4,5,6,7,8,9	
29	blank,0,1,2,3,4,5,6,7,8,9	blank,0,1,2,3,4,5,6,7,8,9	
938	blank,0,1,2,3,4,5,6,7,8,9	blank,0,1,2,3,4,5,6,7,8,9	
948	blank,0,1,2,3,4,5,6,7,8,9	blank,0,1,2,3,4,5,6,7,8,9	
952	blank,0,1,2,3,4,5,6,7,8,9	blank,0,1,2,3,4,5,6,7,8,9	
994	blank,0,1,2,3,4,5,6,7,8,9	blank,0,1,2,3,4,5,6,7,8,9	

Following the import options, the report provides details for records that were imported, such as: MARC validation issues; duplicate detection and overlay; item records created; tags deleted from incoming records; tags retained from duplicate records; conflicts when the same tag is selected for deletion and retention; and resource entities created (for ebooks).

Import Report

Bibliographic record: 914999

Title: A catalogue of the pictures, sculptures, models, drawings, prints, &c. exhibited by the Society of Artists of Great Britain, at the Great Room in Spring-Garden, Charing-Cross, May the 9th, 1761. (Being the second year of their exhibition.)

Begin time: 3/21/2013 1:38:00 PM

Record status: Final

End time: 3/21/2013 1:38:01 PM

LDR status: c

Record set: DeleteTagTest1 - F (QA-Plato 4.1 R2)

Duplicate	Reason	Title

914888	Author/Title/Title/260 \$c	A catalogue of the pictures, sculptures, models, drawings, prints, &c. exhibited by the Society of Artists of Great Britain, at the Great Room in Spring-Garden, Charing-Cross, May the 9th, 1761. (Being the second year of their exhibition.)

914962	Rule group 2:Author/Title/Title/260 \$c	A catalogue of the pictures, sculptures, models, drawings, prints, &c. exhibited by the Society of Artists of Great Britain, at the Great Room in Spring-Garden, Charing-Cross, May the 9th, 1761. (Being the second year of their exhibition.)

Message(s)

Tag was deleted from incoming record: 938	#aKirtas Technologies, Inc.#bKRTS#n529450
Tag was deleted from incoming record: 948	#hNO HOLDINGS IN GBR - 10 OTHER HOLDINGS
Tag was deleted from incoming record: 952	#a4988910#zYUS#bYALE UNIV LIBR#hFull OCLC member#iLCC#u2012220
Tag was deleted from incoming record: 952	#a229258101#zHUV#bHUNTINGTON LIBR ART & BOTANICAL GARDEN#hFull#u20100729
Tag was deleted from incoming record: 952	#a612564927#zHHG#bHARVARD UNIV, HOUGHTON LIBR#hLess-than-full batch#u20100919
Tag was deleted from incoming record: 952	#a702795849#zYUS#bYALE UNIV LIBR#hFull#u20120229
Tag was deleted from incoming record: 994	#aZ0#bGBR

Bibliographic record: 915000

Title: A garden for all seasons : choosing the best plants for wonderful spring, summer, autumn and winter displays

Begin time: 3/21/2013 1:38:01 PM

Record status: Final

End time: 3/21/2013 1:38:02 PM

LDR status: c

Record set: DeleteTagTest1 - F (QA-Plato 4.1 R2)

Duplicate	Reason	Title

914889	ISBN:Author/Title/Title/260 \$c:Just Title and	A garden for all seasons : choosing the best plants for wonderful spring, summer, autumn and winter displays

The last section lists the import statistics.

Import Report			
IMPORT STATISTICS			
Begin time:	3/27/2013 10:48:00 AM	End time:	3/27/2013 10:48:40 AM
Bibliographic records:			
Final:	12	Provisional:	9
Deleted:	0	Rejected:	0
Updated records:	0	Resource entities created on new records:	0
		Resource entities created on updated records:	0
Authority records:			
Final:	0	Provisional:	0
Deleted:	0	Rejected:	0
Remote authority control generated:	0	System generated:	30
Item records:			
Final:	0	Provisional:	0
Updated:	0	Rejected:	0
Total records read from file:	21		
Total records created:	51		

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. This section covers the automatic processing you can choose to initiate in the import profile settings.

See the following topics:

- [“MARC Records Validated”](#) on page 96
- [“Authority Control Performed”](#) on page 96
- [“Specific MARC Tags Removed from Incoming Bibs”](#) on page 97
- [“Bib Tags Marked to Prevent Creation/Updates of Items”](#) on page 97
- [“Item Records Created from Embedded Holdings Tags”](#) on page 99
- [“Bibliographic Overlay Based on Encoding Level”](#) on page 101
- [“Specific MARC Tags Removed from Incoming Bibs”](#) on page 97
- [“Authority Record Overlay Based on Cataloging Source”](#) on page 110

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 indicators 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”](#) on page 297.

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. See [“Set import options for authority records”](#) on page 80.

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 Deduplication** or **Authority Deduplication**. For more information, see [“Change bibliographic or authority deduplication tables”](#) on page 308. You can also select the option **Use profile defined duplicate detection rules** in the import profile and select the rules to apply.

Specific MARC Tags Removed from Incoming Bibs

If the import profile is set up to automatically remove tags from incoming bibliographic records, the tags are removed from the records before they are saved in the Polaris database. See [“Set import options for bibliographic records”](#) on page 72.

Incoming Bibs Protected from Being Overlaid

If the import profile is set up to check the **Do not overlay** box on the incoming records, they are saved as protected records that cannot be overlaid. See [“Set import options for bibliographic records”](#) on page 72.

Bib Tags Marked to Prevent Creation/Updates of Items

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”](#) on page 342.

Automatic Import for Integrated Ebooks

The API-driven import process automatically imports the records when ebooks are purchased from 3M or another integrated ebook vendor. The process uses settings in an import profiles specifically set up for automatic imports. This profile, or a copy of this profile is selected in the Vendor Account workform. For more information, see [“Copy the Integrated Ebook Bibs import profile”](#) on page 355.

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.

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 on 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
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

<i>Polaris Item Record Field (Bold type = Required)</i>	<i>Subfield</i>	<i>Required</i>	<i>Data Entry Conventions</i>
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	ID or description. 80 characters max
Temporary Shelf Location	\$l	No	25 characters
Vol (volume)	\$v	No	60 characters max.

Duplicate Records Overlaid

If the import profile is set to perform duplicate detection, it can also specify how duplicate records are handled. For information regarding the process that compares the encoding level of duplicate bibliographic records, see [“Bibliographic Overlay Based on Encoding Level”](#) on page 101. For information regarding the process that compares the cataloging source of duplicate authority records, see [“Authority Record Overlay Based on Cataloging Source”](#) on page 110.

Tags Retained from Duplicate Records

The Bibliographic Tags to Retain/Delete policy table is used to identify tags in bibliographic records to retain from duplicate records that are overlaid. The Authority Overlay Retention policy table is used to identify tags to retain from duplicate records that are overlaid.

Note:

The Bibliographic Tags to Retain/Delete policy table can also be used to identify tags to delete from incoming records whether they are duplicates or not.

For more information on these tables, see [“Specify tags to retain from overlaid bibs”](#) on page 314. 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 72.

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.

Note:

Double-click on the Leader in the MARC21 view of the Bibliographic Record workflow 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

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.

<i>Incoming LDR/17 Value</i>	<i>Can Overlay</i>	<i>Cannot Overlay</i>
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

<i>Incoming LDR/17 Value</i>	<i>Can Overlay</i>	<i>Cannot Overlay</i>
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

<i>Incoming LDR/17 Value</i>	<i>Can Overlay</i>	<i>Cannot Overlay</i>
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

<i>Incoming LDR/17 Value</i>	<i>Can Overlay</i>	<i>Cannot Overlay</i>
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

<i>Incoming LDR/17 Value</i>	<i>Can Overlay</i>	<i>Cannot Overlay</i>
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

<i>Incoming LDR/17 Value</i>	<i>Can Overlay</i>	<i>Cannot Overlay</i>
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

<i>Incoming LDR/17 Value</i>	<i>Can Overlay</i>	<i>Cannot Overlay</i>
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

<i>Incoming LDR/17 Value</i>	<i>Can Overlay</i>	<i>Cannot Overlay</i>
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

Authority Record Overlay 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”](#) on page 318.

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.

<i>Preferred Cataloging Source Table Entries for Importing Library</i>	<i>Incoming Record Tag 040 \$a</i>	<i>Import Processing Status</i>
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.

<i>Incoming Record Original Cataloging Agency Preference</i>	<i>Processing Done for Incoming Record</i>
Higher than the agency for the existing record	Processed according to value in record status (Leader/05)

<i>Incoming Record Original Cataloging Agency Preference</i>	<i>Processing Done for Incoming Record</i>
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.

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”](#) on page 113
- [“Checking MARC Format”](#) on page 122
- [“Checking for Duplicate Records”](#) on page 124

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**.

See the following topics:

- [“Authority Control for Local Headings”](#) on page 114
- [“ZMARC Remote Authority Control”](#) on page 115
- [“List and resolve unlinked headings”](#) on page 115
- [“Create links from authority records to other records”](#) on page 118
- [“Edit authority records and update linked records”](#) on page 119
- [“Check the logs of the new or updated authority links”](#) on page 121

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.

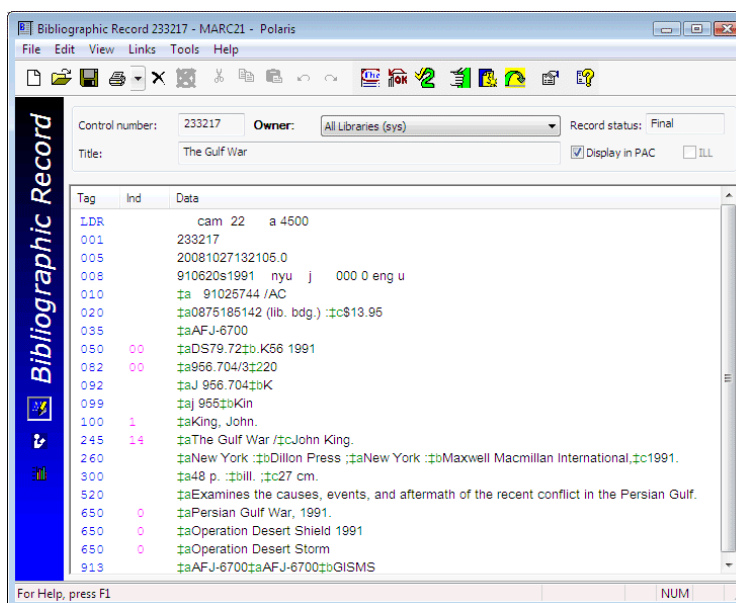
You enable remote automatic authority control through the **Remote automatic authority control** Cataloging profile in Polaris Administration. See [“Managing Authority Control”](#) on page 326.

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.

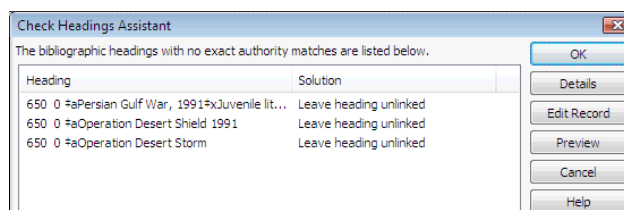
Click  to check *see also* references in the authority record.

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:

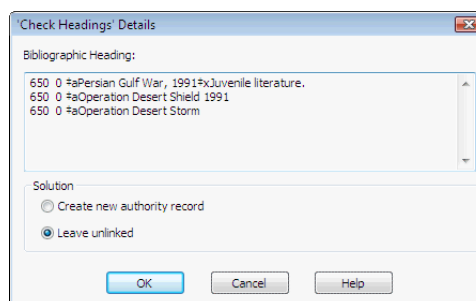
If the headings are linked, the following message appears: **No heading problems were found.** Click **OK** to acknowledge the message and skip the rest of these steps.

- 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.



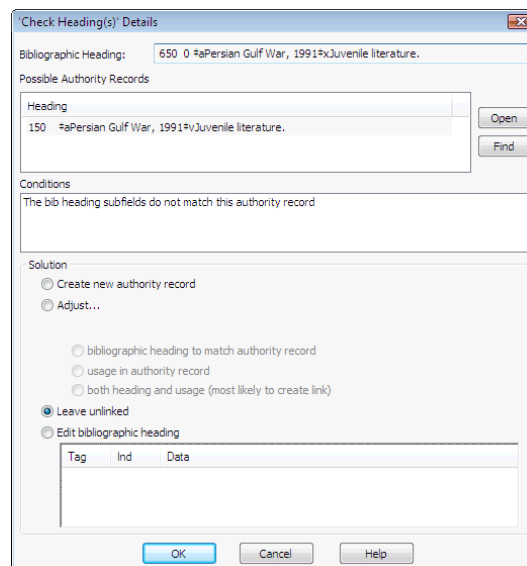
3. Select a single heading or multiple headings to edit:

- 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.

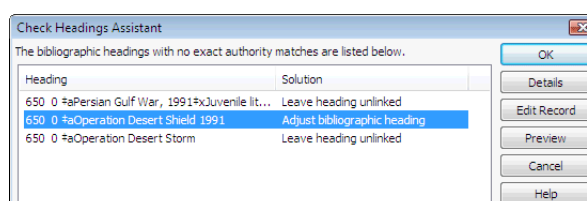


Select **Create new authority record** or **Leave unlinked**, and click **OK**.

- 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 unlink**.
 - **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

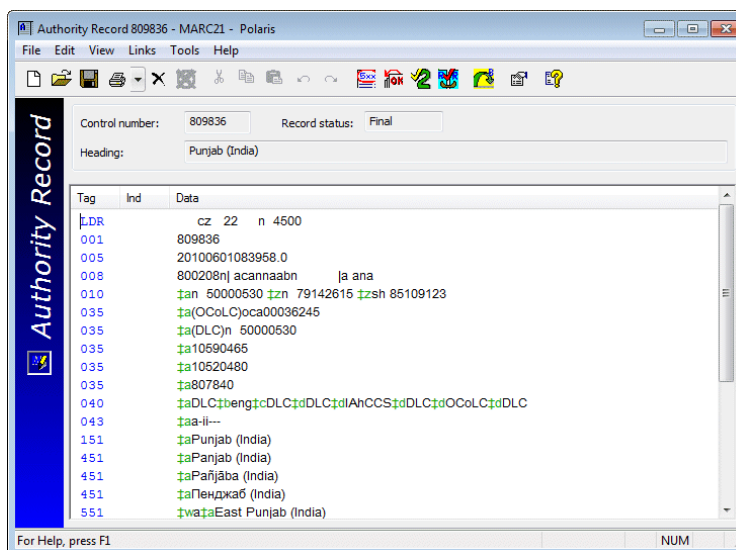
Authority Reports - You can run a report to identify authority records where a *See* reference (4xx field) in one record matches a heading (1xx field) in another record in the database. See "[Authority Reports](#)" in the *Polaris Basics Guide 4.1R2*.

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.

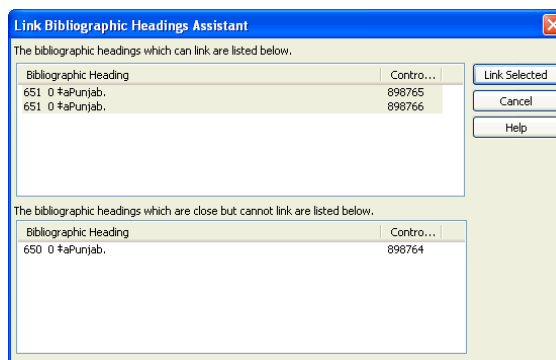
1. Open the Authority Record workform.



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 121.
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 121.

1-2-3

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**

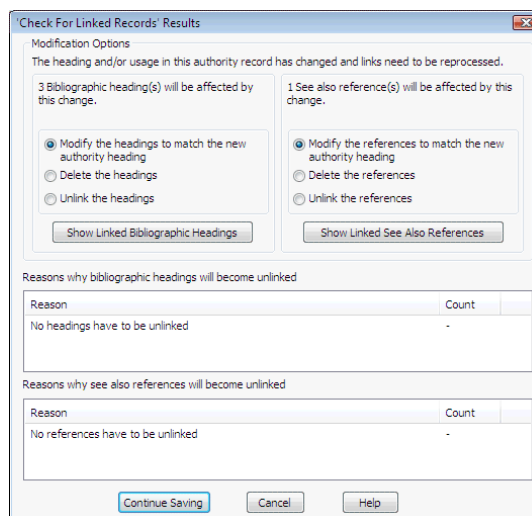
Records or click .

1. Open the Authority Record workflow.
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.

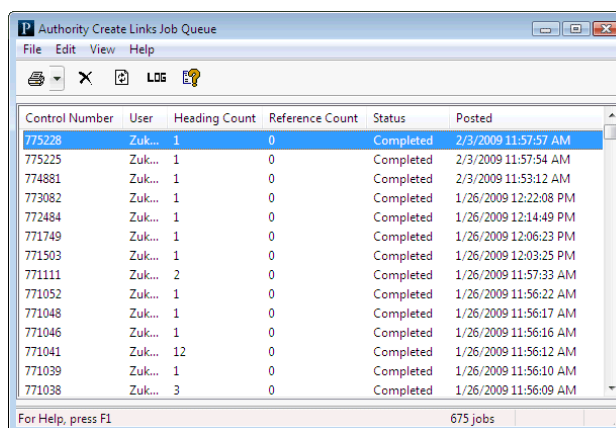
1-2-3

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.



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 .

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 zaMiller, 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”](#) on page 297 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.

See the following topics:

[“Check MARC format from a workform”](#) on page 122

[“Change invalid fields”](#) on page 123

1-2-3

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.

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

Note:

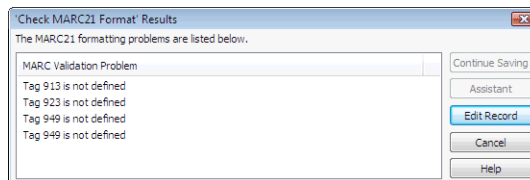
If the content designators are valid, a **No MARC21 formatting problems were found** message box appears. Click **OK** to acknowledge the message and skip the rest of this procedure.

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



Tip:

Click to check the format.



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 123.
 - 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.

1-2-3

Change invalid fields

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 workflow.

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 workflow.
 - 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.

Tip:



Click to check the format.

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”](#) on page 308.
- **Bibliographic Tags to Retain/Delete policy table**
When a record is overlaid, the 035 tag of the replaced record is saved in the new record as well as any tags specified for retention in the Bibliographic Tags to Retain/Delete policy table. See [“Specify tags to retain from overlaid bibs”](#) on page 314.
- **Authority Overlay Retention policy table**
When an authority record is overlaid, the 035 tag of the replaced record is saved in the new record as well as any tags specified for retention in the Authority Overlay Retention policy table. See [“Specify tags to retain from overlaid authority records”](#) on page 316.
- **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”](#) on page 320.
- **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”](#) on page 321.
- **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”](#) on page 313.

Note:

For information on the duplicate detection process during import, see [“Set import options for bibliographic records”](#) on page 72.

See the following topics:

- [“Detect duplicate or replace bibliographic records”](#) on page 125
- [“Detect duplicate authority records”](#) on page 127

1-2-3

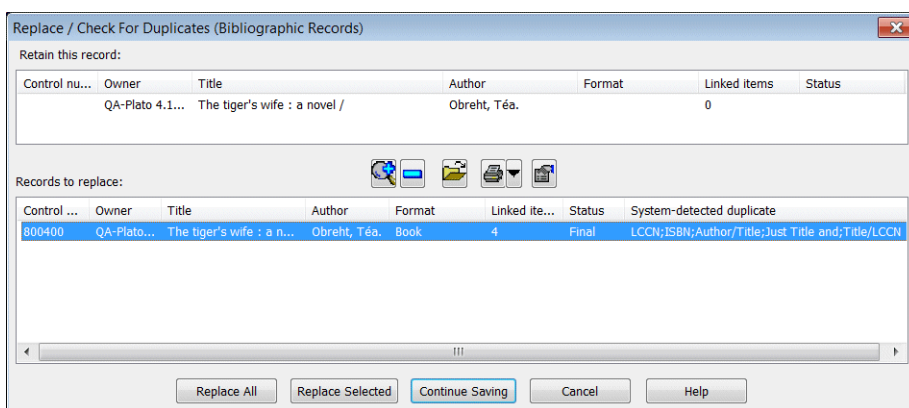
Detect duplicate or replace bibliographic records

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.

If you attempt to replace a protected bibliographic record (the **Do not overlay** box is checked), the protected record that cannot be replaced appears in red in the **Records to replace** list. If you want to continue replacing the record, you can open it in the Bibliographic Record workform and uncheck the **Do not overlay** box, and save the record. Then, refresh the Replace/Check for Duplicates (Bibliographic Records) dialog box. The record is displayed in black text.

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**.
 - **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 a bibliographic record has a status of Deleted, it cannot be added to the list of records to replace.

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 126 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.
- 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.
- **Setting deduplication rules** - The rules that detect duplicates are applied using rules groups in the Bibliographic Deduplication database table or the Authority Deduplication table.

1-2-3

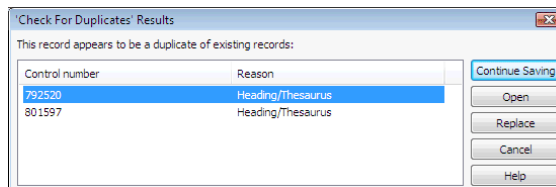
Detect duplicate authority records

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:

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**.

- 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.

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”](#) on page 308.

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 4.1R2*.

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 205.

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 142.

Note:

To specify how hold requests operate in your library, see [“Defining Hold Processing Options”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.

This unit covers the following topics:

- [“Creating Item Records”](#) on page 130
- [“Changing Item Records”](#) on page 150
- [“Printing Cataloging Labels”](#) on page 153

Creating Item Records

Before you can create an item record, a bibliographic record for the title must exist in the database. In addition to the methods covered in this section, you can also create item records automatically in the following ways:

- 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 77.
- Release a purchase order and create on-order items. See [“Release a purchase order”](#) in the *Polaris Acquisitions Guide 4.1R2*.
- 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 4.1R2*.
- Create ebook item records - See [“Creating Ebook Items”](#) on page 214

Note:

You can specify the default shelving scheme to use for all new item records for your organization. See [“Setting Item Copy & Save Options”](#) on page 335.

See the following topics:

- [“Create multiple item records for a single title”](#) on page 131
- [“Create a single new item record manually”](#) on page 136
- [“Enter basic information for an item record”](#) on page 137
- [“Enter circulation information for an item record”](#) on page 138
- [“Enter notes and blocks for an item record”](#) on page 140
- [“Enter acquisitions information for an item record”](#) on page 141
- [“Edit item information for course reserves”](#) on page 142
- [“View item’s circulation history and edit float setting”](#) on page 144
- [“Create a subordinate \(child\) item record”](#) on page 147
- [“Link subordinate items to different records”](#) on page 148
- [“View other item records linked to the same bib”](#) on page 149
- [“View the linked bib from an item record”](#) on page 149

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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 77.

Tip:

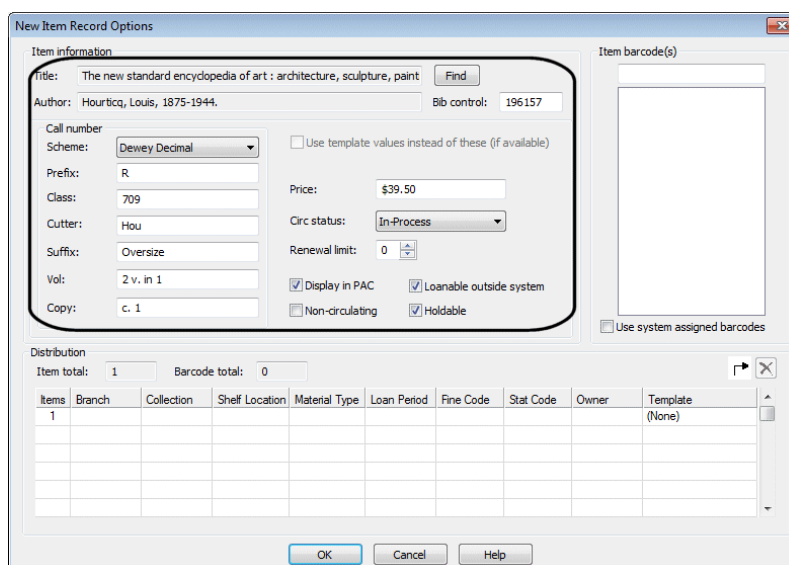
If you are creating all items using the same template, you can select it on the New dialog box. If you are creating items using different templates, do not select a template on the New dialog box. Click **OK** without selecting a template and go to the New Item Record Options dialog box where you can 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 workflow. Then, select **Tools, Create Item Record**, or click .
- From the Item Record workflow, 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.
- 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 4.1R2*.

- 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.

Tip:

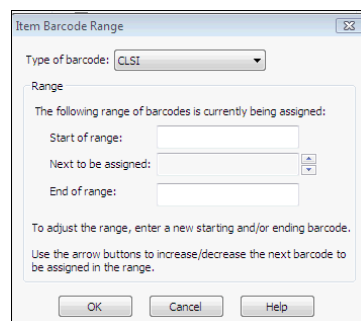
You can set the **Default shelving scheme for new item records** Cataloging profile in Polaris Administration to set the default shelving scheme in the New Item Record Options dialog box. See [“Specify the default shelving scheme for item/holdings records”](#) on page 336.

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:



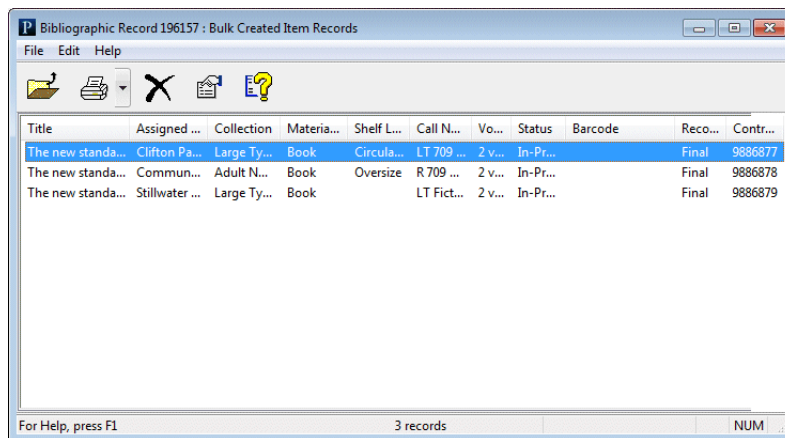
The dialog box titled "Item Barcode Range" contains the following elements:

- Type of barcode:** A dropdown menu currently showing "CLSI".
- Range:** A section with the text "The following range of barcodes is currently being assigned:" followed by three input fields:
 - Start of range:** An empty text box.
 - Next to be assigned:** An empty text box with up and down arrow buttons to its right.
 - End of range:** An empty text box.
- Instructions:** "To adjust the range, enter a new starting and/or ending barcode. Use the arrow buttons to increase/decrease the next barcode to be assigned in the range."
- Buttons:** "OK", "Cancel", and "Help" buttons at the bottom.

- 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 153.

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

The item record opens in the Item Record workflow.

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.

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 workflow.

16. Edit the item record, if necessary, and save it.

17. Select **View, Next Record** from the Item Record workflow to open the next record in the Item Record workflow.

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**.

1-2-3

Create a single new item record manually

Follow these steps to create a new item record manually.

1. Open the Item Record workflow.

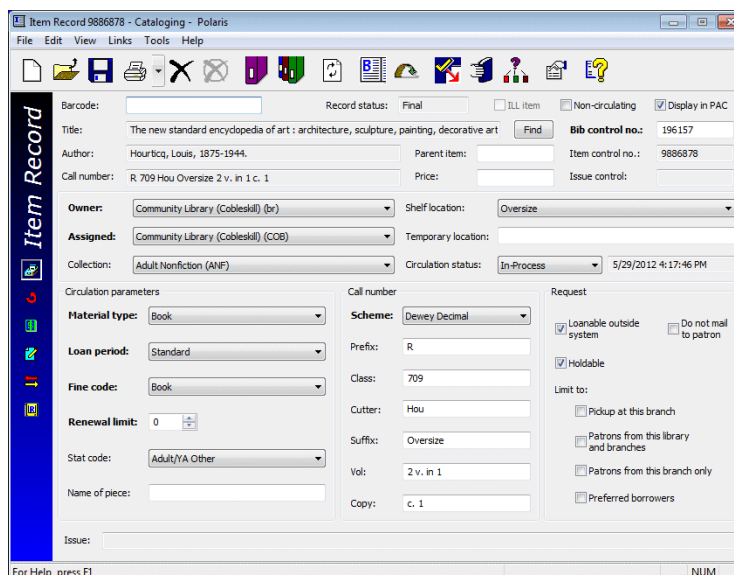
2. Select **File, New**, press **CTRL+N**, or click .

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 workflow, Cataloging view appears.



The screenshot shows the 'Item Record' workflow in the Polaris system. The window title is 'Item Record 9886878 - Cataloging - Polaris'. The interface includes a menu bar (File, Edit, View, Links, Tools, Help) and a toolbar with icons for file operations and search. The main area is divided into several sections:

- Item Record** (left sidebar): A vertical menu with icons for different record types.
- Barcode**: A text field with the value '9886878'.
- Title**: 'The new standard encyclopedia of art : architecture, sculpture, painting, decorative art'.
- Author**: 'Houricq, Louis, 1875-1944'.
- Call number**: 'R 709 Hou Oversize 2 v. in 1 c. 1'.
- Owner**: 'Community Library (Cobleskill) (br)'.
- Assigned**: 'Community Library (Cobleskill) (COB)'.
- Collection**: 'Adult Nonfiction (ANF)'.
- Circulation parameters**: Includes 'Material type' (Book), 'Loan period' (Standard), 'Fine code' (Book), 'Renewal limit' (0), 'Stat code' (Adult/YA Other), and 'Name of piece'.
- Call number**: Includes 'Scheme' (Dewey Decimal), 'Prefix' (R), 'Class' (709), 'Cutter' (Hou), 'Suffix' (Oversize), 'Vol' (2 v. in 1), and 'Copy' (c. 1).
- Request**: Includes 'Request' (Loans outside system, Holdable), 'Limit to' (Pickup at this branch, Patrons from this library and branches, Patrons from this branch only, Preferred borrowers), and 'Do not mail to patron'.

4. Enter information for the item record by following the steps in [“Enter basic information for an item record”](#) on page 137.

1-2-3

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 136.
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”](#) on page 333.

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 138.

1-2-3

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 workflow.

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

The Cataloging view of the Item Record workflow 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”](#) on page 336.

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”](#) on page 330. 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 4.1R2*.

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 4.1R2*.
- **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”](#) on page 339.

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”](#) on page 340.
- **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**.

1-2-3

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 notes to the item record, the icon changes to yellow. If you add blocks, 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 4.1R2*.
 - 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.

1-2-3

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 4.1R2*. 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 .

1-2-3

Edit item information for course reserves

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

Note:

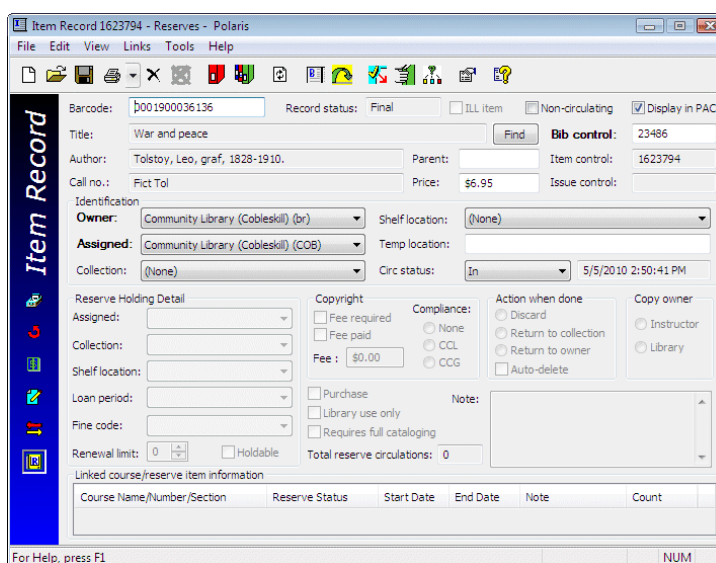
Course reserve functions are available by specific contract.

1. Open the Item Record workflow.
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.



Item Record 1623794 - Reserves - Polaris

File Edit View Links Tools Help

Barcode: 0001900036136 Record status: Final ☐ ILL item ☐ Non-circulating ☒ Display in PAC

Title: War and peace Find Bib control: 23486

Author: Tolstoy, Leo, graf, 1828-1910. Parent: Item control: 1623794

Call no.: Fict Tol Price: \$6.95 Issue control:

Identification

Owner: Community Library (Cobleskill) (br) Shelf location: (None)

Assigned: Community Library (Cobleskill) (COB) Temp location:

Collection: (None) Circ status: In 5/5/2010 2:50:41 PM

Reserve Holding Detail

Assigned: Collection: Shelf location: Loan period: Fine code: Renewal limit: 0 Holdable: ☒

Copyright

☐ Fee required ☐ Fee paid Fee: \$0.00 ☐ Purchase ☐ Library use only ☐ Requires full cataloging

Compliance: ☐ None ☐ CCL ☐ CCG

Action when done: ☐ Discard ☐ Return to collection ☐ Return to owner ☐ Auto-delete

Copy owner: ☐ Instructor ☐ Library

Note:

Linked course/reserve item information

Course Name/Number/Section	Reserve Status	Start Date	End Date	Note	Count

For Help, press F1 NUM

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 workflow.

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 4.1R2*
- [“Managing Course Reserves”](#) in the *Polaris Patron Services Guide 4.1R2*

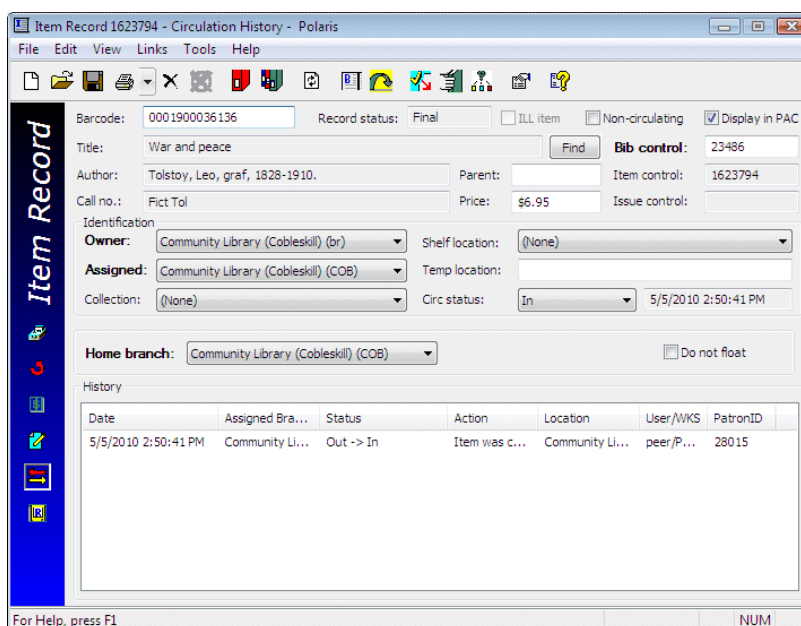
1-2-3

View item's circulation history and edit float setting

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.



Item Record 1623794 - Circulation History - Polaris

File Edit View Links Tools Help

Barcode: 0001900036136 Record status: Final ☐ ILL item ☐ Non-circulating ☒ Display in PAC

Title: War and peace Find Bib control: 23486

Author: Tolstoy, Leo, graf, 1828-1910. Parent: Item control: 1623794

Call no.: Fict Tol Price: \$6.95 Issue control:

Identification

Owner: Community Library (Cobleskill) (br) Shelf location: (None)

Assigned: Community Library (Cobleskill) (COB) Temp location:

Collection: (None) Circ status: In 5/5/2010 2:50:41 PM

Home branch: Community Library (Cobleskill) (COB) ☐ Do not float

History

Date	Assigned Bra...	Status	Action	Location	User/WKS	PatronID
5/5/2010 2:50:41 PM	Community Li...	Out -> In	Item was c...	Community Li...	peer/P...	28015

For Help, press F1 NUM

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. For more information on floating collections, see ["Setting Up Floating Collections"](#) in the *Polaris Patron Services Administration Guide 4.1R2*.

Item Circulation History

The following transactions, with their associated transaction date, are displayed in the Item Record's Circulation History:

- Created via Acquisitions PO Line Item processing
- Created via Acquisitions Invoice processing
- Modified via PO Line Item Receive processing
- Modified via PO Line Item Segment Undo Receipt processing
- Created via ILL processing
- Created via Cataloging
- Created via NCIP create processing
- Modified via Item Bulk Change
- Modified via Cataloging
- Modified via NCIP accept item processing
- Checked in
- Checked in (item was lost)
- Checked out
- Declared lost
- Claim was deleted
- Claim was made (returned or never had)
- Circulation status modified via Manage Item dialog from Check In
- Shelf location modified via Manage Item dialog from Check In
- Returned via ILL processing
- Sent in transit via Removing from Course Reserve
- Modified via PO Line Item Segment Receive processing
- Automatic status change from Check In
- Modified by automatic billed to lost processing
- Circulation status modified because item was held and request pickup branch was modified
- Circulation status modified to Routed by creation of linked route list piece
- Circulation status modified by modification of linked route list piece
- Modified via Floating Collections processing
- Renewal
- Transferred due to hold request
- Transferred due to ILL request
- Created via Acquisitions
- Created via Circulation
- Created via Serials
- Marked for deletion
- Undeleted
- Checked in via In House
- Inventory date was updated
- Barcode replaced via Check In
- Non public note modified via Manage Item dialog from Check In
- Free text block modified via Manage Item dialog from Check In
- Library assigned block modified via Manage Item dialog from Check In

- Assigned collection modified via Manage Item dialog from Check In
- Material type modified via Manage Item dialog from Check In
- Bulk checked out via Outreach Services
- Bulk checked out via Borrow by Mail
- Modified via Receive Shipment
- Linked to new bib
- Linked to new bib via Serials
- First overdue notice: Mail
- First overdue notice: Email
- First overdue notice: Phone
- First overdue notice: Text Message
- Second overdue notice: Mail
- Second overdue notice: Email
- Second overdue notice: Phone
- Second overdue notice: Text Message
- Third overdue notice: Mail
- Third overdue notice: Email
- Third overdue notice: Phone
- Third overdue notice: Text Message
- Bill notice: Mail
- Bill notice: Email
- Bill notice: Phone
- Bill notice: Text Message
- Due date reset
- Held for hold request
- Held for ILL request
- Inventory date was updated - Offline
- Renewal - PAC
- Renewal - Phone
- Checked out - Self Check
- Renewal - Self Check
- Checked out - Offline
- Checked out - PAC
- Checked out - Mobile PAC
- Renewal - Mobile PAC
- Checked out - Third party software
- Renewal - Third party software
- Added copy created by API consumer service.
- Item was unlinked from a bibliographic resource entity.
- Item was transferred to a different bibliographic resource entity.
- Modified by API consumer service

1-2-3

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 148.

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.

New Item Record Options

Item information

Title: The new standard encyclopedia of art : architecture, sculpture, paint Find

Author: Houricq, Louis, 1875-1944. Bib control: 196157

Call number

Scheme: Dewey Decimal ☐ Use template values instead of these (if available)

Prefix: R

Class: 709

Cutter: Hou

Suffix: Oversize

Vol: 2 v. in 1

Copy: c. 1

Price: \$39.50

Circ status: In-Process

Renewal limit: 0

☒ Display in PAC ☒ Loanable outside system

☐ Non-circulating ☒ Holdable

☐ Use system assigned barcodes

Distribution

Item total: 1 Barcode total: 0

Items	Branch	Collection	Shelf Location	Material Type	Loan Period	Fine Code	Stat Code	Owner	Template
1									(None)

OK Cancel Help

3. Enter information for the subordinate item (see [“Create multiple item records for a single title”](#) on page 131).
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.

1-2-3

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 147 to link the primary and subordinate item records to the same bibliographic record.

1. Open the Item Record workflow 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 131. The Item Record workflow 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.

1-2-3

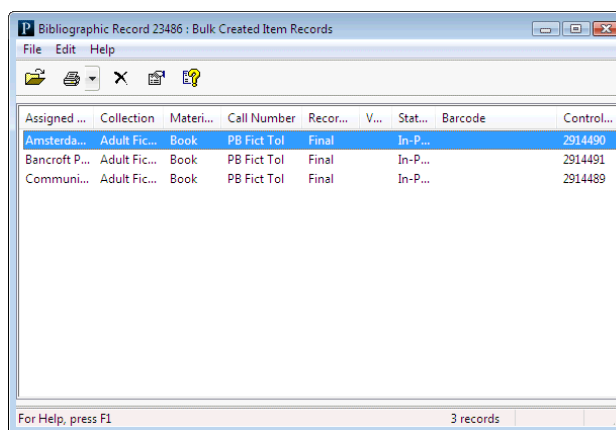
View other item records linked to the same bib

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.

1-2-3

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 workflow. To make the same change in multiple item records, you can use the Bulk Change process; see [“Changing Multiple Item Records”](#) on page 186.

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”](#) on page 340.

See the following topics:

- [“Change an existing item record from the workflow”](#) on page 150
- [“Change an existing item record's linked bib”](#) on page 151

1-2-3

Change an existing item record from the workflow

Follow these steps to change an existing item record

1. Open the Item Record workflow.
2. Edit the fields in the Item Record workflow.
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 workflow.

1-2-3

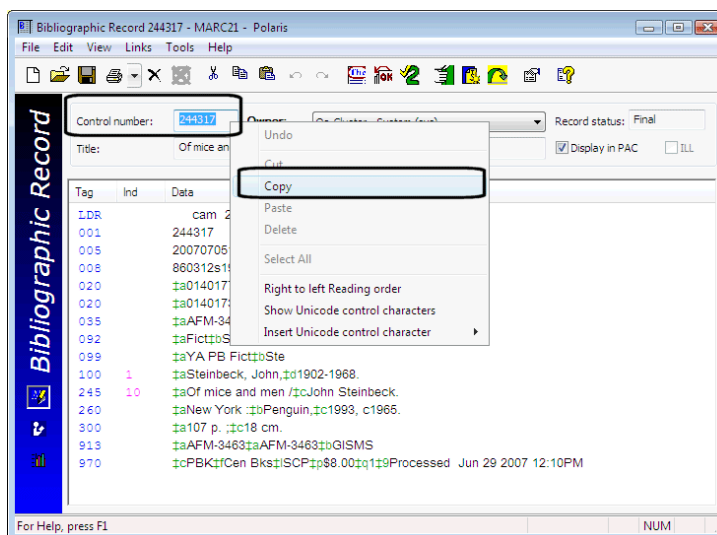
Change an existing item record's linked bib

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

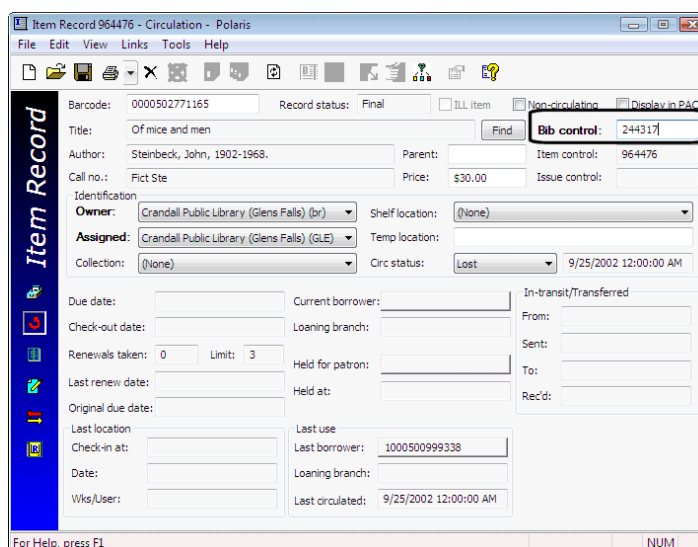
Tip:

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 186.

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”](#) on page 263.

- **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 154.

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”](#) on page 266. 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.

See the following topics:

- “Change label options from Cataloging” on page 154
- “Print spine and pocket labels from an item record” on page 155
- “Print labels from Find Tool, record sets, or list boxes” on page 156
- “Edit labels” on page 157
- “Insert diacritics or special characters into a label” on page 158
- “Create multiple copies of a label” on page 159
- “Create a single new item record manually” on page 136

1-2-3

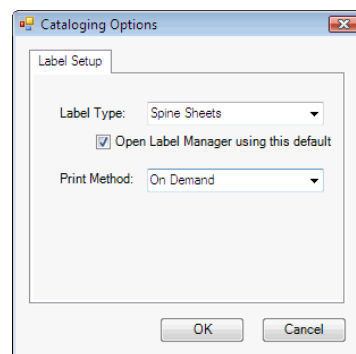
Change label options from Cataloging

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.
To always use 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 154.

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 159.

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 157.
5. If Label Manager is open, select **File, Exit** to close it.

