

# Polaris Fusion Guide

Polaris

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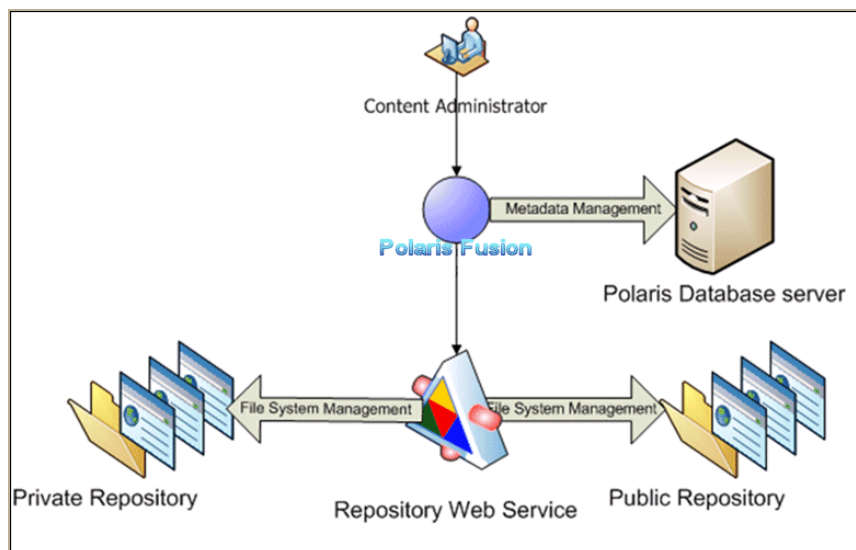
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## Getting Started with Polaris Fusion

With the separately-licensed Polaris®Fusion™ Web-based digital collection management system, libraries can maintain, manage, integrate, and expose digital collections. The digital files are attached to MARC records saved in the Polaris database, so patrons can search for the digital content in Polaris®PowerPAC™ and Polaris Mobile PAC. If you choose, you can expose your library's digital collection to Web crawlers, such as Google™, through an OAI-PMH compliant Web service, a MARC XML Web service, or Z39.50.

You can also use Polaris Fusion to control access to a private repository of restricted digital media and offer this media to patrons for a fee. If you accept credit card payments for fines and fees in Polaris PowerPAC, you can accept payments for digital downloads. For information on enabling credit card payments through the PAC, see the Polaris staff client Help.

If your library also has Polaris Community Profiles, you can make the digital content available via Community records in Polaris PowerPAC. For more information on Community Profiles, see Polaris staff client Help.



### See also:

- "Setting Up Your Digital Collection" on page 5
- "Providing Access to the Digital Collection" on page 9
- "Granting Polaris Fusion Permissions" on page 11
- "Using the Polaris Fusion Interface" on page 12

### Terms

**digital assets** - The actual digital media files consisting of images, pdf files, Microsoft Word files, MP3 files, video files. Polaris Fusion supports digital files of all MIME types. See "MIME - Multipurpose Internet Mail Extensions (MIME) is an Internet standard that was developed to extend the format of e-mail to support text in languages that use character encodings other than ASCII, as well as 8-bit binary content such as files containing images, sounds, movies, and computer programs. MIME is also a fundamental component of communication protocols such as HTTP." below.

**digital collection** - A digital collection consists of the digital files (also called digital assets or resources) and the metadata that describe the digital content and aid in its discovery.

**Dublin Core** - A standard metadata element set for cross-domain information resource description. This standard was established in Dublin, Ohio through a workshop hosted in 1995 by OCLC. It provides a simple, standardized set of conventions for describing media that makes them easier to find. Dublin Core is widely used to describe digital materials such as video, sound, image, text, and composite media like Web pages.

The Dublin Core standard includes two levels: Simple and Qualified. Simple Dublin Core comprises 15 elements; Qualified Dublin Core includes three additional elements (Audience, Provenance, and RightsHolder) as well as a group of qualifiers that refine the semantics of the elements that are useful in resource discovery.

For more information on Dublin Core, see: <http://dublincore.org/>

**Globally Unique Identifier (GUID)** - A GUID is a 128-bit (16 bytes) integer that can be used across all computers and networks wherever a unique identifier is required. Such an identifier has a very low probability of being duplicated.