Related Information

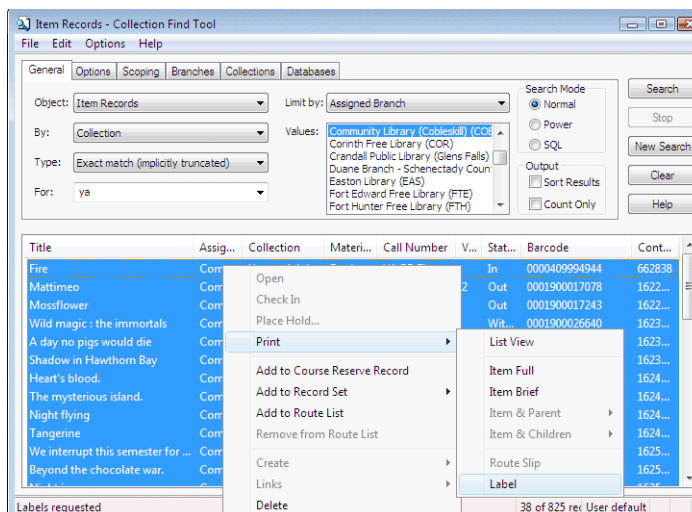
- **Editing labels** - See [“Edit labels”](#) on page 157.
- **Setting Polaris Administration profiles for labels** - See [“Set label profiles in Polaris Administration”](#) on page 263.
- **Configuring labels** - See [“Set up existing label types”](#) on page 270.
- **Specifying content for labels** - See [“Define the label content”](#) on page 273.

1-2-3

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 154.

The Label Manager appears.

YA PB Fict Coo Cooney, Caroline B. Fire	YA Fict Jac 2 Jacques, Brian. Matteo	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 Vol 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, 1958- 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, 1871-1968. 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.

1-2-3

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”](#) on page 266.

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.

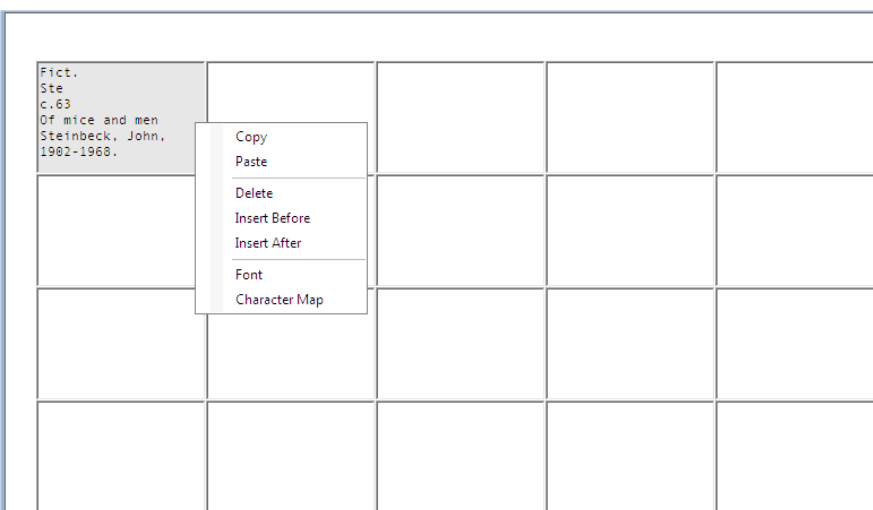
The Label Manager opens with the most recently generated label request displayed.

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 158.
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.

**Tip:**

For information on using an international keyboard to enter diacritics or special characters, see [“Enter diacritics/characters using an IME keyboard”](#) on page 46.

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.

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 Picker dialog box appears.
2. Follow the steps in [“Choose characters/diacritics from a chart”](#) on page 48.

1-2-3

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 157.
6. Select **File, Print** or click  to print the labels.

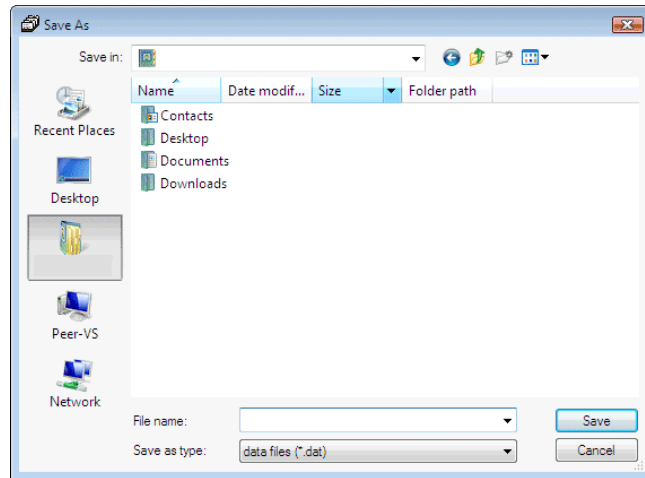
1-2-3

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.

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 [“Create a URL link to a record set in the PAC”](#) on page 170.

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 by selecting the item records in lists, such as Find Tool results or linked list boxes, and selecting the **Ad hoc Bulk Change** option from the right-click menu. See [“Changing Multiple Bibliographic Records”](#) on page 172 and [“Changing Multiple Item Records”](#) on page 186.

This unit covers the following topic:

- [“Using Cataloging Record Sets”](#) on page 162

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 4.1R2*.

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 [“Create a URL link to a record set in the PAC”](#) on page 170.

See the following topics:

- [“Open an existing cataloging record set”](#) on page 163
- [“Create an item record set from bib record set”](#) on page 163
- [“Create a bib record set from an item record set”](#) on page 164
- [“Create a bib record set from an authority record set”](#) on page 165
- [“Create an authority record set from a bib record set”](#) on page 166
- [“Add records to an item or bibliographic record set”](#) on page 167
- [“Retrieve records using a record set”](#) on page 168
- [“Print a list of cataloging records from a record set”](#) on page 168
- [“Display record set titles in PAC content carousels”](#) on page 171
- [“Display record set titles in Community content carousels”](#) on page 171
- [“Changing Multiple Bibliographic Records”](#) on page 172
- [“Changing Multiple Item Records”](#) on page 186

1-2-3

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.

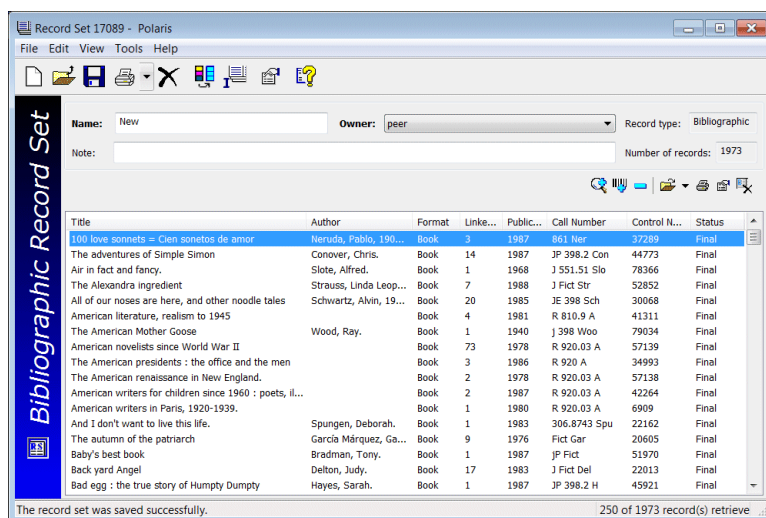
The record set workform appears for the type of record you selected.

1-2-3

Create an item record set from bib record set

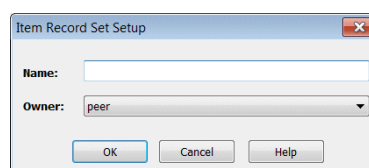
Follow these steps to create a record set of the linked item records from a bibliographic record set.

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**.

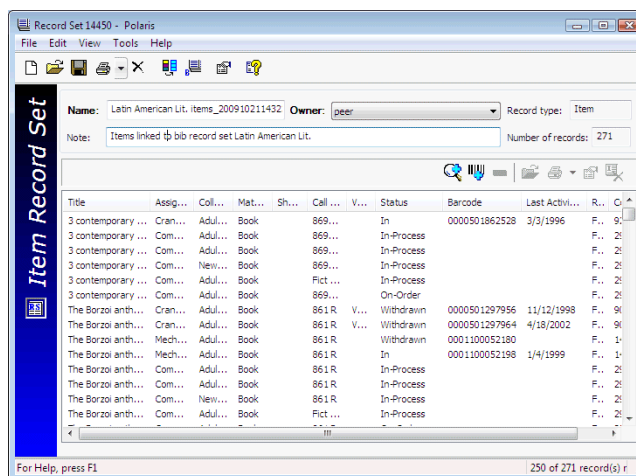
The Item Record Set workform appears with the name and creation date/time in the **Name** box, and the name of the bibliographic record set from which it was created in the **Note** box.

1-2-3

Create a bib record set from an item record set

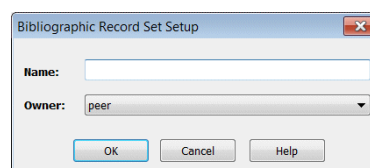
Follow these steps to create a record set of the linked bibs from an item record set.

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**.

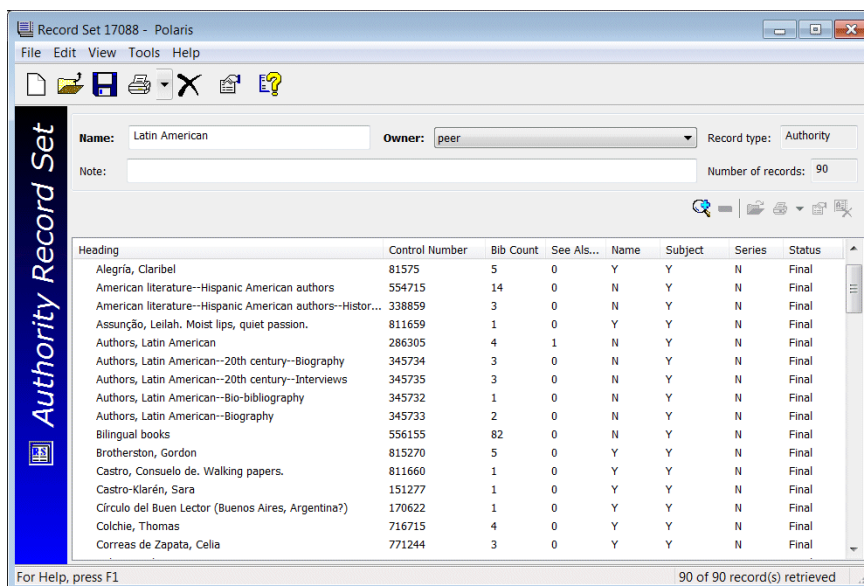
The Bibliographic Record Set workform appears with the name and creation date/time in the **Name** box, and the name of the item record set from which it was created in the **Note** box.

1-2-3

Create a bib record set from an authority record set

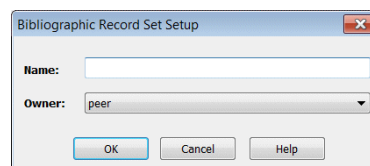
Follow these steps to create a record set of the linked bibliographic records from an authority record set.

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**.

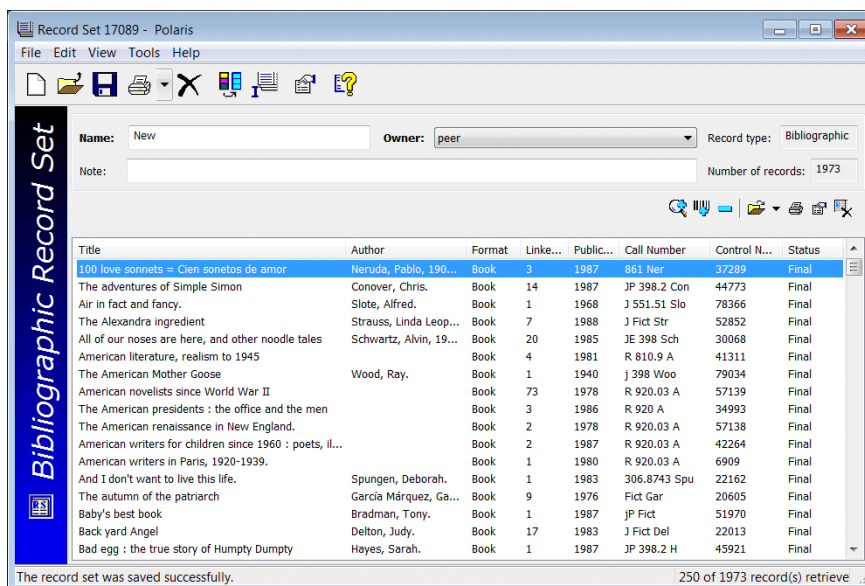
The Bibliographic Record Set workform appears with the name and creation date/time in the **Name** box, and the name of the authority record set from which it was created in the **Note** box.

1-2-3

Create an authority record set from a bib record set

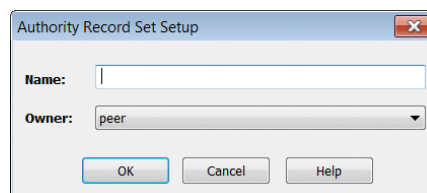
Follow these steps to create a record set of the linked authority records from a bibliographic record set.

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.

1-2-3

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 4.1R2*. Or, you can select specific records in the Find Tool results list and add them to a new or existing record set.

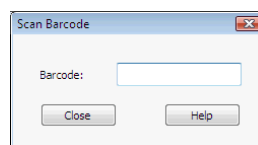
Add records to an item or bibliographic record set

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 4.1R2*
- [“Delete member records from the database”](#) in the *Polaris Basics Guide 4.1R2*
- [“Delete record sets from the Find Tool”](#) in the *Polaris Basics Guide 4.1R2*
- [“Delete a record set from the Record Set workform”](#) in the *Polaris Basics Guide 4.1R2*

1-2-3

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 82.

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.

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.

Tip:

You can also search for a record set by owner.

1-2-3

Print a list of cataloging records from a 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.

Tips:

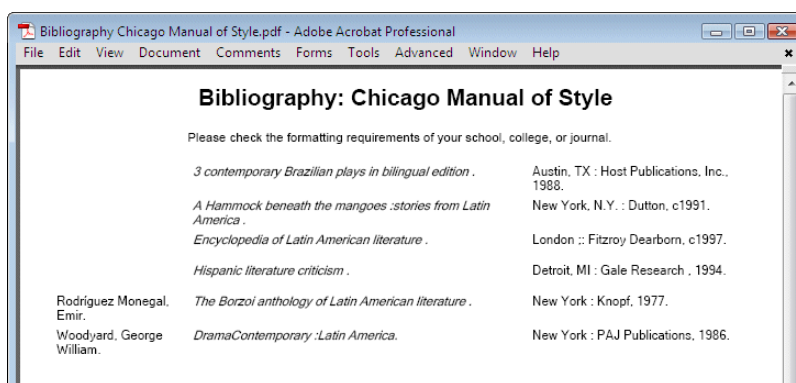
You can also select a single record, right-click and print it. If you select an item record that has child records, or is a child record linked to a parent record, you can print its associated records. You can also print item labels from an item record set. If the item is linked to a serial issue on a route list, you can print the routing slip from the record set.

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.

1-2-3**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.

Create a URL link to a record set in the PAC

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.

Follow these steps to create a URL link to a record set in the PAC.

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 4.1R2*.

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 name)

`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 4.1R2*.
4. Assign the custom web part to a specific page. See [“Assign Web parts to public pages”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

1-2-3

Display record set titles in PAC content carousels

You can publish content in Polaris PowerPAC using 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.

Follow these steps to 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 226.

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 4.1R2*.

1-2-3

Display record set titles in Community content carousels

Follow these steps to display titles from a record set in Community profile 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 226.

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 workflow. See [“Enter community social links in the staff client”](#) in the *Polaris Community Profiles Guide 4.1R2*.

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 or change provisional records to final. The option to create resource entities is used only for linking ebook bibs to vendor accounts. See [“Cataloging Ebooks”](#) on page 211.
- **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.
- **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.
- **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.
- **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.
- **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.

Records are skipped when they do not contain the criteria specified for the bulk change. Records that contain the criteria specified for the bulk change, but cannot be changed for other reasons, are added to a cleanup record set. To bulk change the selected bibliographic records, you must have access and modify permissions for each of the bibliographic records in addition to the permission to perform the bulk change process.

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 119.

See the following topics:

- ["Bulk change non-MARC data in bibliographic records"](#) on page 174
- ["Bulk change data fields in bibliographic records"](#) on page 175
- ["Bulk change the Leader in bibliographic records"](#) on page 177
- ["Bulk change the 006 tag in bibliographic records"](#) on page 178
- ["Bulk change the 007 tag in bibliographic records"](#) on page 180
- ["Bulk change the 008 tag in bibliographic records"](#) on page 183
- ["Check the bulk change queue and run the report"](#) on page 185

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Tip:

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**.

Bulk change non-MARC data in bibliographic records

Follow these steps to change non-MARC data in multiple bibliographic records.

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 setting that specifies whether the bibliographic records can be overlaid, select **Do not overlay**, 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**.
- To create resource entities to manage electronic resources, select **Create resource entities**, and select the vendor account. See [“Bulk-create resource entities”](#) on page 222.

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 185.

Tip:

If the Cataloging parameter **Bibliographic record Do not overlay feature enabled** parameter is set to **No**, the **Do not overlay** check box does not appear on the Bibliographic Record Bulk Change dialog box. See [“Enable the Do not overlay feature”](#) on page 322

1-2-3

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 indicators

Follow these steps to bulk change data fields in multiple bibliographic records.

Note:

To bulk change bibliographic records, they must be in a record set, and you must have the necessary permissions to modify each bibliographic record in the 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.
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 185.

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.

1-2-3

Bulk change the Leader in bibliographic records

Follow these steps to bulk change the Leader in multiple bibliographic records.

Note:

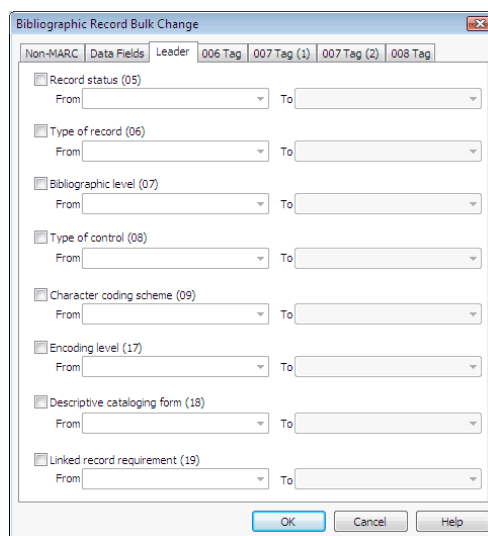
The records you want to bulk change must be in a record set.

1. Open the Bibliographic Record Set workform.
2. Select **Tools, Bulk Change**.
3. Select the Leader tab.

The Leader tabbed page appears.

Tip:

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



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 185.

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.

1-2-3

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.

The screenshot shows the 'Bibliographic Record Bulk Change' dialog box with the '006 Tag' tab selected. The dialog has several sections: 'Tag level' with 'Insert', 'Delete', and 'Replace' options; 'Form of material' with a dropdown for '(00)' and radio buttons for 'As first' and 'As last'; 'Define' fields; and a list of material types (Books, Com. file/Elec. rsc., Contin. resources, Maps, Mixed materials, Music, Visual materials) each with 'From' and 'To' input fields. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

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 185.

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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.


Tip:

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

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**.

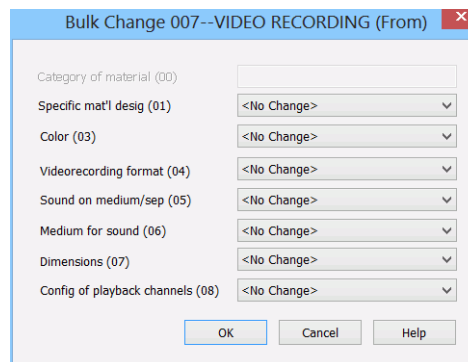
The appropriate dialog box appears, depending on the category of material.

- 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).

The screenshot shows the 'Bibliographic Record Bulk Change' dialog box. The '007 Tag (1)' tab is active. The dialog contains a list of material categories, each with a checkbox, a 'From' input field, and a 'To' input field. The categories are: Notated music, Projected graphic, Remote-sensing image, Sound recording, Tactile material, Text, Unspecified, and Video recording. The 'Video recording' checkbox is checked. At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

- b) Click the **From** button.

A dialog box appears with the values for that category of material.

A screenshot of a software dialog box titled "Bulk Change 007--VIDEO RECORDING (From)". The dialog box has a light blue header bar with a red close button (X) on the right. Below the header, there are eight rows of controls. The first row is "Category of material (00)" with a text input field. The following seven rows are dropdown menus, each with the text "<No Change>" selected. The rows are: "Specific mat'l desig (01)", "Color (03)", "Videorecording format (04)", "Sound on medium/sep (05)", "Medium for sound (06)", "Dimensions (07)", and "Config of playback channels (08)". At the bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Help".

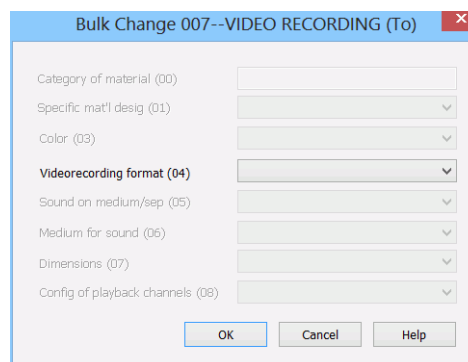
- c) Select the value you want to change, and click **OK**.

The Bibliographic Record Bulk Change dialog box displays the value you selected in the **From** box.

- d) Click the **To** button.

A dialog box appears.

- e) Select the value to put in this position, and click **OK**.

A screenshot of a software dialog box titled "Bulk Change 007--VIDEO RECORDING (To)". The dialog box has a light blue header bar with a red close button (X) on the right. Below the header, there are eight rows of controls. The first row is "Category of material (00)" with a text input field. The following seven rows are dropdown menus, each with a light green background and a downward arrow. The rows are: "Specific mat'l desig (01)", "Color (03)", "Videorecording format (04)", "Sound on medium/sep (05)", "Medium for sound (06)", "Dimensions (07)", and "Config of playback channels (08)". At the bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Help".

The Bibliographic Record Bulk Change dialog box displays the from and to selections.

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 185.

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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.


Tip:

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

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 185.

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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.

Na...	Ow...	Total Records	Status	Posted	Started	Ended
Ebo...	QA...	0	Pending	4/29/2013 ...		
Cat4...	clar...	5	Completed	3/21/2013 ...	3/21/2013 ...	3/21/2013...
Cat4...	clar...	5	Completed	3/21/2013 ...	3/21/2013 ...	3/21/2013...
Cat4...	clar...	5	Completed	3/21/2013 ...	3/21/2013 ...	3/21/2013...
Cat4...	clar...	5	Completed	3/20/2013 ...	3/20/2013 ...	3/20/2013...
Cat4...	clar...	5	Completed	3/20/2013 ...	3/20/2013 ...	3/20/2013...
Cat4...	clar...	5	Completed	3/20/2013 ...	3/20/2013 ...	3/20/2013...
Cat4...	clar...	5	Completed	3/20/2013 ...	3/20/2013 ...	3/20/2013...
Cat4...	clar...	5	Completed	3/20/2013 ...	3/20/2013 ...	3/20/2013...
Cat4...	clar...	5	Completed	3/20/2013 ...	3/20/2013 ...	3/20/2013...

For Help, press F1 273 jobs

2. Select **File, View**, or click  **Report** to run the report.

The Bibliographic Bulk Change Report appears in the preview window.

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 \$Insert 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 \$wHistorical	

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 \$wHistorical	

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 \$vFiction \$wHistorical	

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 select **Tools, Bulk Change**, or you can select multiple items from anywhere in Polaris where items are displayed in a list, right-click and select the **Ad hoc Bulk Change** option. For example, you can select multiple items in the Find Tool results list, right-click and select **Ad hoc Bulk Change** to open the Item Record Bulk Change box.

Note:

For more information on using cataloging record sets, see [“Using Cataloging Record Sets”](#) on page 162.

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.

<i>From Circulation Status</i>	<i>To Circulation Status</i>	
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

See the following topic:

[“Bulk change item records”](#) on page 187

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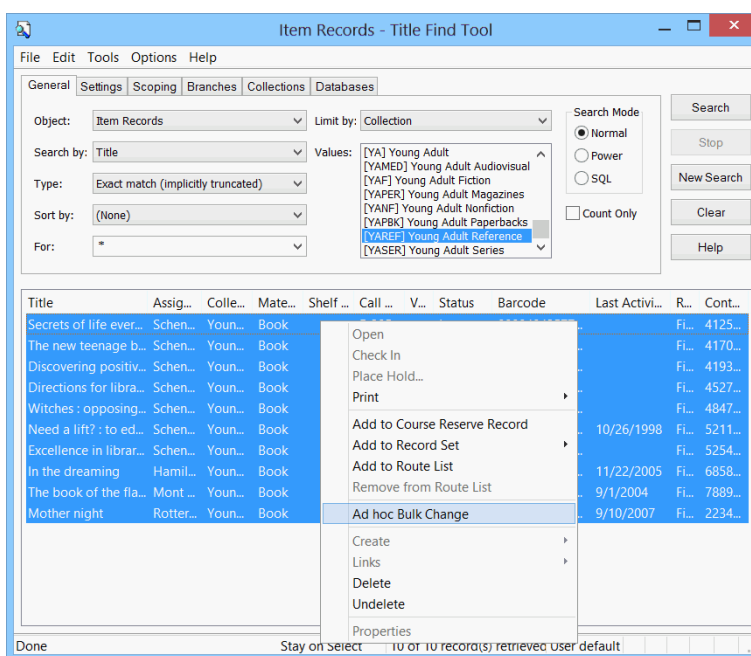
Bulk change item records

You can open the Item Record Bulk Change dialog box from an item record set or from a list of item records. Follow these steps to bulk change item records.

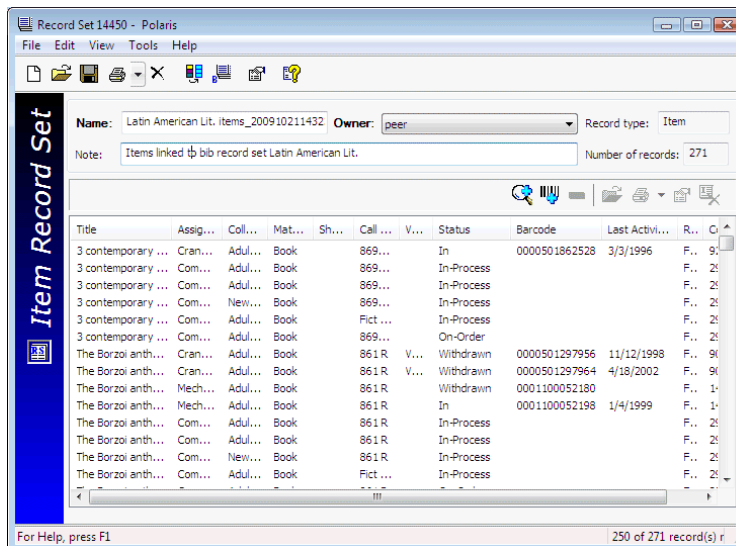
Note:

To bulk change item records, you need the **Access item record bulk change: Allow** permission set at the System level, and the **Item record: Bulk change** permission for each item's owning branch.

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 list, such as the Find Tool results list, a linked list box, or the Bibliographic Record Preview window, select the records, right-click and select **Ad hoc bulk change**.

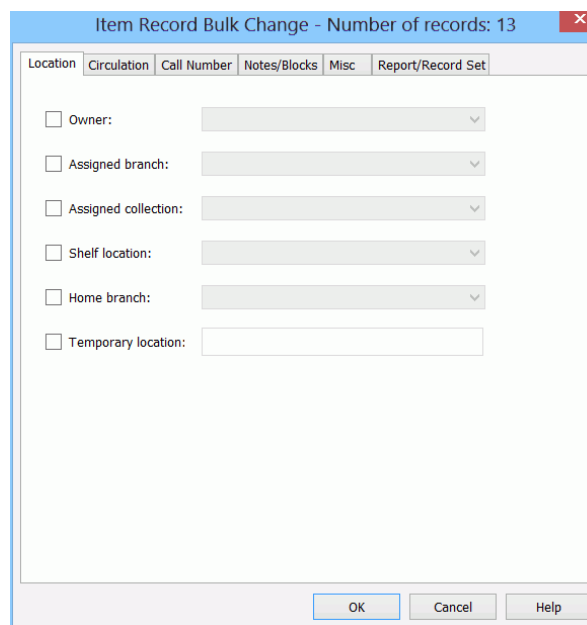


- b) If the items are in a record set, open the record set, and select **Tools, Bulk Change**, press **CTRL+B**, or click  to select all the item records in the record set, or select multiple records, right-click and select **Ad hoc bulk change** from the right-click menu.



The Item Record 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 4.1R2*.

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 4.1R2*.
 - 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 4.1R2*.
 - 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.

The screenshot shows a dialog box titled "Item Record Bulk Change - Number of records: 10". It has a tabbed interface with the following tabs: Location, Circulation, Call Number (selected), Notes/Blocks, Misc, and Report/Record Set. The "Call Number" tab contains several settings, each with a checkbox and a text input field:

- ☐ Shelving scheme: [dropdown menu]
- ☐ Call number prefix: [text input]
- ☐ Classification number: [text input]
- ☐ Cutter number: [text input]
- ☐ Call number suffix: [text input]
- ☐ Volume number: [text input]
- ☐ Copy number: [text input]
- ☐ Use call number fields from bib record

At the bottom right of the dialog box are three buttons: OK, Cancel, and Help.

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.
- 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.

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).

- d) Notes/Blocks** - Use this tab to change the item records' notes and blocks.

The screenshot shows a dialog box titled "Item Record Bulk Change - Number of records: 13". It has five tabs: "Location", "Circulation", "Call Number", "Notes/Blocks" (which is selected), and "Misc". The "Notes/Blocks" tab contains several sections, each with a checkbox and a text input field, followed by three radio buttons: "Replace", "Prepend", and "Append". The sections are: "Public note:", "Non-public note:", "Physical condition:", "Library assigned block:" (which has a dropdown menu instead of a text field), and "Free text block:". At the bottom of the dialog are "OK", "Cancel", and "Help" buttons.

- 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.

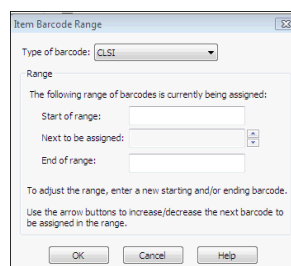
- To change the bibliographic control number for all item records, select **Bib control no.** Then, if you know the bibliographic control number, enter it in the box and press **Tab**, or click **Find**, and search for the bibliographic record. All item records in the record set will be linked to this 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 Item barcode range dialog box: select the barcode type, type the beginning and ending barcodes, and specify the next barcode to be assigned.

The 'Item Barcode Range' dialog box is shown. It has a title bar with a close button. Inside, there is a 'Type of barcode' dropdown menu set to 'CLSI'. Below this is a 'Range' section with the text 'The following range of barcodes is currently being assigned:'. It contains three input fields: 'Start of range:', 'Next to be assigned:', and 'End of range:'. The 'Next to be assigned:' field has small up and down arrow buttons to its right. Below these fields is a note: 'To adjust the range, enter a new starting and/or ending barcode. Use the arrow buttons to increase/decrease the next barcode to be assigned in the range.' At the bottom are 'OK', 'Cancel', and 'Help' buttons.

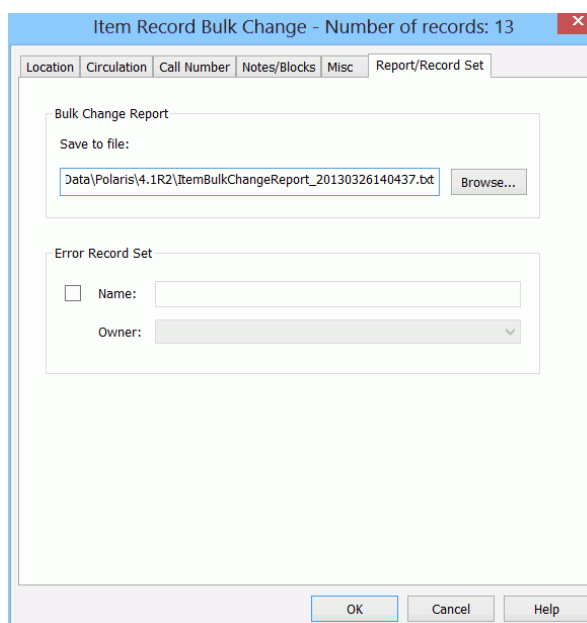
Barcodes are automatically assigned to the item records in the order in which they are sorted in the linked item list box, or in the order in which they appear in the record set. If all the records have not been loaded into the record set at the time the bulk change is launched, the items are processed 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.

The 'Item Record Bulk Change - Number of records: 13' dialog box is shown. It has a title bar with a close button. Below the title bar are tabs: 'Location', 'Circulation', 'Call Number', 'Notes/Blocks', 'Misc', and 'Report/Record Set'. The 'Report/Record Set' tab is selected. Inside the tab, there is a 'Bulk Change Report' section with a 'Save to file:' label and a text box containing 'Data\Polaris\4.1R2\ItemBulkChangeReport_20130326140437.txt'. To the right of the text box is a 'Browse...' button. Below this is an 'Error Record Set' section with a 'Name:' label and a text box, and an 'Owner:' label with a dropdown menu. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

- 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 196.
- 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

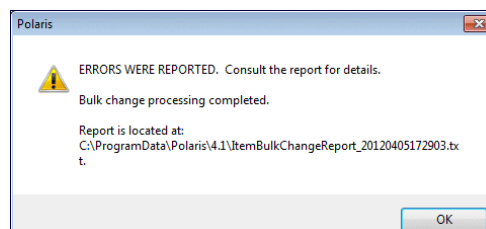
Tip:

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.

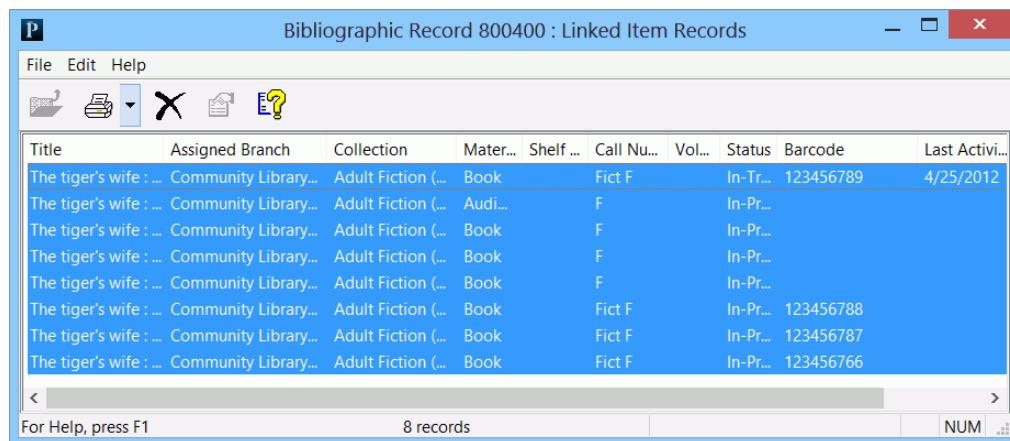


6. Click **OK** to close the message box.

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 any changes to fields that display in the list view are 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.



Title	Assigned Branch	Collection	Mater...	Shelf ...	Call Nu...	Vol...	Status	Barcode	Last Activi...
The tiger's wife : ...	Community Library...	Adult Fiction (...)	Book		Fict F		In-Tr...	123456789	4/25/2012
The tiger's wife : ...	Community Library...	Adult Fiction (...)	Audi...		F		In-Pr...		
The tiger's wife : ...	Community Library...	Adult Fiction (...)	Book		F		In-Pr...		
The tiger's wife : ...	Community Library...	Adult Fiction (...)	Book		F		In-Pr...		
The tiger's wife : ...	Community Library...	Adult Fiction (...)	Book		F		In-Pr...		
The tiger's wife : ...	Community Library...	Adult Fiction (...)	Book		Fict F		In-Pr...	123456788	
The tiger's wife : ...	Community Library...	Adult Fiction (...)	Book		Fict F		In-Pr...	123456787	
The tiger's wife : ...	Community Library...	Adult Fiction (...)	Book		Fict F		In-Pr...	123456766	

For Help, press F1

8 records

NUM

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 59.

This unit covers the following topics:

- [“Exporting Cataloging Records”](#) on page 200
- [“Cleaning Up the Catalog”](#) on page 203

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.

See the following topics:

- [“Configure the export process”](#) on page 200
- [“Export cataloging records”](#) on page 201

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Configure the export process

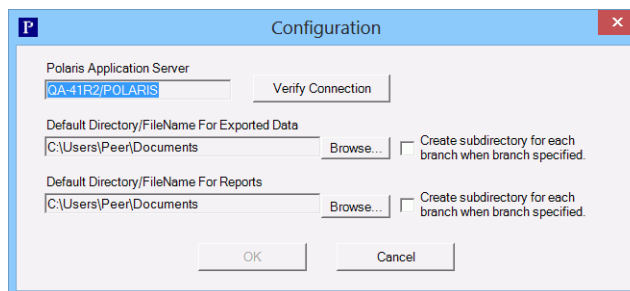
Note:

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 201.

1-2-3

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 200.

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 Export Express, 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 99.
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 4.1R2*.

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 204. 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 [“Outreach Services Reports”](#) in the *Polaris Basics Guide 4.1R2*, and [“PAC Reports”](#) in the *Polaris Basics Guide 4.1R2*.

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”](#) on page 347. To permanently delete the retained records, you must set up purge criteria in a Purge record. See [“Purge cataloging records”](#) on page 208.

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”](#) on page 342.

See the following topics:

- [“Create a record set of unlinked records”](#) on page 204
- [“Delete bibliographic or item records”](#) on page 205
- [“Delete authority records”](#) on page 207
- [“Restore \(undelete\) a deleted cataloging record”](#) on page 208
- [“Purge cataloging records”](#) on page 208

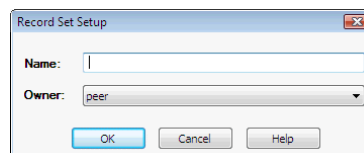
1-2-3

Create a record set of unlinked records

Follow these steps to create a record set of unlinked bibliographic or authority records.

1. Select **Utilities, Cataloging Processing, Create Unlinked Bibliographic Record Set, or Create Unlinked Authority Record Set**.

The Record Set Setup dialog box appears.


Tip:

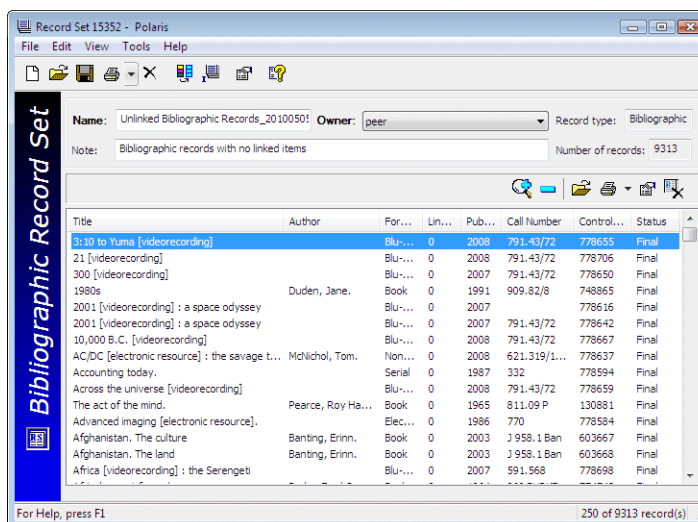
Authority records are considered unlinked when there are no bibliographic or *see also* links; they could have *see also from* links.

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

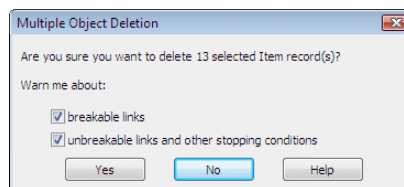
- “Delete bibliographic or item records” on page 205
- “Purge cataloging records” on page 208

1-2-3

Delete bibliographic or item records

Follow these steps to delete bibliographic or item records.

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 4.1R2*.
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 206.

- **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.
 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.

Tip:

After you have deleted all the records within the record set, you can delete the record set. See [“Delete record sets from the Find Tool”](#) in the *Polaris Basics Guide 4.1R2*.

Tip:

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**.

Related Information

Tip:

The default setting for both parameters is No (prevent deletion of bibs or items that have linked hold requests).

- **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
- System-level Cataloging parameters that allow or prevent deletion if the records have linked hold requests:
 - **Bibliographic record delete:** Allow if there are holds
 - **Item record delete:** Allow if there are holds
- **Unbreakable links or conditions that prevent item deletion:**
 - Item is a parent item with child records linked to it
 - Item is checked out
 - 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 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.

1-2-3

Delete authority records

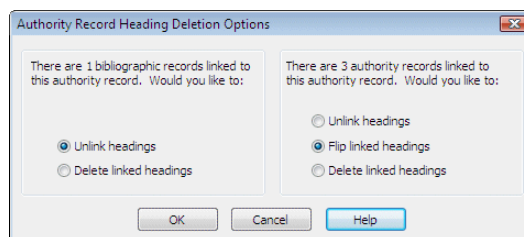
Follow these steps to delete authority records.

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 .
 - 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  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 4.1R2*.
 - 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.

Tip:

After you have deleted all the records within the record set, you can delete the record set. See [“Delete record sets from the Find Tool”](#) in the *Polaris Basics Guide 4.1R2*.

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).

1-2-3**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.



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**.

1-2-3**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”](#) on page 347.

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.

Name	Owner	Creator	Scheduled	Last Run	Organization
clean up	Sarat...	Zuko...	4/15/2010 11:42:52 AM		QA-Orion 4.0 Cluster Test System
WinRunner Daily D...	Sarat...	Zuko...	1/9/2010 5:00:02 AM		QA-Orion 4.0 Cluster Test System
Delete cleanup	Sarat...	Zuko...	12/1/2009 3:40:12 PM		QA-Orion 4.0 Cluster Test System
Test purge cancell...	Sarat...	Zuko...	11/19/2009 2:43:58 PM		QA-Orion 4.0 Cluster Test System
Authority purge	Sarat...	Zuko...	4/28/2009 2:05:44 PM		QA-Orion 4.0 Cluster Test System
A WinRunner purg...	Sarat...	Zuko...	3/6/2009 5:00:05 AM		Saratoga Springs Public Library
test_mes_01	Stilliv...	Alden	7/7/2008 11:38:58 AM		Stillwater Public Library

For Help, press F1

7 records

NUM

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  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 .

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: Sukowati
=====
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 E. was purged.
-----
Authority Record: 18183; Heading = Hickey, Edward S. was purged.
-----
Authority Record: 28012; Heading = Finkelstein, Norman, 1954- was purged.
-----
Authority Record: 36978; Heading = Eagle, 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 = Wing, 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 [“Outreach Services Reports”](#) in the *Polaris Basics Guide 4.1R2*.

Cataloging Ebooks



You have several options for cataloging ebooks in Polaris:

- Use a traditional 856 tag with a link to the vendor's site. Patrons click the link to go to the vendor's site for availability and access. See [“Creating MARC Records”](#) on page 30.
- Use a traditional 856 tag with a link to the vendor's site, but create resource entities to limit patron access by resource group. If the ebook is not available at the branch to which the patron is connected in the PAC, the ebook does not appear. To limit access, your Polaris administrator must set up the resource group and a non-integrated vendor account with this resource group selected. For more information, see [“Create a non-integrated ebook vendor account”](#) on page 369.
- Import records automatically from 3M or another integrated ebook vendor. When the records are imported, resource entities are created that integrate the ebook title with Polaris Circulation. To integrate ebooks with Polaris Circulation, you set up an import profile and item template in Polaris Cataloging. Then your Polaris administrator sets up an integrated ebook vendor account where the import profile and item template are selected. If your library wants to limit access for the integrated ebooks, your Polaris administrator must also create a resource group and select the resource group in the integrated vendor's account. For more information, see [“Create an integrated \(3M\) ebook vendor account”](#) on page 361.

This unit covers the following topics:

- [“Importing Integrated Ebook Bibs”](#) on page 212
- [“Creating Ebook Items”](#) on page 214
- [“Creating and Displaying Resource Entities”](#) on page 216

Importing Integrated Ebook Bibs

The **Integrated Ebook Bibs** read-only import profile, provided by Polaris Library Systems, is set up specifically for importing ebook bibliographic records from integrated ebook vendors. This profile, or a copy with similar settings, must be selected in the Vendor Account workform for the integrated ebook vendor. When a vendor account is associated with the import profile, resource entities are created automatically in the imported records and display in the Resources view of the Bibliographic Record workform.

The API-driven import process automatically imports the records when ebooks are purchased from the 3M Cloud Library. It is not necessary to use the Import setup wizard to import 3M ebook records into the catalog. However, if you want to make changes to the Integrated Ebook Bibs import profile, your Polaris Administrator must copy the import profile, rename it, and select it in the Vendor Account workform. For more information, see [“Copy the Integrated Ebook Bibs import profile”](#) on page 355.

Once the import profile is selected in the Vendor Account workform, and the API-driven import process is up and running, records for ebook titles that are purchased at 3M are imported automatically. The import jobs appear in the Import Jobs Queue.

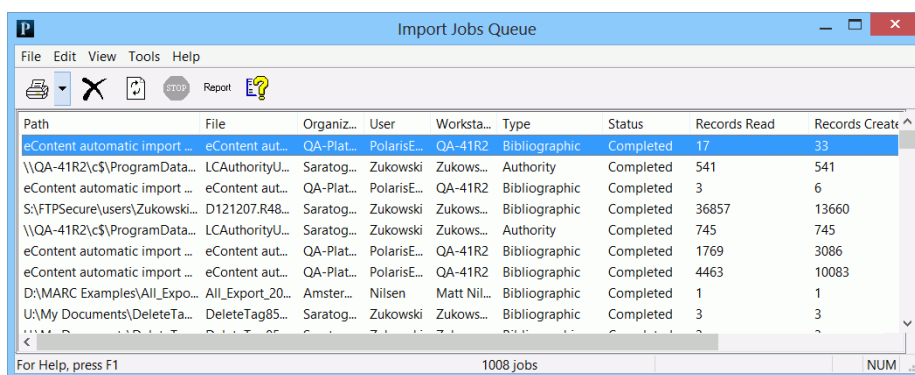
1-2-3

View the ebook import jobs in the queue and run the report

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.



Path	File	Organiz...	User	Worksta...	Type	Status	Records Read	Records Create
eContent automatic import ...	eContent aut...	QA-Plat...	PolarisE...	QA-41R2	Bibliographic	Completed	17	33
\\QA-41R2\c\$\ProgramData...	LCAuthorityU...	Saratog...	Zukowski	Zukows...	Authority	Completed	541	541
eContent automatic import ...	eContent aut...	QA-Plat...	PolarisE...	QA-41R2	Bibliographic	Completed	3	6
S:\FTPSecure\users\Zukowski...	D121207.R48...	Saratog...	Zukowski	Zukows...	Bibliographic	Completed	36857	13660
\\QA-41R2\c\$\ProgramData...	LCAuthorityU...	Saratog...	Zukowski	Zukows...	Authority	Completed	745	745
eContent automatic import ...	eContent aut...	QA-Plat...	PolarisE...	QA-41R2	Bibliographic	Completed	1769	3086
eContent automatic import ...	eContent aut...	QA-Plat...	PolarisE...	QA-41R2	Bibliographic	Completed	4463	10083
D:\MARC Examples\All_Exp...	All_Export_20...	Amster...	Nilsen	Matt Nil...	Bibliographic	Completed	1	1
U:\My Documents\DeleteTa...	DeleteTag85...	Saratog...	Zukowski	Zukows...	Bibliographic	Completed	3	3

For Help, press F1

1008 jobs

NUM

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.

Import Report			
File: eContent automatic import 12/4/2012 1:54:13 PM for vendor account: 3M Cloud Library QA.			
Submitted date:	12/4/2012 1:54:13 PM	Import type:	Express
		Source:	MARC File
Profile used:	Integrated ebook Bibs		
Branch:	QA-Plato 4.1 Cluster Test System		
User:	PolarisExec	Stopped by user:	No
Workstation:	QA-Plato2	Scheduled date:	
Vendor account:	3M Cloud Library QA		
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, ignore and save record as final.		
Authority control:	No authority control		
Duplicate detection:	Perform duplicate detection. If errors are found, reject duplicate and automatically retain MARC tags.		
Use system duplicate rules:	No	Retain data:	Yes
		Use system retention rules:	No
Bibliographic duplicate criteria			
The 037 \$a of the incoming record matches the 037 \$a of an existing record			
Retention tag	Indicator one	Indicator two	
852	blank,0,1,2,3,4,5,6,7,8,9	blank,0,1,2,3,4,5,6,7,8,9	
856	blank,0,1,2,3,4,5,6,7,8,9	blank,0,1,2,3,4,5,6,7,8,9	
956	4	4	
Authority save option:	Do not save		
Item save option:	Save as final		
Item create option:	Use embedded and template fields		
Item duplicate option:	If duplicate barcode is found, do not save item record.		
Item no barcode option:	If no barcode is found, save item record as final.		
Item EDI option:	No EDI item update processing		
Display in PAC:	Yes	Template:	E-book automatic import (Digital Branch)

Creating Ebook Items

Integrated ebook item records are created upon the automatic import of the ebook bibliographic records provided by 3M, according to the settings in the **Ebook automatic import** template selected in the Vendor Account workform. See [“Set up the item template for the integrated ebooks”](#) on page 354. The **Ebook** check box is checked automatically in the Item Record workform, which identifies the item record as an integrated ebook item record. You can search for integrated ebook vendor item records in the Polaris Find Tool by selecting **Limit By, Ebook (integrated)** and then selecting **Yes, No** or **All**. No special permissions are necessary for working with ebook item records; the existing **Item records: Create, Modify, Delete** permissions also apply to ebook items.

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

- **Links** - You can link to the vendor account and resource group. Select **Links, Vendor Account** or **Resource Group** from the Item Record workform or from the right-click menu for an item record listed in the Find Tool or another list.
- **Ebook check box** - The **Ebook** check box is always checked for integrated ebook vendor item records. It is supplied automatically and cannot be changed.
- **File, New** - You cannot create a new ebook item record from the Item Record workform if the item is from an integrated ebook vendor.
- **Assigned branch** - If your library uses Resource Groups to limit access to ebooks by branch, the assigned branch in the ebook item records should be in the resource group or digital branch selected in the integrated ebook vendor account. If the assigned branch is not in the resource group, the availability information in the PAC is negatively affected.
- **Additional read-only fields** - These cannot be changed in the Item Record workform or via Item Bulk Change.
- **Vendor account and resource group** - The vendor account and resource group are displayed on the Item Record workform's Source and Acquisition view and the property page.
- **Added copy note** - The History view displays the following note for added copies of an existing ebook title that is under the same vendor contract: **Added copy created by API consumer service.**

See the following topics:

- [“Read-Only Fields in Integrated Ebook Vendor Items”](#) on page 215
- [“Ebook Item Records and Item Bulk Change”](#) on page 215

Read-Only Fields in Integrated Ebook Vendor Items

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

Tip:

Ebook (check box always checked)

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

Ebook Item Records and Item Bulk Change

If you select an item bulk change option that cannot be made because some of the selected items are ebooks, the changes are made in item records where the changes are possible, but not in the ebook items. The bulk change report lists the ebook item records that were not changed.

Removing Expired Ebooks

When a library's access to an ebook title ends because of publisher restrictions, 3M sends the remove event which is detected by the Polaris API consumer service. See [“Removing Expired Ebooks”](#) on page 371.

Creating and Displaying Resource Entities

Resource entities are 856 tags (or other tags containing URLs) that receive special processing in Polaris. For ebooks provided by 3M or another integrated ebook vendor, resource entities are used to integrate ebooks with Polaris circulation. They can also be used to restrict access to ebooks for either integrated or non-integrated vendors. If a bibliographic record has a resource entity associated with it, the Resources view displays the resource entity information.

Notes:

Current Bibliographic Record permissions apply to the Resources view.

The ebook TOM is generated from fixed field values in the record. If the fixed field values do not generate the correct TOM icon, you can make changes on the Bibliographic Record workform or bulk change multiple records.

Ebook bibliographic records can be included in record sets and content carousels.

The Resources view of the Bibliographic Record workform displays all the resource entities associated with a bibliographic record. A submenu in the right portion of the Resources view includes the following options:

- **Linked Item Records** - Links to electronic (ebook) items associated with this resource entity. The **Ebook** check box is checked on the Item Record workform.
- **Open Vendor Account** - Links to the Vendor Account workform for the resource entity.
- **Revert to MARC tag** - Changes the resource entity to an 856 tag. See [“Convert a resource entity to an 856 tag”](#) on page 225.
- **Delete Resource Entity** - Deletes the resource entity from the bibliographic record.

You can also link to the vendor account and the resource group from the links menu. The Vendor Account workform opens if the bib is linked to a single vendor account. If the bib is linked to multiple vendor accounts, a list box displays the following columns:

- Vendor account
- Active
- Vendor
- ContractID
- Resource Group

Resource Entities for Integrated Ebook Vendors

Tip:

A resource entity can also be created from the Bibliographic Record workflow.

When an integrated ebook vendor's bibliographic records are imported in Polaris, a resource entity is automatically created for each 856 tag containing data that identifies the vendor account and links to the electronic resource in the vendor's repository.

All the 856 tags provided by the integrated ebook vendor have a first indicator (access method) of 4 (HTTP). An 856 tag with a second indicator of 0 (resource) must be present to create the resource entity. This tag provides the information that identifies the vendor account and the electronic resource itself, the ebook in the vendor's repository. Other 856 tags with a second indicator of 2 (related resource) may be present, but are not required to create the resource entity.

Resource entities for integrated ebook vendors must have a vendor contract ID/URL combination that is unique in the entire Polaris system.

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

Tip:

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

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

Example:

037 \$adk42g9\$b3M Cloud Library\$nhhttp://ebook.3m.com

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

Example:

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

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

Example:

856 42 \$3Cover Image\$uhttp://ebook.3m.com/delivery/img?type=DOCUMENTIMAGE&documentID=dk42g9&token=nobody

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

Example:

856 42 #3M Cloud Icon#uhttp://ebookdownload.3m.com/sites/prototypes/web/media/themes/mmm_patron/img/landing_page/step1.png

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

Example:

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

Tip:

You can also create resource entities from the Bibliographic Record workform. See [“Create a resource entity from the Bibliographic Record workform”](#) on page 222.

When the library purchases ebooks at 3M or another integrated ebook vendor that can exchange records using the Polaris API-driven import process, the bibliographic records are imported automatically and a resource entity is created for each 856 that identifies the vendor account.

Bibliographic Record 948494 - Resources - Polaris

File Edit View Links Tools Help

Control number: 948494 Owner: QA-Plato 4.1 Cluster Test System (sys) Record status: Final ☒ Display in PAC ☐ ILL

Title: Antifragile: Things That Gain from Disorder [electronic resource]

▼ Resource Entities

3M Cloud Library QA

Vendor Account Name: 3M Cloud Library QA

Active: Yes

Resource Group: Default server Resource group

Imported MARC Data: 856 40 #3M Cloud Library#uhttp://ebook.3m.com/library/polarisdemo-document_id-p9m2g9#x-bu8mf

Object Identifier: p9m2g9

URL: http://ebook.3m.com/library/polarisdemo-document_id-p9m2g9

Link Text: 3M Cloud Library

Cover Image URL: http://ebook.3m.com/delivery/img?type=DOCUMENTIMAGE&documentID=p9m2g9&token=nobody

Public Note:

Non-Public Note:

Creator: PolarisExec

Creation Date: 1/21/2013 2:01:10 PM

Vendor's object ID

Vendor's contract ID

Linked Item Records
Open Vendor Account
Revert to MARC tag
Delete Resource Entity

The following information is displayed directly under **Resources Entities** in the Resources view of the Bibliographic Record workform:

- The vendor's name, for example **3M Cloud Library**
- **Vendor Account Name** - Identifies the account associated with the vendor.
- **Active (Yes/No)** - Vendor account's status
- **Resource Group** - (optional) This is the name of the Resource Group, which is derived from the Vendor Account. The Resource Group cannot be modified from this view; you must change it in the Vendor Account.
- **Imported MARC data** - The 856 tag for the electronic resource, which includes the object identifier and the vendor's contract ID.
- **Object Identifier**: The ebook vendor's unique ID that identifies the electronic resource in the vendor's repository.
- **URL** - The URL to the ebook in the vendor's repository.
- **Link Text** - You can change the link text. The link text and public note appear in the PAC in the tooltip associated with the vendor logo. If the link text is not defined for the resource entity, the default is **3M Cloud Library**.
- **Cover Image URL** - The link to the cover image.
- **Public Note** - You can enter a public note that appears in the tooltip next to the vendor logo. The public note displays on a separate line in the tooltip, prefixed with the label **Note:**.
- **Non-Public Note** - You can enter a non-public note for staff members.
- **Creator** - PolarisExec indicates the resource entity was created automatically.
- **Creation Date** - The date and time when the resource entity was created automatically.

Tip:

Currently, the link text and public note do not display in Mobile PAC for an integrated ebook vendor.

Multiple Resource Entities for Same Integrated Vendor

If your library has multiple contracts with the same integrated ebook vendor, and the same ebook title is ordered under both contracts, a resource entity is created for each 856 tag that contains a unique vendor contract ID. Both resource entities are displayed in the Resources view of the Bibliographic Record.

The screenshot shows the 'Bibliographic Record 947938 - Resources - Polaris' window. The title is 'Hobbit Journey, A [electronic resource] : Discovering the Enchantment of J. R. R. Tolkien's Middle-earth'. The 'Resource Entities' section lists two entities:

3M Cloud Library QA

- Vendor Account Name: 3M Cloud Library QA
- Active: Yes
- Resource Group: Default server Resource group
- Imported MARC Data: 856 40 #3M Cloud Library#uhttp://ebook.3m.com/library/polarisdemo-document_id-e2u6g9#x8u8mf
- Object Identifier: e2u6g9
- URL: http://ebook.3m.com/library/polarisdemo-document_id-e2u6g9
- Link Text: 3M Cloud Library
- Cover Image URL: http://ebook.3m.com/delivery/img?type=DOCUMENTIMAGE&documentID=e2u6g9&token=nobody
- Public Note:
- Non-Public Note:
- Creator: PolarisExec
- Creation Date: 1/16/2013 9:21:08 AM

3M Cloud Library QA 2

- Vendor Account Name: 3M Cloud Library QA 2
- Active: Yes
- Resource Group: Saratoga & branches 8 & 28 & 18
- Imported MARC Data: 856 40 #3M Cloud Library#uhttp://ebook.3m.com/library/polaristest-document_id-e2u6g9#xczmf
- Object Identifier: e2u6g9
- URL: http://ebook.3m.com/library/polaristest-document_id-e2u6g9
- Link Text: 3M Cloud Library
- Cover Image URL: http://ebook.3m.com/delivery/img?type=DOCUMENTIMAGE&documentID=e2u6g9&token=nobody
- Public Note:
- Non-Public Note:
- Creator: PolarisExec
- Creation Date: 1/17/2013 9:56:08 AM

On the left side of the window, there is a vertical blue bar with the text 'Bibliographic Record' and several icons. At the bottom, there is a status bar with 'For Help, press F1' and 'NUM OVR'.

Resources Entities for Non-Integrated Ebook Vendors

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

Bibliographic Record 782189 - Resources - Polaris

File Edit View Links Tools Help

Control number: 782189 Owner: QA-Plato 4.1 Cluster Test System (sys) Record status: Final ☒ Display in PAC

Title: Cross [electronic resource] ☐ ILL

▼ Resource Entities

Content Reserve

Vendor Account Name: Content Reserve

Active: Yes

Resource Group: Overdrive - content reserve

Imported MARC Data: 856 4 #uhttp://www.contentreserve.com/TitleInfo.asp?ID={255C452B-F158-40A4-8CBC-9D439CF61381}&Format=25#zClick for information

Object Identifier: 255C452B-F158-40A4-8CBC-9D439CF61381

URL: http://www.contentreserve.com/TitleInfo.asp?ID={255C452B-F158-40A4-8CBC-9D439CF61381}&Format=25

Link Text: Click for information

Cover Image URL:

Public Note:

Non-Public Note:

Creator: Zukowski

Creation Date: 1/23/2013 10:06:13 AM

Linked Item Records
Open Vendor Account
Revert to MARC tag
Delete Resource Entity

Creating, Modifying, and Deleting Resource Entities

Resource entities are created when ebook bibliographic records are imported using an import profile that is associated with a vendor account. The import is automatic for integrated ebook vendors that can exchange records using the Polaris API-driven import process, and it is launched from the Import Setup window for ebook vendors that cannot exchange records using the API-driven import process. Resource entities can also be created from the Bibliographic Record workform and from the Bibliographic Bulk Change dialog box.

Note:

A single bibliographic record cannot contain resource entities for both integrated and non-integrated ebooks.

1-2-3

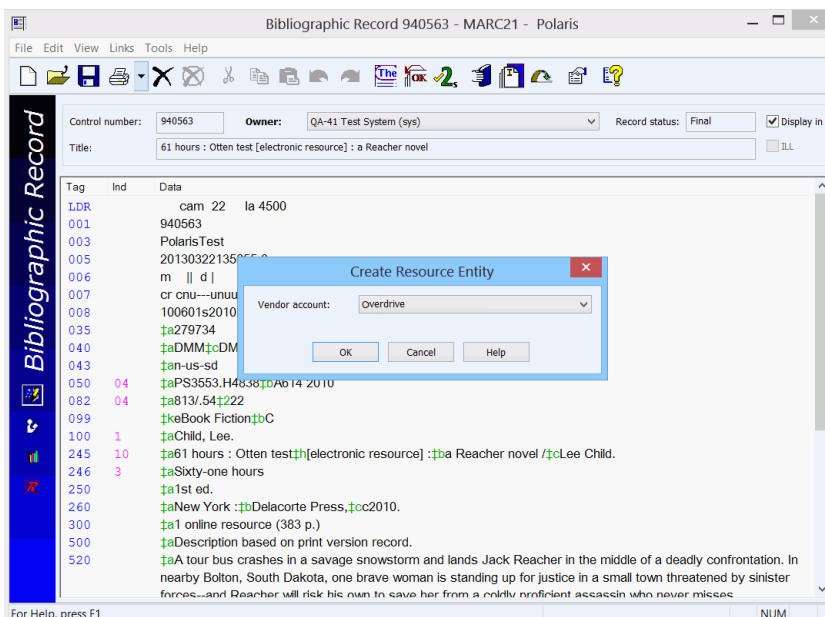
Create a resource entity from the Bibliographic Record workflow

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

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

The Create Resource Entity dialog box appears.

3. Select the vendor account, and click **OK** to close the dialog box.



4. Save the bibliographic record to create the resource entity. See [“Resource Entities for Integrated Ebook Vendors”](#) on page 217.

1-2-3

Bulk-create resource entities

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

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

1. Open the bibliographic record set containing the records for which you want to create resource entities.

**Tip:**

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

2. Select Tools, Bulk Change.

The Bibliographic Bulk Change dialog box appears with the non-MARC tabbed page displayed.

3. Select the **Create resource entities check box, and select the vendor account in the **Vendor account** box.**

The screenshot shows the 'Bibliographic Record Bulk Change' dialog box with the 'Data Fields' tab active. The 'Non-MARC' tab is also visible. The 'Create resource entities' checkbox is checked, and the 'Vendor account' dropdown is set to 'Overdrive'. Other options include 'Display In PAC', 'Record owner', and 'Save provisional records as final'.

4. Click OK.

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

Bibliographic Bulk Change Report

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

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

1-2-3

Delete a resource entity

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

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

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

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

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

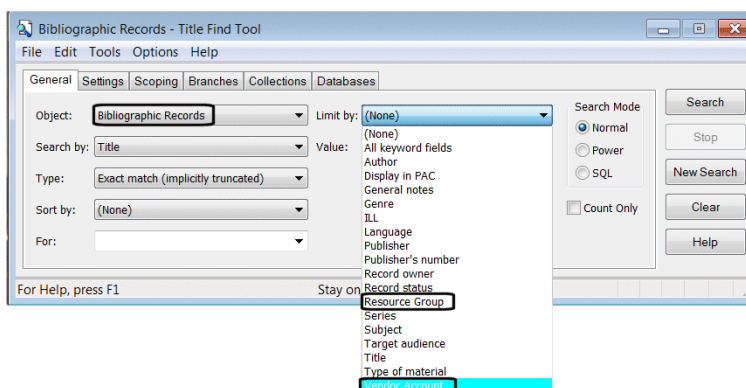
1-2-3

Delete a bibliographic record with a resource entity

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

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

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



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

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

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

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

1-2-3

Copy a bibliographic record with a resource entity

When you select **File, New, Copy** from the Bibliographic Record workflow, the resource entity is not copied to the new record. Instead, the tags are converted to traditional MARC tags in the new record. The resource entity can be created for the new record in another step. See [“Create a resource entity from the Bibliographic Record workflow”](#) on page 222.

1-2-3

Convert a resource entity to an 856 tag

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

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

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

Exporting Bibliographic Records with Resource Entities

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

Resource Entities Transactions

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

Overlaying 3M Ebook Bibliographic Records

If you want to import bibliographic records and overlay the 3M ebook bibs, while retaining all the integration with Polaris Circulation, the following steps are required:

- Inform the bibliographic record vendor that MARC or MARCXML records can be imported.
- Inform the bibliographic record vendor that the 037 tag must be retained in their records because the 037 tag contains the 3M item identifier and serves as a match point when the record is imported into Polaris.
- Copy and rename the Integrated ebook bibs import profile and follow the instructions in [“Create an import profile for overlaying 3M records”](#) on page 226.

1-2-3

Create an import profile for overlaying 3M records

Follow these steps to set up an import profile for overlaying 3M bibliographic records while retaining the data that enables integration with Polaris.

1. Select **Utilities, Importing, Profile Manager**.
The Profile Manager opens.
2. Select **PolarisExec** in the **Creator** box to see only the Polaris import profiles.
3. Select the **Integrated ebook bibs** import profile, right-click, and select **Copy**.
The Modify Import Profile window opens.
4. On the Profile Setup tab, type a name for the profile. You can also type a different description.
5. Save the import profile.
6. Select the Bibliographic Records tab.
7. In the Duplicate Detection section of the Bibliographic Records tab, under **If a suspected duplicate is found**, select **Save incoming record as final; replace database record**.

Note:

Do not change the duplicate detection rules defined in the profile.

8. Remove the 852 tag from the list of profile-defined retention tags, but leave the 856 tag.
9. Click **Save** to save the changes to the profile.

Modify Import Profile - Overlay 3M Ebook Bibs

Profile Setup | Bibliographic Records | Item Records | Authority Records | Record Sets

Bibliographic Save Options

☒ Save all records as final ☐ Save all records as provisional ☐ Do not save any records ☒ Display in PAC Record owner: QA-Plato 4.1 Cluster Test System (sys)

When Saving Bibliographic Records as Final

☒ Perform MARC 21 Validation
If validation errors are found:
☐ Save record as provisional
☒ Ignore errors; save record as final

☐ Perform Authority Control
If no matching heading is found:
☐ Automatically create new authority record; save bibliographic record as final
☐ Do not create authority record; save bibliographic record as final
☐ Do not create authority record; save bibliographic record as provisional

☒ Perform Duplicate Detection
☐ Use system defined duplicate detection rules
☒ Use profile defined duplicate detection rules
If a suspected duplicate is found:
☐ Save incoming record as provisional
☒ Save incoming record as final; do not replace database record
☐ Save record with highest encoding level. If encoding levels match:
☐ Save incoming record as final; replace database record
☐ Reject incoming record
☐ Save incoming record as provisional (ignore 'Keep MARC Tags')
☐ Reject incoming record; add MARC retention tags to database record

Rules to select

- incoming 001/003 = existing 035 #a
- incoming 001 = existing 010 #a
- incoming 001 = existing 035 #a
- incoming 1xx #a = existing 1xx #a
- incoming 010 #a = existing 010 #a
- incoming 022 #a = existing 022 #a

Rules to apply (as unique groups)

- incoming 037 #a = existing 037 #a

☒ Keep MARC Tags
☐ System defined overlay retention tags
☒ Profile defined overlay retention tags

Tag	Indicator 1	Indicator 2	MARC Description
856	0,1,2,3,4,...	0,1,2,3,4,...	Electronic Location and Access
956	4	2	Integrated Ebook Product Information

Save Close Help

10. Select the Item Records tab.

11. Clear the Build item records check box.

Modify Import Profile - Overlay 3M Ebook Bibs

Profile Setup | Bibliographic Records | Item Records | Authority Records | Record Sets

When Saving Bibliographic Records as Final

☐ Build item records

☐ Using embedded holdings fields only
☐ Using template/system default values only
☐ Using all available holdings/item fields

If a duplicate item record (barcode) is found:
☐ Save duplicate item record as provisional
☐ Do not save duplicate item record

If no item record (barcode) is found:
☐ Save item record as final
☐ Save item record as provisional
☐ Do not save item record

☐ Display in PAC (when not explicitly found)

Item template (for fields that are missing):

☐ Update items (enriched EDI)

If an update error is encountered:
☐ Save item record as provisional
☐ Do not save item record

Embedded holdings field/MARC subfield mapping

Holdings tag number: 852

Assigned Branch:	a	Loanable Outside System:	7
Assigned Collection:	b	Material Type:	w
Barcode:	p	Name Of Piece:	
Call Number Prefix:	k	Non Circulating:	
Call Number Suffix:	m	Non Public Note:	x
Circulation Status:		Owning Branch:	o
Classification Number:	h	Physical Condition:	q
Copy Number:	t	POLI-Segment ID:	
Cutter Number:	i	Price:	0
Display In PAC:	4	Public Note:	z
Fine Code:	r	Renewal Limit:	y
Free Text Block:		Shelf Location:	c
Funding Source:	1	Shelving Scheme:	j
Holdable:	5	Statistical Code:	d
Library Assigned Block:		Temporary Shelf Location:	i
Loan Period Code:	u	Volume Number:	v

Save Close Help

12. Click Save to save the profile.

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 4.1R2*.

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”](#) on page 229

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.

The screenshot displays the Polaris Cataloging interface. On the left, a sidebar contains two sections: 'Featured Community Resources' and 'Featured Bibliographic Resources'. The 'Featured Community Resources' section lists 'Arts activities for young children' with a description: 'Events and community profiles that have arts education and activities for young children. Community arts programs.' The 'Featured Bibliographic Resources' section lists 'Art Projects for Children' with a description: 'Ideas for doing art projects with children. For parents, teachers and caregivers.' A 'Save Search' button is located at the bottom of the sidebar. The main content area shows a search results page for the keyword 'art projects'. The search bar at the top contains 'art projects' and a 'Go!' button. Below the search bar, there are options for 'Search by' (Any Field) and 'Limit by' (All Items - All Libraries). The results show '1 - 10 of 259' items, with '10' items per page. The first result is '1. Play-doh art projects' by Ross, Kathy, 1948-. The description for this result is: 'Play-doh art projects / by Kathy Ross ; illustrated by Sharon Hawkins Vargo. Publisher, Date: Brookfield, Conn. : Millbrook Press, 2002. Description: 48 p. : col. ill. ; 22 x 29 cm. Call Number: J 745.5 Ros 2002'. There are buttons for 'Availability', 'Full Display', and 'Place Request' next to the result.

See the following topics:

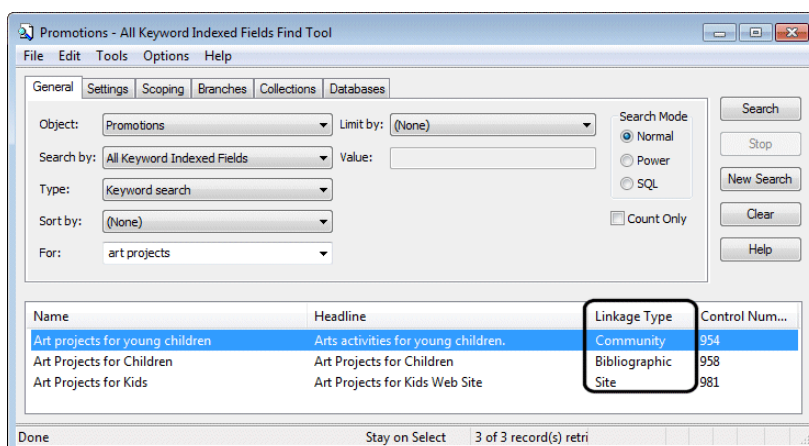
- “Find an existing promotion record” on page 230
- “Create a new promotion record from the Shortcut Bar” on page 230
- “Create a new record from the Promotion workflow” on page 231
- “Enter or edit general promotion information” on page 232
- “Enter the resource(s) to feature” on page 233
- “Enter search terms to trigger the featured resources” on page 234
- “Enter demographic targeting for promotions” on page 238

1-2-3

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.

1-2-3

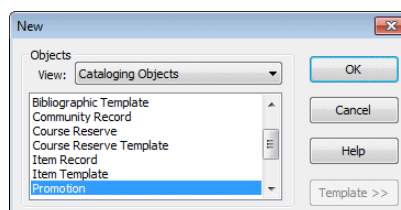
Create a new promotion record from the Shortcut Bar

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 workflow opens.

4. Enter information in the workflow. See the following topics:

- “Enter or edit general promotion information” on page 232
- “Enter the resource(s) to feature” on page 233
- “Enter search terms to trigger the featured resources” on page 234
- “Enter demographic targeting for promotions” on page 238

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

A message in the status bar indicates the record was saved.

1-2-3

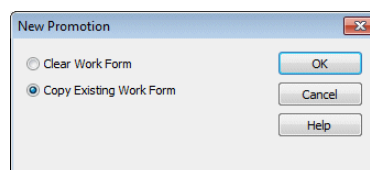
Create a new record from the Promotion workflow

Follow these steps to create a new promotion record from the Promotion workflow.

1. Use the Polaris Find Tool to locate and display an existing promotion record.

2. Select **File, New**, or press **CTRL+N** from the workflow menu bar.

The New Promotion dialog box appears.



3. Select one of the following options:

- **Clear Work Form** - The data is cleared from the workflow, and a new, blank workflow appears.
- **Copy Existing Work Form** - The original workflow closes, and a copy of the workflow appears.

4. Click **OK**.

5. The new record appears in the Promotion workflow.

6. Enter or modify the information in the Promotion workflow.

- “Enter or edit general promotion information” on page 232
- “Enter the resource(s) to feature” on page 233
- “Enter search terms to trigger the featured resources” on page 234
- “Enter demographic targeting for promotions” on page 238

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).

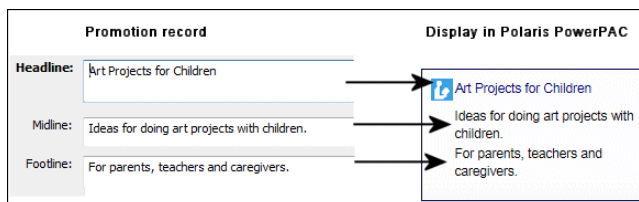
Note:

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

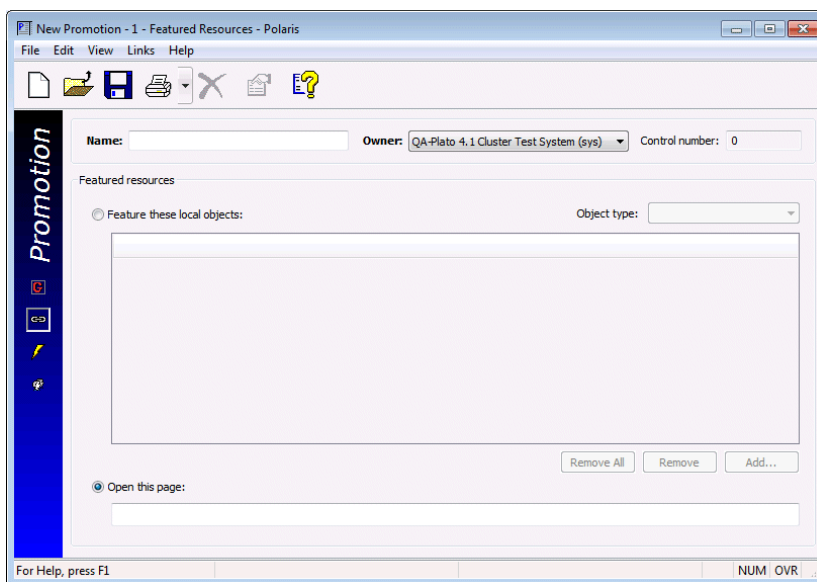
Enter the resource(s) to feature

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 workflow. Promotion records are linked to the bibliographic or community records they feature.

1. Open the Promotions workflow, 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 4.1R2*.

4. Select **File, Save**.

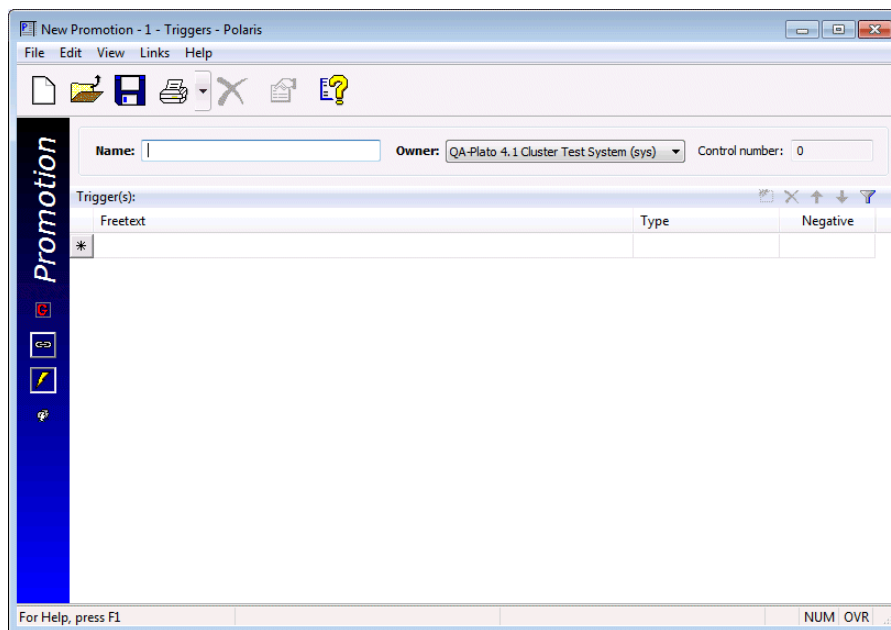
1-2-3

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 236.

Follow these steps to enter promotion triggers.

1. Open the Promotions workform, and go to the Triggers view.



Tips:

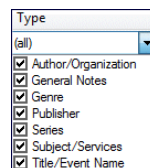
Wild card characters, such as an asterisk, are not supported for triggers.

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.

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.

3. In the **Type** column, select the box to open the list of search types.



Type
(all)
☒ Author/Organization
☒ General Notes
☒ Genre
☒ Publisher
☒ Series
☒ Subject/Services
☒ Title/Event Name

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 236.

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:

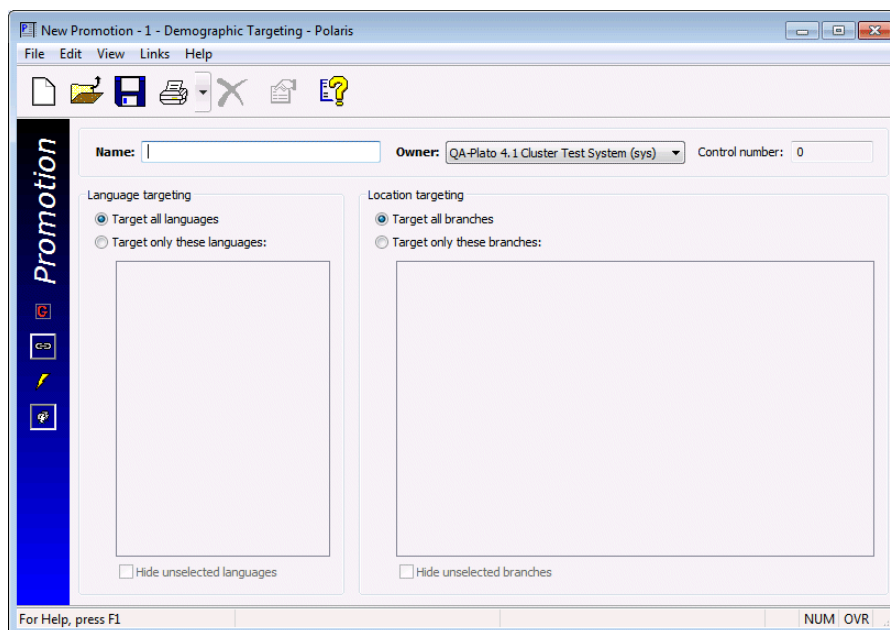
For the search term *Kei\$ha*, enter two triggers: *keisha* and *kei\$ha*. This way, a match will occur when the user searches for either version of the name.

1-2-3

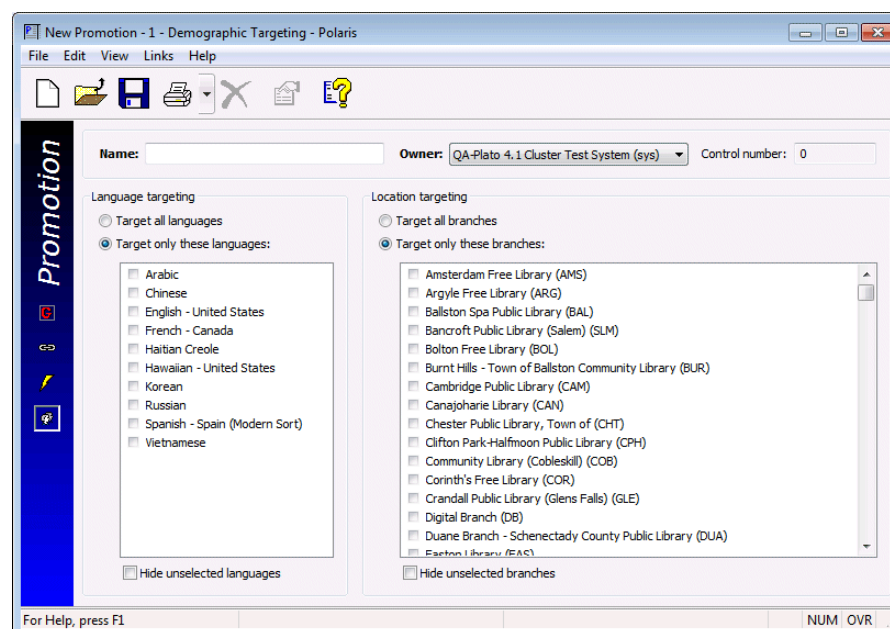
Enter demographic targeting for promotions

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.

Note:

For more information on the TOM display in the PAC, see [“Setting Up Search Filters \(Limit By\)”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

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 248.

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 4.1R2*.

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 [“Outreach Services Reports”](#) in the *Polaris Basics Guide 4.1R2*.

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	

<i>Format/Icon</i>	<i>Code</i>	<i>LDR/06</i>	<i>LDR/07</i>	<i>006</i>	<i>007</i>	<i>008</i>
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			

<i>Format/Icon</i>	<i>Code</i>	<i>LDR/06</i>	<i>LDR/07</i>	<i>006</i>	<i>007</i>	<i>008</i>
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

<i>Format/Icon</i>	<i>Code</i>	<i>LDR/06</i>	<i>LDR/07</i>	<i>006</i>	<i>007</i>	<i>008</i>
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

<i>Format/Icon</i>	<i>Code</i>	<i>LDR/06</i>	<i>LDR/07</i>	<i>006</i>	<i>007</i>	<i>008</i>
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		

<i>Format/Icon</i>	<i>Code</i>	<i>LDR/06</i>	<i>LDR/07</i>	<i>006</i>	<i>007</i>	<i>008</i>
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	

<i>Format/Icon</i>	<i>Code</i>	<i>LDR/06</i>	<i>LDR/07</i>	<i>006</i>	<i>007</i>	<i>008</i>
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 250. To see which icon will appear in Polaris PowerPAC, select **View, PAC** from the Bibliographic Record workform.

<i>Order of Precedence</i>	<i>Format/Type of Material</i>	<i>Code</i>
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

<i>Order of Precedence</i>	<i>Format/Type of Material</i>	<i>Code</i>
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 248.



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.

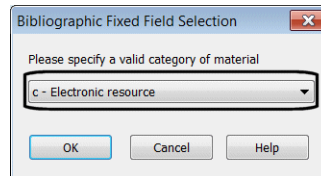
LDR 06=a-Language material

AND

006/00 = m - Computer file/Electronic resource

AND

007/00= c - Electronic resource



Bibliographic Fixed Field Selection

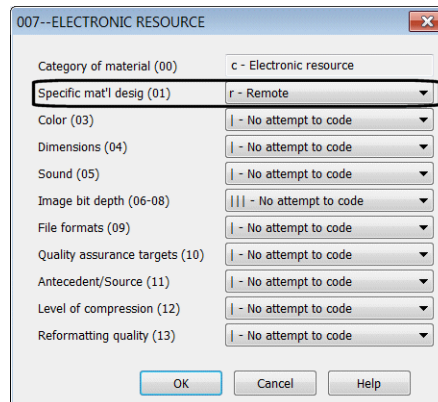
Please specify a valid category of material

c - Electronic resource

OK Cancel Help

AND

007/01= r - Remote



007--ELECTRONIC RESOURCE

Category of material (00) c - Electronic resource

Specific mat'l design (01) r - Remote

Color (03) | - No attempt to code

Dimensions (04) | - No attempt to code

Sound (05) | - No attempt to code

Image bit depth (06-08) ||| - No attempt to code

File formats (09) | - No attempt to code

Quality assurance targets (10) | - No attempt to code

Antecedent/Source (11) | - No attempt to code

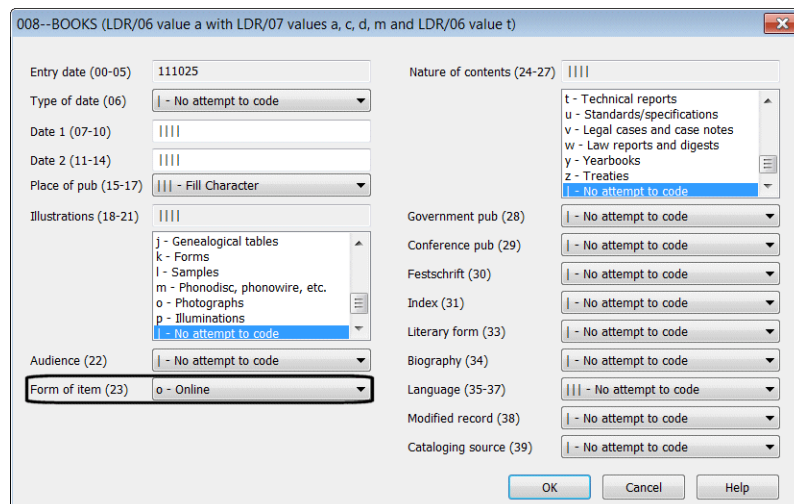
Level of compression (12) | - No attempt to code

Reformatting quality (13) | - No attempt to code

OK Cancel Help

AND EITHER

008/23=o - online



008--BOOKS (LDR/06 value a with LDR/07 values a, c, d, m and LDR/06 value t)

Entry date (00-05) 111025

Type of date (06) | - No attempt to code

Date 1 (07-10) ||||

Date 2 (11-14) ||||

Place of pub (15-17) ||| - Fill Character

Illustrations (18-21) ||||

j - Genealogical tables
k - Forms
l - Samples
m - Phonodisc, phonowire, etc.
o - Photographs
p - Illuminations
| - No attempt to code

Audience (22) | - No attempt to code

Form of item (23) o - Online

Nature of contents (24-27) ||||

t - Technical reports
u - Standards/specifications
v - Legal cases and case notes
w - Law reports and digests
y - Yearbooks
z - Treaties
| - No attempt to code

Government pub (28) | - No attempt to code

Conference pub (29) | - No attempt to code

Festschrift (30) | - No attempt to code

Index (31) | - No attempt to code

Literary form (33) | - No attempt to code

Biography (34) | - No attempt to code

Language (35-37) ||| - No attempt to code

Modified record (38) | - No attempt to code

Cataloging source (39) | - No attempt to code

OK Cancel Help

Audio E-book



A downloadable electronic sound file of a recorded book.

LDR 06=**i-Nonmusical sound recording**

LEADER - BIBLIOGRAPHIC DATA

Record status (05)	n - New
Type of record (06)	i - Nonmusical sound recording
Bibliographic level (07)	m - Monograph/item
Type of control (08)	- No specific type
Character coding scheme (09)	- MARC-8
Encoding level (17)	I - Full-level input by OCLC participa
Descriptive cataloging form (18)	a - AACR 2
Multipart resource record level (19)	- Not specified or not applicable

OK Cancel Help

AND

006 /00=**m-Computer file/Electronic resource** AND /09=**h-Sound**

006--COMPUTER FILES/ELECTRONIC RESOURCES

Form of material (00)	m - Computer file/Electronic resource
Audience (05)	- Unknown or not specified
Type of computer file (09)	h - Sound
Government pub (11)	- No attempt to code

OK Cancel Help

AND Two 007s needed:

1st 007: /00=**s-Sound recording** AND /12=**e-Digital recording** AND /13=**d-Digital storage**

007--SOUND RECORDING

Category of material (00)	s - Sound recording
Specific mat'l desig (01)	z - Other
Speed (03)	u - Unknown
Config of playback channels (04)	u - Unknown
Groove width/pitch (05)	n - Not applicable
Dimensions (06)	n - Not applicable
Tape width (07)	n - Not applicable
Tape configuration (08)	n - Not applicable
Kind of disc/cylinder/tape (09)	i - No attempt to code
Kind of material (10)	i - No attempt to code
Kind of cutting (11)	i - No attempt to code
Special playback char (12)	e - Digital recording
Capture/storage technique (13)	d - Digital storage

OK Cancel Help

2nd 007: /00=**c-Electronic resource** AND /01=**r-Remote** AND /05=**a-Sound on medium**

007--ELECTRONIC RESOURCE

Category of material (00)	c - Electronic resource
Specific mat'l desig (01)	r - Remote
Color (03)	n - Not applicable
Dimensions (04)	n - Not applicable
Sound (05)	a - Sound on medium
Image bit depth (06-08)	nnn - Not applicable
File formats (09)	a - One
Quality assurance targets (10)	n - Not applicable
Antecedent/source (11)	u - Unknown
Level of compression (12)	u - Unknown
Reformatting quality (13)	u - Unknown

OK Cancel Help

AND

008 /23=s-Electronic *Or* o-online

008--MUSIC (LDR/06 values c, d, i, j)

Entry date (00-05)	070606	Literary text (30-31)	f
Type of date (06)	r - Reprint/issue date and original		
Date 1 (07-10)	2007		
Date 2 (11-14)	2007		
Place of pub (15-17)	mdy - Maryland		
Form of composition (18-19)	nn - Not applicable	Transposition (33)	n - Not applicable
Format of music (20)	n - Not applicable	Language (35-37)	eng - English
Music parts (21)	- No parts in hand or not specified	Modified record (38)	- Not modified
Audience (22)	- Unknown or not specified	Cataloging source (39)	d - Other
Form of item (23)	s - Electronic		
Accomp matter (24-29)	- No accompanying matter - a - Discography - b - Bibliography - c - Thematic index - d - Libretto or text - e - Biography of composer or author - f - Biography of performer or historian		

OK Cancel Help

Audio Books



Sound recording of a book being read aloud - can be on a diskette or a CD.