**metadata** - Data that describe the characteristics of an individual datum or a collection of data, so that it can be located. The metadata required for effective data management vary with the type of data and the context of use. In a library, where the data is the content of the titles stocked, metadata about a title would typically include a description of the content, the author, the publication date, and the physical location. For photographic images, the metadata would typically include the date the photograph was taken and the details of the camera settings.

**MIME** - Multipurpose Internet Mail Extensions (MIME) is an Internet standard that was developed to extend the format of e-mail to support text in languages that use character encodings other than ASCII, as well as 8-bit binary content such as files containing images, sounds, movies, and computer programs. MIME is also a fundamental component of communication protocols such as HTTP.

Each MIME format includes a MIME content type (MIME type) and subtype which denote the kind of data stored in the file. MIME types and subtypes are typically listed as type/subtype. For example, an MPEG video file would be listed as “video/mpeg.”

The following are some common MIME content types/subtypes:

**Note:**

Polaris Fusion supports all of the over 600 MIME content types.

Application/ Subtype	Audio/ Subtype	Image/ Subtype	Multipart/ Subtype	Text/ Subtype	Video/ Subtype
application/ EDI-X12	audio/ mpeg	image/ gif	multipart/ mixed	text/ css	video/ mpeg
application/ EDIFACT	audio/ x-ms-wma	image/ jpeg	multipart/ alternative	text/ html	video/ mp4
application/ javascript	audio/ vnd.rn- realaudio	image/ png	multipart/ related	text/ plain	video/ quicktimevideo
application/ octet-stream	audio/x-wav	image/ tiff	multipart/ form-data	text/ xml	video/ x-ms-wmv

**OAI-PMH** - The Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH) is a mechanism for repository interoperability. Data Providers are repositories that expose structured metadata via OAI-PMH. Service Providers then make OAI-PMH service requests (verbs) to harvest that metadata. These verbs are as follows:

**GetRecord** - Retrieves an individual metadata record from a repository. Required arguments specify the identifier of the item from which the record is requested and the format of the metadata that should be included in the record.

**Identify** -Retrieve information about a repository. Some of the information returned is required as part of the OAI-PMH. Repositories may also employ the **Identify** verb to return additional descriptive information.

**ListRecords** -This verb is used to harvest records from a repository. Optional arguments permit selective harvesting of records based on set membership and/or datestamp.

**ListIdentifiers** -This verb is an abbreviated form of **ListRecords**, retrieving only headers rather than records. Optional arguments permit selective harvesting of headers based on set membership and/or datestamp.



**ListMetadataFormats** - Retrieves the metadata formats available from a repository. An optional argument restricts the request to the formats available for a specific item.

**ListSets** - This verb is used to retrieve the set structure of a repository; it is used for selective harvesting.

For more information on OAI-PMH, see:

<http://www.openarchives.org/>

**repository** - A Web server where the digital media resides. It must have Microsoft Internet Information Services (IIS) software. The repository has two parts: a public repository where the staff or the public can access the digital content without restrictions, and a private repository where digital content is secured because of copyright or other restrictions, and users must have permission to view the digital media. The digital repository is composed of the following:

**IIS Server** - A computer program that accepts HTTP requests from Web browsers and responds with pages that contain HTML documents and linked objects, such as images, sound files, videos, and documents.

**Media Repository Web Service** - A .NET Web service that manages the digital content within the IIS server repository. Polaris Fusion uses the Web service to add, modify, and delete content from the IIS repository. It is also used by Polaris PowerPAC to build enriched data links, provide access management for digital content, and to locate the IIS server that acts as a repository for the digital content.

**The OAI-PMH Data Provider Web Service** - A network-accessible service that can process the six types of OAI-PMH requests (verbs), and expose the descriptive metadata associated with digital collections to OAI-PMH harvesters. Additional Web methods allow a general Dublin Core and MOD export service.

**resource records** - Resource records provide metadata regarding the location (repository URL and filename), ownership (Polaris organization), access rules, copyright information, MIME type, and collection of the digital asset file. They also include the date and time when the digital file was created, the creator and modifier of the digital file, and any notes. The actual digital asset files are attached to these resource records and to digital collection MARC records.