LDR 06=**a-Language material**

LEADER - BIBLIOGRAPHIC DATA	
Record status (05)	n - New
Type of record (06)	a - Language material
Bibliographic level (07)	m - Monograph/item
Type of control (08)	- No specific type
Character coding scheme (09)	- MARC-8
Encoding level (17)	- Full level
Descriptive cataloging form (18)	- Non-ISBD
Multipart resource record level (19)	- Not specified or not applicable

AND

007 /00=**s-Sound recording**

007--SOUND RECORDING	
Category of material (00)	s - Sound recording
Specific mat'l desig (01)	d - Sound disc
Speed (03)	f - 1.4 m. per sec.
Config of playback channels (04)	u - Unknown
Groove width/pitch (05)	n - Not applicable
Dimensions (06)	g - 4 3/4 in. or 12 cm.
Tape width (07)	n - Not applicable
Tape configuration (08)	n - Not applicable
Kind of disc/cylinder/tape (09)	i - No attempt to code
Kind of material (10)	i - No attempt to code
Kind of cutting (11)	i - No attempt to code
Special playback char (12)	e - Digital recording
Capture/storage technique (13)	d - Digital storage
OK Cancel Help	

Music CD



Musical sound recording on a compact disc.

LDR 06=**j-Musical sound recording**

LEADER - BIBLIOGRAPHIC DATA	
Record status (05)	c - Corrected or revised
Type of record (06)	j - Musical sound recording
Bibliographic level (07)	m - Monograph/item
Type of control (08)	- No specific type
Character coding scheme (09)	- MARC-8
Encoding level (17)	- Full level
Descriptive cataloging form (18)	a - AACR 2
Multipart resource record level (19)	- Not specified or not applicable
OK Cancel Help	

AND

007 /00=**s-Sound recording** AND 007 /01=**d-Sound disc**

007--SOUND RECORDING

Category of material (00)	s - Sound recording
Specific matl desig (01)	d - Sound disc
Speed (03)	f - 1.4 m. per sec.
Config of playback channels (04)	u - Unknown
Groove width/pitch (05)	n - Not applicable
Dimensions (06)	g - 4 3/4 in. or 12 cm.
Tape width (07)	n - Not applicable
Tape configuration (08)	n - Not applicable
Kind of disc/cylinder/tape (09)	i - No attempt to code
Kind of material (10)	i - No attempt to code
Kind of cutting (11)	i - No attempt to code
Special playback char (12)	u - Unknown
Capture/storage technique (13)	u - Unknown

OK Cancel Help



Book and CD

A book with a sound recording on CD.

LDR /06=**a-Language material** Or LDR 06=**i-Nonmusical sound recording**

LEADER - BIBLIOGRAPHIC DATA

Record status (05)	n - New
Type of record (06)	a - Language material
Bibliographic level (07)	m - Monograph/item
Type of control (08)	- No specific type
Character coding scheme (09)	- MARC-8
Encoding level (17)	- Full level
Descriptive cataloging form (18)	- Non-ISBD
Multipart resource record level (19)	- Not specified or not applic

AND

006 /00=**a-Language material**

006--BOOKS

Form of material (00)	a - Language material	Nature of contents (07-10)	
Illustrations (01-04)			
	k - Forms l - Samples m - Phonodisc, phonowire, etc. o - Photographs p - Illuminations i - No attempt to code		t - Technical reports u - Standards/specifications v - Legal cases and case notes w - Law reports and digests y - Yearbooks z - Treaties i - No attempt to code
Audience (05)	i - No attempt to code	Government pub (11)	i - No attempt to code
Form of item (06)	i - No attempt to code	Conference pub (12)	i - No attempt to code
		Festschrift (13)	i - No attempt to code
		Index (14)	i - No attempt to code
		Literary Form (16)	i - No attempt to code
		Biography (17)	i - No attempt to code

OK Cancel Help

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**

007--SOUND RECORDING

Category of material (00)	s - Sound recording
Specific mat'l desig (01)	s - Sound cassette
Speed (03)	f - 1.4 m. per sec.
Config of playback channels (04)	u - Unknown
Groove width/pitch (05)	n - Not applicable
Dimensions (06)	g - 4 3/4 in. or 12 cm.
Tape width (07)	n - Not applicable
Tape configuration (08)	n - Not applicable
Kind of disc/cylinder/tape (09)	i - No attempt to code
Kind of material (10)	i - No attempt to code
Kind of cutting (11)	i - No attempt to code
Special playback char (12)	i - No attempt to code
Capture/storage technique (13)	e - Analog electrical storage

OK Cancel Help

Blu-ray Disc



The Blu-ray Disc (BD) is a high density optical disc recorded with a blue laser.

LDR/06=g - **projected medium**

LEADER - BIBLIOGRAPHIC DATA

Record status (05)	c - Corrected or revised
Type of record (06)	g - Projected medium
Bibliographic level (07)	m - Monograph/item
Type of control (08)	- No specific type
Character coding scheme (09)	- MARC-8
Encoding level (17)	K - Less-than-full input by OCLC par
Descriptive cataloging form (18)	a - AACR 2
Multipart resource record level (19)	- Not specified or not applicable

OK Cancel Help

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**

007--VIDEORECORDING

Category of material (00)	v - Videorecording
Specific mat'l desig (01)	d - Videodisc
Color (03)	c - Multicolored
Videorecording format (04)	s - Blu-ray disc
Sound on medium/sep (05)	a - Sound on medium
Medium for sound (06)	i - Videodisc
Dimensions (07)	z - Other
Config of playback channels (08)	u - Unknown

OK Cancel Help

AND 008/33=v -**videorecording**

008--VISUAL MATERIALS (LDR/06 values g, k, o, r)

Entry date (00-05)	080416
Type of date (06)	s - Single known date/probable date
Date 1 (07-10)	2008
Date 2 (11-14)	
Place of pub (15-17)	cau - California
Running time (18-20)	109
Audience (22)	g - General
Government pub (28)	- Not a government publication
Form of item (29)	- None of the following
Type of visual matl (33)	v - Videorecording
Technique (34)	i - Live action
Language (35-37)	eng - English
Modified record (38)	- Not modified
Cataloging source (39)	d - Other

OK Cancel Help



An abbreviation of digital videodisc that stores a video recording.

LDR/06=**g** - projected medium

LEADER - BIBLIOGRAPHIC DATA

Record status (05)	c - Corrected or revised
Type of record (06)	g - Projected medium
Bibliographic level (07)	m - Monograph/item
Type of control (08)	- No specific type
Character coding scheme (09)	- MARC-8
Encoding level (17)	K - Less-than-full input by OCLC par
Descriptive cataloging form (18)	a - AACR 2
Multipart resource record level (19)	- Not specified or not applicable

OK Cancel Help

007 /00=**v**-Videorecording AND /01=**d**-Videodisc

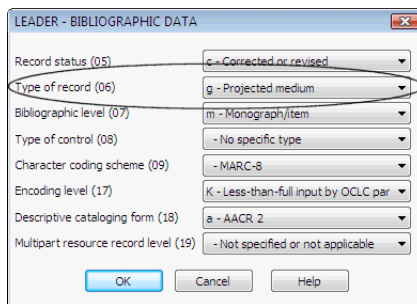
007--VIDEORECORDING

Category of material (00)	v - Videorecording
Specific matl desig (01)	d - Videodisc
Color (03)	i - No attempt to code
Videorecording format (04)	i - No attempt to code
Sound on medium/sep (05)	a - Sound on medium
Medium for sound (06)	i - No attempt to code
Dimensions (07)	i - No attempt to code
Config of playback channels (08)	u - Unknown

OK Cancel Help

Videotape

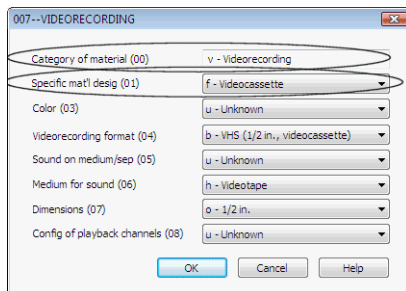
LDR/06=g - projected medium



LEADER - BIBLIOGRAPHIC DATA	
Record status (05)	g - Corrected or revised
Type of record (06)	g - Projected medium
Bibliographic level (07)	m - Monograph/item
Type of control (08)	- No specific type
Character coding scheme (09)	- MARC-8
Encoding level (17)	K - Less-than-full input by OCLC par
Descriptive cataloging form (18)	a - AACR 2
Multipart resource record level (19)	- Not specified or not applicable

AND

007 /00=v AND /01=c or f



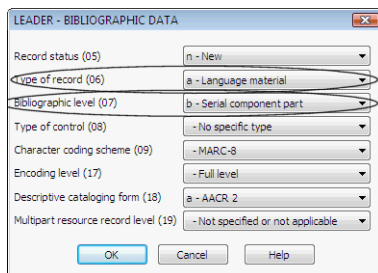
007--VIDEORECORDING	
Category of material (00)	v - Videorecording
Specific matl desig (01)	f - Videocassette
Color (03)	u - Unknown
Videorecording format (04)	b - VHS (1/2 in., videocassette)
Sound on medium/sep (05)	u - Unknown
Medium for sound (06)	h - Videotape
Dimensions (07)	o - 1/2 in.
Config of playback channels (08)	u - Unknown

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



LEADER - BIBLIOGRAPHIC DATA	
Record status (05)	n - New
Type of record (06)	a - Language material
Bibliographic level (07)	b - Serial component part
Type of control (08)	- No specific type
Character coding scheme (09)	- MARC-8
Encoding level (17)	- Full level
Descriptive cataloging form (18)	a - AACR 2
Multipart resource record level (19)	- Not specified or not applicable

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

LEADER - BIBLIOGRAPHIC DATA	
Record status (05)	n - New
Type of record (06)	a - Language material
Bibliographic level (07)	m - Monograph/item
Type of control (08)	- No specific type
Character coding scheme (09)	- MARC-8
Encoding level (17)	- Full level
Descriptive cataloging form (18)	- Non-ISBD
Multipart resource record level (19)	- Not specified or not applicable

AND

006 /00=**s**-Serial/Integrating resource

006--CONTINUING RESOURCES	
Form of material (00)	s - Serial/Integrating resource
Frequency (01)	- No attempt to code
Regularity (02)	- No attempt to code
Type of cont resource (04)	- No attempt to code
Form of original item (05)	- No attempt to code
Form of item (06)	- No attempt to code
Nature of entire work (07)	- No attempt to code
Nature of contents (08-10)	t - Technical reports u - Standards/specifications v - Legal cases and case notes w - Law reports and digests y - Yearbooks z - Treaties - No attempt to code
Government publication (11)	- No attempt to code
Conference publication (12)	- No attempt to code
Orig alphabet/script of title (16)	- No attempt to code
Entry convention (17)	- No attempt to code

AND

008/21=**p**-Periodical

008--CONTINUING RESOURCES (LDR/06 value a with LDR/07 values b, i, s)			
Entry date (00-05)		Nature of contents (25-27)	
Pub status (06)	- No attempt to code	t - Technical reports	
Date 1 (07-10)		u - Standards/specifications	
Date 2 (11-14)		v - Legal cases and case notes	
Place of pub (15-17)	- Fill Character	w - Law reports and digests	
Frequency (18)	- No attempt to code	y - Yearbooks	
Regularity (19)	- No attempt to code	z - Treaties	
Type cont resource (21)	p - Periodical	- No attempt to code	
Form of orig item (22)	- No attempt to code	Government pub (28)	- No attempt to code
Form of item (23)	- No attempt to code	Conference pub (29)	- No attempt to code
Nature of entire work (24)	- No attempt to code	Orig alphabet/script of title (33)	- No attempt to code
		Entry convention (34)	- No attempt to code
		Language (35-37)	- No attempt to code
		Modified record (38)	- No attempt to code
		Cataloging source (39)	- No attempt to code

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

Setting Up Labels



You set label profiles for Cataloging and Serials labels on the Staff Client tab in Polaris Administration, and you configure, customize, and edit labels using the Label Manager. The Label Manager is available from the Polaris Shortcut Bar under **Utilities** and from Polaris Administration.

Note:

The permissions **Label Manager Configuration: Create, Modify, and Delete** apply to label type and label content. For example, if you have the **Create** permission, you can create both label types and label content.

Recommendations for Label Types and Content

The available label types are associated with the branch where you are logged on. Make sure the content types and label types are available at the workstation from which you are printing the labels. If your library system does centralized processing, set the label types and content at the system level, and make sure all your branches are using the same label types and content. If your branch does its own processing, make sure the content type and the label type you need are both available at the workstation from which you print the labels.

When you set up custom labels, use the default label types for guidelines on the label and page sizes. Although you can change the page and label size to any value greater than 0, deviating too far from the standard sizes may produce labels with incomplete text. Use **Print Preview** to check your custom labels.

This unit covers the following topics:

- [“Setting Label Profiles”](#) on page 263
- [“Configuring Existing Label Types”](#) on page 266
- [“Creating Custom Labels”](#) on page 274
- [“Setting the Default Label Printers”](#) on page 277

Setting Label Profiles

Polaris Administration profiles on the Staff Client tab control various default settings for labels, such as whether labels are printed automatically when item records are created. Use the **Labels: Options** profile to configure existing label types and specify the label content.

See the following topic:

- “[Set label profiles in Polaris Administration](#)” on page 263

1-2-3

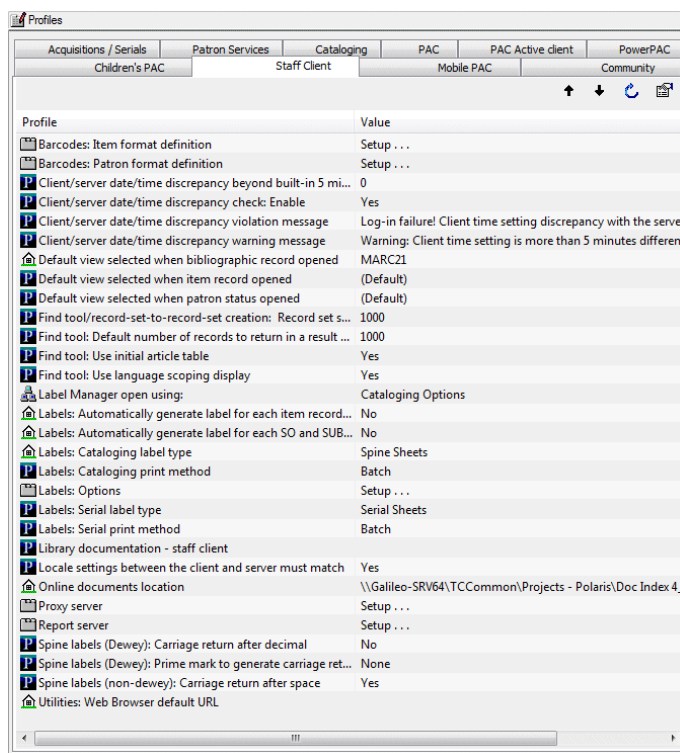
Set label profiles in Polaris Administration

Tip:

For a list of all the Staff Client profiles, see “[Staff Client Profiles Reference](#)” in the *Polaris Administration Guide 4.1R2*.

Follow these steps to set default values for spine, pocket, and serial labels.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Staff Client** tab.



3. Double-click **Label Manager open using** and select **Cataloging Options** or **Serial Options** to specify which type of label appears when you open Label Manager from the **Utilities** menu on the Polaris Shortcut Bar.
 - If you select **Cataloging Options**, the cataloging label displays according to the setting in the **Labels: Cataloging label type** profile.
 - If you select **Serial Options**, the serial label is displayed according to the setting in the **Labels: Serial label type** profile.
4. Double-click **Labels: Automatically generate labels for each item record created**. Select **Yes** to generate labels automatically when items are created, or **No** if you do not want labels to be generated automatically.
5. Double-click **Labels: Automatically generate labels for each SO and SUBS check-in**. Select **Yes** to set labels to be generated automatically when issues or parts are checked in, or **No** if you do not want labels to be generated automatically.
6. Double-click **Labels: Cataloging label type**, and select the default label type to be generated when cataloging items.

Note:

The label types must be enabled for them to appear in this list. See [“Set up existing label types”](#) on page 270.

7. Double-click **Labels: Cataloging print method**, and 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 and the user can view the label before printing it.
 - 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.

Note:

Batch printing is limited to 500 labels at a time.

- If **Quick Print** is selected, the label is printed at the designated printer without opening the Label Manager.

Tip:

You can also select **Utilities** from the Polaris Shortcut Bar and select **Label Manager**, **Tools**, **Label Settings and Content** to open the Label Configuration dialog box.

8. Double-click **Setup** in the **Labels: Options** profile to modify existing labels, specify the label content, and create custom labels. The Label Configuration dialog box appears. See [“Set up existing label types”](#) on page 270.

Note:

This profile is available at the workstation level, but only the Settings tab appears. Both the Settings and Content tabs are available at the system, library, and branch levels.

9. Double-click **Labels: Serial label type**, and select the default label type for serials issues.

- 10.** Double-click **Labels: Serial print method**, and select **On Demand**, **Batch**, or **Quick Print** to specify how you want serial labels to print.
- If **On Demand** is selected, the Label Manager appears when the user requests a label and the user can view the label before printing it.
 - 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 issues or parts.

Note:

Batch printing is limited to 500 labels at a time.

- If **Quick Print** is selected, the label is printed at the designated printer without opening the Label Manager.
- 11.** To specify a carriage return in the classification number, do the following:

Dewey shelving scheme -

- To force a new line after a decimal in the classification number on spine labels, double-click **Spine Labels (Dewey): Carriage return after decimal**, and select **Yes**.
- To specify a character that forces a new line in the classification number, double-click **Spine Labels (Dewey): Prime mark to generate carriage return**, and select one of the following options from the list:
- Select **None** to ignore any prime marks.
- Select **Forward Slash /** to start a new line wherever this prime mark is placed in the classification number.
- Select **Apostrophe '** to start a new line wherever this prime mark is placed in the classification number.

Library of Congress or other non-Dewey shelving scheme -

- To force a new line after a space in the classification number, set the **Spine Labels (non-Dewey): Carriage return after space** profile to **Yes**.

Tip:

The prime marks must be inserted with the contents in the **Class** box on the Item Record workform.

Configuring Existing Label Types

Use the Label Manager to configure existing label types for spine, pocket, and serial labels, and to specify the content that you want to appear on them. You can also set up your own custom labels in Label Manager. See [“Creating Custom Labels”](#) on page 274. After labels are set up and enabled in the Label Manager, they are available to be printed from the following areas in Polaris:

- Item Record
- New Item Record Options
- Serial Issue
- Standing Order Part
- Subscription Check In
- Standing Order Part Check In

Labels can be printed as you catalog each item, or you can catalog multiple items and print labels in batch. If the profile **Labels: Automatically generate label for each item created** is set to **Yes** in Polaris Administration, a label is generated automatically when you create and save a new item record.

To print labels, 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.

By default, Polaris uses the Andale Mono font, which is available at no cost from the Microsoft Web site. The default size is 12 points. On an SL4 label sheet, this font allows eight characters and spaces per line (total of eight lines) on the spine label and 28 characters per line on the pocket labels (total of four lines). The label stock size and label size can be changed but you cannot change the number of labels per page or per label group for the system-defined label types (Spine, SL4, SL6, SLB and Serials). See [“Standard Label Types”](#) on page 267.

After you generate your labels, you can preview them in the Label Manager and use the right-click context menu to edit this particular page of labels. You can copy, paste, delete, insert text, change the font, or select diacritics to insert into the labels.

See the following topics:

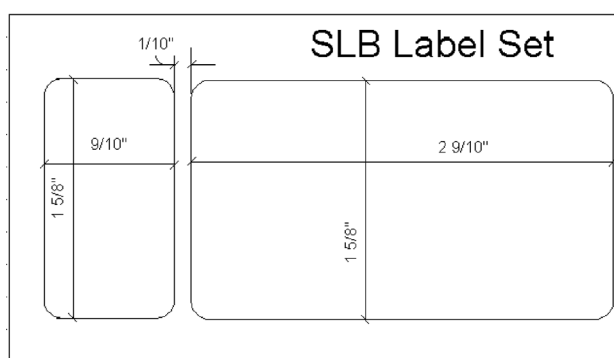
- [“Standard Label Types”](#) on page 267
- [“Computype Spine Labels”](#) on page 268
- [“Label Content”](#) on page 269
- [“Set up existing label types”](#) on page 270
- [“Define the label content”](#) on page 273

Standard Label Types

All the standard label types have three sections of content. Label sets contain different label styles. You can configure existing label types, see [“Set up existing label types”](#) on page 270.

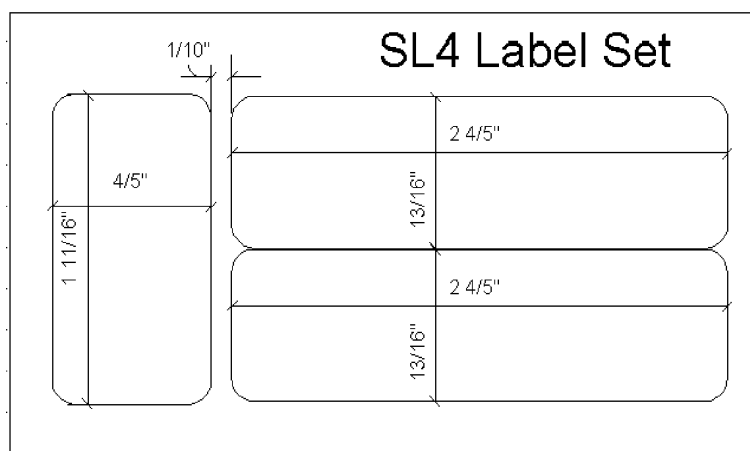
Spine sheets - Spine label sheets contain 50 labels per sheet. Each label is 1.5 inches (3.81 cm) wide and 1 inch (2.54 cm) high. They can have five text lines of 11 characters each.

SLB sheets - SLB label sheets contain 12 label sets per sheet. Each label set has a spine label and a pocket label. Polaris SLB spine labels have nine text lines of eight characters each. Polaris SLB pocket labels have nine text lines of 28 characters each.

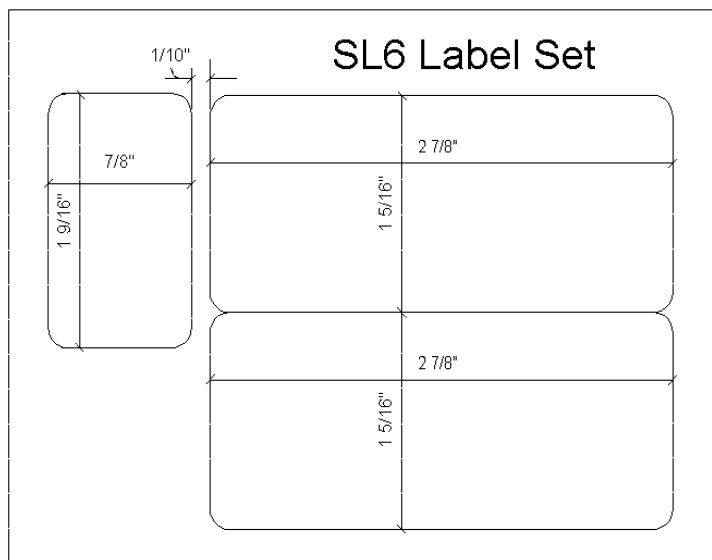


Serial sheets - Serial label sheets contain 20 labels per sheet. Serial labels are 4 inches (10 cm) wide and 1 inch (2.54 cm) high. They have five text lines of 34 characters each.

SL4 sheets - SL4 label sheets contain 12 label sets per sheet. Polaris creates SL4 spine labels with nine text lines of eight characters each. The pocket labels have four text lines of 28 characters each.



SL6 sheets - SL6 label sheets contain eight label sets per sheet. Polaris SL6 spine labels have nine text lines of seven characters each. The other labels in the set have six text lines of 28 characters each.



CompuType Spine Labels

The following types of labels are offered by CompuType and supported by the Polaris Label Manager. You cannot change CompuType labels in Label Manager.

- **Single Label** - 1 inch wide and 1.5 inches high
- **Single Label** - 1.125 inches wide and 1.25 inches high
- **2 Label Set**
 - Label 1 - 0.875 inches wide and 1.375 inches high
 - Label 2 - 2.875 inches wide and 1.375 inches high
- **3 Label Set**
 - Label 1 - 0.9 inches wide and 1.5625 inches high
 - Label 2 - 2.9 inches wide and .8125 inches high
 - Label 3 - 2.9 inches wide and .8125 inches high

Label Content

The label may include information from the item record, the serial issue/part record, or the linked bibliographic record. See [“Define the label content”](#) on page 273.

- **Call Number** - If **Library of Congress** is selected in the shelving scheme on the Item Record workform, each part of the call number will be printed on a separate line on the label. If **Dewey Decimal** is the shelving scheme, all parts of the call number are printed on different lines based on the **Carriage return after Dewey decimal** and **Prime mark to generate carriage return**. For all other shelving schemes, a new line is printed for each part of the call number.
- **Author** - The author information comes from the 1xx tag and subfields in the bibliographic record linked to the item record. If there is no 1xx field, the space remains blank on the label. The information is printed in the same order as the subfields in the MARC 21 record. The text wraps within this section, but there is a break before the bottom section.
- **Title** - The title information comes from the 245 tag and subfields in the bibliographic record linked to the item record. The information is printed in the same order as the subfields in the MARC21 record.
- **Collection** - The label content can include the collection or the collection abbreviation from the item record.

1-2-3

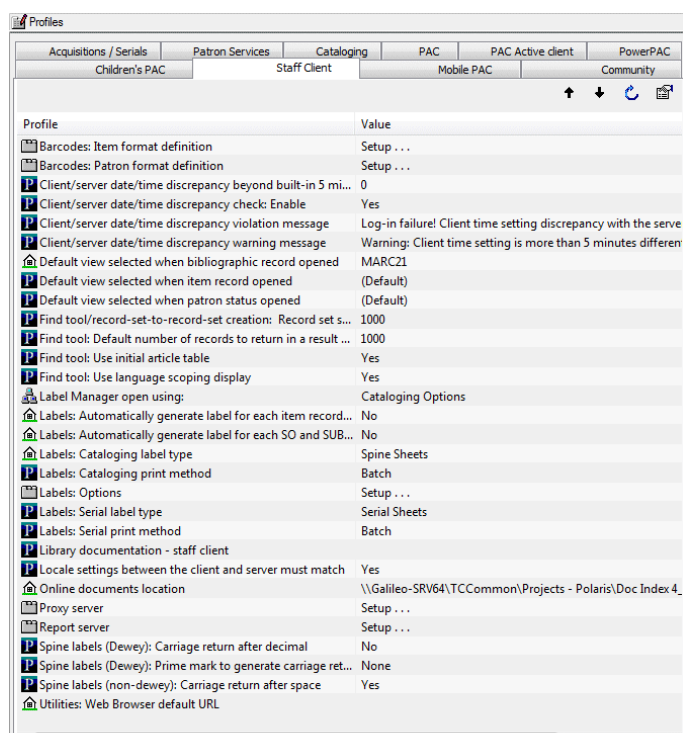
Set up existing label types

You can set up label types in Polaris Administration or from the Polaris Shortcut Bar. Follow these steps to configure spine, pocket, serial, or custom label types.

Important:

If your library uses Computype® printers, you can use only the Computype label types listed in Settings & Content, and none of the settings can be changed for Computype labels. These label types are not enabled at Polaris installation, so your library will need to enable them. Also, be sure to indicate a Computype label type as the default Cataloging label. For the measurements of Computype labels, see “[Computype Spine Labels](#)” on page 268.

1. In the Administration Explorer tree view, expand the folder for the organization or workstation.
2. Select **Profiles** and select the **Staff Client** tab.

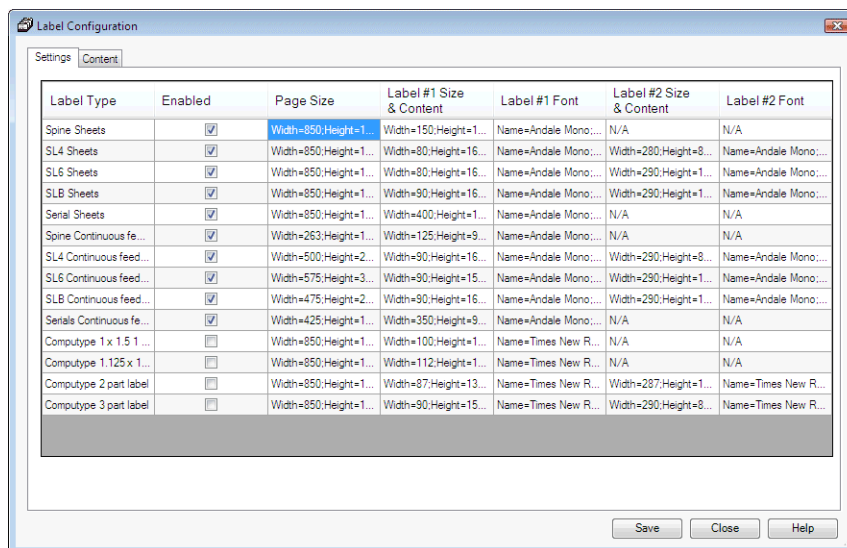


3. Select **Labels: Options**.

The Label Configuration window appears with the Settings tabbed page displayed.

Tip:

Navigate between cells using the arrow keys or **Tab** (to go forward) and **Alt+Tab** to go back. Expand the dialog box by dragging the bottom right corner. To see more of a column's content, select the column's left or right rule in the heading, and drag to expand the column.



4. On the **Settings** tab, select the check box in the **Enabled** column next to the label types you want to make available.

When the label types are enabled, they appear in the **Label** menu in the Label Manager.

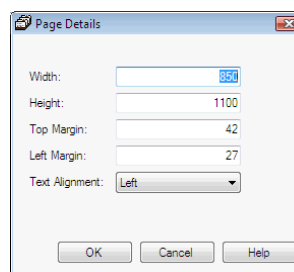
Tip:

The page size must be larger than the label size.

5. To change the page size, margins, or text alignment on the page of labels, do the following steps:

- a) Right-click in the **Page Size** cell associated with the label type and select **Open**, or tab to the cell and press **Enter**.

The Page Details dialog box appears.

**Tip:**

The measurements are in .Net units (1 unit = 1/100 inch).

- b) Type numeric values in the **Width** and **Height** boxes to specify the dimensions of the labels page.
- c) Type numeric values in the **Top Margin** and **Left Margin** boxes to determine the placement of the first label on the page.
- d) Select **Center**, **Left**, or **Right** in the **Text Alignment** box to align the text on the label page.
- e) Click **OK** to save your changes and return to the Label Configuration window.

Tip:

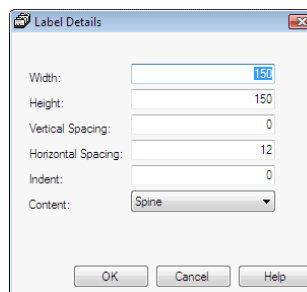
If you prefer using the keyboard, you can tab to the **Text Alignment** box and type **L** for left, **C** for center, or **R** for right text alignment.

Tip:

The label size must be smaller than the page size.

6. To change the label size, adjust the spacing, modify the text alignment on the label, or specify the label content, do the following steps:
 - a) Right-click in the **Label Size and Content** cell associated with the label type and select **Open**, or tab to the cell and press **Enter**.

The Label Details dialog box appears.



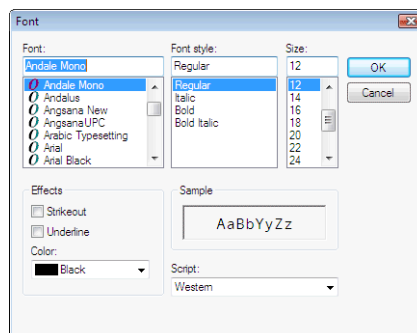
- b) Type numbers for the label's dimensions in the **Width** and **Height** boxes.
- c) Type numbers in the **Vertical Spacing**, **Horizontal Spacing**, and **Indent** boxes to specify the white space between the label borders and the text in the label.
- d) Select the content type in the **Content** box.

Note:

The content type is determined by the selections on the Content tab. For information on specifying content for the label types, see [“Define the label content”](#) on page 273.

- e) Click **OK** to save the label details.
7. To modify the font, do the following steps.
 - a) Right-click in the **Font** cell for the label and select **Open**, or tab to the column, and press **Enter** in the label row.

The Font dialog box appears.



- b) Select the **Font**, **Font Style**, **Size**, **Effects** and **Script** for the text on the label.
- c) Click **OK** to save your changes and return to the Label Configuration dialog box.

1-2-3

Define the label content

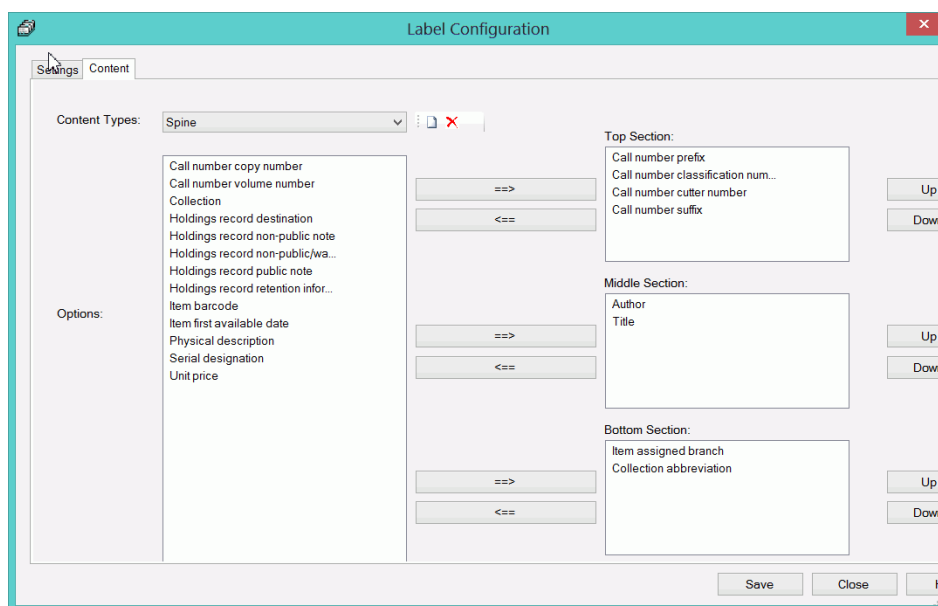
Follow these steps to set up label content types.

Note:

To access the Label Configuration dialog box, select **Profiles, Staff Client, Labels: Options**.

1. Select the Content tab on the Label Configuration dialog box.

The Content tabbed page appears.



2. Select the type of label for which you want to define the content in the **Content type** box.

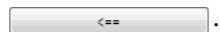
3. To add a new label content type, click  and type a name for the new content type in the **Add new content type** box.

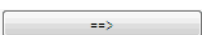
Note:

You cannot create a new label content type at the workstation level in Polaris Administration, but you can assign existing content to the label type.

Tip:

To remove fields from the label, select the fields in the **Top Section**, **Middle Section**, or **Bottom Section** box, and click



4. Select the fields to include in the label from the **Options** list, and click  next to the **Top Section**, **Middle Section**, or **Bottom Section** box. The available selections depend on the content type you selected.

The text wraps within the label section, and breaks separate the sections. To change the position of fields within the sections on the label, select the field, and click the **Up** or **Down** button that corresponds to the section. To delete a content type, select it and click . You cannot delete the default label content types (Spine, Pocket, or Serial) or content types that are used in a label type.

5. Click **Save** to save the label.

Creating Custom Labels

If the available label types do not meet your library's needs, you can set up customized labels in Label Manager. Once the custom labels are defined, they are available in the drop-down list from the Label Manager and from the other areas where labels can be printed. Custom labels can be configured in the Label Configuration dialog box. When you close and reopen Label Manager, the custom label is retained, but the label displayed in the Label Manager window is the default label defined in Polaris Administration.

See the following topic:

- [“Design a new label type”](#) on page 274

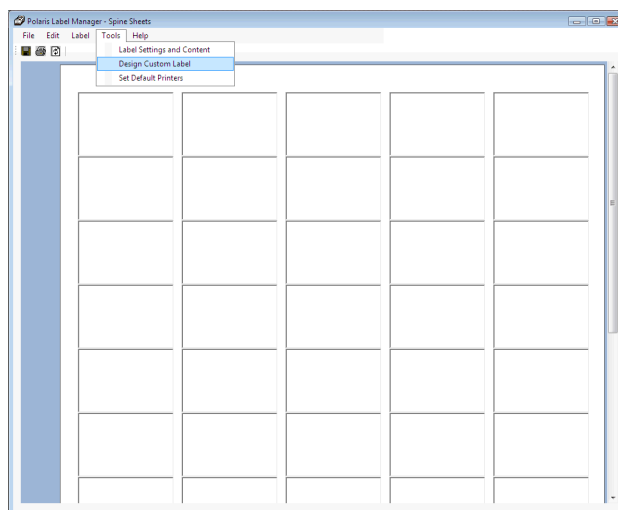
1-2-3

Design a new label type

Follow these steps to define a new label type.

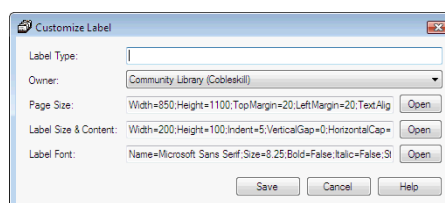
1. From the Polaris Shortcut Bar, select **Utilities, Label Manager**.

The Label Manager window appears.



2. Select **Tools, Design Custom Label**.

The Customize Label dialog box appears.



Tip:

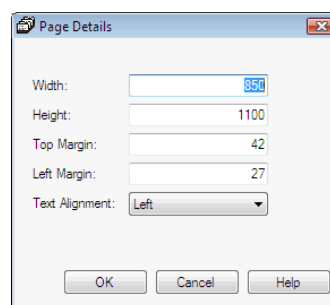
The limit for the label type name is 80 characters. The name should identify the library and the label stock, for example: **OCPL Pocket**.

Tip:

The page size must be larger than the label size.

3. Type a name for the label in the **Label Type** box.
4. Select the organization that owns the label in the **Owner** box.
5. To set the page dimensions, margins, and text alignment, do the following steps:
 - a) Click the **Open** button in the **Page Size** row, or tab to the **Open** button and press **Enter**.

The Page Details dialog box appears.



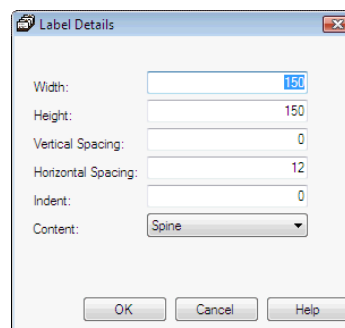
- b) Set the page dimensions by typing numeric values in the **Width** and **Height** boxes.

Note:

The measurements are in .Net units (1 unit = 1/100 inch).

- c) Set the page margins by typing numeric values in the **Top Margin** and **Left Margin** boxes.
 - d) Select the text alignment in the **Text Alignment** box.
 - e) Click **OK** to close the Page Details dialog box.
6. To set the label's dimensions, spacing, and content, do the following steps:
 - a) Click the **Open** button in the **Label Size & Content** row, or tab to the **Open** button and press **Enter**.

The Label Details dialog box appears.



Tip:

The measurements are in .Net units (1 unit = 1/100 inch).

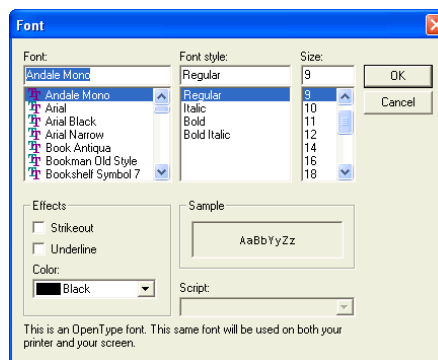
- b) Set the label's dimensions by typing numeric values in the **Width** and **Height** boxes.
- c) Set the amount of spacing between labels by typing numeric values in the **Vertical Spacing** and **Horizontal Spacing** boxes.
- d) Set the indent from the left edge of the label by typing numeric values in the **Indent** box.
- e) Select the content type for the labels in the **Content** box.

Note:

The content types are set in the Label Configuration dialog box. See [“Define the label content”](#) on page 273.

- f) Click **OK** to close the Page Details dialog box and return to the Customize Label dialog box.
7. To set the font for the custom labels, do the following steps:
- a) Click the **Open** button in the **Label Font** row, or tab to the **Open** button and press **Enter**.

The Font dialog box appears.



- b) Choose the font, font style, point size, and any other characteristics, and click **OK** to return to the Customize Label dialog box.
8. Click **Save** to save the custom label you created.

The custom label appears in the Label menu in Label Manager and in the list of enabled label types in the Label Configuration dialog box.

Setting the Default Label Printers

For each enabled label type, you can set a default label printer in Label Manager.

See the following topic:

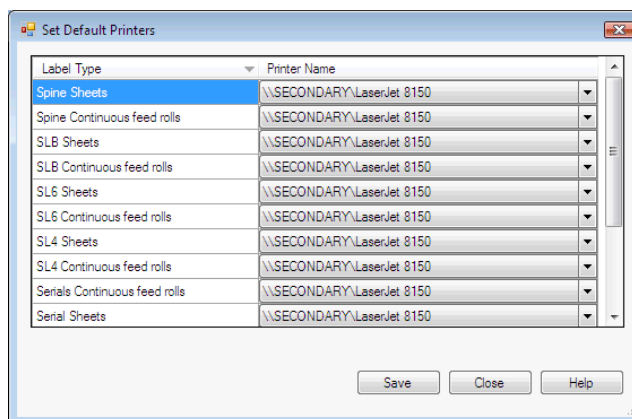
- “Set a default label printer” on page 277

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Set a default label printer

Follow these steps to set a default printer to be used to print labels.

1. Select **Utilities** on the Polaris Shortcut Bar and select Label Manager.
The Label Manager appears.
2. Select **Tools, Set Default Printers**.
The Set Default Printers dialog box appears.



3. For each label type that is enabled and appears in the **Label Type** column, select the default printer in the **Printer Name** column.

Note:

The choices depend on what printers have been installed on the workstation.

4. Click **Save** to save the printer selections.

Cataloging Administration



To set up Cataloging in Polaris, you grant the appropriate permissions to your cataloging staff, set profiles and parameters that control automated processes, and define/modify entries in database and policy tables.

Note:

For information on settings for Community Records, see the Polaris Community Profiles Guide.

Polaris Administration settings control how Polaris data is categorized, used, and stored, and what functions are available to staff and patrons. You can make most administration settings by two methods: through the Administration Explorer, and through the appropriate workflow for a specific record. For detailed information about using the Administration Explorer, finding and opening administration records, and general methods for setting permissions, parameters, profiles and tables, see the *Polaris Administration Guide*.

Note:

Topics in Polaris Administration guides and online Help use the Administration Explorer method, unless you must specifically open the record workflow.

You use profiles and parameters to control automated processes, set defaults, indicate the default directory for reports, and specify whether deleted records are retained in the database. In addition, you can set staff members' profiles to allow them to override blocks in Cataloging.

Note:

Not all profiles and parameters are available at every organizational level. For a list of technical services profiles and parameters, including the levels at which they can be set, see the following reference sections: [“Cataloging Permissions, Parameters, and Profiles”](#) on page 373.

When you set up Cataloging, you use policy and database tables to customize duplicate detection, define tags to retain when records are overlaid, define the order in which fields are checked for the call number and price, and make other settings.

Note:

You must have specific permissions to modify the tables. See [“Administration Workflow Permissions”](#) in the *Polaris Administration Guide 4.1R2*.

- **Policy tables used in Cataloging**

- Authority Overlay Retention
- Bibliographic Tags to Retain/Delete
- Authority Record Import: Preferred Cataloging Source

- **Database tables used in Cataloging**

- Authority Control - This is a read-only table where you can see the bibliographic tags and the authority tags to which they are matched during authority control processing.
- Authority Deduplication
- Bibliographic Deduplication
- Item Create Call Number Hierarchy
- Item Create Price Hierarchy

This unit covers the following topics:

- [“Cataloging Permissions”](#) on page 280
- [“Enabling Language Display/Entry in Cataloging”](#) on page 288
- [“Managing MARC Re-indexing”](#) on page 289
- [“Managing Auto-Search Suggestions”](#) on page 291
- [“Displaying Cataloging Records”](#) on page 292
- [“Deleting MARC Tags from Incoming Bibs”](#) on page 293
- [“Administering MARC Validation and Display”](#) on page 297
- [“Managing Duplicate MARC Records”](#) on page 307
- [“Managing Importing”](#) on page 323
- [“Managing Authority Control”](#) on page 326
- [“Copying Bib Data to Items”](#) on page 328
- [“Setting Item Copy & Save Options”](#) on page 335
- [“Displaying Warning Messages for Bibs and Items”](#) on page 340
- [“Setting Utility to Delete Bib Tags Marked with Subfield 9”](#) on page 342
- [“Managing Record Deletion”](#) on page 346
- [“Setting the Cataloging Directory”](#) on page 349
- [“Implementing Integrated Ebook Vendors - Overview”](#) on page 350
- [“Implementing Non-Integrated Ebook Vendors - Overview”](#) on page 367

Cataloging Permissions

Before your staff can do cataloging tasks in Polaris, you must assign permissions to do the tasks. Cataloging permissions define who can create, access, and work with cataloging records and functions. Each organization can specify which permission groups, workstations, or staff members are permitted to work with records and control processes.

See the following topics:

[“Set Cataloging security”](#) on page 280

[“Cataloging Workflow Permissions”](#) on page 282

1-2-3

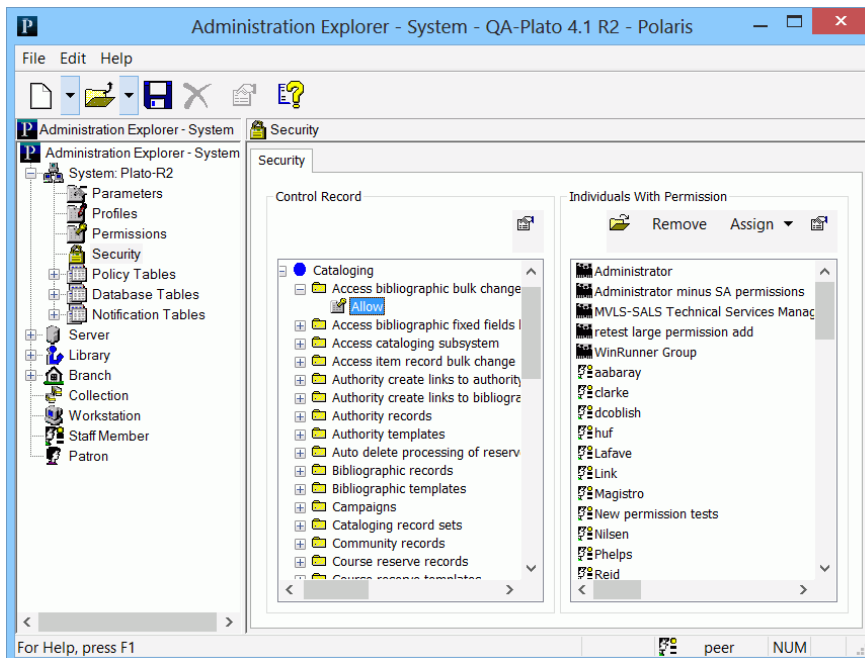
Set Cataloging security

Follow these steps to review and set Cataloging permissions.

Note:

Certain System Administration permissions are required to assign permissions. See [“Setting Administration Permissions”](#) in the *Polaris Administration Guide 4.1R2*.

1. In the Administration Explorer tree view, select the **Security** folder for the organization for which you want to set permissions.
The Security view is displayed in the details pane.
2. Double-click the **Cataloging** folder in the Control Record list.
The permissions appear under the object folders.
3. Select the permission.
The permission groups, staff members, and workstations with that permission appear in the right pane of the Explorer.



4. Click **Assign**, and select **Permission Group**, **Workstation** or **Staff Member**.
The Find Tool appears.
5. Use the Find Tool to search for and select the staff member, permission group, or workstation to which you want to grant the selected permission.
The staff member, workstation, or permission group appears in the list of those that have the selected permission.
6. Select **File**, **Save** to save any changes.

Related Information

- **Cataloging permissions (organized by task)**
 - [“Cataloging Workflow Permissions”](#) on page 282
- **Cataloging permissions (alphabetical reference lists)**
 - [“Cataloging Permissions”](#) on page 373
- **General information about setting Polaris permissions**
 - [“Granting Permissions”](#) in the *Polaris Administration Guide 4.1R2*

Cataloging Workflow Permissions

The following table lists cataloging tasks, the Polaris permissions required to do the tasks, the administrative levels at which they can be set, and the subsystems where the permissions are located. For instructions on how to set technical services permissions, see [“Set Cataloging security”](#) on page 280.

Note:

To modify Polaris Administration profiles and parameters, you must have the following permissions:

Access administration: Allow

Modify parameters: Allow

Modify profiles: Allow

For more information, see [“Administration Workflow Permissions”](#) in the *Polaris Administration Guide 4.1R2*.

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
Maintain the Authority Catalog		
Maintain authority control headings	Access cataloging subsystem: Allow Authority records: Access Authority records: Create Authority records: Delete/Undelete Authority records: Modify Authority templates: Access Authority create links to authority records Authority create links to bibliographic records	System - Cataloging System - Cataloging System - Cataloging System - Cataloging System - Cataloging System, Library - Cataloging System - Cataloging System - Cataloging
Additional permission for enabling or disabling automatic re-indexing during the next server upgrade.	Access MARC Re-index during next server upgrade: Allow	System - Cataloging
Maintain the standard authority control templates for the organization	Access cataloging subsystem: Allow Authority records: Access Authority templates: Access Authority templates: Create Authority templates: Delete Authority templates: Modify	System - Cataloging System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Use and edit the authority record templates the staff member created. (Add this permission to other authority control permissions to give staff members the ability to use their own templates without affecting the organization's templates.)	Use 'own' authority templates: Allow	System - Cataloging
Maintain the Bibliographic Catalog		

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
Add bibliographic entries to the catalog (original and copy cataloging)	Access cataloging subsystem: Allow Bibliographic records: Access Bibliographic records: Create Bibliographic records: Modify Bibliographic templates: Access	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch -- Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Create authority records from heading tags in a bibliographic record	Authority records: Create Bibliographic records: Access	System - Cataloging System, Library, Branch - Cataloging
Maintain existing bibliographic records, including replacing and protecting records.	Access cataloging subsystem: Allow Bibliographic records: Access Bibliographic records: Delete/Undelete Bibliographic records: Modify Modify Do not Overlay setting in Bib records: Allow	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging
Prevent warning messages from appearing when deleting multiple bibliographic records	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	System - Cataloging System - Cataloging
Additional permission for enabling or disabling automatic re-indexing during the next server upgrade.	Access MARC Re-index during next server upgrade: Allow	System - Cataloging
Bulk change bibliographic records	Access cataloging subsystem Bibliographic records: Access (for all records) Bibliographic records: Modify (for all records) Cataloging record sets: Access Cataloging record sets: Create Cataloging record sets: Delete Cataloging record sets: Modify Access bibliographic bulk change: Allow Access bibliographic fixed fields bulk change: Allow	System - Cataloging System, Library, Branch- Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging System - Cataloging
Maintain bibliographic record templates used by the entire organization	Access cataloging subsystem: Allow Bibliographic templates: Create Bibliographic template: Access Bibliographic templates: Delete Bibliographic templates: Modify Bibliographic records: Access	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch- Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Use and edit the bibliographic record templates the staff member created. (Add to other bibliographic record permissions so staff members can use their own templates without affecting the organization's templates.)	Use 'own' bibliographic templates: Allow	System - Cataloging

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
Protect bibliographic records from overlay.	Modify do not overlay setting in bib records: Allow Bibliographic records: Access Bibliographic records: Modify (To change the setting in the Bib Bulk Change dialog or Import Setup window, the user must also have the required permissions for these functions.)	System - Cataloging (Note: The Cataloging parameter, Bibliographic record do not overlay feature, must be set to Yes to display the Do not overlay check box in the Bibliographic Record workform, the Bib Bulk Change dialog box, and the Import Setup window.)
Maintain Item Records		
Add item records to the catalog	Access cataloging subsystem: Allow Item records: Create Bibliographic records: Access Item records: Access Item records: Modify cataloging view Item templates: Access Override invalid item barcode message: Allow	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System
Maintain existing item records	Access cataloging subsystem: Allow Item records: Access Item records: Modify cataloging view Item records: Modify header Item records: Modify history view Item records: Modify notes and notices view Item records: Modify reserves view Item records: Modify source and acquisition view Item records: Delete/Undelete Bibliographic records: Access Note - Item records: Create is necessary to change the owner on the item record.	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Prevent warning messages from appearing when deleting multiple item records	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	System - Cataloging System - Cataloging
Override and continue when invalid barcode message appears	Override invalid item barcode message: Allow	System - Cataloging
Maintain item records for ephemeral items so that they can be circulated	Quick-circ item records: Access Quick-circ item records: Create Quick-circ item records: Modify Quick-circ item records: Delete	Branch - Cataloging Branch - Cataloging Branch - Cataloging Branch - Cataloging
Create bibliographic records from item records or item templates	Create a bib record from the item or item template: Allow	System - Cataloging

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
Bulk change item records	Access cataloging subsystem: Allow Item records: Access Item records: Bulk change Item records: Modify header Cataloging record sets: Access Cataloging record sets: Create Cataloging record sets: Modify Access item record bulk change: Allow	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging
Maintain item templates used by the organization	Access cataloging subsystem: Allow Item templates: Create Item templates: Delete Item templates: Access Item templates: Modify Item records: Access	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Use and edit the item templates the staff member created. (Add this permission to other workflow permissions to allow the staff member to templates they created.)	Use 'own' item templates: Allow	System - Cataloging
Maintain Labels for the Organization		
Create, modify, and delete label configurations	Label Manager Configuration: Create Label Manager Configuration: Delete Label Manager Configuration: Modify	System - Cataloging System - Cataloging System - Cataloging
Maintain Import Profiles in Import Profile Manager		
Create, modify, and delete import profiles	Import profiles: Access Import profiles: Create Import profiles: Delete Import profiles: Modify	System - Cataloging System - Cataloging System - Cataloging System - Cataloging
Import Records		
Import bibliographic, authority, and item records using Express Import	Bibliographic records: Create Bibliographic records: Modify Authority records: Create Authority records: Modify Express import: Allow Item records: Create Cataloging record sets: Create Cataloging record sets: Access	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging System - Cataloging System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
Import bibliographic, authority, and item records using Full Import	Bibliographic records: Create Bibliographic records: Modify Authority records: Create Authority records: Modify Import bibliographic, item and authority records: Allow Item records: Create Cataloging record sets: Create Cataloging record sets: Access	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging System - Cataloging System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Manage your own import jobs from the import jobs queue	Import bibliographic, item and authority records: Allow or Express import: Allow	System - Cataloging
Manage import jobs for a branch or for the system	Manage import jobs for this organization: Allow	System, Branch - Cataloging
Specify blackout times when importing cannot be run.	Modify import blackout times: Allow	System - System Administration
Export Records		
Export bibliographic, authority, and item records from the Polaris catalog	Export bibliographic, item and authority records: Allow	System - Cataloging
Maintain Cataloging Record Sets		
Maintain authority, bibliographic, and item record sets used by the entire organization	Access cataloging subsystem: Allow Cataloging record sets: Access Cataloging record sets: Modify Cataloging record sets: Delete Bibliographic records: Access Authority records: Access Item records: Access	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging System, Library, Branch - Cataloging
Use and edit the authority, bibliographic, and item record sets the staff member created	Use 'own' cataloging record sets	System - Cataloging
Purge Cataloging Records Marked as Deleted		
Maintain purge criteria that are used to purge cataloging records from the database when they are marked for deletion but retained in the database	Purge criteria: Access Purge criteria: Delete Purge criteria: Create Purge criteria: Modify	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Maintain Course Reserves		
Maintain course reserve records	Access cataloging subsystem: Allow Course reserve records: Access Course reserve records: Delete Course reserve records: Create Course reserve records: Modify Patron registration: Access Patron registration: Modify	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging Branch - Circulation Branch - Circulation
Maintain reserve items	Item records: Access Item records: Modify reserves view Auto delete processing of reserve item records: Allow	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
Maintain reserve item templates used by the organization	Reserve item templates: Access Reserve item templates: Create Reserve item templates: Modify Reserve item templates: Delete	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Use and edit the reserve item templates the staff member created	Use 'own' reserve item templates: Allow	System - Cataloging
Maintain course reserve templates for the organization	Course reserve templates: Access Course reserve templates: Delete Course reserve templates: Create Course reserve templates: Modify	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Update URL Links		
Use the Polaris URL Detective, which is available from the Utilities menu if your library has purchased this product.	Use URL Detective: Allow	System - Cataloging
Maintain Community records		
Maintain Community records (if your library has purchased Community Profiles)	Community records: Access Community records: Create Community records: Modify Community records: Delete	System, Library, Branch, Staff, Workstation - Cataloging
Managing Event imports	Event import profiles: Access Event import profiles: Create Event import profiles: Modify Event import profiles: Delete	System- Cataloging
Maintain Promotion records		
Work with Promotion records (if your library has purchased Feature It)	Access cataloging subsystem: Allow Promotion records: Access Promotion records: Create Promotion records: Modify Promotion records: Delete	System System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Feature bibliographic records	Bibliographic records: Access	System, Library, Branch - Cataloging

Related Information

- **Permissions for administering cataloging** - For the permissions required to do cataloging administrative tasks, such as modifying MARC validation and setting duplicate detection criteria, see [“Cataloging Administration Permissions”](#) in the *Polaris Administration Guide 4.1R2*.
- **Instructions for granting permissions in technical services** - See [“Set Cataloging security”](#) on page 280.
- **List of all cataloging permissions** - See [“Cataloging Permissions”](#) on page 373.

Enabling Language Display/Entry in Cataloging

On the MARC21 view of the Bibliographic and Authority workforms, staff can enter international characters and diacritic marks. These characters are defined in the *MARC 21 Specifications for Record Structure, Character Sets, and Exchange Media* (2007). The Unicode international characters are stored in UTF-16 and displayed in the Polaris user interface.

To correctly display all international characters, a Unicode-compliant font must be installed on your cataloging computer. Look in the **Windows/Fonts** folder to determine if a Unicode font is installed.

Polaris uses fonts according to your Windows operating system. In the MARC21 view, Polaris uses fonts in the following order:

Note:

In the MARC21 view of the Bibliographic and Authority workforms, the Arial Unicode MS font overrides all other fonts. In the rest of the Polaris staff client, the Segoe UI font overrides all others.

- Arial Unicode MS (Unicode 2.1) - This font comes with Office 2000 and later. Libraries with an earlier version of Microsoft Office will see the font changed to Arial Unicode MS.
- Segoe UI (Unicode 4.1) - This font comes with Windows Vista and Office 2007. Libraries using Microsoft Office 2007 will see the font changed to Segoe UI.
- Lucida Sans Unicode (Unicode 2.0) - This font comes with Windows 98 and later. Libraries with any other version of the Windows operating system will see Lucida Sans Unicode.
- Default System Font (MS Shell Dlg 2, which maps to Tahoma) - If the system cannot install any of the fonts above, the default system font is used.

If your library has Windows Vista, Windows 7, or Windows 8 operating system, support for the East Asian, Cyrillic, and Middle-Eastern language families is installed by default when Windows is installed. If the cataloging workstation is being used to catalog primarily in a specific language, you may want to change the keyboard input setting. See [“Enter diacritics/characters using an IME keyboard”](#) on page 46.

Managing MARC Re-indexing

When the system-level Cataloging parameter **MARC Re-index during next server upgrade** is set to **Yes**, an automatic re-indexing of MARC records will take place when your library installs the next Polaris upgrade. If your library wants automatic re-indexing to take place, the parameter must be set to **Yes** *before* you upgrade to the next release. After the re-indexing process is complete, the parameter is automatically reset to **No** (the default setting).

Important:

Re-indexing can add a significant amount of time to the upgrade process and should be avoided if it is not necessary. However, if you must re-index, performing the process at upgrade may be both cost-effective and time-effective, since there is a fee associated with retroactive re-indexing and the server will be offline during the upgrade in any case.

When the parameter is set to **Yes**, the system sets a flag so that the server installation database update (DBUpdate) process performs a re-index comprised of the following general steps:

- Alerts the Polaris support engineer that a re-index will take place during the DBUpdate process
- Rebuilds indices and re-links bibs to authorities
- Defragments database tables
- Updates database statistics

When the re-indexing has successfully completed, an alert is logged in the DBUpdate report. To set the parameter before the next upgrade, you need the System Administration permission **Access MARC Re-index during next server upgrade: Allow**.

See the following topic:

- [“Enable or disable automatic MARC re-indexing”](#) on page 290

1-2-3

Enable or disable automatic MARC re-indexing

Follow these steps to allow or disallow automatic re-indexing of MARC records when the server is upgraded.

1. Select **Administration, Explorer**, and select the System organization.
2. Select **Parameters**, and select the Cataloging tab.

The system-level cataloging parameters are displayed.

Parameters	
SelfCheck Unit	
Request	
Credit Card Payment	
Acquisitions / Serials	
Patron Services	
Cataloging	
PAC	
Notification	
Parameter	Value
Auto-suggest feature enabled	Yes
Bibliographic record delete: Allow if there are holds	Yes
Bibliographic record do not overlay feature enabled	Yes
Bibliographic record replace: Maximum allowed in o...	999
Item record delete: Allow if there are holds	Yes
Item record history display assigned branch	Yes
Item record history display patron ID	Yes
Item record history time threshold	365 day(s)
MARC Re-index during next server upgrade	No
Mark embedded holdings tag as processed	Yes
Normalize ambiguous LCCNs as if they are in the old...	Yes

3. Select the **MARC Re-index during next server upgrade** parameter and set it to **Yes** to allow automatic re-indexing of MARC records when the server is upgraded, or **No** to not allow automatic re-indexing.

Note:

When the parameter is changed from **No** to **Yes**, the following warning message appears: Setting the MARC Re-index during next server upgrade parameter to 'Yes' may substantially increase processing time during your next upgrade. If you have questions about this, please contact your Polaris Site Manager.

4. Select **File, Save**.

Managing Auto-Search Suggestions

If the system-level Cataloging parameter **Auto-suggest feature enabled** is set to **Yes** in Polaris Administration, automatic suggestions appear for the following types of searches in the Polaris Staff Client and the PAC:

Important:

For the Auto-suggest feature to work in the staff client, staff client workstations must allow port 80 traffic to the Polaris application server. To open port 80, select **Control Panel** on the workstation, select **Windows Firewall, Advanced Settings, Inbound Rules, New Rule, Protocol and Ports** and type **80** in the **Specific local ports** box.

- **Find Tool** - Automatic suggestions appear when staff members do a keyword or phrase search in the Find Tool for any record and access point that is keyword-indexed. See [“Automatic Suggestions in Keyword or Phrase Searching”](#) in the *Polaris Basics Guide 4.1R2*.
- **PAC** - Automatic suggestions appear when patrons do quick, keyword, phrase, or advanced searches in Polaris PowerPAC.

See the following topic:

- [“Enable or disable the Auto-suggest feature”](#) on page 291

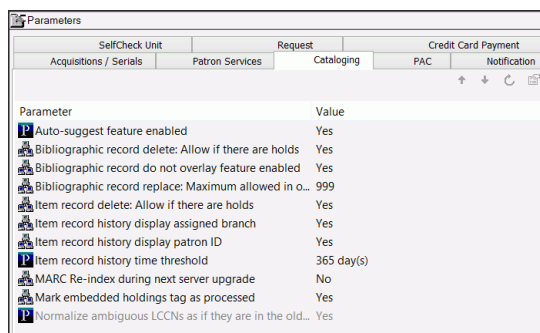
1-2-3

Enable or disable the Auto-suggest feature

Follow these steps to enable or disable automatic suggestions that appear for certain phrase and keyword searches in the Find Tool, and for quick, keyword, phrase, and advanced searches in Polaris PowerPAC.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Parameters** and select the **Cataloging** tab.

The Cataloging parameters appear.



Parameter	Value
Auto-suggest feature enabled	Yes
Bibliographic record delete: Allow if there are holds	Yes
Bibliographic record do not overlay feature enabled	Yes
Bibliographic record replace: Maximum allowed in o...	999
Item record delete: Allow if there are holds	Yes
Item record history display assigned branch	Yes
Item record history display patron ID	Yes
Item record history time threshold	365 day(s)
MARC Re-index during next server upgrade	No
Mark embedded holdings tag as processed	Yes
Normalize ambiguous LCCNs as if they are in the old...	Yes

3. Select **Auto-suggest feature enabled**, and select **Yes** to enable this feature or **No** to disable this feature.
4. Select **File, Save**, click  or press **Ctrl+S**.

Displaying Cataloging Records

You can use Staff Client profiles in Polaris Administration to specify the opening view of the Item Record or Bibliographic Record workflow. These profiles can be set at the system, library, branch, staff, and workstation levels. For example, you could set the profile **Default view selected when item record opened** to **Circulation** for a staff member working at the circulation desk, and set it to **Cataloging** for a cataloger. In addition, you can set system-level Cataloging parameters to specify how many days circulation transactions are displayed in the Item Record workflow - Circulation History view, and whether the patron ID or assigned branch are displayed.

See the following topic:

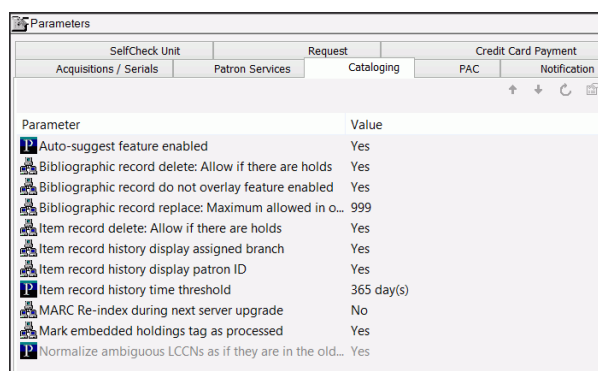
- “Set the circulation history display for item records” on page 292

1-2-3

Set the circulation history display for item records

Follow these steps to set the cataloging parameters for the Item Record workflow - Circulation History view.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Parameters** and select the **Cataloging** tab to access the system-level Cataloging parameters.



3. To change the Item Record - Circulation History view, do the following:
 - Select **Yes** or **No** in the **Item record history display assigned branch** value to turn on or off the display of the assigned branch.
 - Select **Yes** or **No** in the **Item record history display patron ID** value to turn on or off the display of the patron ID.
 - Type a different number in the **Item record history time threshold** value to change the number of days a circulation transaction or status change is displayed.
4. Select **File, Save. Bibliographic Records**

Deleting MARC Tags from Incoming Bibs

Use the following Cataloging Administration settings to delete specific MARC tags from bibliographic records that are being saved to the database:

- **Bibliographic Tags to Retain/Delete** - Use this policy table to specify tags to be deleted automatically if the user selects the following options in an import profile: **Delete MARC Tags on incoming record** and **Profile-defined deletion tags**. The tags specified for deletion in the policy table are also deleted from records when they are found via a Z39.50 search of a remote database and saved to the Polaris database if the **Delete MARC tags when saving Z39.50 records to local database** profile is set to **Yes**.

Note:

Import profiles can be set to delete the system-defined tags or to delete tags defined in the profile.

- **Delete MARC tags when saving Z39.50 records to local database** - When this profile is set to **Yes** for the system, library, or branch level, the tags specified for deletion in the Bibliographic Tags to Retain/Delete policy table are deleted automatically when records found via a Z39.50 search of a remote database are saved to the Polaris database.

The following tags cannot be selected for deletion in either the Bibliographic Tags to Retain/Delete policy table or in the import profile:

- LDR
- 001
- 003
- 005
- 008

In addition, the following tags are used in duplicate detection and should not be deleted.

- 010\$a
- 020\$a
- 022\$a
- 024\$a
- 028\$a
- 035\$a
- 037\$a
- 1xx\$a
- 245\$a
- 246\$a
- 247\$a
- 260\$c

Tags are never automatically deleted from bibliographic records when:

- the new bibliographic record is created manually by entering tags in the MARC 21 view of the Bibliographic Record workform;
- a new bibliographic record found during a Z39.50 search is saved as a Bibliographic Record template;
- or, a new bibliographic record is overlaid by the database record during importing.

See the following topics:

- [“Specify tags to delete from new bibliographic records”](#) on page 294
- [“Enable automatic tag deletion for bibs from remote databases”](#) on page 296

1-2-3

Tip:

This policy table is also used to specify tags to retain from bibliographic records when they are overlaid during duplicate detection. For information on this process, see [“Specify tags to retain from overlaid bibs”](#) on page 314.

Specify tags to delete from new bibliographic records

The Bibliographic Tags Retain/Delete policy table is used to specify tags to retain from duplicate records that are overlaid.

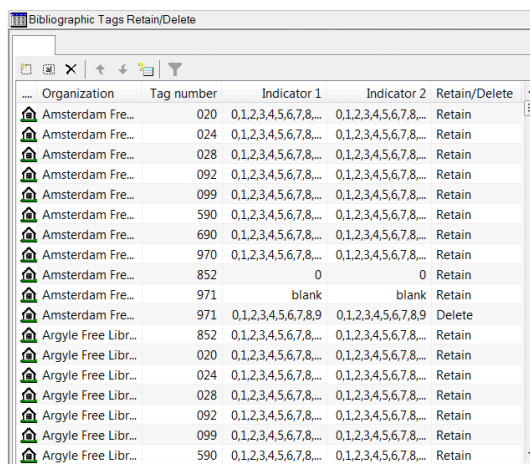
Follow these steps to specify the tags to automatically delete from incoming bibliographic records.

Note:

These permissions are required to view and change the Bibliographic Tags Retain/Delete policy table: **Access administration: Allow**, **Access tables: Allow** and **Modify Bibliographic Tags Retain/Delete: Allow**

1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Policy Tables** folder.
3. Select **Bibliographic Tags Retain/Delete**.

The Bibliographic Tags Retain/Delete policy table appears.



Organization	Tag number	Indicator 1	Indicator 2	Retain/Delete
Amsterdam Fre...	020	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	024	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	028	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	092	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	099	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	590	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	690	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	970	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	852	0	0	Retain
Amsterdam Fre...	971	blank	blank	Retain
Amsterdam Fre...	971	0,1,2,3,4,5,6,7,8,9	0,1,2,3,4,5,6,7,8,9	Delete
Argyle Free Libr...	852	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Argyle Free Libr...	020	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Argyle Free Libr...	024	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Argyle Free Libr...	028	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Argyle Free Libr...	092	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Argyle Free Libr...	099	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Argyle Free Libr...	590	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain

4. Click .

The Insert: Bibliographic Tags Retain/Delete dialog box opens.

5. In the **Organization** box, select the organization to which this entry applies.

Note:

If the Insert dialog box was opened for a branch, the branch name is the only one listed in the **Organization** box.

- a) Enter the tag number in the **Tag number** box tag.
 - b) If you want all indicator values included, leave them highlighted in the **Indicator 1** and **Indicator 2** boxes. Click an indicator to un-highlight it if you do not want it included.
 - c) Select **Retain from deleted or rejected record (occurs only when duplicated is deleted)**.
6. Click **OK** to insert the tag.
 - If the tag/indicator combination is already in the table, a message appears:
Warning: This table already contains a retain/delete row for this tag.
 - If the tag indicator/combination has already been specified as a tag to be retained, and you attempt to define it as a tag to be deleted, the following message appears:
Warning: The same tag/indicator combination cannot be selected for both retention and deletion.
 7. Select **File, Save**.

Related Information

- **Modify a table entry** - Select an entry and click .
- **Delete a table entry** - Select an entry and click .

1-2-3

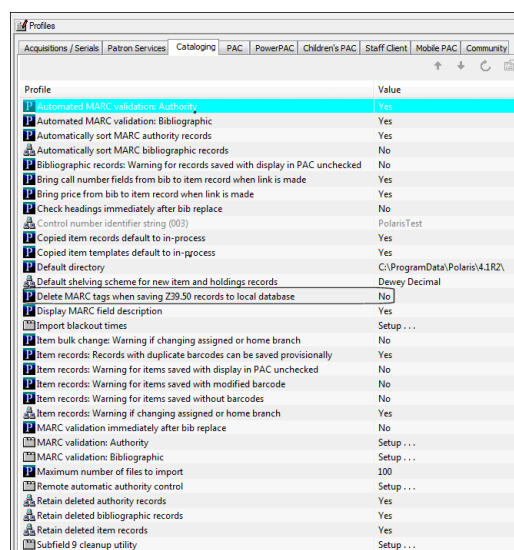
Enable automatic tag deletion for bibs from remote databases

Follow these steps to enable tag deletion when saving bibliographic records found via a Z39.50 search of a remote database.

1. Open the Administration Explorer, and select the organization, (System, Library, or Branch) for which you are setting the profile.
2. Select **Profiles, Cataloging**.
3. Select **Delete MARC tags when saving Z39.50 records to local database** and select **Yes** or **No**.

Note:

The default setting is **No**.



4. Select **File, Save** to save the changes to the profile.

If this profile is set to **Yes**, a staff member who retrieves a record via a Z39.50 search will see a brief message in the status bar of the Bibliographic Record workform before saving the retrieved record to the local database. This message informs the user that MARC tag deletion is enabled and that the tags selected for deletion in the Bibliographic Tags to Retain/Delete policy table will be removed when the record is saved. When the user saves the record in Polaris, the tags will be removed.

Administering MARC Validation and Display

In Polaris, MARC records are validated according to rules defined in the system-level profiles: **MARC Validation Bibliographic** and **MARC Validation Authority**. These rules are applied when new records are created, and when existing records are saved or checked for MARC format. They are also applied to imported records when the option to perform MARC validation is selected in the import profile.

The MARC validation profiles also specify the sort order and the display names for MARC tags in the MARC21 view of the Bibliographic Record and Authority Record workforms. You can edit validation rules and change the display names and sort order of MARC tags using these profiles, but all changes are applied to every organization in your library system. However, you can use separate profiles at the library or branch level to turn off MARC validation, tag display names, or automatic sorting.

See the following topics for information on setting up MARC validation and MARC display to apply to records in your library system:

- [“Add or change a MARC validation rule”](#) on page 298
- [“Define a conditional validation rule”](#) on page 300
- [“Specify the display name for MARC tags”](#) on page 303
- [“Change the sort order of MARC tags”](#) on page 302

See the following topics for information on turning off MARC validation, MARC tag display, and MARC tag sorting for a specific library or branch:

- [“Turn automatic MARC validation on or off”](#) on page 304
- [“Turn MARC tag name display on or off”](#) on page 305
- [“Turn automatic MARC tag sorting on or off”](#) on page 306

Important:

You can also specify whether to perform automatic MARC re-indexing when the server is upgraded by selecting Yes or No for the system-level cataloging parameter **MARC re-index during next system upgrade**. See [“Managing MARC Re-indexing”](#) on page 289.

1-2-3

Add or change a MARC validation rule

Follow these steps to add or change validation rules for bibliographic or authority MARC formats.

Note:

These permissions are required to view and change the MARC Validation Editor:

Access administration: Allow

Modify profiles: Allow

Access MARC Validation: Authority: Allow

Access MARC Validation: Bibliographic: Allow

MARC Validation: Authority - insert row: Allow

MARC Validation: Authority - modify row: Allow

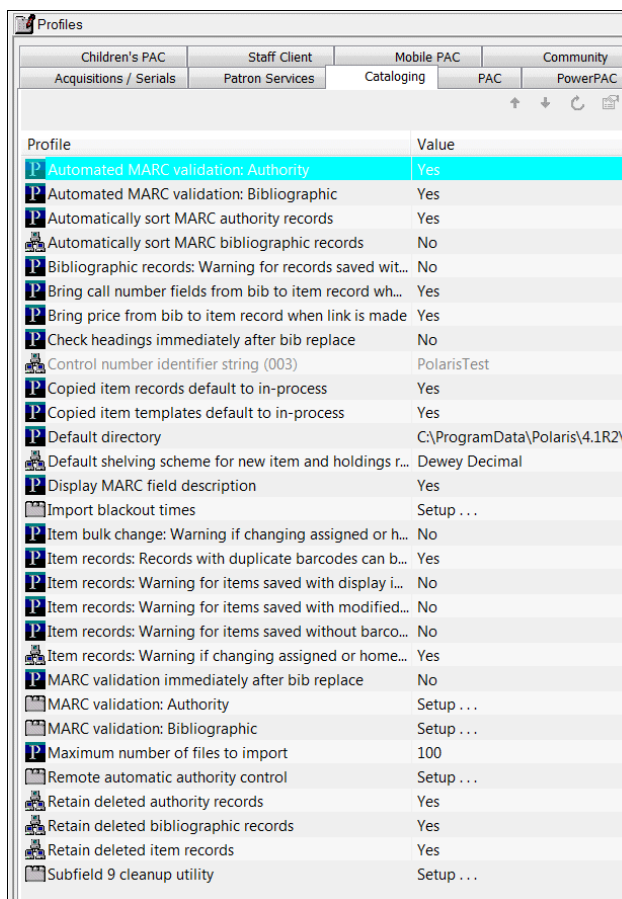
MARC Validation: Authority - delete row: Allow

MARC Validation: Bibliographic - insert row: Allow

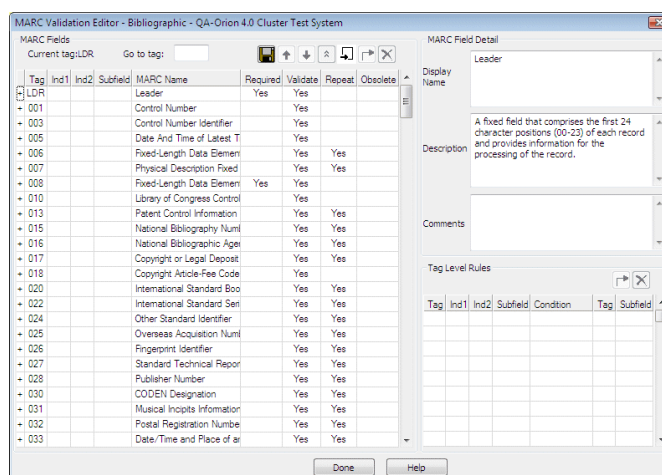
MARC Validation: Bibliographic - modify row: Allow

MARC Validation: Bibliographic - delete row: Allow

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles** and select the **Cataloging** tab.



3. Double-click **MARC validation: Bibliographic** or **MARC validation: Authority**.
The MARC Validation Editor appears for the selected MARC format.



Tip:

To add a new row at the end of the validation rules, click .

4. To add a new validation rule, do the following steps:

Note:

You can add only local tags (9xx or x9x tags); for example, 970, 590 or 690.

- a) Select the row just below where you want to put the new row, and click  (Insert row) to open a new row.
- b) Type the tag, indicator, or subfield for which you are defining the validation rule.

5. To change an existing validation rule, select the row where the tag, indicator, or subfield is listed.

Note:

To add or view indicator and subfield rows, click the + (plus sign) next to the tag.

6. Set the rules for tag, indicator, or subfield as follows:

Note:

A LDR and an 008 tag are the minimum required tags for a bibliographic record in Polaris.

- To specify that the selected tag, indicator, or subfield is required in order to save a bibliographic or authority record as final, select the **Required** column, and click the check box to indicate **Yes**. Clear the check box if you do not want the tag, indicator, or subfield to be required. If a subfield is required, it must be present when the associated tag is used.
- To specify that the selected tag, indicator, or subfield must be validated, select the **Validate** column, and click the check box to indicate **Yes**. Clear the check box if you do not want the tag, indicator, or subfield to be validated, and it will be ignored when records are validated.

- To allow the tag, indicator, or subfield to appear in the MARC record more than once, select the **Repeat** column, and select the check box to indicate **Yes**. Clear the check box to disallow the tag, indicator, or subfield to be in records of this type more than once. When you do not specify that a tag, indicator, or subfield can be repeated, an error message appears if there is more than one occurrence of the tag.
- To specify that the tag, indicator, or subfield is no longer valid, select the **Obsolete** column, and select the check box to indicate **Yes**. If **Yes** is in this column, and this tag, indicator, or subfield is in a MARC record, a message tells the user it is obsolete. Clear the check box if you do not want the message to appear.
- To specify tags or subfields that are required or prohibited when certain tags are used, see [“Define a conditional validation rule”](#) on page 300. Each tag and subfield designator can have a list of these conditional rules. Conditional rules cannot be applied to the Leader, control fields, fixed fields (fields less than 010), or indicators.

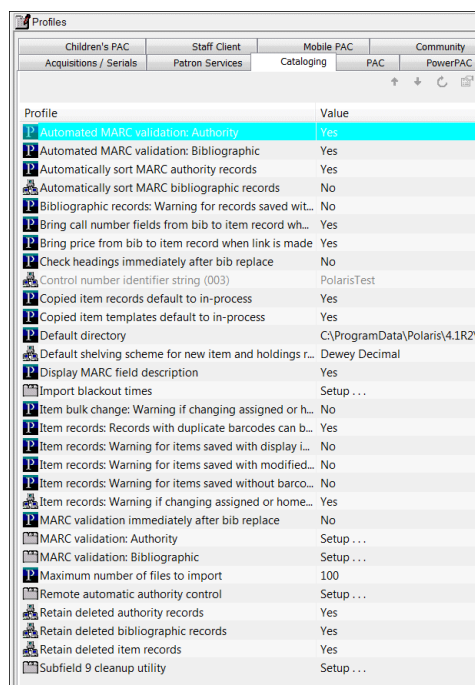
7. Select **File**, **Save**, click  or press **Ctrl+S**.

1-2-3

Define a conditional validation rule

You can define a conditional rule to identify the tags and subfields that must be present or prohibited if a particular tag, indicator, or subfield is present. Follow these steps to define a conditional validation rule.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles** and select the **Cataloging** tab.



3. Select **MARC validation: Bibliographic** or **MARC validation: Authority**.

The MARC Validation Editor appears for the selected MARC format.

4. Select the tag in the MARC Fields list for which you want to create a conditional validation rule.

Tip:

You cannot set conditional rules for the Leader, control fields, fixed fields (fields less than 010) or indicators.

5. In the **Rules** list, click to open a conditional rule row.

The selected tag number is displayed in the first column of the first available row in the Rules list.

Tip:

To delete the rule, select it under

Tag Level Rules, and click .

6. Type the indicator or subfield in the appropriate column, select the box in the **Condition** column in the same row, and specify the condition:

- Select **must have** if the tag or subfield is required.

Example:

A 490 tag must have an 830 tag.

Tag	Ind1	Ind2	Subfield	Condition	Tag	Subfield
490				must have	830	

- Select **must not have** if the tag or subfield is prohibited when the tag is used.

Example:

A 100 tag must not have a 110, 111, or 130 tag.

Tag	Ind1	Ind2	Subfield	Condition	Tag	Subfield
100				must not have	110	
100				must not have	111	
100				must not have	130	

7. Select **File, Save**, click or press **Ctrl+S**.

1-2-3

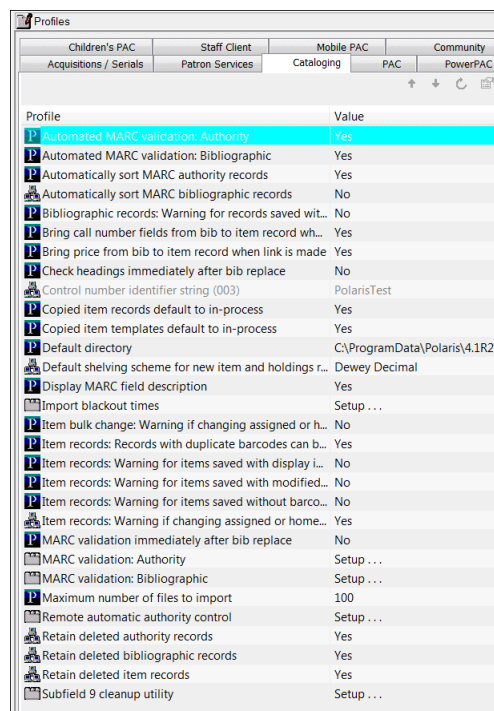
Change the sort order of MARC tags

Follow these steps to change the MARC tag sort order.

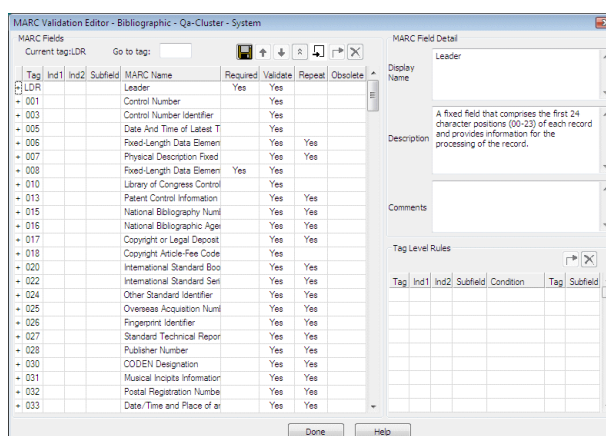
Tip:

When new versions of Polaris contain updates to the validation editor, your changes are not overwritten.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles** and select the **Cataloging** tab.



3. Select **MARC validation: Bibliographic** or **MARC Validation: Authority** to display the MARC Validation Editor for the selected MARC format.



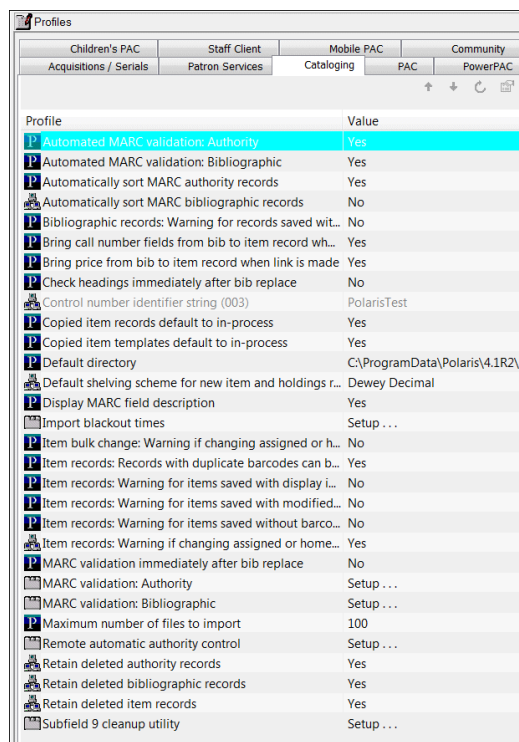
4. Click to move a row up, to move a row down, or to move a row to the top.
5. Select **File, Save**, click or press **Ctrl+S**.

1-2-3

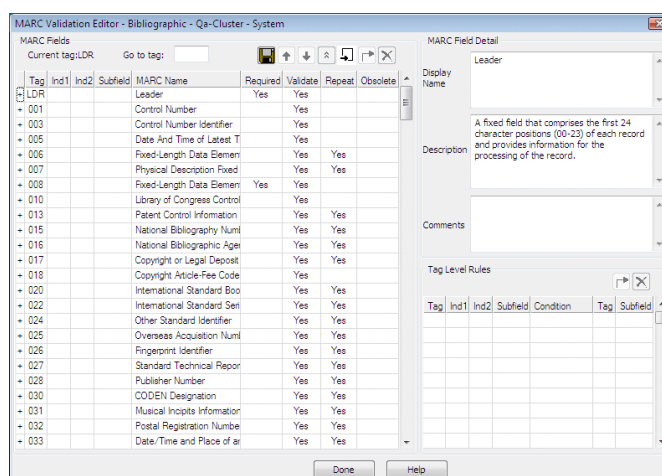
Specify the display name for MARC tags

Follow these steps to specify the display name of MARC tags.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles** and select the **Cataloging** tab.



3. Select **MARC validation: Bibliographic** or **MARC validation: Authority** to display the MARC Validation Editor for the selected MARC format.



4. Select a tag, indicator, or subfield.

Tip:

Expand a tag to see the indicators and subfields.

5. Type a name in the **Display Name** box. This is the descriptive phrase/name that will be displayed in the MARC21 view when a user selects the tag, indicator, or subfield in the Bibliographic Record or Authority Record workform. The maximum length is 255 characters. When this box is empty, the MARC name is used for the popup field description in the MARC21 view of the workform.
6. If you want to describe the tag, type additional text in the **Description** box. The text in the **Description** box does not display in the Bibliographic or Authority Record workforms.
7. Click  to save the validation rules.

Related Information

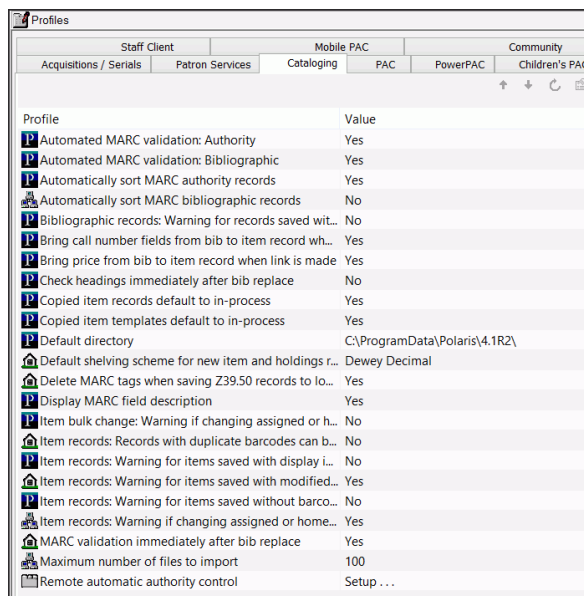
[“Turn MARC tag name display on or off”](#) on page 305

1-2-3

Turn automatic MARC validation on or off

MARC validation rules are set at the system level only, but you can turn the validation on or off at the system, library, or branch level. Follow these steps to enable or disable automatic MARC validation.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.



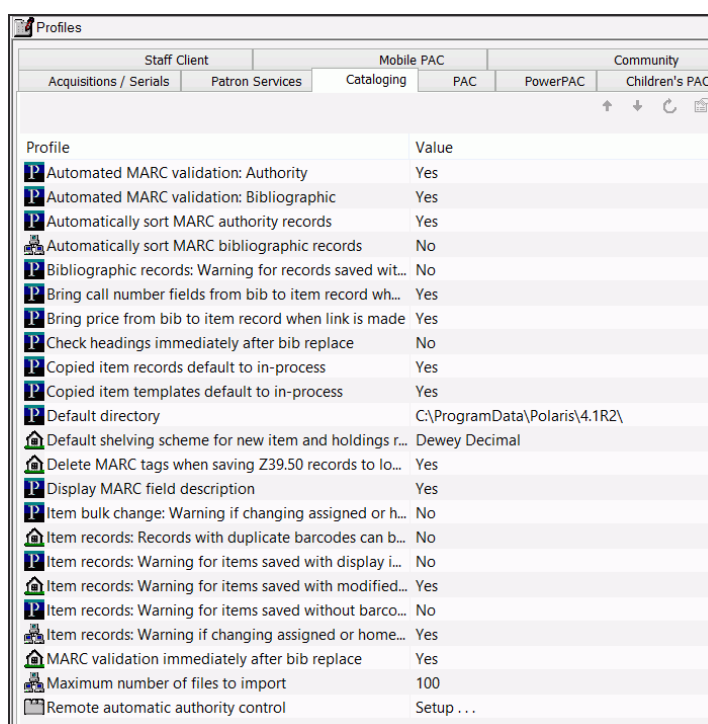
3. Double-click **Automated MARC Validation: Bibliographic** or **Automated MARC Validation: Authority**.
4. Select **Yes** or **No**.
5. Select **File, Save**.