**token** - A resumption token is a mechanism that allows a repository to handle the flow of large result sets. When a harvester makes an incoming request for a large result set, the transaction can be partitioned among several requests and responses. The token is implemented to make the subsequent requests until the transaction is complete.

## Setting Up Your Digital Collection

Creating a digital collection that can be accessed from the PAC involves organizing and preparing the collection and then using Polaris Fusion to link the digital files to the metadata that describe the digital assets and aid in their discovery. Setting up your library's digital collection involves the following general steps:

### Prepare Your Library's Digital Collection

- **Create a digitization plan** - If your library needs to add to its digital collection, establish procedures for digitizing the materials and implement naming conventions for the digital files. The materials may include images (photographs, negatives, slides, drawings, maps), documents (newspapers, magazines, books, articles, letters), audio materials (LP records, cassettes), and video materials (VHS, film reels). Depending on the type of material and your library's equipment, some digitization projects may be carried out by library staff and volunteers, while other projects may require the services of an outside vendor. For example, your library could scan images and documents in-house, but use a vendor to digitize its audio and video materials. Maintaining your digital repository requires plans for backups, redundancy, and disaster recovery. Many sources for digitization plans and best practices are available on the internet.
- **Enter descriptions and rights information for the digital files** - Set up forms or other methods for recording the following information about the digital files: format, year created, descriptors, free or limited access, etc. This will help catalogers who will enter the metadata in Fusion or the Polaris staff client.
- **Gather your library's digital content** - Put all your library's digital content in an easily accessible network or desktop file location. Make sure the digital files with controlled access are separated from digital files with free access.
- **Set up the digital repository server** - The digital repository is a Web (HTTP) server where the digital files reside. Polaris Library Systems installs the server and software. The server must be a Microsoft Internet Information Server (IIS). Record the server name, the physical paths for the public and private parts of the repository, the base URL, and the Web service URL.
- **Grant Fusion permissions to staff** - Use the Polaris ILS staff client to grant permissions that enable the appropriate staff members to use specific Fusion functions. See "Granting Polaris Fusion Permissions" on page 11.

## Set Up Polaris Fusion

- **Define the digital repository** - Enter the description, server name, public repository physical path, private repository physical path, base URL, and Web service URL. See "Define a repository" on page 71.
- **Enter authentication methods** - Enter the authentication method description; and select the PAC organizations, patron branches, and patron codes to which this authentication method applies. See "Add an authentication method" on page 81.
- **Define repository collections** - Enter the collection description, repository, authentication method, access limitations, a default price for accessing the digital file (if applicable); specify whether to display in PAC, and whether to expose the collection to the OAI/PMH provider. See "Defining Collections, Copyright Types, & Request/Denial Reasons" on page 59.
- **Add database connections** - Set up connections between Polaris Fusion and internal or external databases. Enter a description for the connection; specify the local Polaris database connection, the host server URL, the server type, and the target database. See "Add a connection to an internal or external database" on page 52.
- **Set the Fusion application defaults** - Enter the Web service URL, the search defaults, forms options, e-commerce options (if available), access request options, and shopping cart options. See "Specify Polaris Fusion application defaults" on page 54.
- **Define copyright types** - For each copyright type, enter a description, clearance provider, and expiration date (if applicable). See "Add a copyright type " on page 63.
- **Define MIME Types** - For each MIME type, enter the file extension, MIME subtype, content type, and thumbnail image to display in PAC. See "Define a MIME type" on page 73.
- **Define enriched data links** - These are clickable links to additional information about a title displayed in the PAC. The enriched data is provided by third-party vendors and can consist of a simple book jacket image, or contents, excerpts, reviews, ratings, and other information. See "Define an enriched data link" on page 75.

**Tip:**

Bibliographic templates created in the Polaris staff client are not available for selection in Polaris Fusion.

- **Set up MARC templates** - Enter the bibliographic template description, number of authority records, and template elements in Polaris Fusion. See "Create a Fusion bibliographic template" on page 43.