1-2-3

Turn MARC tag name display on or off

The descriptive tag names displayed in the MARC21 view of the Bibliographic and Authority workforms are set in the Automated MARC Validation Bibliographic and MARC Validation Authority profiles at the system level (see [“Specify the display name for MARC tags”](#) on page 303). You cannot change these descriptive names at the library or branch level, but you can set profiles to turn the display on or off. Follow these steps to specify if MARC tag descriptions are displayed in the MARC21 view of the workform.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.



Profile	Value
Automated MARC validation: Authority	Yes
Automated MARC validation: Bibliographic	Yes
Automatically sort MARC authority records	Yes
Automatically sort MARC bibliographic records	No
Bibliographic records: Warning for records saved wit...	No
Bring call number fields from bib to item record wh...	Yes
Bring price from bib to item record when link is made	Yes
Check headings immediately after bib replace	No
Copied item records default to in-process	Yes
Copied item templates default to in-process	Yes
Default directory	C:\ProgramData\Polaris\4.1R2\
Default shelving scheme for new item and holdings r...	Dewey Decimal
Delete MARC tags when saving Z39.50 records to lo...	Yes
Display MARC field description	Yes
Item bulk change: Warning if changing assigned or h...	No
Item records: Records with duplicate barcodes can b...	No
Item records: Warning for items saved with display i...	No
Item records: Warning for items saved with modified...	Yes
Item records: Warning for items saved without barco...	No
Item records: Warning if changing assigned or home...	Yes
MARC validation immediately after bib replace	Yes
Maximum number of files to import	100
Remote automatic authority control	Setup...

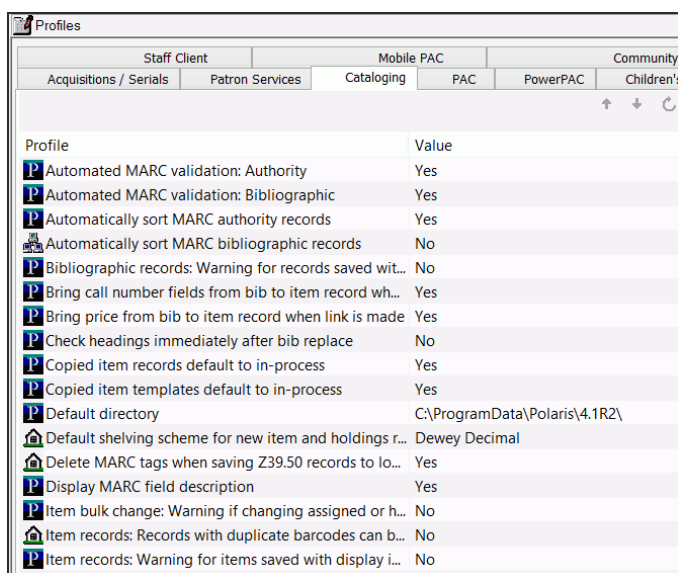
3. Select **Display MARC field description**.
4. Select **Yes** to display the MARC field descriptions in the MARC21 view for authority and bibliographic records, or select **No** if you do not want to display the descriptions.

1-2-3

Turn automatic MARC tag sorting on or off

The sorting order for MARC tags in the MARC21 view of the Bibliographic Record and Authority Record workforms is defined in the MARC Validation profiles at the system level (see [“Change the sort order of MARC tags”](#) on page 302). You cannot change the sorting order at the library or branch level, but you can turn automatic sorting on or off. Follow these steps to turn automatic sorting of MARC tags on or off.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.



3. Double-click **Automatically sort MARC bibliographic tags** or **Automatically sort MARC authority tags**.
4. Select **Yes** to sort the MARC tags in the MARC21 view of the workform. Users can enter the tags in any order and they will be sorted in the order specified in the MARC validation profiles. Select **No** to turn off automatic sorting of MARC tags.

Managing Duplicate MARC Records

Bibliographic and authority records are checked for duplicates automatically when new records are saved or when existing records are checked for duplicates. When you import records, the options for handling potential duplicates can be set in the import profile. See [“Setting Up Import Profiles and Importing Records”](#) on page 59.

The following Cataloging Administration settings are used to manage duplicate detection and overlay:

- **Bibliographic Deduplication** - Rules in this database table determine if imported or saved bibliographic records are duplicates of existing records. For details, see [“Bibliographic Duplicate Detection Rules Reference”](#) on page 310.
- **Authority Deduplication** - Rules in this database table determine if imported or saved authority records are duplicates of existing records. For details, see [“Authority Duplicate Detection Rules Reference”](#) on page 312.

Note:

You can modify the rule groups in the deduplication tables to include or exclude rules, and you can create rule groups, but you cannot add or modify the rules themselves. The deduplication tables are set up by Polaris Library Systems during Polaris implementation, and the table entries apply to all organizations.

- **Bibliographic Tags to Retain/Delete** - This policy table is used in duplicate detection to specify tags to retain from overlaid duplicate records. See [“Specify tags to retain from overlaid bibs”](#) on page 314.
- **Authority Overlay Retention** - This policy table identifies tags to transfer to a new authority record from the duplicate record that is being overlaid. If the authority record contains a tag that is listed in the retention table, the data in the tag is copied into the new record. See [“Specify tags to retain from overlaid bibs”](#) on page 314.
- **Authority Record Import: Preferred Cataloging Source** - This policy table identifies the preferred cataloging sources for imported authority records. If the imported record is a duplicate of an existing record, and the incoming record's cataloging source is preferred over the existing record's source, the existing record is overlaid with the new record. See [“Specify preferred cataloging sources for authority records”](#) on page 318.
- **Bibliographic records replace: Maximum allowed in one operation** - 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”](#) on page 313.
- **MARC validation immediately after bib replace** - If this profile is set to **Yes**, a MARC validation check is performed immediately after bibliographic records are replaced. This prevents situations such as non-repeatable tags accumulating in the record that overlays the duplicate records. See [“Enable validation when duplicate bibs are replaced”](#) on page 320.

- **Check headings immediately after bib replace** - If this profile is set to **Yes**, the headings are checked as soon as a bibliographic record replaces one or more bibliographic records. See [“Enable headings check when replacing bibs”](#) on page 321.
- **Bibliographic Record Do Not Overlay feature enabled** - If this system-level parameter is set to **Yes**, staff members with the appropriate permissions can protect certain bibliographic records from being overlaid by selecting the **Do not overlay** check box in the Bibliographic Record workflow, the Bibliographic Bulk Change dialog box, the Bibliographic Record template workflow, and the Bibliographic Records tab of the Import Setup window. If the parameter is set to **No**, the **Do not overlay** check box does not appear on these workflows or dialog boxes. See [“Enable the Do not overlay feature”](#) on page 322.

1-2-3

Change bibliographic or authority deduplication tables

The Bibliographic Deduplication and the Authority Deduplication tables contain the rules that determine if a bibliographic or authority record is a duplicate of an existing record. The rules are applied in groups to more efficiently determine a duplicate. Two records must meet all the rules in at least one group to be potential duplicates.

When records are checked for duplicates, the rules group name displays in the duplicate detection dialog box as the duplicate reason. You can rename the group so that the reason for the duplicate is clear. For example, if the rules group name is **245 \$a matches 245 \$a** you could rename it **Matching Title**.

Note:

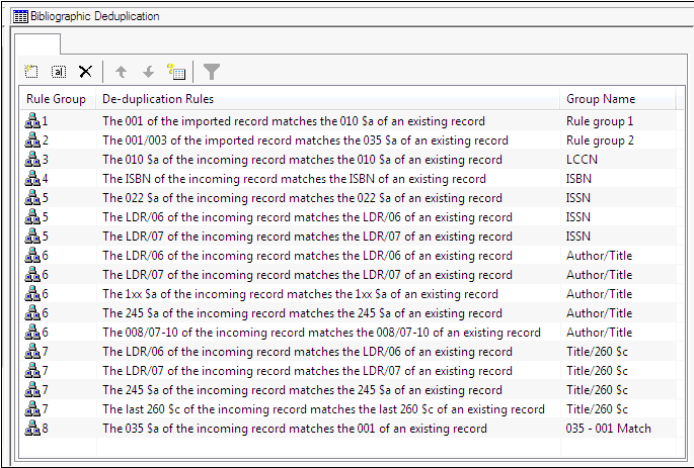
These permissions are required to view and change the rules groupings in the deduplication tables: **Access administration: Allow; Access tables: Allow; Modify bibliographic deduplication table: Allow; Modify authority deduplication table: Allow**

Follow these steps to create a new rules group or modify an existing one.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Database Tables** folder.
3. Select the **Bibliographic Deduplication** or **Authority Deduplication** table to display the appropriate table in the details view.

Note:

When you first implement Polaris, a default set of rules groups appears. You can add or remove rules from a group, change the rules group name, add new rules groups, or delete a group.

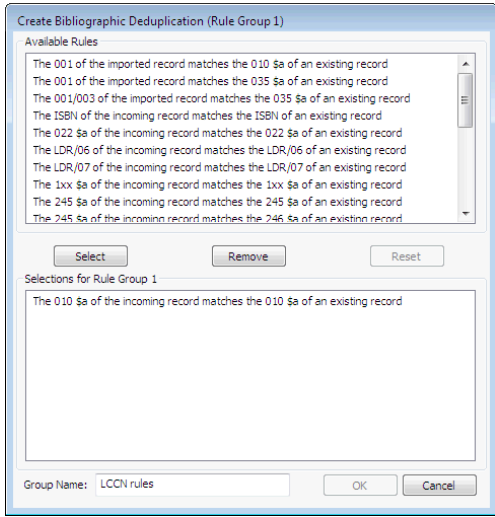


Rule Group	De-duplication Rules	Group Name
1	The 001 of the imported record matches the 010 \$a of an existing record	Rule group 1
2	The 001/003 of the imported record matches the 035 \$a of an existing record	Rule group 2
3	The 010 \$a of the incoming record matches the 010 \$a of an existing record	LCCN
4	The ISBN of the incoming record matches the ISBN of an existing record	ISBN
5	The 022 \$a of the incoming record matches the 022 \$a of an existing record	ISSN
5	The LDR/06 of the incoming record matches the LDR/06 of an existing record	ISSN
5	The LDR/07 of the incoming record matches the LDR/07 of an existing record	ISSN
6	The LDR/06 of the incoming record matches the LDR/06 of an existing record	Author/Title
6	The LDR/07 of the incoming record matches the LDR/07 of an existing record	Author/Title
6	The 1xx \$a of the incoming record matches the 1xx \$a of an existing record	Author/Title
6	The 245 \$a of the incoming record matches the 245 \$a of an existing record	Author/Title
6	The 008/07-10 of the incoming record matches the 008/07-10 of an existing record	Author/Title
7	The LDR/06 of the incoming record matches the LDR/06 of an existing record	Title/260 \$c
7	The LDR/07 of the incoming record matches the LDR/07 of an existing record	Title/260 \$c
7	The 245 \$a of the incoming record matches the 245 \$a of an existing record	Title/260 \$c
7	The last 260 \$c of the incoming record matches the last 260 \$c of an existing record	Title/260 \$c
8	The 035 \$a of the incoming record matches the 001 of an existing record	035 - 001 Match

4. Do one of the following actions:

- To create a new rules group, click .
- To modify an existing group, select the group, and click .

The Create or Modify Deduplication Rules dialog box appears.



Create Bibliographic Deduplication (Rule Group 1)

Available Rules

- The 001 of the imported record matches the 010 \$a of an existing record
- The 001 of the imported record matches the 035 \$a of an existing record
- The 001/003 of the imported record matches the 035 \$a of an existing record
- The ISBN of the incoming record matches the ISBN of an existing record
- The 022 \$a of the incoming record matches the 022 \$a of an existing record
- The LDR/06 of the incoming record matches the LDR/06 of an existing record
- The LDR/07 of the incoming record matches the LDR/07 of an existing record
- The 1xx \$a of the incoming record matches the 1xx \$a of an existing record
- The 245 \$a of the incoming record matches the 245 \$a of an existing record
- The 245 \$a of the incoming record matches the 246 \$a of an existing record

Select Remove Reset

Selections for Rule Group 1

- The 010 \$a of the incoming record matches the 010 \$a of an existing record

Group Name: LCCN rules OK Cancel

5. Do one of the following actions:

- To add a rule to the group, select the rules from the Available Rules list, and click **Select**.
- To remove a rule from the group, select the rule in the Selections for Rule Group list, and click **Remove**.
- To name or rename the rules group, type the name in the **Rules Group** box.

Tip:

If you made changes to the group and you want to return the group to its state when you opened the dialog box, click **Reset**.

6. When you finish changing the current group, click **OK**.

7. Select **File, Save**.

Related Information

- **Specifying duplicate detection rules when importing** - You can specify duplicate detection rules to use when importing records. See [“Setting Up Import Profiles”](#) on page 61.
- **List of bibliographic duplicate detection rules** - See [“Bibliographic Duplicate Detection Rules Reference”](#) on page 310.
- **List of authority record duplicate detection rules** - See [“Authority Duplicate Detection Rules Reference”](#) on page 312.

Bibliographic Duplicate Detection Rules Reference

Two bibliographic records are identified as potential duplicates based on the rules groups in the Bibliographic Deduplication table. Each rules group contains one or more rules. Two bibliographic records must meet all the rules in at least one group to be potential duplicates.

Note:

When you select custom duplicate detection rules in an import profile, each rule is applied as a group, so only one rule needs to be met to identify the records as duplicates. See [“Set import options for bibliographic records”](#) on page 72.

<i>Rule</i>	<i>Comment</i>
1. The 001 tag of the imported record matches the 035 \$a of an existing record.	Applies only to imported records. The 001 tag must match the numeric portion of the 035 tag (normalized). The parenthetical information in the 035 tag is ignored.
2. The 001/003 tags of the imported record matches any 035\$a subfield in the existing record.	Applies only to imported records. The 001 tag must match the numeric portion of the 035 tag (normalized). If the incoming record contains a 003 tag, the 003 data must match the parenthetical information in the 035 tag. If the incoming record lacks an 003 tag, the parenthetical information in the 035 tag is ignored.
3 The 010\$a subfield of the incoming record matches the 010\$a subfield in the existing record.	For LCCNs, the prefix, year, and serial number (the first 12 characters) must match. Suffixes and revision dates are ignored.
4. The ISBN in the incoming record matches any ISBN in the existing record.	The alphanumeric ISBN must match. Parenthetical and other information is ignored. This rule is applied to any 020 tag and also to any 024 tag where the first indicator = 3.
5. Any 022\$a subfield in the incoming record matches any 022\$a subfield in the existing record.	The 8-digit alphanumeric ISSN must match. Parenthetical and other information is ignored.
6. The LDR/06 value in the incoming record matches the LDR/06 in the existing record.	The value in the Record Type position of the Leader must match exactly.
7. The LDR/07 value in the incoming record matches the LDR/07 in the existing record.	The value in the Bibliographic Level position of the Leader must match exactly.
8. The 1xx\$a subfield in the incoming record matches the 1xx\$a subfield in the existing record.	The entire text of \$a subfield of both records must match. Punctuation is ignored. Tag and indicator values need not match.
9. The 245\$a subfield in the incoming record matches the 245\$a subfield in the existing record.	The entire text of \$a subfield must match. Punctuation is ignored. Indicator values need not match.
10. The 245\$a subfield in the incoming record matches any 246\$a subfield in the existing record.	The entire text of \$a subfield must match. Punctuation is ignored. Indicator values need not match.

<i>Rule</i>	<i>Comment</i>
11. Any 246\$a subfield in the incoming record matches the 245\$a subfield of the existing record.	The entire text of \$a subfield must match. Punctuation is ignored. Indicator values need not match.
12. Any 247\$a subfield in the incoming record matches the 245\$a subfield in the existing record.	The entire text of \$a subfield must match. Punctuation is ignored. Indicator values need not match.
13. The 008/07-10 values in the incoming record match the 008/07-10 in the existing record.	The date in the Beginning Date of Publication must match exactly in both records.
14. The last 260\$c subfield in the incoming record matches the last 260\$c subfield in the existing record.	The entire text of the \$c subfield must match in both records. Punctuation is ignored.
15. The 035a of the incoming record matches the 035\$a of an existing record.	
16. Any 035\$a subfield in the incoming record matches the 001 tag in the existing record.	This rule should be enabled only when a library is importing records that have been previously exported from the same Polaris database, when the intent is to have the incoming record replace the existing record.
17. The Bib record owner value in the incoming record matches the value in the existing record.	
18. The UPC of the incoming record matches the UPC of the existing record.	This rule is applied to any 024 tag where the first indicator value =1.
19. The 024\$a (excluding ISBN and UPC) of the incoming record matches the 024\$a (excluding ISBN and UPC) of an existing record.	This rule is applied to any 024 tag where the first indicator value is other than 1 or 3 .
20. The 028\$a of the incoming record matches the 028\$a of an existing record.	
21. The 037\$a of the incoming record matches the 037\$a of an existing record.	

Authority Duplicate Detection Rules Reference

Two authority records are identified as potential duplicates based on the rules groups in the Authority Deduplication table.

<i>Rule</i>	<i>Comment</i>
1. The 001 tag of the imported record matches the 010\$a subfield in the existing record.	Applies only to imported records. For LCCNs, the prefix, year, and serial number (the first 12 characters) must match; suffixes and revision dates are ignored.
2. The 001/003 tags of the imported record matches any 035\$a subfield in the existing record.	Applies only to imported records. The 001 tag matches the numeric portion of the 035 tag (normalized). If the incoming record contains a 003 tag, the 003 data matches the parenthetical information in the 035 tag; if no 003 tag, the information in the 035 tag is ignored.
3. The 035\$a subfield of the incoming record matches any 035\$a subfield in the existing record.	
4. The 010\$a subfield of the incoming record matches the 010\$a subfield in the existing record.	For LCCNs, the prefix, year, and serial number (the first 12 characters) must match. Suffixes and revision dates are ignored.
5. Any 035\$a subfield of the incoming record matches the 001 tag in the existing record.	Library is importing records that have been previously exported from the same Polaris database, when the intent is to have the incoming record replace the existing record.
6. The 008/11 tag of the incoming record matches the 008/11 of the existing record.	Matches 008 subject heading system code of both records.
7. The 1xx tag of the incoming record matches the 1xx of the existing record.	Matches entire text of the 1xx tag (concatenation of all data fields).
8. The 010\$z of the incoming record matches the 010\$a of the existing record.	

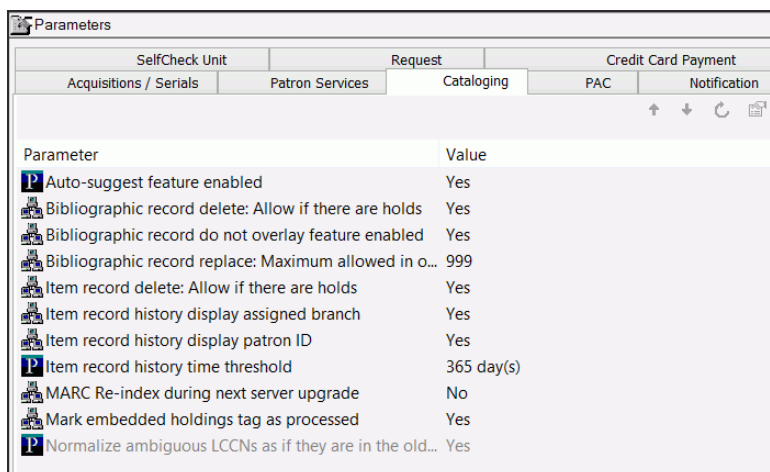
1-2-3

Set the number of bibs that can be replaced at once

Follow these steps to set the maximum number of bibliographic records that can be replaced in one operation. For information on replacing bibliographic records, see [“Detect duplicate or replace bibliographic records”](#) on page 125.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Parameters** and select the **Cataloging** tab.

The system-level Cataloging parameters appear.



Parameter	Value
Auto-suggest feature enabled	Yes
Bibliographic record delete: Allow if there are holds	Yes
Bibliographic record do not overlay feature enabled	Yes
Bibliographic record replace: Maximum allowed in o...	999
Item record delete: Allow if there are holds	Yes
Item record history display assigned branch	Yes
Item record history display patron ID	Yes
Item record history time threshold	365 day(s)
MARC Re-index during next server upgrade	No
Mark embedded holdings tag as processed	Yes
Normalize ambiguous LCCNs as if they are in the old...	Yes

3. Select **Bibliographic record replace: Maximum allowed in one operation**.
4. Type a number less than 999.
5. Select **File, Save**.

The new limit is saved and applies to all branches in your library system.

1-2-3

Specify tags to retain from overlaid bibs

The Bibliographic Tags Retain/Delete policy table is used to specify tags to retain from duplicate records that are overlaid.

Note:

This policy table is also used to specify tags to delete from incoming records that are saved to the database, even if the incoming records are not duplicates of existing bibliographic records in the database. For information on this process, see [“Deleting MARC Tags from Incoming Bibs”](#) on page 293.

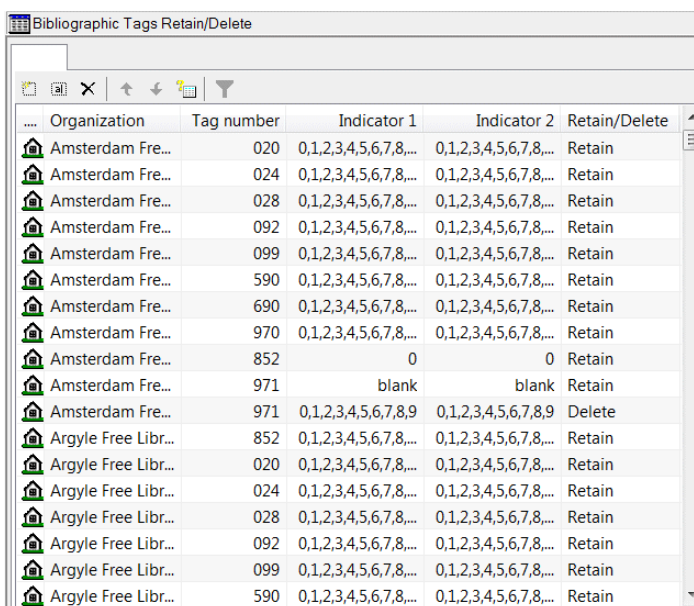
Follow these steps to specify which fields to transfer automatically to the replacement record when a bibliographic record is overlaid.

Note:

These permissions are required to view and change the Bibliographic Tags Retain/Delete policy table: **Access administration: Allow, Access tables: Allow and Modify Bibliographic Tags Retain/Delete: Allow**

1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Policy Tables** folder.
3. Select **Bibliographic Tags Retain/Delete**.

The Bibliographic Tags Retain/Delete policy table appears.



Organization	Tag number	Indicator 1	Indicator 2	Retain/Delete
Amsterdam Fre...	020	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Amsterdam Fre...	024	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Amsterdam Fre...	028	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Amsterdam Fre...	092	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Amsterdam Fre...	099	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Amsterdam Fre...	590	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Amsterdam Fre...	690	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Amsterdam Fre...	970	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Amsterdam Fre...	852	0	0	Retain
Amsterdam Fre...	971	blank	blank	Retain
Amsterdam Fre...	971	0,1,2,3,4,5,6,7,8,9	0,1,2,3,4,5,6,7,8,9	Delete
Argyle Free Libr...	852	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Argyle Free Libr...	020	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Argyle Free Libr...	024	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Argyle Free Libr...	028	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Argyle Free Libr...	092	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Argyle Free Libr...	099	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain
Argyle Free Libr...	590	0,1,2,3,4,5,6,7,8,...	0,1,2,3,4,5,6,7,8,...	Retain

4. Click .

The Insert: Bibliographic Tags Retain/Delete dialog box opens.

5. In the **Organization** box, select the organization to which this entry applies.

Note:

If the Insert dialog box was opened for a branch, the branch name is the only one listed in the **Organization** box.

- a) Enter the tag number in the **Tag number** box tag.
 - b) If you want all indicator values included, leave them highlighted in the **Indicator 1** and **Indicator 2** boxes. Click an indicator to un-highlight it if you do not want it included.
 - c) Select **Retain from deleted or rejected record (occurs only when duplicated is deleted)**.
6. Click **OK** to insert the tag.
 - If the tag/indicator combination is already in the table, a message appears:
Warning: This table already contains a retain/delete row for this tag.
 - If the tag indicator/combination has already been specified as a tag to be retained, and you attempt to define it as a tag to be deleted, the following message appears:
Warning: The same tag/indicator combination cannot be selected for both retention and deletion.

7. Select **File, Save**.

Related Information

- **Modify a table entry** - Select an entry and click .
- **Delete a table entry** - Select an entry and click .

1-2-3

Specify tags to retain from overlaid authority records

The Authority Overlay Retention policy table is used to retain specific tags from duplicate records that are deleted or rejected. When a duplicate authority record is overlaid, the links from the overlaid record are transferred to the new record, and specific tags from the overlaid record are retained in the new record.

Follow these steps to specify which fields to transfer automatically when an authority record is overlaid.

Note:

These permissions are required to view and change the Bibliographic Tags Retain/Delete policy table: **Access administration: Allow, Access tables: Allow, Modify Authority Overlay Retention: Allow**

1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Policy Tables** folder.
3. Select **Authority Overlay Retention**.

The Authority Overlay Retention Table appears.

Organization	Tag number	Indicator 1	Indicator 2
Amsterdam Free Li...	020	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	024	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	028	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	092	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	099	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	590	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	690	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	970	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	852	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Argyle Free Library	852	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Argyle Free Library	020	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...

4. Click .

The Insert: Authority Overlay Retention dialog box appears.

Insert: Bib Overlay Retention Tags -

Organization:  Community Library (Cobleskill)

Tag number:

Indicator 1:

Indicator 2:

5. In the **Organization** box, select the organization to which this entry applies.

Note:

If the Insert dialog box was opened for a branch, the branch name is the only one listed in the **Organization** box.

6. In the **Tag Number** box, type the tag that you want retained in the new records.
7. To retain the tag only if certain indicators are present, highlight the indicator values in the **Indicator 1** and **Indicator 2** boxes.

Note:

If the tag is in the retention table without indicator values, the tag is always retained. If indicator values are defined along with the tag, the data in the tag is copied only if the indicator values also match.

8. Click **OK** on the dialog box.
The Overlay Retention table is displayed.
9. Select **File, Save**.

Related Information

- **Modify a table entry** - Select an entry and click .
- **Delete a table entry** - Select an entry and click .

1-2-3

Specify preferred cataloging sources for authority records

The Authority Record Import: Preferred Cataloging Source policy table determines whether imported authority records overlay existing authority records when duplicates are found. When an authority record is imported, and a duplicate record exists in the database, the code in the original cataloging source tag (040 \$a) is checked against the entries in the table. If the code matches an entry in the table, the preference order of the code is checked. The existing record is overlaid with the new record if the code has a higher level of preference than the code in the existing record. For more information about the checking during importing, see [“Authority Record Overlay Based on Cataloging Source”](#) on page 110.

Important:

If your library uses the Authorities Weekly service, and you want to ensure that the incoming updated records always overlay the database records, remove all entries from the Authority Record Import: Preferred Cataloging Source policy table at the System level.

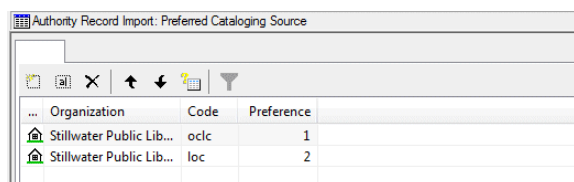
Follow these steps to add a cataloging source to the Authority Record Import: Preferred Cataloging Source table.

Note:

These permissions are required to view and change the overlay retentions tables: **Access administration: Allow, Access tables: Allow, Modify Authority authority record import: preferred cataloging source: Allow**

1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Policy Tables** folder.
3. Select **Authority Record Import: Preferred Cataloging Source**.

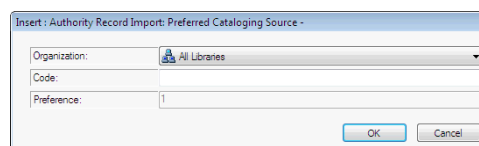
The Authority Record Import: Preferred Cataloging Source table appears.



Organization	Code	Preference
Stillwater Public Lib...	oclc	1
Stillwater Public Lib...	loc	2

4. Click .

The Insert: Authority Record Import: Preferred Cataloging Source dialog box appears.



Insert: Authority Record Import: Preferred Cataloging Source -

Organization:  All Libraries

Code:

Preference:

OK Cancel

5. In the **Organization** box, select the organization to which this entry applies.

Note:

If the dialog box was opened for a branch, the branch name is the only one listed in the **Organization** box.

6. Type the MARC code of the cataloging agency in the **Code** box.
Enter the value your cataloging agency uses in tag 040 \$a of the records you receive from the agency. You can also get the MARC code from the *MARC Code List for Organizations* that is maintained by the Library of Congress.
7. Click **OK** on the dialog box.
8. Select **File, Save**.

Related Information

- **Modify a table entry** - Select an entry, and click .
- **Delete a table entry** - Select an entry, and click .
- **Change the source preference order** - Select an entry, and click  to move the entry up (higher preference), or click  to move the entry down (lower preference).

1-2-3

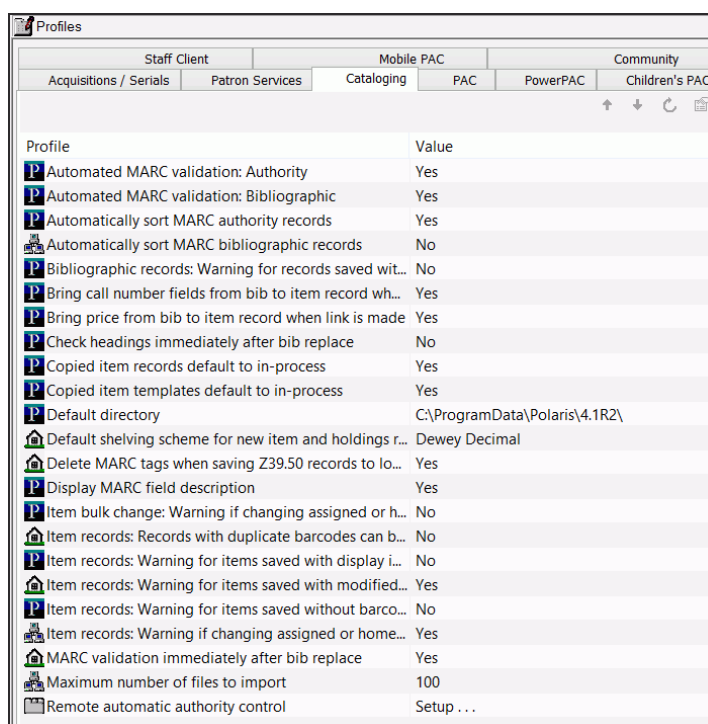
Enable validation when duplicate bibs are replaced

You can set the **MARC validation immediately after bib replace** profile to **Yes** if you want bibliographic records to be checked for the correct MARC format immediately after they replace other records. For information on replacing bibliographic records, see [“Detect duplicate or replace bibliographic records”](#) on page 125.

Follow these steps to set the **MARC validation immediately after bib replace** Cataloging profile.

1. In the Administration Explorer tree view, expand the folder for the organization or staff member.
2. Select **Profiles** and select the **Cataloging** tab.

The cataloging profiles appear.



Profiles	
Staff Client	
Acquisitions / Serials	
Patron Services	
Cataloging	
Mobile PAC	
PAC	
PowerPAC	
Community	
Children's PAC	
Profile	Value
Automated MARC validation: Authority	Yes
Automated MARC validation: Bibliographic	Yes
Automatically sort MARC authority records	Yes
Automatically sort MARC bibliographic records	No
Bibliographic records: Warning for records saved wit...	No
Bring call number fields from bib to item record wh...	Yes
Bring price from bib to item record when link is made	Yes
Check headings immediately after bib replace	No
Copied item records default to in-process	Yes
Copied item templates default to in-process	Yes
Default directory	C:\ProgramData\Polaris\4.1R2\
Default shelving scheme for new item and holdings r...	Dewey Decimal
Delete MARC tags when saving Z39.50 records to lo...	Yes
Display MARC field description	Yes
Item bulk change: Warning if changing assigned or h...	No
Item records: Records with duplicate barcodes can b...	No
Item records: Warning for items saved with display i...	No
Item records: Warning for items saved with modified...	Yes
Item records: Warning for items saved without barco...	No
Item records: Warning if changing assigned or home...	Yes
MARC validation immediately after bib replace	Yes
Maximum number of files to import	100
Remote automatic authority control	Setup ...

3. Double-click the **MARC validation immediately after bib replace** profile.
4. Select **Yes** to enable the validation check, or select **No** to disable the validation check.
5. Select **File, Save**.

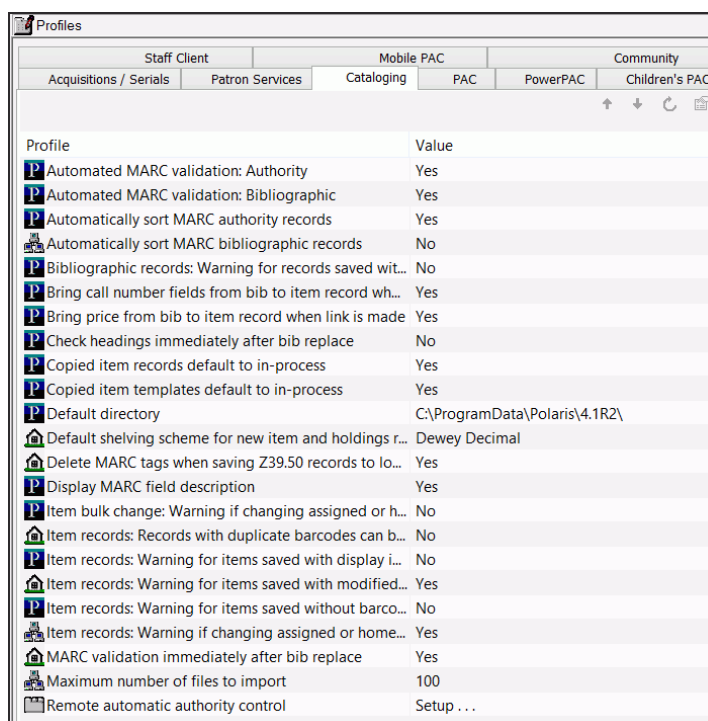
1-2-3

Enable headings check when replacing bibs

You can set the **Check headings immediately after bib replace** profile to **Yes** if you want to check the headings for bibliographic records immediately after they replace other records. Follow these steps to set the **Check headings immediately after bib replace** Cataloging profile.

1. In the Administration Explorer tree view, expand the folder for the organization or staff member.
2. Select **Profiles** and select the **Cataloging** tab.

The cataloging profiles appear.



Profiles	
Staff Client	
Mobile PAC	
Community	
Acquisitions / Serials	Patron Services
Cataloging	PAC
PowerPAC	Children's PAC
Profile	Value
Automated MARC validation: Authority	Yes
Automated MARC validation: Bibliographic	Yes
Automatically sort MARC authority records	Yes
Automatically sort MARC bibliographic records	No
Bibliographic records: Warning for records saved wit...	No
Bring call number fields from bib to item record wh...	Yes
Bring price from bib to item record when link is made	Yes
Check headings immediately after bib replace	No
Copied item records default to in-process	Yes
Copied item templates default to in-process	Yes
Default directory	C:\ProgramData\Polaris\4.1R2\
Default shelving scheme for new item and holdings r...	Dewey Decimal
Delete MARC tags when saving Z39.50 records to lo...	Yes
Display MARC field description	Yes
Item bulk change: Warning if changing assigned or h...	No
Item records: Records with duplicate barcodes can b...	No
Item records: Warning for items saved with display i...	No
Item records: Warning for items saved with modified...	Yes
Item records: Warning for items saved without barco...	No
Item records: Warning if changing assigned or home...	Yes
MARC validation immediately after bib replace	Yes
Maximum number of files to import	100
Remote automatic authority control	Setup ...

3. Double-click the **Check headings immediately after bib replace** profile.
4. Select **Yes** to enable the validation check, or select **No** to disable the validation check.
5. Select **File, Save**.

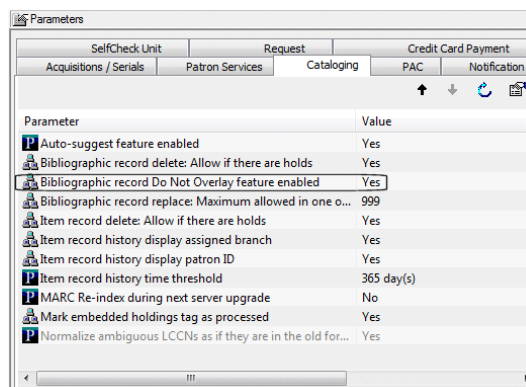
Enable the *Do not overlay* feature

Follow these steps to enable the **Do not overlay** feature for protecting bibliographic records from being overlaid.

1. Select **Administration, Explorer, System, Parameters**, and select the **Cataloging** tab.

The system-level Cataloging parameters are displayed.

2. Double-click the **Bibliographic record Do not overlay feature enabled** parameter, and select **Yes**.



3. Select **File, Save**.

When the parameter is set to **Yes**, the **Do not overlay** check box appears, unchecked by default, on the Bibliographic Record workform, the Bibliographic Record Template workform, the Import Profile, and the Bibliographic Record Bulk Change dialog box. When the parameter is set to **No**, the **Do not overlay** check box does not appear on any workforms or dialog boxes.

If the parameter is enabled and is subsequently disabled, the state of the **Do not overlay** bit in the records, templates, and import profiles (checked or unchecked) is saved, but it is ignored in any subsequent processing. However, if the library subsequently re-enables the parameter, and any bib records, bib templates or import profiles have the **Do not overlay** bit selected, a message informs the user that the *Do not overlay* setting will be restored for ## records, ## bibliographic templates, and xx import profiles.

Managing Importing

The following Cataloging profiles are used to manage import processing as a whole:

- **Maximum number of files to import** - This profile specifies the limit on the number of files that can be included in a single import job. See [“Set the limit on the number of files in a single import job”](#) on page 324.
- **Import blackout times** - This profile specifies the times during the day that imports are not allowed to be run. Up to three daily time periods can be specified as well as a single one-time date/time range. See [“Specify import blackout times”](#) on page 325.

Automatic processing for individual import jobs depends on the options selected in the import profile. See the following topics for information on automatic processing that can be selected in the import profile:

- [“Managing Duplicate MARC Records”](#) on page 307
- [“Administering MARC Validation and Display”](#) on page 297
- [“Managing Authority Control”](#) on page 326

Note:

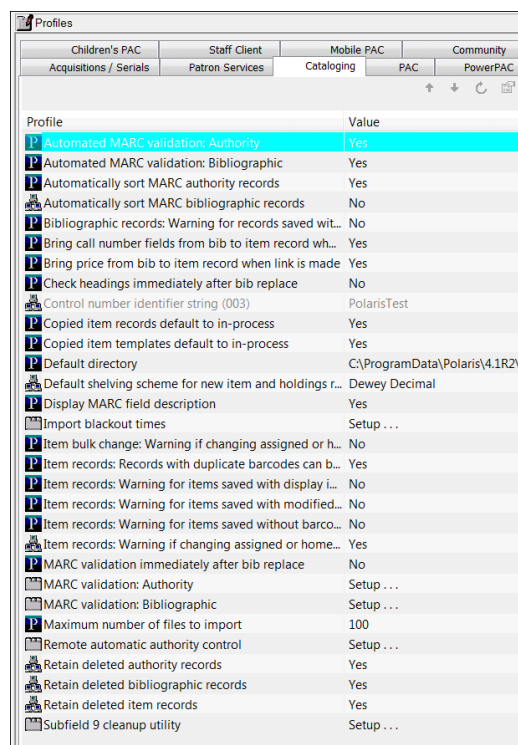
For information about setting up import profiles for specific uses, see [“Setting Up Import Profiles”](#) on page 61. For information on setting up an import profile for the automatic API-driven import process for 3M ebook bibs, see [“Copy the Integrated Ebook Bibs import profile”](#) on page 355.

1-2-3

Set the limit on the number of files in a single import job

Follow these steps to specify the limit on the number of files that can be included in a single import job.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles** and select the **Cataloging** tab to see the cataloging profiles set at the system level.



3. Double-click **Maximum number of files to import**, and change the number by typing a different number or by selecting the up or down arrows in the number box. The default is 100 and the maximum setting is 1,000.

1-2-3

Specify import blackout times

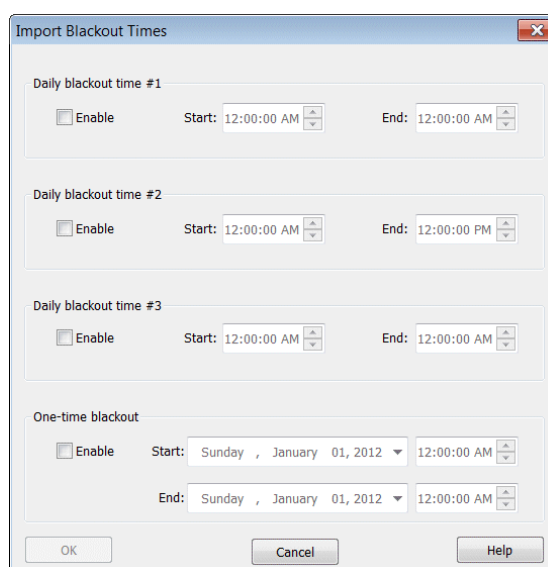
Follow these steps to specify the times when import processing cannot be done.

Note:

You must have the System Administration permission **Modify import blackout times: Allow** to set or modify import blackout times.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles** and select the **Cataloging** tab to see the cataloging profiles set at the system level.
3. Double-click the **Import blackout times** profile.

The Import blackout times dialog box appears.



4. Follow these steps to set up to three daily blackout times:
 - a) Select **Enable** under **Daily blackout time 1, 2, or 3**.
 - b) Select a **Start** time and an **End** time.
5. Follow these steps to set a one-time blackout time:
 - a) Select **Enable** under **One-time blackout**.
 - b) Select a **Start** date and time.
 - c) Select an **End** date and time.

Select **OK**.

The import blackout times are set for the system.

6. Select **File, Save**.

Managing Authority Control

The Authority Control read-only database table displays bibliographic tags and the authority tags to which they are matched during authority control processing. This processing occurs automatically when records are imported or saved.

If you have access to the Polaris ZMARC Z39.50 authority record database (or another remote authority record database), you can set the **Remote automatic authority control** Cataloging profile to enable remote automatic authority control and specify the server and database to search. When a user saves a bibliographic record, and no matching authority record is found in the local database, the system automatically searches the remote database you specified. If a matching authority record is found in the remote database, the new authority record is saved in the Polaris database and the bibliographic record is linked to it. Before setting up remote automatic authority control using the ZMARC database, you must set up the ZMARC server connection. Contact your Polaris Site Manager for more information about setting up and using Polaris ZMARC.

See the following topics:

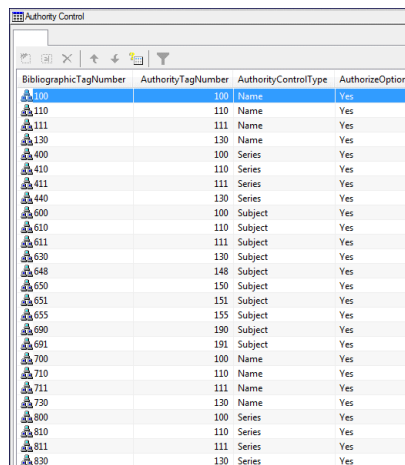
- [“View the Authority Control database table”](#) on page 326
- [“Enable remote automatic authority control”](#) on page 327

1-2-3

View the Authority Control database table

Follow these steps to view the Authority Control database table.

1. In the Administration Explorer tree view, expand the System folder.
2. Expand the **Database Tables** folder.
3. Select **Authority Control** to view the table entries in the details view.



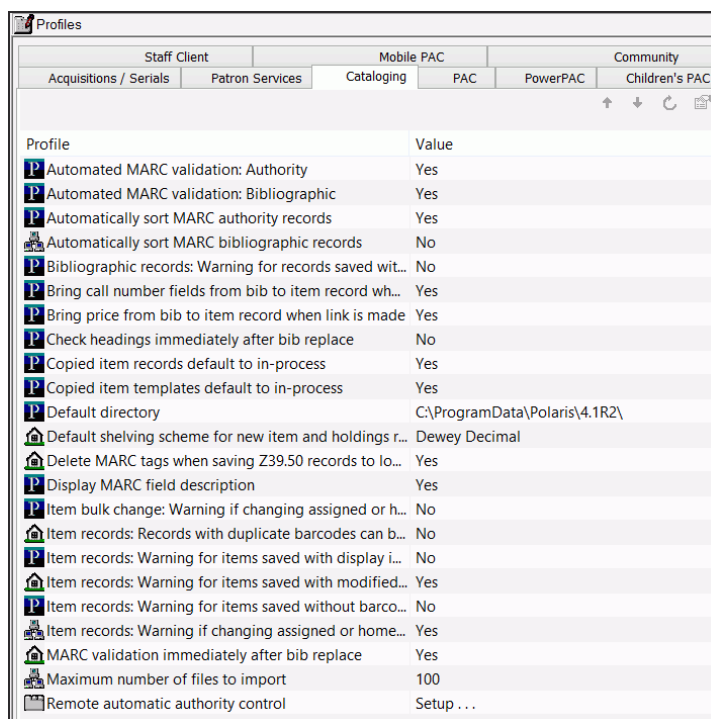
BibliographicTagNumber	AuthorityTagNumber	AuthorityControlType	AuthorizeOption
100	100	Name	Yes
110	110	Name	Yes
111	111	Name	Yes
130	130	Name	Yes
400	100	Series	Yes
410	110	Series	Yes
411	111	Series	Yes
440	130	Series	Yes
600	100	Subject	Yes
610	110	Subject	Yes
611	111	Subject	Yes
630	130	Subject	Yes
648	148	Subject	Yes
650	150	Subject	Yes
651	151	Subject	Yes
655	155	Subject	Yes
690	190	Subject	Yes
691	191	Subject	Yes
700	100	Name	Yes
710	110	Name	Yes
711	111	Name	Yes
730	130	Name	Yes
800	100	Series	Yes
810	110	Series	Yes
811	111	Series	Yes
830	130	Series	Yes

1-2-3

Enable remote automatic authority control

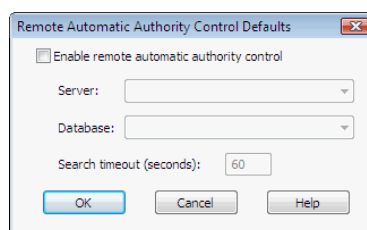
Follow these steps to enable remote automatic authority control.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.