- **Create access request reasons** - Enter a description for each access request reason. See "Add an access request reason" on page 65.
- **Create access request denial reasons** - Enter a description for the access request denial and the denial text. See "Add an access request denial reason" on page 67.

### Link the Digital Asset Files to Metadata in Fusion

When you link a digital file to a MARC record, the file is automatically uploaded to the repository specified in Polaris Fusion.

**Important:**

You must link the digital file to a MARC record in Polaris Fusion to save it in the repository. You cannot copy the files to the server.

**Tip:**

If your username is associated with a record set in Polaris Fusion, any bibliographic records you create or import in Fusion are saved in the specified record set in the Polaris staff client. See "Associate a Polaris Fusion user with a record set" on page 51.


**Create a digital collection MARC record** - You can create digital collection MARC records in Polaris Fusion and in the Polaris staff client. You can also import records from another database to Fusion and transform the records into digital collection MARC records. Bibliographic records created in Polaris Fusion are saved in the Polaris bibliographic database with a type of material (TOM) of digital collection (dmc). Digital collection bibliographic records created in the Polaris staff client are available in Polaris Fusion. To produce the digital collection type of material, which allows digital assets to be linked to the record, the MARC record in the Polaris staff client must have the following in the LDR: **06=m (computer file)** and **07=c (collection)**. For information on creating and importing MARC records in Polaris Fusion, see "Create a MARC record using the Polaris Fusion labeled editor" on page 34 and "Import a record from another database" on page 37. For information on creating MARC records in the Polaris staff client, see the **Polaris Cataloging Guide** or Polaris staff client online Help.

**Create a resource record** - Select a MARC record, enter the resource record identifier, select the repository collection, and select the library organization; enter notes regarding the digital asset's provenance and rights; enter public notes that display in the PAC, or enter notes for staff only. See "Add a resource record to a MARC record" on page 23.

**Link the digital file to the MARC record and upload the file to the repository** - Select the digital file's copyright type, MIME type, enriched data link description, extended data link description (optional), access control list and price (if applicable), and browse to the digital file. When you click the **Link** button, the file is uploaded to the digital repository, and

it is linked to the resource and MARC records. You can link multiple digital files to a single MARC record. See "Link digital files to the resource record" on page 27.

## Providing Access to the Digital Collection

In Polaris PowerPAC or Polaris Mobile PAC search results, any titles in the digital collection are identified by a digital collection format icon  and a Type of Material (TOM) code of **dmc**. If a patron selects **Digital Collection** in the **Limit by** box, the search results will return only MARC records with a TOM code of **dmc**. All MARC records created in Polaris Fusion have a TOM of **dmc**. All bibliographic records created in the Polaris staff where the MARC record's LDR 06=m (computer file) and LDR 07=c (collection) have a TOM of **dmc**.

### Tip:

Patrons cannot submit access request forms or purchase digital content through Polaris Mobile PAC.

When a patron selects a title in the digital collection, it is displayed in Polaris PowerPAC or Polaris Mobile PAC. Digital collection titles linked to graphic files display thumbnail images of the digital content with links to the full images. If multiple digital images are attached to the MARC record, the first image linked to the MARC record is displayed in the brief description. Patrons can click the link to see thumbnail images of the other digital images. Other types of content, like documents in pdf format, display the format icon specified for that MIME type instead of a thumbnail image. Patrons click a link to access the file. If the file is available with free access, it opens in another window, and patrons can save the file to their local computer or portable drive.



## Managing Patron Access to Digital Media

Some digital assets may be freely available to patrons, some may require the patron to log in, and other restricted assets may require patrons to submit an access request form. If your library is set up to process credit card transactions, you can offer patrons the option to purchase digital content through Polaris PowerPAC. You can provide the following levels of access to your library's digital assets:

**Tip:**

Patrons cannot submit access request forms or purchase access to digital assets from Polaris Mobile PAC.