3. Double-click **Remote automatic authority control**.

The Remote Automatic Authority Control Defaults dialog box appears.



4. Select **Enable remote automatic authority control**.
5. Select the server in the **Server** box.
6. Select the database in the **Database** box.
7. Type the amount of time in seconds before the search for a matching authority record times out in the **Search timeout (seconds)** box.
8. Click **OK** to save the remote automatic authority control defaults.

Copying Bib Data to Items

You can set Polaris Administration Cataloging profiles to copy the call number and price from bibliographic records to their linked items. Then you use database tables to specify the order in which the bibliographic fields are checked for the call number and price.

If the **Bring call number fields from bib to item record when link is made** profile is set to **Yes**, call number information in bibliographic records is copied to the linked item records according to settings in the Item Create Call Number Hierarchy database table. When a new item record is created and linked to a bibliographic record, the bibliographic record's call number tags are checked based on the shelving scheme in the item record and the corresponding entry in the Item Create Call Number Hierarchy table.

The fields are copied to item records as follows:

- If the bibliographic record has a classification and cutter number, they are copied as a group to the item record. However, if the item template has values in the **Class** and **Cutter** fields and the New Item Record Options dialog box has the **Use template values instead of these (if available)** check box checked, the classification and cutter numbers are copied from the item template to the new item records.
- If the bibliographic record has any of the other call number fields (prefix, suffix, volume, copy number), these fields are copied to the item record independently of the other call number fields. If the bibliographic record has some of these fields defined, and the item template has others, the resulting item records can have a mixture, with some fields from the bibliographic record and some from the item template.

If the profile, **Bring price from bib to item record when link is made** is set to **Yes**, the price in bibliographic records is copied to the linked item records according to the settings in the Item Create Price Hierarchy database table. When a new item record is created and linked to a bibliographic record, the bibliographic record's tags and subfields are checked for a price in the order specified in the Item Create Price Hierarchy database table.

See the following topics:

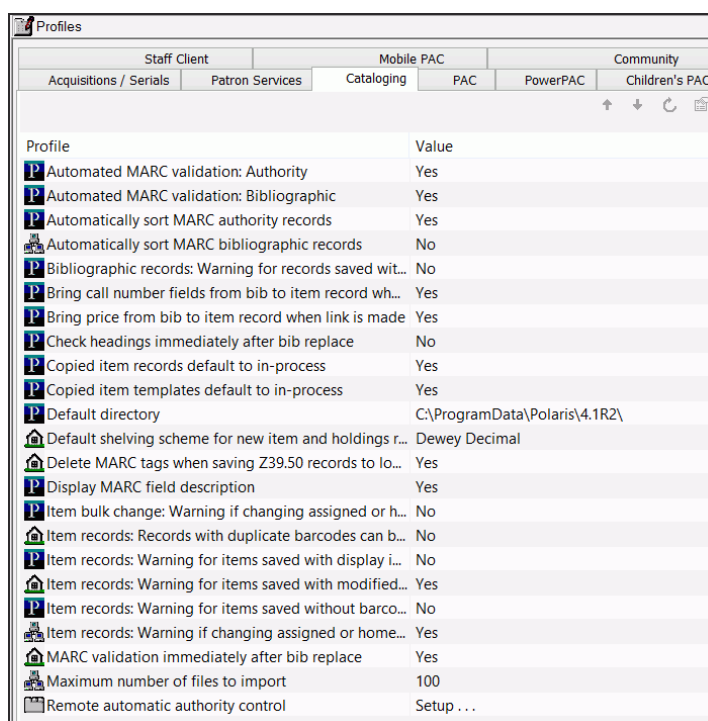
- [“Copy bibliographic call numbers to item records”](#) on page 329
- [“Modify the Item Create Call Number Hierarchy table”](#) on page 330
- [“Copy the price from bibliographic records to item records”](#) on page 332
- [“Modify the Item Create Price Hierarchy table”](#) on page 333

1-2-3

Copy bibliographic call numbers to item records

Follow these steps to automatically copy call number fields from linked bibliographic records (according to the settings in the Item Create Call Number Hierarchy database table).

1. In the Administration Explorer tree view, expand the folder for the organization, staff member or workstation.
2. Select **Profiles** and select the **Cataloging** tab.



3. Select **Bring call number fields from bib to item record when link is made** and set the profile to **Yes** or **No**.
 - **Yes** - When an item record is created for the organization, if there are call numbers in the linked bibliographic record, the numbers are copied to the item record. The system checks for the call number information in fields in the bibliographic record according to the hierarchy set in the Item Create Call Number Hierarchy database table. See [“Modify the Item Create Call Number Hierarchy table”](#) on page 330.
 - **No** - When an item record is created for the organization, the classification and cutter numbers in the linked bibliographic record are not copied to the item record.
4. Select **File, Save**.

1-2-3

Modify the Item Create Call Number Hierarchy table

The Item Create Call Number Hierarchy table is set up during Polaris implementation, but you can add and change entries. Each library can specify different tags to use for the call number.

Note:

These permissions are required to view and modify the Item Create Call Number Hierarchy database table: **Access administration: Allow; Access tables: Allow; Modify call number hierarchy table: Allow.**

Follow these steps to add or change call number entries.

Note:

The call number fields in bibliographic records are copied to their linked item records if the **Bring call number fields from bib to item record when link is made** profile is set to **Yes**. See [“Copy bibliographic call numbers to item records”](#) on page 329.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Database Tables** folder.
3. Select Item Create Call Number Hierarchy.

The Item Create Call Number Hierarchy table appears.

Organiz...	Precedence	Scheme	Tag	Prefix	Classification	Cutter	Suffix	Volume	Copy
Amste...	1	Library of Congress	90	a		b			
Amste...	2	Library of Congress	50	a		b			
Amste...	1	Dewey Decimal	99	a		b			
Amste...	2	Dewey Decimal	92	a		b			
Argyle...	1	Dewey Decimal	92	a		b			
Argyle...	2	Dewey Decimal	99	a		b			
Ballist...	1	Dewey Decimal	92	a		b			
Ballist...	2	Dewey Decimal	99	a		b			
Bancr...	1	Dewey Decimal	92	a		b			
Bancr...	2	Dewey Decimal	99	a		b			
Bolto...	1	Dewey Decimal	92	a		b			
Bolto...	2	Dewey Decimal	99	a		b			
Burnt ...	1	Dewey Decimal	92	a		b			
Burnt ...	2	Dewey Decimal	99	a		b			
Camb...	1	Dewey Decimal	92	a		b			
Camb...	2	Dewey Decimal	99	a		b			

4. Do one of the following actions:
 - To add an entry, click .
 - To modify an entry, double-click the entry, or select the entry and click .

The Insert or Modify dialog box appears, depending on your selection.

Modify : Item Create Call Number Hierarchy - Amsterdam Free Library

Organization:	Amsterdam Free Library
Precedence:	1
Scheme:	Library of Congress
Tag:	90
Prefix:	
Classification:	a
Cutter:	b
Suffix:	
Volume:	
Copy:	

OK Cancel

5. In the **Organization** box, select the branch for which the call number is used, if it is not already selected.
6. If you are adding a new entry, select the shelving scheme in the **Shelving Scheme** box. You cannot change the shelving scheme for existing entries.
7. In the **Bibliographic Tag Number** box, type the bibliographic record tag that contains the call number information.
8. In the **Prefix** box, type the tag subfield that contains the prefix information.
9. In the **Classification** box, type the tag subfield that contains the classification information.
10. In the **Cutter** box, type the tag subfield that contains the cutter number.

Note:

Do not enter the subfield delimiters.

11. In the **Suffix** box, type the tag subfield that contains the call number suffix.
12. In the **Volume** box, type the tag subfield that contains the volume number.
13. In the **Copy** box, type the tag subfield that contains the copy number.
14. Click **OK** on the dialog box.
15. Select **File, Save**.

1-2-3

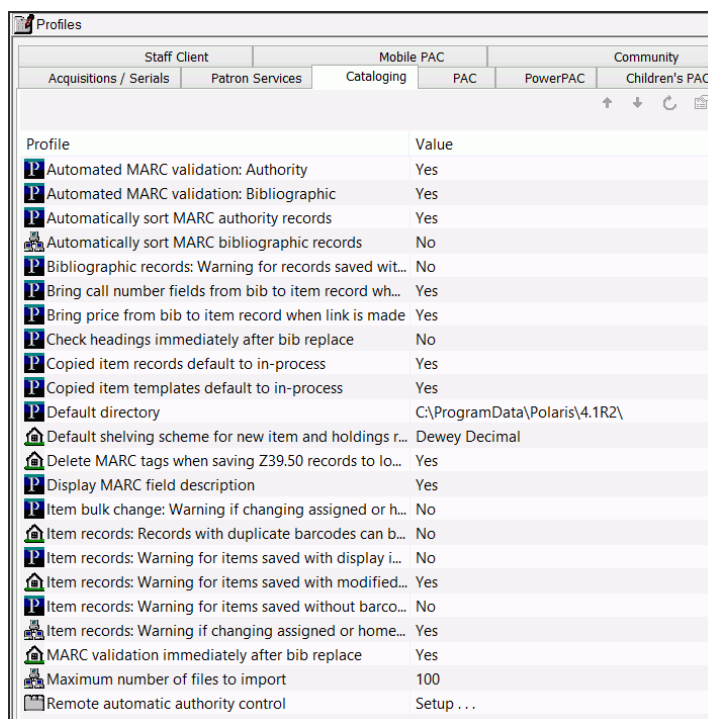
Copy the price from bibliographic records to item records

Follow these steps to set up item records so that price information is automatically copied from linked bibliographic records.

Note:

These permissions are required to view and modify the Item Create Price Hierarchy table: **Access administration: Allow; Access tables: Allow; Modify item create price hierarchy table: Allow.**

1. In the Administration Explorer tree view, expand the folder for the organization, staff member or workstation.
2. Select **Profiles** and select the **Cataloging** tab.



3. Select **Bring price from bib to item record when link is made** and set the profiles to **Yes** or **No** to specify if the price is copied to item records:
 - **Yes** - When an item record is created for the organization, the price is copied from the linked bib to the item record, according to the hierarchy established in the Item Create Price Hierarchy table; see [“Modify the Item Create Price Hierarchy table”](#) on page 333.
 - **No** - When an item record is created for the organization, the price in the linked bibliographic record is not copied to the item record.
4. Select **File, Save**.

1-2-3

Modify the Item Create Price Hierarchy table

You use the Item Create Price Hierarchy database table to specify the order in which fields in bibliographic records are checked for the price. The Item Create Price Hierarchy table is set up during Polaris implementation, but you can add and change entries. Each library can specify different tags to use for the price.

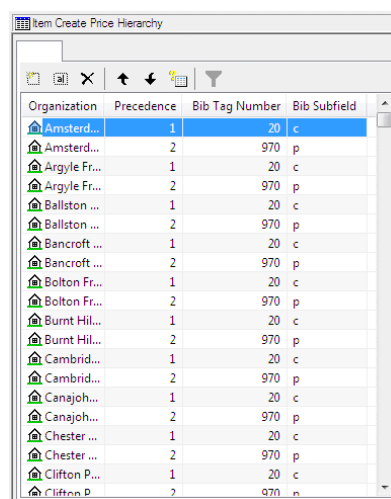
Follow these steps to add or change the tags checked for price.

Note:

These permissions are required to view and modify the Item Create Price Hierarchy table: **Access administration: Allow; Access tables: Allow; Modify item create price hierarchy table: Allow**

1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Database Tables** folder.
3. Select **Item Create Price Hierarchy**.

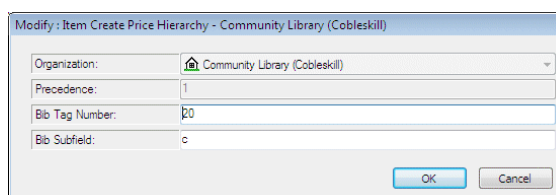
The Item Create Price Hierarchy table appears.



Organization	Precedence	Bib Tag Number	Bib Subfield
Amsterd...	1	20	c
Amsterd...	2	970	p
Argyle Fr...	1	20	c
Argyle Fr...	2	970	p
Ballston ...	1	20	c
Ballston ...	2	970	p
Bancroft ...	1	20	c
Bancroft ...	2	970	p
Bolton Fr...	1	20	c
Bolton Fr...	2	970	p
Burnt Hill...	1	20	c
Burnt Hill...	2	970	p
Cambrid...	1	20	c
Cambrid...	2	970	p
Canajoh...	1	20	c
Canajoh...	2	970	p
Chester ...	1	20	c
Chester ...	2	970	p
Clifton P...	1	20	c
Clifton P...	2	970	p

4. Do one of the following actions:
 - To add an entry, click .
 - To modify an entry, double-click the entry, or select the entry and click .

The Insert or Modify dialog box appears depending on your selection.



Modify: Item Create Price Hierarchy - Community Library (Cobleskill)

Organization:  Community Library (Cobleskill)

Precedence: 1

Bib Tag Number: 20

Bib Subfield: c

OK Cancel

5. Select the branch for which the price hierarchy is used in the **Organization** box.
The Precedence field is filled in automatically.
6. In the **Bib Tag Number** box, type the bibliographic record tag that contains the price information (for example, **020** or **970**).
7. In the **Bib Subfields** box, type the tag subfield that contains the price information. (for example, **\$c** or **\$p**).
8. Click **OK** to close the dialog box.
9. To change the order in which a tag is checked, select it in the table, and click  to move the entry up or  to move the entry down.
10. Select **File, Save**.

Setting Item Copy & Save Options

Several Cataloging profiles affect the creation and modification of item records and item record templates. They specify defaults for copied item records and templates, defaults for the shelving scheme, and whether item records can be saved provisionally if they have duplicate barcodes.

Note:

For information on the profiles that copy the call number and price from bibliographic records, see [“Copying Bib Data to Items”](#) on page 328. For information on setting the warning message profiles for item records, see [“Displaying Warning Messages for Bibs and Items”](#) on page 340.

The Cataloging profile **Default shelving scheme for new item and holdings records** specifies the scheme that appears by default in new item and serial holdings records. This profile can be set at the system, library, branch, or staff member level in Polaris Administration. The default shelving scheme appears when users create new item records from the New Item Record Options dialog box or the Item Record workform (when **File, New, Clear workform** is selected).

Two other Cataloging profiles determine the default status of copied item records and copied item templates. Copied item records and item templates can be assigned a default status of In-process, or they can retain the status of the record from which they were copied. The **Copied item records default to In-process** profile determines the status of copied item records, and the **Copied item templates default to In-process** determines the status of copied item templates.

The **Item records: Records with duplicate barcodes can be saved provisionally** profile specifies whether an item record can be saved provisionally if its barcode is determined to be a duplicate of existing item record's barcode. If this profile is set to **Yes**, item records with duplicate barcodes can be saved provisionally. If it is set to **No**, the option to save item records with duplicate barcodes provisionally is disabled.

See the following topics:

- [“Specify the default shelving scheme for item/holdings records”](#) on page 336
- [“Set the status of copied items to in-process”](#) on page 337
- [“Set the status of copied item templates to in-process”](#) on page 338
- [“Specify if items with duplicate barcodes can be saved provisionally”](#) on page 339

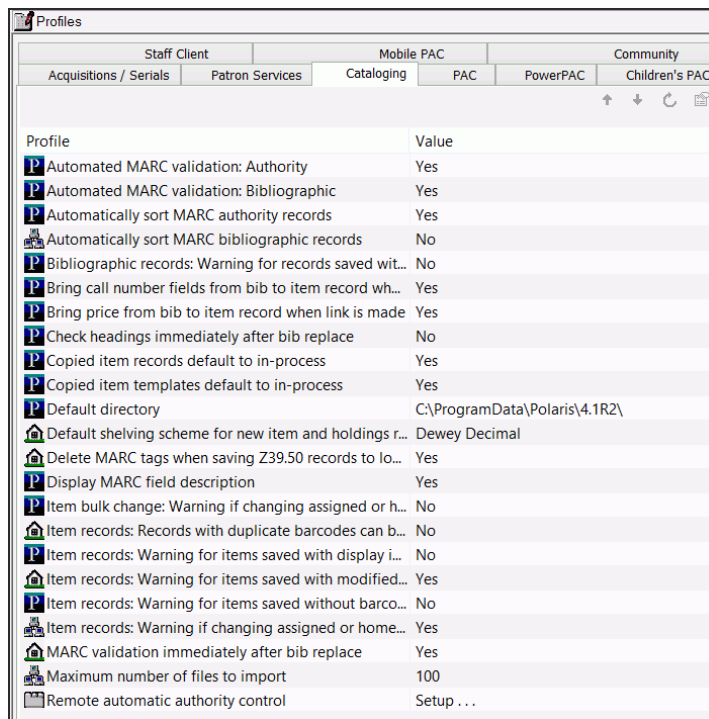
1-2-3

Specify the default shelving scheme for item/holdings records

Follow these steps to specify the default shelving scheme for new item and serial holdings records.

1. In the Administration Explorer tree view, expand the folder for the organization or staff member.
2. Select **Profiles** and select the **Cataloging** tab.

The Cataloging profiles appear.



3. Double-click **Default shelving scheme for new item and holdings records**.
4. Select the shelving scheme.
5. Select **File, Save**, click  or press **Ctrl+S**.

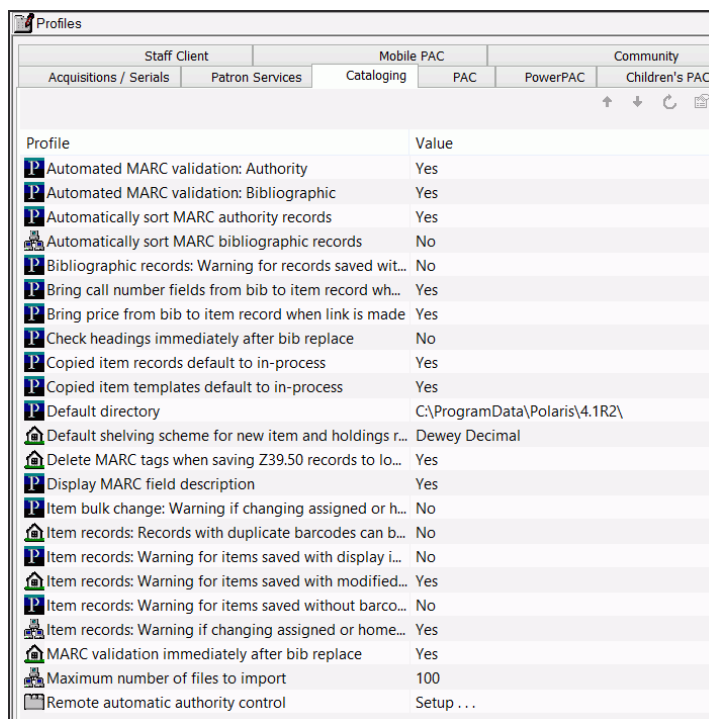
1-2-3

Set the status of copied items to in-process

You can set the status of copied item records so that they retain the circulation status of the item record template from which they were copied, or they get set to a status of **In-Process**.

Follow these steps to set the status of copied items.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.



3. Double-click **Copied item records default to In-process**.
4. Choose one of the following options:
 - To set the profile so that new item records created by copying an existing record will always have a status of **In-Process**, select **Yes**.
 - To set the profile so that new item records created by copying an existing record will retain the status of the existing item record, select **No**.
5. Select **File, Save**, click  or press **Ctrl+S**.

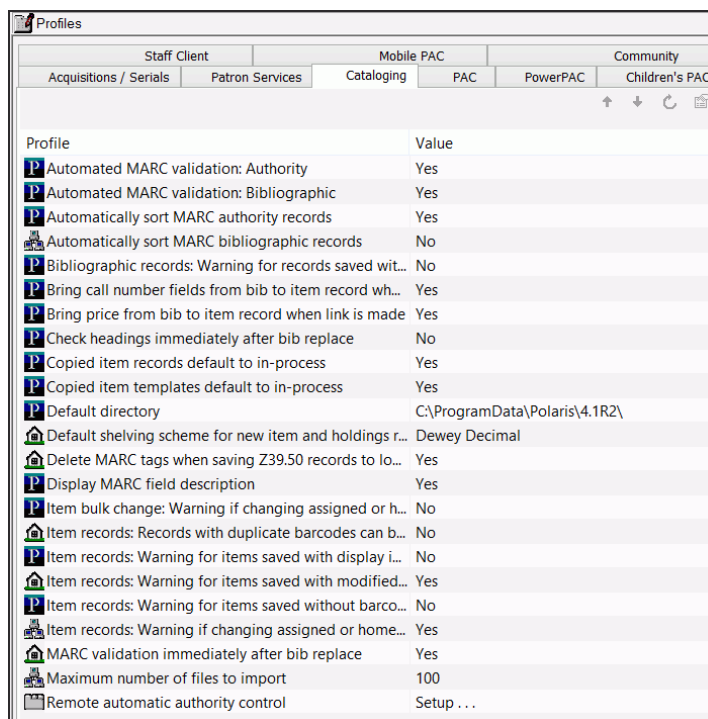
1-2-3

Set the status of copied item templates to in-process

You can specify the status of copied item record templates so that they retain the circulation status of the item record template from which they were copied, or they are set to a status of **In-Process**.

Follow these steps to set the status of copied item record templates.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.



3. Select **Copied item templates default to In-process**.
4. Choose one of the following options:
 - To set the profile so that new item record templates created by copying an existing template will always have a status of **In-Process**, select **Yes**.
 - To set the profile so that new item record templates created by copying an existing item record template will retain the status of the existing item record template, select **No**.
5. Select **File, Save**, click  or press **Ctrl+S**.

1-2-3

Specify if items with duplicate barcodes can be saved provisionally

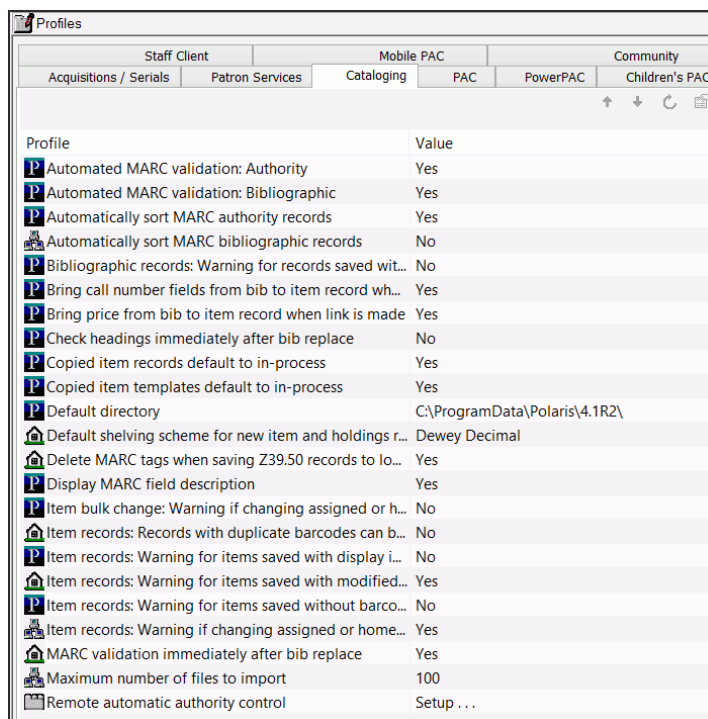
Tip:

This profile setting does not affect bulk item creation, bulk change, or item creation during importing. When barcodes are assigned during bulk creation or bulk change, duplicate barcodes are never assigned. In the import profile, users with the appropriate permissions can still select the import option to create provisional item records when duplicate barcodes are encountered.

This profile is checked when users create or save an item, and its barcode is a duplicate of a barcode for an existing item.

Follow these steps to set the profile to allow or prevent the creation of provisional items with duplicate barcodes.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.



3. Select the **Item records: Records with duplicate barcodes can be saved provisionally** profile.
4. Set the profile to **Yes** to allow users to save an item record provisionally if a duplicate barcode is found. Set the profile to **No** to prevent users from saving an item record provisionally if a duplicate barcode is found.
5. Select **File, Save**, click  or press **Ctrl+S**.

Displaying Warning Messages for Bibs and Items

You can set up warning messages to appear when certain information is missing or changed in a bibliographic or item record, or when the record will not display in the PAC.

See the following topics:

- “Set message for bibs that do not display in PAC” on page 340
- “Set warnings for changed item records” on page 341

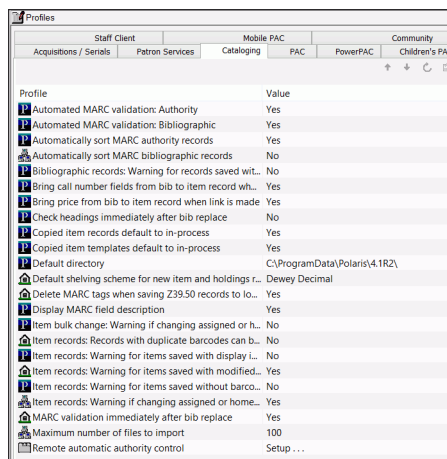
1-2-3

Set message for bibs that do not display in PAC

Follow these steps to turn the message on or off when bibliographic records are saved and the **Display in PAC** check box on the Bibliographic Record workform is unchecked.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.

The Cataloging profiles appear.



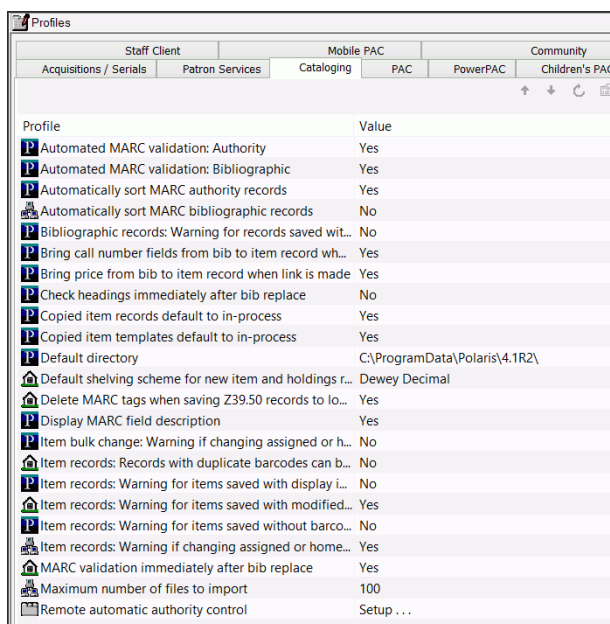
3. Double-click **Bibliographic records: Warning for records saved with display in PAC unchecked**.
4. Select **Yes** to display a warning message when users save a bibliographic record with the **Display in PAC** check box unchecked, or select **No** to save or change the records without displaying the message.
5. Select **File, Save**.

1-2-3

Set warnings for changed item records

Follow these steps to display warning messages when item records are saved, changed, or bulk-changed.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.



3. Set the following profiles to **Yes** to display warning messages, or set them to **No** to save or change the records without displaying a message:
 - **Item bulk change: Warning if changing assigned or home branch** - If this profile is set to **Yes**, a warning message appears when a user attempts to change the assigned branch or home branch using the Item Record Bulk Change dialog box.
 - **Item records: Warning for items saved with modified barcode** - If this profile is set to **Yes**, a warning message appears when a user changes the barcode on a final item record and saves the record.
 - **Item records: Warning for items saved with Display in PAC unchecked** - If this profile is set to **Yes**, a warning message appears when a user saves an item record that does not have the **Display in PAC** box checked.
 - **Item records: Warning for items saved without barcodes** - If this profile is set to **Yes**, a warning message appears when a user saves an item record that does not have a barcode.
 - **Item records: Warning if changing assigned or home branch** - If this profile is set to **Yes**, a warning message appears when a user changes the assigned branch or home branch for an item record.
4. Select **File, Save**.

Setting Utility to Delete Bib Tags Marked with Subfield 9

You can use the system-level Cataloging profile **Subfield 9 cleanup utility** to clean up specific MARC tags marked with a system-supplied subfield 9 and text. The profile specifies the tags to scan for the presence of the \$9 and the date range. When the utility runs, the specified tags are checked for a \$9, and if the subfield was inserted in the time period specified, the whole tag is deleted.

Note:

This utility is used to delete bibliographic tags from existing records after the processing is complete. You can also specify unwanted tags to delete from new bibliographic records when they are imported or saved. See [“Specify tags to retain from overlaid bibs”](#) on page 314.

These system-supplied subfields are inserted under the following conditions to prevent bibliographic tags from being used more than once:

- Before item records are created from embedded holdings data in imported bibliographic records, the system first checks for the presence of existing embedded holdings tags. If embedded holdings tags are found and they are not already marked with a \$9 subfield, the tags are marked with the subfield 9 and the text **Tag retained from duplicate overlay**mmm dd yyyy hh:mm[AM/PM]. The marked tags are not used to create item records. See [“Bib Tags Marked to Prevent Creation/Updates of Items”](#) on page 97.
- After item records are created from embedded holdings tags in imported bibliographic records, a subfield 9 and the text **Item generated** mmm dd yyyy hh:mm[AM/PM] is inserted only if the Cataloging parameter **MARC embedded holdings tags as processed** is set to **Yes** in Polaris Administration. The marked tags are not used again.
- After bibliographic records are bulk-added to a purchase order or selection list, a subfield 9 and the text **Processed** mmm dd yyyy hh:mm[AM/PM] is inserted into the 970 tags if the Acquisitions parameter **Bulk add to PO/SL: Mark 970 data as processed** is set to **Yes**. The marked tags are not used again during bulk add.

Note:

970 tags are also marked during migration from another system with \$9 **Migrated 970:** mmm dd yyyy hh:mm[AM/PM].

See the following topics:

- [“Mark embedded holdings data as processed”](#) on page 343
- [“Set up the Subfield 9 cleanup utility”](#) on page 344

1-2-3

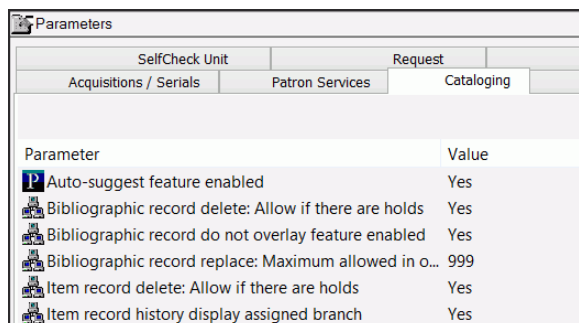
Mark embedded holdings data as processed

Follow these steps to insert a subfield 9 in embedded holdings tags in bibliographic records after these tags have been used to create item records.

Note:

For more information on setting up import profiles to create item records from embedded holdings data, see [“Set import options for item records”](#) on page 77.

1. In the Administration Explorer tree view, expand the System folder.
2. Select **Parameters** and select the **Cataloging** tab.



Parameter	Value
Auto-suggest feature enabled	Yes
Bibliographic record delete: Allow if there are holds	Yes
Bibliographic record do not overlay feature enabled	Yes
Bibliographic record replace: Maximum allowed in o...	999
Item record delete: Allow if there are holds	Yes
Item record history display assigned branch	Yes

3. Select **Mark embedded holdings tags as processed** and select **Yes**.

When bibliographic records with embedded holdings data are imported into Polaris, and item records are created automatically from this data, a \$9 is inserted into the embedded holdings tag with the following automatic processing information: **Item generated mmm dd yyyy hh:mm[AM/PM]**

Note:

The holdings tag is specified in the import profile used to import the records. If the bibliographic records were imported using the **Polaris default (with item creation)** profile, item records are created using the data in the 852 tags in the imported bibliographic records. You can set up different import profiles where you specify that item records are created from data in other embedded holdings tags, such as the 949 tag. Whatever tag is used to create the item records is the one that will be marked with the \$9.

1-2-3

Set up the Subfield 9 cleanup utility

Follow these steps to set the Subfield 9 cleanup utility profile.

Important:

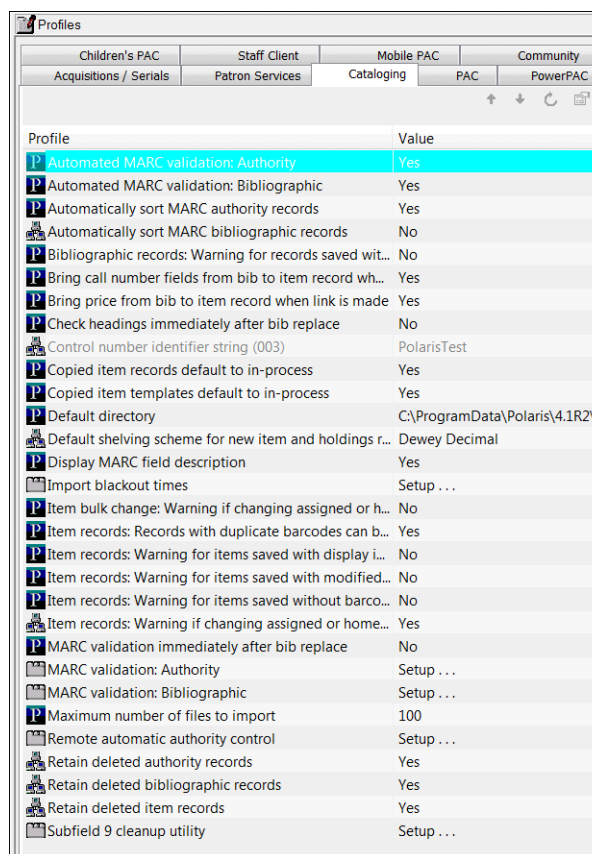
To use the Subfield 9 cleanup utility, a subfield 9 must have been inserted into the tags in order to delete them. See [“Setting Utility to Delete Bib Tags Marked with Subfield 9”](#) on page 342 for the conditions under which the \$9 is inserted.

1. In the Administration Explorer tree view, expand the System folder.

Note:

The Subfield 9 cleanup utility profile is available only at the system level.

2. Select **Profiles** and select the **Cataloging** tab.

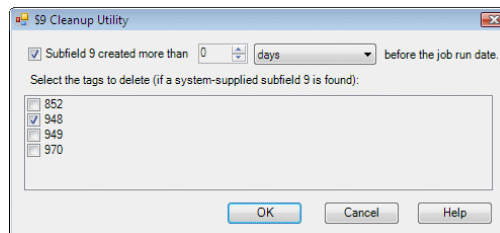


3. Select **Subfield 9 cleanup utility**.

The \$9 Cleanup Utility dialog box appears.

Note:

If you want to add another tag to this profile, contact your Polaris Site Manager.



4. Select the check box next to **Subfield 9 created more than _____ before the job run date**, select a number and select **days**, **months** or **years** to indicate the time period (relative to the date the job was run) for which you want the system to check for the presence of the \$9.

Note:

When the tags are marked with a \$9, a date is included. This is the date that will be checked when the utility is run.

5. Select the tags to delete if a \$9 is found with a date within the date range you specified.

When you have set up this profile, a nightly SQL job will run unless it is disabled in the SQL server agent. It will check the tags you specified for the presence of a \$9, and if it finds this subfield in the tag, it will check the date to determine if it is within the date range you specified.

For example, if you select **Subfield 9 created more than 2 months before the job run date**, and select 970, the nightly utility will check the 970 tags. If it finds a bibliographic record that has a 970 tag with a \$9 and a processed date more than two months before the utility is run, it automatically deletes the 970 tag and all its contents, un-indexes the tag, and adjusts the tag sequence in the bibliographic records. The bibliographic record's modification date is updated and the transaction is logged.

6. Click **OK**.

Related Information

- **Subfield Nine Utility Report** - When the \$9 Cleanup Utility is run, a log is generated, and you can see these logs in the Subfield Nine Utility Report. See [“Outreach Services Reports”](#) in the *Polaris Basics Guide 4.1R2*.
- **852 or other embedded holdings tags used to create item records** - When you set up an import profile, you can specify the embedded holdings tags to create item records automatically. See [“Set import options for item records”](#) on page 77.
- **970 tags used to create selection list and purchase order line item segments** - See [“Creating Purchase Orders”](#) in the *Polaris Acquisitions Guide 4.1R2*.

Managing Record Deletion

You can set Cataloging profiles to retain deleted records and then purge them from the database in a separate process. Bibliographic and item record deletion for ILL requests also honor these settings. The purge process automatically removes records marked for deletion based on criteria in a Purge record. See [“Purge cataloging records”](#) on page 208.

In addition, you can set Cataloging parameters to prevent or allow the deletion of bibliographic or item records with linked hold requests. These parameters are available at the System level only, and the default is **No**, which prevents deletion of bibs or items with linked hold requests. If the parameters are set to **Yes**, the records with linked hold requests can be deleted if the hold requests have a status of Active, Pending, or Inactive.

See the following topics:

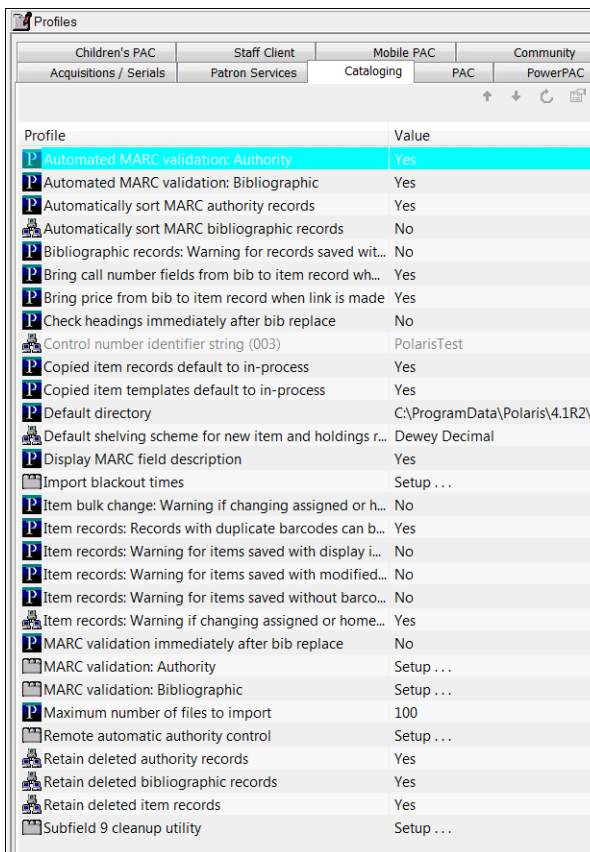
- [“Retain deleted records”](#) on page 347
- [“Allow or prevent deletion of bibs with linked hold requests”](#) on page 348
- [“Allow or prevent deletion of items with linked hold requests”](#) on page 348

1-2-3

Retain deleted records

Follow these steps to retain cataloging records that are marked for deletion.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles, Cataloging** to display the profiles list.



Profile	Value
Automated MARC validation: Authority	Yes
Automated MARC validation: Bibliographic	Yes
Automatically sort MARC authority records	Yes
Automatically sort MARC bibliographic records	No
Bibliographic records: Warning for records saved wit...	No
Bring call number fields from bib to item record wh...	Yes
Bring price from bib to item record when link is made	Yes
Check headings immediately after bib replace	No
Control number identifier string (003)	PolarisTest
Copied item records default to in-process	Yes
Copied item templates default to in-process	Yes
Default directory	C:\ProgramData\Polaris\4.1R2\
Default shelving scheme for new item and holdings r...	Dewey Decimal
Display MARC field description	Yes
Import blackout times	Setup ...
Item bulk change: Warning if changing assigned or h...	No
Item records: Records with duplicate barcodes can b...	Yes
Item records: Warning for items saved with display i...	No
Item records: Warning for items saved with modified...	No
Item records: Warning for items saved without barco...	No
Item records: Warning if changing assigned or home...	Yes
MARC validation immediately after bib replace	No
MARC validation: Authority	Setup ...
MARC validation: Bibliographic	Setup ...
Maximum number of files to import	100
Remote automatic authority control	Setup ...
Retain deleted authority records	Yes
Retain deleted bibliographic records	Yes
Retain deleted item records	Yes
Subfield 9 cleanup utility	Setup ...

3. To retain cataloging records, set the following profiles to **Yes**:
 - Retain deleted authority records
 - Retain deleted bibliographic records
 - Retain deleted item records
4. Select **File, Save** on the Polaris Shortcut Bar.

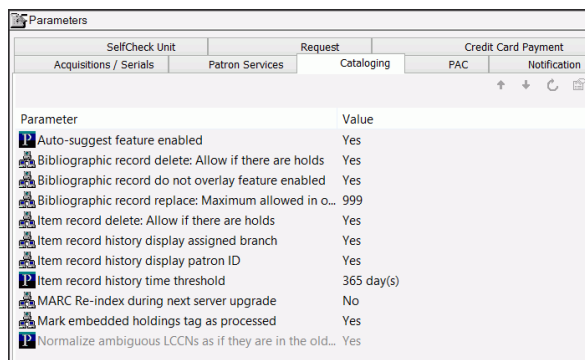
Related Information

[“Purge cataloging records”](#) on page 208.

1-2-3

Allow or prevent deletion of bibs with linked hold requests

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Parameters, Cataloging** to display the parameters list.



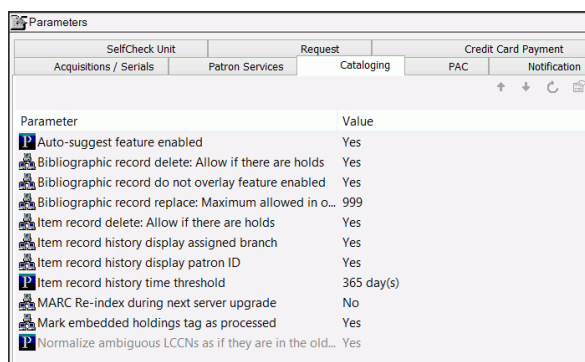
Parameter	Value
Auto-suggest feature enabled	Yes
Bibliographic record delete: Allow if there are holds	Yes
Bibliographic record do not overlay feature enabled	Yes
Bibliographic record replace: Maximum allowed in o...	999
Item record delete: Allow if there are holds	Yes
Item record history display assigned branch	Yes
Item record history display patron ID	Yes
Item record history time threshold	365 day(s)
MARC Re-index during next server upgrade	No
Mark embedded holdings tag as processed	Yes
Normalize ambiguous LCCNs as if they are in the old...	Yes

3. Set the **Bibliographic record delete: Allow if there are holds** parameter to **Yes** to allow the deletion of bibliographic records with linked hold requests, or set the parameter to **No** to prevent the deletion of bibliographic records with linked hold requests.
4. Select **File, Save** on the Polaris Shortcut Bar.

1-2-3

Allow or prevent deletion of items with linked hold requests

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Parameters, Cataloging** to display the parameters list.



Parameter	Value
Auto-suggest feature enabled	Yes
Bibliographic record delete: Allow if there are holds	Yes
Bibliographic record do not overlay feature enabled	Yes
Bibliographic record replace: Maximum allowed in o...	999
Item record delete: Allow if there are holds	Yes
Item record history display assigned branch	Yes
Item record history display patron ID	Yes
Item record history time threshold	365 day(s)
MARC Re-index during next server upgrade	No
Mark embedded holdings tag as processed	Yes
Normalize ambiguous LCCNs as if they are in the old...	Yes

3. Set the **Item record delete: Allow if there are holds** parameter to **Yes** to allow the deletion of item records with linked hold requests, or set the parameter to **No** to prevent the deletion of item records with linked hold requests.
4. Select **File, Save** on the Polaris Shortcut Bar.

Setting the Cataloging Directory

You can set up a default directory cataloging so that bulk change and other catalog processing reports are automatically saved to a specific folder.

Note:

Import processing reports are not saved in this directory; they can be accessed from the Import Jobs Queue.

See the following topic:

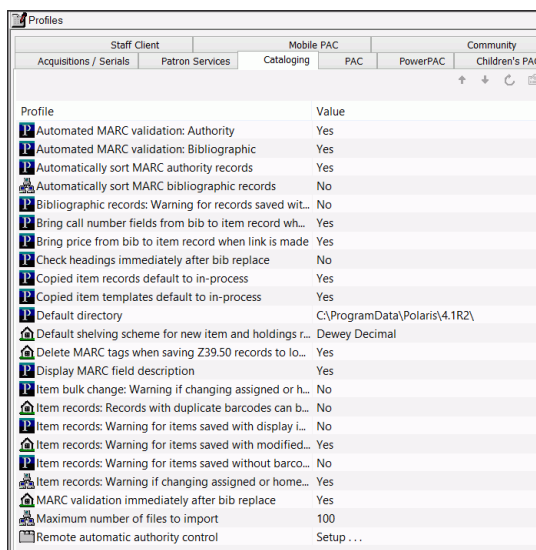
- “Specify the default directory for Cataloging files” on page 349

1-2-3

Specify the default directory for Cataloging files

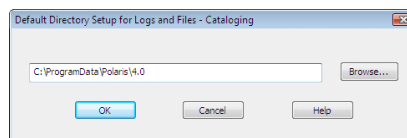
Follow these steps to specify where catalog processing reports are saved.

1. In the Administration Explorer tree view, expand the folder for the organization, staff member, or workstation.
2. Select **Profiles** and select the **Cataloging** tab.



3. Select **Default directory**.

The Default Directory Setup for Logs and Files dialog box appears.



4. Type the cataloging default directory location, or click **Browse** and select the location, and select **OK** to update the cataloging default directory.

Implementing Ebook Vendors

Libraries can catalog, display in PAC, manage access, and circulate ebooks from vendors that integrate with Polaris circulation and from vendors that do not integrate with Polaris circulation. Integrated ebook vendor accounts are set up for automatic processing that integrates ebooks with Polaris so that circulation is tracked in Polaris. Non-integrated vendor accounts can be set up to limit patron access by linking groups of branches (resource groups) with the vendor account. If the library does not want to limit access to a non-integrated vendor's ebooks, no vendor account is necessary. Vendor accounts for integrated ebook vendors can also be set up to restrict patron access using resource groups.

See the following topics:

- [“Implementing Integrated Ebook Vendors - Overview”](#) on page 350
- [“Setting Up Integrated Ebook Processing”](#) on page 354
- [“Implementing Non-Integrated Ebook Vendors - Overview”](#) on page 367
- [“Setting Up Non-Integrated Ebook Processing”](#) on page 368
- [“Removing Expired Ebooks”](#) on page 371

Implementing Integrated Ebook Vendors - Overview

Currently, ebook integration is available through the Polaris ILS and 3M™ Cloud Library. When the integrated ebook vendor account is created in Polaris and the library has purchased the ebook titles, patrons can search for, place holds on, and check out the vendor's ebooks directly from the PAC. In addition, all associated circulation and patron accounting processing and tracking for these integrated ebooks occurs in Polaris.

When the library purchases ebooks at the integrated ebook vendor's web site, the following process between the ebook vendor and Polaris components creates ebook bibliographic records containing the integrated vendor account data and the item count:

- The integrated ebook vendor's API makes a call to the Polaris API (PAPI).
- The Polaris API consumer service is notified. This service allows the Polaris ILS to consume data from third-party APIs.
- The Polaris API consumer service calls the ebook vendor's API and gets the MARCXML records and a count of the number copies for each ebook title the library purchased.

- The Polaris API consumer service parses the MARCXML records and creates the appropriate number of holdings tags based on the holdings count.
- The Polaris API consumer service then submits an automatic import job for processing.

Next, the bibliographic records are imported automatically using the Polaris **Integrated Ebook Bibs** import profile, which is linked to the Vendor Account record in Polaris, and the following processing occurs in Polaris:

- New bibliographic records for the integrated ebooks are saved in the Polaris database.
- A Resource Entity is created for each 856 tag with vendor account data that links to the ebook in the vendor repository. The vendor contract ID is in subfield x of the 856 tag. The Resources view of the Bibliographic Record workform displays the Resource Entity.
- The integrated ebook item records are created using information from the holdings tags and the **Ebook automatic import item** template.

Then, when a patron checks out an ebook in the Polaris PAC, the transaction is integrated between the integrated ebook vendor and Polaris:

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

Note:

Integrated ebook checkins through the PAC are handled the same way.

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

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

Note:

Integrated ebook checkins through the vendor's service (3M Cloud Library) are handled the same way.

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

Checklist for Implementing Integrated Ebook Vendors

To implement ebook processing with an integrated ebook vendor, the library and Polaris Library Systems do the following:

- ☐ The library contracts with the integrated ebook vendor for a subscription to the ebook service.
- ☐ The library obtains a Polaris Integrated Ebooks license for the ebook vendor. A single integrated ebook license covers Polaris PowerPAC, Polaris Mobile PAC, and Polaris PowerPAC Children's Edition.
- ☐ The library purchases a license for the Polaris API, which has an annual maintenance fee. Only one Polaris API license is required for each Polaris installation, regardless of the number of vendor contracts. If the library already has a license for the Polaris API, no additional API fee is required.
- ☐ Polaris Library Systems sets up an integrated ebook Vendor record.
- ☐ The library sets up an automatic ebook item template. The name must begin with **Ebook automatic import** (case does not matter, and **e-book** is also accepted). See ["Set up the item template for the integrated ebooks"](#) on page 354.
- ☐ (Optional) If any changes are required to the settings in the read-only **Integrated Ebook Bibs** import profile, the library copies and renames the profile. See ["Copy the Integrated Ebook Bibs import profile"](#) on page 355.
- ☐ (Optional) The library sets up resource groups for the library organizations that allow their patrons to access the ebooks. See the Polaris staff client online Help.
- ☐ If multiple libraries in your system use the same vendor account (contract), Polaris recommends that you set up a digital branch to represent the account. If you plan to use a digital branch, it must be created before activating the vendor account. See ["Setting Up a Digital Branch"](#) on page 353.
- ☐ The library, with the assistance of the Polaris site manager, sets up an integrated ebook vendor account under the vendor record. See ["Create an integrated \(3M\) ebook vendor account"](#) on page 361. The vendor account is used to create resource entities and ebook item records in Polaris. The vendor account is linked to:
 - The resource group whose patrons have access to the ebooks.
 - The import profile for importing ebook bibliographic records. For API-driven imports, the **Integrated Ebook Bibs** polarisexec import profile (or a renamed copy) is selected in the vendor account. Only one import profile can be associated with a vendor account. For non-API imports, the library selects the vendor account in the import profile.
 - The item template used in the automatic creation of ebook items.
- ☐ The library purchases the ebooks at the ebook vendor's site.

Tip:

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

Tip:

Polaris Administration also includes a non-integrated vendor account for OverDrive, and a generic, non-integrated vendor record that any Polaris customer can use for any non-integrated vendor accounts where the library wants to restrict access by a branch or group of branches.

- ❑ The integrated ebook vendor transmits the bibliographic records in MARCXML or MARC format.
- ❑ The API consumer service automatically imports the bibliographic records using the import profile specified in the vendor account.
- ❑ The import process automatically creates the resource entities and ebook item records in Polaris. See [“The API Consumer Service”](#) on page 364.

Setting Up a Digital Branch

If multiple libraries in your system use the same Vendor Account (contract) for API-driven import processing (used for integrated econtent with 3M), Polaris recommends that you set up a digital branch to represent the account. The digital branch will ease processing when automatically importing MARC records via the API-driven import, where a vendor account is associated with a single import profile and a single item template. Since the import profile specifies a record set and the item template specifies an assigned branch, associating those fields with a single digital branch prevents the need for extensive bulk changes once the item records are created. For more information about setting up branch records in Polaris, see [“Working with Branches”](#) in the *Polaris Administration Guide 4.1R2*. Multiple digital branches, one per multi-library vendor contract, can be created if necessary. In PAC, the materials associated with the digital branch are available according to the branch’s resource group membership.

Important:

If you plan to use a digital branch, the branch must be set up in Polaris before you activate the vendor account and start the API Consumer Service.

Note that if only one library is involved in the contract, a digital branch is not needed. All the ebook item records are assigned to that library.

Setting Up Integrated Ebook Processing

Before you create an integrated vendor account, you must set up the item template to associate with the vendor account. “[Set up the item template for the integrated ebooks](#)” on page 354. In addition, if you want to change any settings in the read-only **Integrated ebook Bibs** import profile, you must first copy and rename the profile before you create the integrated vendor account. See “[Copy the Integrated Ebook Bibs import profile](#)” on page 355.

1-2-3

Set up the item template for the integrated ebooks

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

1. Select **File, New** from the Polaris Shortcut Bar.
2. Select **Item Template** and click **OK**.
3. The Item Template workform opens.
4. Type **Ebook automatic import** or **E-book automatic import** in the **Name** box. Case does not matter, and other words can follow this string, but the name must begin with **Ebook automatic import**.
5. Select the branch that owns the template in the **Template owner** box.
6. In the **Assigned** box, select the branch for the ebook items that will be created using this template. If a resource group is selected in the Vendor Account, the **Assigned** branch selected in the item template must belong to the resource group.
7. In the **Circulation status** box, select **In**.
8. Select the **Fine code** and **Renewal limit**.
9. Select **File, Save** to save the template.

Note:

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

The screenshot shows the 'Item Template 6996 - Cataloging - Polaris' window. The 'Name' field contains 'Ebook automatic import digital branch'. The 'Template owner' is 'QA-Plato 4.1 R2 (sys)'. The 'Assigned' box is 'Digital Branch (DB)'. The 'Circulation status' is 'In'. The 'Material type' is 'ebook'. The 'Loan period' is 'Standard'. The 'Fine code' is 'Book'. The 'Renewal limit' is '1'. The 'Stat code' is '(None)'. The 'Home branch' is 'Digital Branch (DB)'. The 'Request' section has 'Holdable' checked and 'Pickup at' set to '(None)'. The 'Do not mail to patron' checkbox is unchecked.

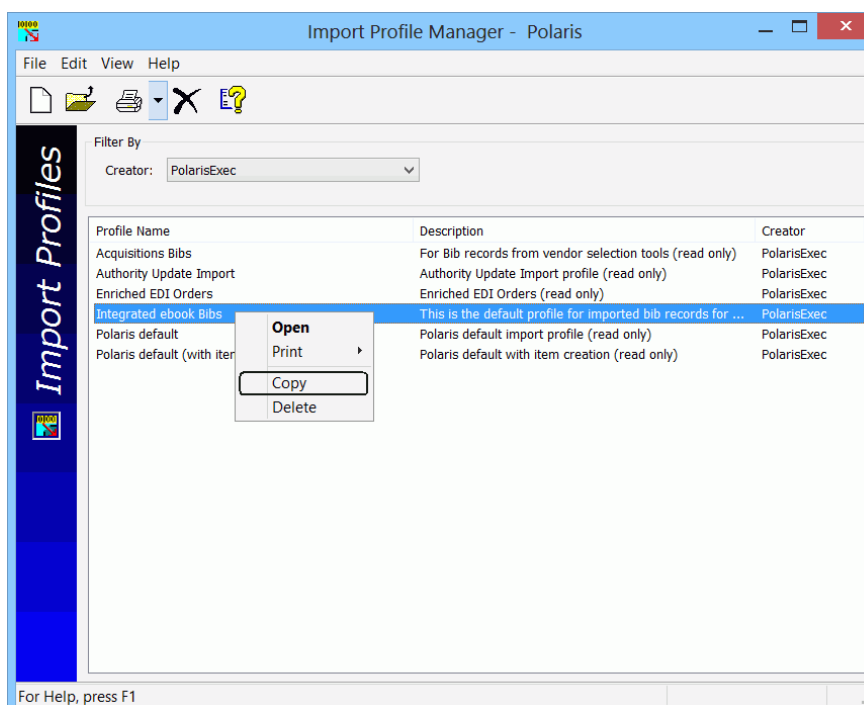
1-2-3

Copy the Integrated Ebook Bibs import profile

To enable the automatic import of integrated ebooks, an import profile must be selected in the Vendor Account workform. A read-only polarisexec import profile named **Integrated Ebook Bibs** is available for selection in the integrated ebook vendor's account. However, if you want to change any of the settings, you must copy the import profile and rename it, then select it in the vendor account.

Follow these steps to copy and rename the **Integrated Ebook Bibs** read-only profile.

1. Select **Utilities, Importing, Profile Manager** from the Polaris Shortcut Bar.
The Import Profile Manager appears.
2. In the **Creator** box, select **PolarisExec** to limit the view to only the Polaris read-only profiles.
3. Select the **Integrated Ebook Bibs** import profile, right-click, and select **Copy**.



The Create Import profile window appears.

The screenshot shows the 'Create Import Profile' window with the 'Profile Setup' tab selected. The window has a title bar with a close button. Below the title bar is a tabbed interface with 'Profile Setup', 'Bibliographic Records', 'Item Records', 'Authority Records', and 'Record Sets'. The 'Profile Setup' tab contains the following fields:

- Name:** A text input field with a cursor.
- Creator:** A dropdown menu showing 'peer'.
- Description:** A large text area.
- Source file name:** A text input field with a 'Browse...' button.
- Vendor account:** A dropdown menu showing '(None)'.

4. Type a name for the profile in the **Name** box, and an optional description in the **Description** box.

5. Click **Save**.

The profile is saved. The Create Import Profile window remains open.

6. Set up the import profile by entering information on the following tabs in the Import Setup window. Be sure to retain settings that are necessary for the automatic import.

- **Profile Setup Tab** - Type a name and optional description for the integrated ebook import profile. You do not need to specify a source file; the ebook bibliographic records are imported automatically. You can select an integrated vendor account or leave it set to **None** because once this import profile is selected in the Vendor Account workform, it will be associated with that vendor. Save the import profile with the new name.

This screenshot shows the 'Create Import Profile' window after the profile has been saved. The title bar now reads 'Create Import Profile - (copied from Integrated ebook Bibs profile)'. The 'Profile Setup' tab is still selected, and the fields are populated with the following information:

- Name:** Community Branch Integrated Ebook Import Profile
- Creator:** peer
- Description:** Profile for automatic import of bib records from 3M Cloud Library
- Source file name:** (empty)
- Vendor account:** A dropdown menu showing a list of options: 3M QA Digital Group 1, (None), 3M QA Digital Group 1, 3M QA Digital Group 2. The first option, '3M QA Digital Group 1', is selected.

At the bottom right of the window are three buttons: 'Save', 'Close', and 'Help'.

- **Bibliographic Records Tab** - To enable automatic processing, the duplicate detection settings, profile-defined duplicate detection rules, and profile-defined retention tags should not be changed on this tab. The following settings are copied from the Integrated Ebook Bibs import profile:

Save all records as final

Perform MARC 21 Validation

Perform Duplicate Detection

Use profile defined duplicate detection rules: incoming 037\$a = existing 037\$a

If suspected duplicate is found:

Reject incoming record; add MARC retention tags to database record.

Keep MARC tags - Profile defined overlay retention tags:

- **856 Electronic Location and Access**

- **852 Location**

- **956 Integrated Ebook Product Information**

Bibliographic Save Options

☒ Save all records as final
☐ Save all records as provisional
☐ Do not save any records

☒ Display in PAC
☐ Do not overlay

Record owner: QA-Plato 4.1 R2 (sys)

☐ Delete MARC Tags on incoming record
☐ System defined deletion tags
☐ Profile defined deletion tags

When Saving Bibliographic Records as Final

☒ Perform MARC 21 Validation
 If validation errors are found:
☐ Save record as provisional
☒ Ignore errors; save record as final

☐ Perform Authority Control
 If no matching heading is found:
☐ Automatically create new authority record; save bibliographic record as final
☐ Do not create authority record; save bibliographic record as final
☐ Do not create authority record; save bibliographic record as provisional

☒ Perform Duplicate Detection
☐ Use system defined duplicate detection rules
☒ Use profile defined duplicate detection rules

If a suspected duplicate is found:
☐ Save incoming record as provisional
☐ Save incoming record as final; do not replace database record
☐ Save incoming record as final; replace database record
☐ Save record with highest encoding level. If encoding levels match:
☐ Save incoming record as final; replace database record
☐ Reject incoming record
☐ Save incoming record as provisional (ignore 'Keep MARC Tags')
☒ Reject incoming record; add MARC retention tags to database record

Rules to select

- incoming 001/003 = existing 035 \$a
- incoming 001 = existing 010 \$a
- incoming 001 = existing 035 \$a
- incoming 1xx \$a = existing 1xx \$a
- incoming 010 \$a = existing 010 \$a
- incoming 022 \$a = existing 022 \$a

Rules to apply (as unique groups)

- incoming 037 \$a = existing 037 \$a

☒ Keep MARC Tags
☐ System defined overlay retention tags
☒ Profile defined overlay retention tags

Tag	Indicator 1	Indicator 2	MARC Description
856	0,1,2,3,4...	0,1,2,3,4...	Electronic Location and Access
852	0,1,2,3,4...	0,1,2,3,4...	Location
956	4	2	Integrated Ebook Product Information

- **Item Records Tab** - This tab is set up to create items from the 852 tag. Before import processing occurs, the API automatically inserts 852 tags into the bibliographic record using the data from the Ebook item template selected in the Vendor Account. Then the import process takes over to the build the actual item records, using the mapping from the Item Records tab.

The Item Records tab in the Integrated Ebooks import profile is set up as follows:

Build item records: Using all available holdings/item fields

If a duplicate item record (barcode) is found: Do not save duplicate item record.

If no item record (barcode) is found, Save item record as final.

Display in PAC - The check box is selected.

Item template (for fields that are missing): This field can be left blank; the item template is selected in the Vendor Account for the integrated ebook vendor.

Embedded holdings field/MARC subfield mappings: Holdings tag number: 852
If you copy and rename the Integrated Ebooks import profile, the Embedded holdings field/MARC subfield mappings fields should not be changed.

- **Authority Records Tab** - You can change the settings on the Authority Records tab without affecting the automatic import of integrated ebook bibliographic records. The following setting is copied from the Integrated Ebook Bibs import profile:
Do not save any records

- **Integrated Ebook Bibs Import Profile Record Sets tab** - You can change the names of any record set without affecting the automatic import of integrated ebook bibliographic records. The following settings are copied from the Integrated Ebook Bibs import profile:

Bibliographic Record Sets

Final, Save to new record set, Ebook Import, final

Provisional, Save to new record set, Ebook Import, provisional

Deleted, Save to new record set, Ebook Import, deleted

Item Record Sets

Final, Save to new record set, Ebook Import, final

Provisional, Save to new record set, Ebook Import, provisional

7. Save the import profile.

This is the profile that will be selected in the vendor account for the integrated ebook vendor. See [“Setting Up Integrated Ebook Processing”](#) on page 354.

Once the API consumer service submits the automatic import job, the job appears in the Import Jobs Queue and is processed according to the position in the queue. If your library has established import blackout periods, the automatic import process will not occur during the blackout times. The API-driven import will resume automatically after the blackout period is over.

When an integrated ebook vendor's records are imported into Polaris via the API-driven import, the following automatic processing occurs:

- **Resource entities are created** - The first record in the file is checked for a match between the URL syntax in the 856 tag and the information in the Polaris Vendor Account. If a match is found, a resource entity is built in the bibliographic record, and item records are built from the embedded holdings data in the bibliographic records. If no match is found, the import is stopped, the Import Jobs Queue lists the failed job, and the import report lists the error. See [“Creating and Displaying Resource Entities”](#) on page 216.
- **Ebook item records are generated** - The Vendor Account specifies the import profile and the item template to use to create the items. Before the import processing occurs, the API determines how many item records need to be built, and an 852 is inserted into the bibliographic record for each item record, using values from the **Ebook automatic import** item template. See [“Set up the item template for the integrated ebooks”](#) on page 354. During import processing, once an 852 tag has been used to create an item record, a \$9 subfield is added to the 852 tag so that it is not used again to create an ebook item record. When the Subfield 9 cleanup utility runs, the subfield \$9 is removed.
- **Auto-suggest and facets are updated the following day** - On the day when ebooks are imported, auto-suggest and search results facets in the PAC are not applied to these ebook records until the overnight jobs for these processes occur.
- **Automatic import jobs appear in the Import Jobs Queue** - Automatic import jobs are listed in the Import Jobs Queue along with the import jobs launched by staff.

Note:

The **Manage import jobs for this organization** permission allows the polarisexec user (who always gets all permissions) to stop automatic imports if necessary, and delete them from the queue.

1-2-3

Create an integrated (3M) ebook vendor account

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

Note:

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

Follow these steps to create a vendor account for an integrated ebook vendor.

Tip:

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

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

The Vendor Account workform opens.

Attribute	Value
Vendor account access ID	
Vendor account access key	
Vendor account base path	
Vendor account server name	
Vendor account use SSL	Yes
Vendor account import profile ID	Integrated ebook Bibs
Vendor account item template ID	(None)

3. Modify the editable fields and test the vendor connection as follows:
 - **Vendor name** - System-supplied; read-only
 - **Integrated circulation vendor** - This check box is automatically checked if the vendor's ebooks are integrated with Polaris.
 - **Active** - This check box is initially unchecked when you are creating a vendor account for an integrated ebook vendor. Leave the check box unchecked, and enter the account information. Polaris Library Systems activates the vendor account.
 - **Vendor account name** - (required) The library supplies a unique name to identify the account.

- **AccountID** - The account ID is supplied by Polaris when the account is saved, and it appears in the title bar of the Vendor Account workform.
- **Vendor account description** (optional) - The library can add a description for the vendor account.
- **Resource group** (optional) - The library can select a resource group to limit access to the ebooks by branch. For more information on resource groups, see Polaris staff client online Help.
- **Icon URL** (optional) - The library can specify a URL location for the icon that represents the ebook vendor. The icon is always sized at 16x16 pixels so it is aligned correctly in the PAC. For an integrated ebook vendor, the icon appears next to the TOM icon in PAC displays. If a bibliographic record has multiple resource entities for different integrated vendor accounts, and more than one resource entity is eligible for display in PAC based on resource group filtering, the default icon for the PAC theme is used.
- **Vendor contract ID** - The vendor's contract ID is required for integrated ebook vendors. The contract ID must be unique, and it can contain up to 255 characters.
- **Vendor account access ID** - The library's access ID for the ebook vendor account.
- **Vendor account access key** - The library's access key for the ebook vendor account.
- **Vendor account base path** - The URL path to the library's resources at ebook vendor.
- **Vendor account server name** - The vendor account server name.
- **Vendor account use SSL** - The library selects **Yes** or **No** to indicate whether Secure Socket Layer is used.
- **Vendor account import profile ID** - The import profile for automatic API-driven imports for the integrated ebook vendor. The library can specify the polarisexec **Integrated Ebook Bibs** profile, or a renamed copy of this profile. See ["Copy the Integrated Ebook Bibs import profile"](#) on page 355.
- **Vendor account item template ID** - The library creates the item template used during the automatic API-driven import process. The item template name must begin with **Ebook automatic import** or **ebook automatic import**. See ["Set up the item template for the integrated ebooks"](#) on page 354.

Tips:

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

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

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

4. Save the Vendor Account workflow.
5. Ask your Polaris representative to activate the vendor account, which starts the API consumer service. To check the status of the service, see [“Check the status of the Polaris API Consumer Service”](#) on page 364.

Important:

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

The API Consumer Service

The Polaris API Consumer Service gets the MARCXML records from the ebook vendor, parses the records, creates the appropriate number of holdings tags, and submits the automatic import job for processing. If the bibliographic record for the ebook title is already in the system, the API consumer service synchronizes the number of items available in the 3M Cloud Library with the number of items available in Polaris, automatically creating new ebook item records and bypassing the import process. You can check the status of the Polaris API Consumer Service to see if it is started.

1-2-3

Check the status of the Polaris API Consumer Service

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

1. Go to the server where the service is running.
2. Select **Start, Administrative Tools, Services**.
The Services window opens.
3. Select **Polaris API Consumer Service** and scroll right to see the status of the service. The service status should be **Started**.

Suspending/Reactivating an Integrated Vendor Account

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

Important:

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

1-2-3

Suspend an integrated ebook vendor account

Follow these steps to suspend an integrated ebook vendor account.

1. Open the integrated ebook vendor account in the Vendor Account workform. See [“Create an integrated \(3M\) ebook vendor account”](#) on page 361.
2. Clear the **Active** check box.
3. Save the workform.
4. Do an IIS reset.

Results of suspending a vendor account

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

- **PAC** - The **Check out** or **Place request** button changes to **Temporarily Unavailable** (the button text can be changed in WebAdmin).
- **Polaris Staff Client**
 - **Bibliographic Record** - The Resource view of the Bibliographic Record workform indicates that the vendor account is suspended.
 - **Import Profile** - In the import profile associated with the vendor account, the vendor account's name is listed with **suspended** after it. If you select a suspended vendor account and import records using the Polaris Import Setup window, resource entities are built during the import, but the entities are not accessible for circulation functions. In addition, in the absence of the API call, the import cannot determine how many items to build, so no item records are built. When the vendor account is reactivated and the synchronization process restarts, any necessary item records are generated.
 - **Import Report** - The import report indicates the vendor account was suspended at the time of import, so only one item record was built for each imported bibliographic record.

1-2-3

Reactivate a suspended integrated ebook vendor account

Important:

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

Follow these steps to reactivate a suspended integrated ebook vendor account.

1. Open the integrated ebook vendor account in the Vendor Account workform. See [“Create an integrated \(3M\) ebook vendor account”](#) on page 361.
2. Check the **Active** check box.
3. Save the workform.
4. Perform an IIS reset.

Results of reactivating a suspended integrated ebook vendor account

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

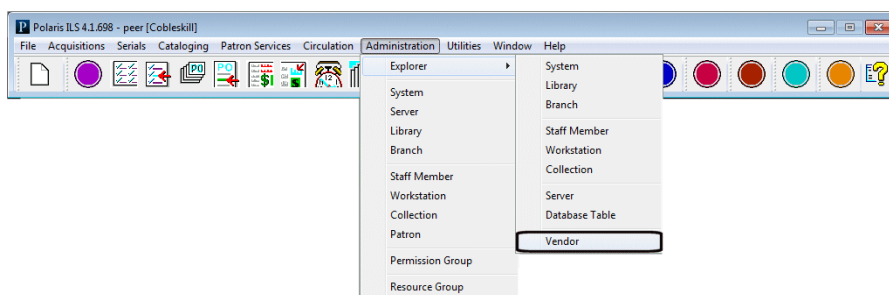
- **PAC** - The **Temporarily Unavailable** changes back to the **Check out** or **Place request** button (whichever is appropriate).
- **Polaris Staff Client** - The message **Vendor Account Suspended** no longer appears on the Resource view of the Bibliographic Record workform; automatic imports resume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

Implementing Non-Integrated Ebook Vendors - Overview

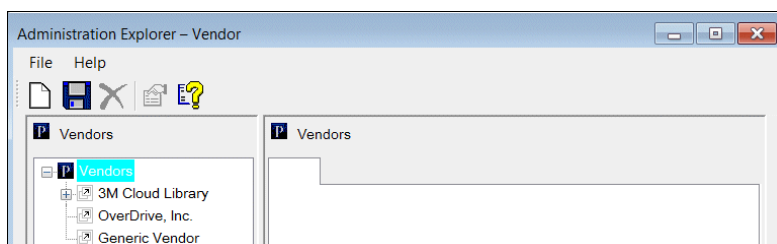
When the library offers ebooks from non-integrated vendors such as OverDrive, the records are displayed in PAC search results, but patrons must click a link to check them out on the vendor's site. These circulation transactions are not recorded in Polaris.

You can create vendor accounts for non-integrated ebook vendors if you want to limit patron access to the ebooks based on the contract the library has with the vendor. If you do not want to limit access, you do not need a vendor account in Polaris. No license is required for setting up non-integrated vendor accounts. To implement ebook processing for a non-integrated ebook vendor, the library and Polaris Library Systems do the following:

- ❑ Polaris provides the OverDrive non-integrated ebook vendor record, and the Generic vendor record, which the library can use for other non-integrated ebook vendors. The Vendor option is available under **Administration, Explorer, Vendor**.



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



- ❑ The library sets up resource groups in Polaris Administration for the library organizations that allow their patrons to access the ebooks from the non-integrated vendor. To set up a resource group, select **File, New, Resource Group** from the Polaris Shortcut Bar. Select the branches that belong to this resource group. For more information on resource groups, see Polaris staff client online Help.
- ❑ The library sets up a non-integrated vendor account under the **Overdrive** or **Generic** vendor record. Non-integrated vendor accounts are used to limit access to ebooks for a vendor that does not integrate with Polaris

Circulation. See [“Create a non-integrated ebook vendor account”](#) on page 369.

- ❑ The library imports the ebooks from the non-integrated ebook vendor using an import profile with the OverDrive or other non-integrated vendor’s account selected.
- ❑ For existing ebook titles from OverDrive or another non-integrated vendor, the library gathers the bibliographic records in a record set and uses the Bib Bulk Change process to create resource entities that are used to limit access in the PAC. Resource entities can also be created for single records from the Bibliographic Record workform. See [“Creating and Displaying Resource Entities”](#) on page 216.

Setting Up Non-Integrated Ebook Processing

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

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

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

1-2-3

Create a non-integrated ebook vendor account

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

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

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

Attribute	Value
Vendor account identifier value	contentreserve.com
Vendor account identifier tag number	856
Vendor account identifier subfield	u
Vendor object identifier tag number	856
Vendor object identifier subfield	u
Vendor object identifier start value	ID={
Vendor object identifier end value	}
Vendor account URL and link text tag number	856
Vendor account URL and link text indicator two	2
Vendor account URL subfield	u
Vendor account link text subfield	z
Vendor account public note subfield	
Vendor account nonpublic note subfield	

Note:

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

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

Note:

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

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

Note:

The resource group must be set up in Polaris Administration before it appears in the list. For information on setting up resource groups in Polaris, see Polaris staff client online Help.

5. To display the vendor's icon next to the URL link in the PAC, enter the URL for the vendor's icon in the **Icon URL** box.
6. Type the contract ID in the **Vendor contract ID** box. The contract ID is optional for non-integrated vendors.
7. In the Vendor account settings, enter the following information:

Note:

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

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

Note:

If both the object identifier start and end values are left blank, the entire subfield is included.

- **Vendor account URL and link text tag number** (required) - Identifies the tag where the URL for the ebook and link text are found. These need to be in the same tag. This is the tag that becomes the resource entity for the non-integrated ebook bibliographic record.
 - **Vendor account URL and link text indicator two** (required) - Identifies the MARC second indicator value for the tag containing the URL and link text.
 - **Vendor account URL subfield** (required) - Identifies the subfield where the URL is located.
 - **Vendor account link text subfield** (required) - Identifies the subfield where the link text is located.
 - **Vendor account public note subfield** - Identifies the subfield for the public note.
 - **Vendor account nonpublic note subfield** - Identifies the non-public note subfield.
8. Save the Vendor Account workform for the non-integrated vendor account.

Removing Expired Ebooks

Ebook publishers may restrict ebook circulations using one of the following methods:

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

To comply with these restrictions, 3M developed a “remove” event that went into effect on 2/14/2013. When a library’s access to an ebook title ends because of publisher restrictions, 3M sends the remove event which is detected by the Polaris API consumer service.

The API consumer service receives a remove event from 3M under the following conditions:

- A copy with a status of checked out expires due to a maximum circulation event in 3M.
- A copy with any status expires due to the time limit specified by the publisher.

When the API consumer service receives a remove event for a title, Polaris reduces the number of available items by one by either suppressing the record from display in PAC or by changing its circ status to *Withdrawn*. If the library has multiple copies of the ebook title, and one copy expires, 3M sends the remove event, but does not indicate which copy of the ebook has been removed, so the removed copy cannot be matched to a specific ebook item in Polaris.

To determine which ebook item should be removed, Polaris uses the following methods:

- The ebook item with the oldest creation date is selected for removal. If two items have the same creation date, the item with the lower item record ID is selected.
- If the selected item’s status is *Checked Out*, the **Display in PAC** setting is changed so that the item does not display. When it is checked back in, its **Display in PAC** setting is turned back on, and its circ status changes to *Withdrawn*.
- If the item’s status is *In*, no changes are made to the **Display in PAC** setting, and the status is set to *Withdrawn*.

Important:

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

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

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

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

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

Note:

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

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

Integrated Ebooks With All Copies Expired

Bib ID	Title	Author	# of Resource Entities	Vendor Account
944058	Chickadee [electronic resource]	Erdrich, Louise.	1	3M Cloud Library QA
942605	The Gardner Heist [electronic resource] : The True Story of the World's Largest Unsolved Art Theft	Boser, Ulrich.	1	3M Cloud Library QA
948973	House of Earth [electronic resource] : A Novel	Guthrie, Woody.	1	3M Cloud Library QA
946534	The Ritual Bath [electronic resource]	Kellerman, Faye.	1	3M Cloud Library QA 2

Cataloging Permissions, Parameters, and Profiles

These are the permissions, parameters, and profiles that you set to administer and maintain the Cataloging subsystem.

Cataloging Permissions

These permissions are available under **Security, Cataloging** at the listed organizational levels on the Administration Explorer.

Note:

To do a cataloging task, both the staff member and the workstation must have the permission.

For more information on the permissions required for specific Cataloging tasks, see [“Cataloging Permissions”](#) on page 280.

Access cataloging subsystem (System)	Maintain the catalog. Access to the Cataloging menu and workforms. • Allow
Access bibliographic bulk change (System)	Bulk change bibliographic records. • Allow
Access bibliographic fixed fields bulk change (System)	Bulk change fixed fields in bibliographic records. • Allow
Access item record bulk change (System)	Bulk change item records. (You must also have the Item record: Bulk change permission to change item records owned by your organization.) • Allow
Authority create links to authority records (System)	Create links from an authority record to other authority records. • Allow
Authority create links to bibliographic records (System)	Create links from an authority record to bibliographic records. • Allow
Authority records (System)	Maintain authority control in the catalog. • Access • Create • Modify • Delete/Undelete

Authority templates (System, Library, Branch)	Maintain templates for authority MARC records. • Access • Create • Modify • Delete
Auto delete processing of reserve item records (System)	Maintain course reserve item records; invoke the auto-delete process from the course reserve item record. • Allow
Bibliographic records (System, Library, Branch)	Maintain bibliographic MARC records. • Access • Create • Modify • Delete/ Undelete
Bibliographic templates (System, Library, Branch)	Maintain templates for bibliographic MARC records. • Access • Create • Modify • Delete
Cataloging record sets (System, Library, Branch)	Maintain record sets. • Access • Create • Modify • Delete
Community records (System, Library, Branch, Staff, Workstation)	Maintain community records for a library organization. • Access • Create • Modify • Delete
Course reserve records (System, Library, Branch)	Maintain course reserves. • Access • Create • Modify • Delete

Course reserve templates (System, Library, Branch)	Use course reserve templates. • Access • Create • Modify • Delete
Create a bib record from the item or item template (System)	Create title entries from bibliographic information entered in the Item Record workform or Item Template workform. • Allow
Event import profiles (System)	Manage Community Event import profiles. • Access • Create • Modify • Delete
Export bibliographic, item and authority records (System)	Export cataloging records. • Allow
Express importing (System)	Import cataloging records using the Express Import option. • Allow
Import bibliographic, item and authority records (System)	Import MARC 21 cataloging files, and modify import settings. • Allow
Import profiles (System)	Maintain import profiles. • Access • Create • Modify • Delete
Item records (System, Library, Branch)	Catalog items. • Access • Bulk change • Create • Delete/Undelete • Modify cataloging view • Modify header • Modify history view • Modify notes and notices view

	• Modify reserves view • Modify source and acquisition view
Item templates (System, Library, Branch)	Maintain item templates. • Access • Create • Modify • Delete
Label Manager Configuration (System)	Maintain labels for the organization. • Create • Modify • Delete
Manage import jobs for this organization (System, Branch)	Manage import jobs launched by users logged into the system or branch for which the permission is granted; specify blackout times for the organization. • Allow
Modify Do not overlay setting in bib records	Modify the Do not overlay setting in bibliographic records. With this permission, staff members can modify the Do not overlay check box in the Bibliographic Record workform, the Bib Bulk Change dialog box, and the Import Setup window (provided they have the other required permissions). • Allow
Override invalid item barcode message (System)	Override invalid item barcode message when saving an item record, including serial item records. • Allow
Promotions (System, Library, Branch)	Maintain promotion records used to feature resources in the PAC. The library must have a license for Feature It. • Access • Create • Modify • Delete
Purge criteria (System, Library, Branch)	Purge records marked as deleted but not removed from the database. • Access • Create • Modify • Delete

Quick-circ item records (Branch)	Maintain ephemeral (quick-circ) items. • Access • Create • Modify • Delete
Reserve item templates (System, Library, Branch)	Maintain reserve item templates. • Access • Create • Modify • Delete
Suppress warnings for breakable links when deleting multiple bibliographic records (System)	Users can stop warning messages regarding breakable links to other records when deleting multiple bibliographic records. • Allow
Suppress warnings for breakable links when deleting multiple item records: Allow (System)	Users can stop warning messages regarding breakable links to other records when deleting multiple item records. • Allow
Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple bibliographic records (System)	Users can stop warning messages regarding unbreakable links and other conditions when deleting multiple bibliographic records. • Allow
Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple item records (System)	Users can stop warning messages regarding unbreakable links and other conditions when deleting multiple item records. • Allow
Use 'own' authority templates (System)	Maintain own authority templates. • Allow
Use 'own' bibliographic templates (System)	Maintain own bibliographic templates. • Allow
Use 'own' cataloging record sets (System)	Maintain own record sets. A staff member with this permission can create record sets that no other staff member or system administrator can access or modify. Grant this permission only if you want the staff member to create record sets that no one else can access. • Allow
Use 'own' course reserve templates (System)	Maintain own course reserve templates. • Allow

Use 'own' item templates (System)	Maintain own item templates. • Allow
Use 'own' reserve item templates (System)	Maintain own reserve item templates. • Allow
Use URL Detective (System)	Use the URL Detective utility available from the Utilities menu. You must also have a license for this utility. • Allow

Cataloging Parameters

These parameters are available when you select **Parameters, Cataloging** for the listed organizational levels in the Administration Explorer. For more information, see [“Cataloging Administration”](#) on page 278.

Auto-suggest feature enabled (System)	Specifies whether automatic suggestions appear for a phrase or keyword search in the staff client for patron, bibliographic, item, or authority records, and a phrase, keyword, and advanced search in the Polaris PowerPAC. The default setting is Yes ; to disable, select No .
Bibliographic record replace: Maximum allowed in one operation (System)	Sets the maximum number of bibliographic records that can be replaced at once. The default is 50; the limit is 999.
Bibliographic record delete: Allow if there are holds (System)	Specifies whether bibliographic records can be deleted if there are linked hold requests. The default setting is No ; to enable, select Yes .
Bibliographic record do not overlay feature enabled	Specifies whether the Do not overlay feature is enabled. When enabled, the Bibliographic Record workform, the Bibliographic Records tab of the Import Setup window, and Bibliographic Record Bulk Change dialog box will have a Do not overlay check box that staff members with the appropriate permissions can select to prevent specific bibliographic records from being overlaid. The default setting is No ; to enable, select Yes .
Item record delete: Allow if there are holds (System)	Specifies whether item records can be deleted if there are linked hold requests. The default setting is No ; to enable, select Yes .
Item record history display assigned branch (System)	Specifies whether the Assigned branch appears in the Item record Circulation History view. The default setting is Yes ; to disable, select No .
Item record history display patron ID (System)	Specifies whether the patron ID appears in the Item Record workform, Circulation History view. The default setting is Yes ; to disable, select No .

Item record history time threshold (System)	Specifies the number of days that a status change to an item record appears in the Circulation History view of the Item record workform. The default is 365 day(s).
MARC Re-index during next server upgrade (System)	Specifies whether to re-index MARC records when the server is upgraded. The default setting is No ; to enable, select Yes .
Mark embedded holdings tag as processed (System)	Specifies whether a \$9 with processing information is inserted in embedded holdings tags in bibliographic records when item records are created from these tags during the import process. The default setting is Yes ; to disable, select No .
Normalize ambiguous LCCNs as if they are in the old format (System)	Specifies how to process Library of Congress Control Numbers in MARC records that do not have a distinct format. This setting applies to all organizations and resources in the Polaris installation where bibliographic records are saved. The default is Yes , normalize LCCNs where the format is not distinct as if the LCCN is in the old control number format; to disable, select No .

Cataloging Profiles

These profiles are available when you select **Profiles, Cataloging** for the listed organizational levels in the Administration Explorer. For more information, see [“Cataloging Administration”](#) on page 278.

Automated MARC validation: Authority (System, Library, Branch, Staff)	Specifies whether the format of MARC authority records is checked automatically when the record is saved for the organization or resource. The default is Yes ; to disable, select No .
Automated MARC validation: Bibliographic (System, Library, Branch, Staff)	Specifies whether the format of MARC bibliographic records is checked automatically when the record is saved for the organization or resource. The default is Yes ; to disable, select No .
Automatically sort MARC Authority Records (System, Library, Branch)	Specifies whether the MARC tags in an authority record are sorted automatically when the record is opened or saved for the organization. The default is Yes ; to disable, select No .
Automatically sort MARC Bibliographic Records (System, Library, Branch)	Specifies whether the MARC tags in a bibliographic record are sorted automatically when the record is opened or saved for the organization. The default is Yes ; to disable, select No .
Bibliographic records: Warning for records saved with display in PAC unchecked (System, Library, Branch)	Specifies whether a warning message appears when users save a bibliographic record that does not have the Display in PAC check box checked. This warns the user that the saved record will not display in the PAC. The default is No ; to enable, select Yes .

Bring call number fields from bib to item record when link is made (System, Library, Branch, Staff, Workstation)	Specifies whether the call number fields from the bibliographic record automatically complete the appropriate boxes in the item record when the staff member creates a linked item. The default is Yes ; to disable, select No .
Bring price from bib to item record when link is made (System, Library, Branch, Staff, Workstation)	Specifies whether the price from the bibliographic record automatically fills the Price box in the item record when the staff member creates a linked item. The default is Yes ; to disable, select No .
Check headings immediately after bib replace (System, Library, Branch, Staff)	Specifies whether bibliographic record headings are checked immediately after they replace other bibliographic records. The default is Yes ; to disable, select No .
Copied item records default to In-process (System, Library, Branch)	Specifies whether copied item records get a default status of In-process . The default is Yes ; to disable, select No .
Copied item templates default to In-process (System, Library, Branch)	Specifies whether copied item templates get a default status of In-process . The default is Yes ; to disable, select No .
Default directory (System, Library, Branch, Workstation)	Displays the Default Directory Setup dialog box which specifies the folder used as the default path for cataloging functions. The folder can be a shared folder on the network or a folder on the staff computer. Each workstation can have a different default directory. The default is: C:\Polaris Reports
Default shelving scheme for new item and holdings records (System, Library, Branch)	Specifies the default shelving scheme that appears when you create new item and serial holdings records. The default is Dewey Decimal ; to change the setting, select: Library of Congress , National Library of Medicine , No Information , Other , Shelved Separately , Shelving Control Number , Superintendent of Documents , or Title .
Delete MARC tags when saving Z39.50 tags to local databases (System)	Specifies whether tags set up for deletion from incoming bibliographic records in the Bibliographic Tags to Retain/Delete policy table are also deleted from bibliographic records when the records are found via a Z39.50 search of a remote database and saved to the local database.
Display MARC field description (System, Library, Branch, Staff)	Specifies whether the descriptions for the MARC tags and subfields automatically display when the cursor is positioned in the MARC21 view. The default is Yes ; to disable, select No .
Import blackout times (System)	Specifies the times when no importing jobs can be processed for the library system. Double-click to open the Import Blackout Times dialog box to enable and schedule the blackout times.
Item bulk change: Warning if changing the Assigned or Home branch (System, Library, Branch)	Specifies whether a warning appears when you are bulk changing item records and you have selected to change the Assigned or Home branch. The default is Yes ; to disable, select No .

Item records: Records with duplicate barcodes can be saved provisionally	Specifies whether item records can be saved provisionally if they have duplicate barcodes. The default is Yes ; to disable, select No .
Item records: Warning if changing the Assigned or Home branch (System, Library, Branch)	Specifies whether a warning message appears when you change the Assigned or Home branch on an Item record. The default is Yes ; to disable, select No .
Item records: Warning for items saved with display in PAC unchecked (System, Library, Branch)	Specifies whether a warning appears when item records are saved and they do not have the Display in PAC box checked. The default is Yes ; to disable, select No .
Item records: Warning for items saved without barcodes (System, Library, Branch)	Specifies whether a warning appears when an item record is saved without a barcode. The default is Yes ; to disable, select No .
Item records: Warning for items saved with modified barcode (System, Library, Branch)	Specifies whether a warning message appears when an item record is saved with a modified barcode. The default is Yes ; to disable, select No .
MARC validation immediately after bib replace (System, Library, Branch, Staff)	Specifies whether MARC validation is performed automatically after a bibliographic record replaces other bibliographic records. The default is No ; to enable, select Yes .
MARC Validation: Authority (System)	Opens the MARC Validation Editor - Authority where you can specify how authority records are validated.
MARC Validation: Bibliographic (System)	Opens the MARC Validation Editor - Bibliographic where you can specify how bibliographic records are validated.
Maximum number of files to import (System, Library, Branch)	Specifies the maximum number of files that can be included in a single import job. The default is 100 ; the limit is 1,000.
Override Cataloging blocks (Staff)	Specifies whether the selected staff member can override permission blocks in cataloging functions. Staff members with this permission must also be allowed to do the restricted functions. The default is No ; to enable, select Yes .
Remote automatic authority control (System, Library, Branch)	Displays the Remote Automatic Authority Control Defaults dialog box where you enable automatic authority control, specify the Z39.50 server and database to search for authority records when no matching records are found in your local database, and specify the length of time (in seconds) to search before timing out.
Retain deleted authority records (System)	Specifies whether authority records are retained in the database when they are marked for deletion. The default is No ; to enable, select Yes .

- Retain deleted bibliographic records (System)** Specifies whether bibliographic records are retained in the database when they are marked for deletion. The default is **No**; to enable, select **Yes**.
- Retain deleted item records (System)** Specifies whether item records are retained in the database when they are marked for deletion. The default is **No**; to enable, select **Yes**.
- Subfield 9 cleanup utility (System)** Controls the cleanup utility that deletes processed tags from bibliographic records. Specifies the tags to check for the presence of a \$9 and the time period (relative to the day the utility is run) to check. No defaults are set.

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 384
- “Navigation Actions” on page 385
- “MARC Editor (Keyboard)” on page 385
- “Select Actions (Keyboard)” on page 385

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+Alt+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
Select the entire tag field	Double-click the tag number
Select the entire line	Triple-click 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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