- **Free access** - Patrons can access the digital asset directly from Polaris PowerPAC or Mobile PAC without logging into their account.
- **Requires authentication** - Patrons must log in to access the digital asset. Authentication methods are associated with digital collections, and all the digital assets in the collection use the same authentication method. You set up the authentication methods on the Access rules tab, Authentication method subtab. See "Add an authentication method" on page 81.
- **Access is limited to specific patrons** - Patrons must log in, and their name will be checked against an access control list to determine if they can be granted access to the digital asset in the private repository.

**Tip:**

You can select both **Purchase required** and **User must request access** if you want patrons to request access before they can purchase and download the file.

- **Requires the patron to request access** - Patrons must submit an **Access request** form from Polaris PowerPAC, and the request must be granted before they can access the digital asset in the private repository. When you link a digital asset to a resource record, you can select **User must request access**.
- **Requires a purchase** - Patrons must purchase access to the digital asset. See "Specify Polaris Fusion application defaults" on page 54.

**Note:**

Your library must be set up to accept credit card payments for patrons to purchase digital content from Polaris PowerPAC. For details about Polaris Administration settings for credit card processing, see Polaris staff client Help.

## Granting Polaris Fusion Permissions

Polaris Fusion permissions are set in Polaris Administration in the Polaris staff client and are available only if the library has a license to use Polaris Fusion. The Fusion permissions correspond to the menu subtabs within the main tabs in the Fusion interface. When your Polaris administrator allows users access to a Polaris Fusion subtab, the users can do all the tasks available on that subtab. Initially, Polaris Fusion permissions are granted to the Administrator group only.

**Note:**

For information on setting permissions, see Polaris staff client Help.

The following permissions, available on the system-level security node in Polaris Administration, control access to the tabs and subtabs in the Polaris Fusion interface:

- Access Access rules: Access control list management: Allow
- Access Access rules: Authentication method management: Allow
- Access Attribute administration: Collection management: Allow
- Access Content management: Create: Allow
- Access Content management: Import: Allow
- Access Content management: Link: Allow
- Access Polaris Fusion: Allow
- Access Repository set up: OAI-PMH Provider management: Allow
- Access Repository set up: Repository settings: Allow
- Access User preferences: General preferences: Allow
- Access User preferences: Templates: Allow
- Manage PAC access control list requests: Allow

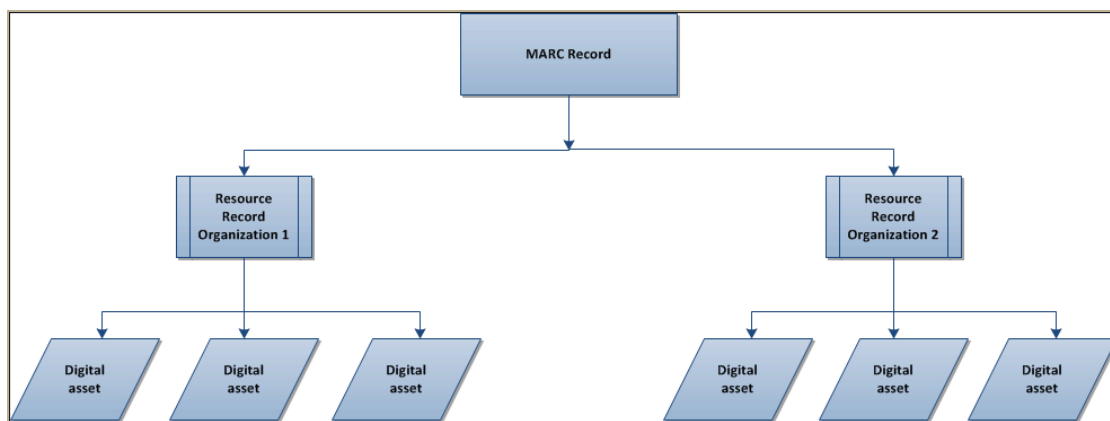


## Using the Polaris Fusion Interface

The Polaris Fusion interface is organized by functional tabs and subtabs. Permissions are based on access to the subtabs; if you have access to a subtab, you can perform all functions available on that subtab. For more information, see "Granting Polaris Fusion Permissions" on the previous page.

### Polaris Fusion Records

Polaris Fusion records consist of MARC records with metadata that describe the digital media, and resource records with metadata that manage the media. The actual digital asset files are linked to the resource records.

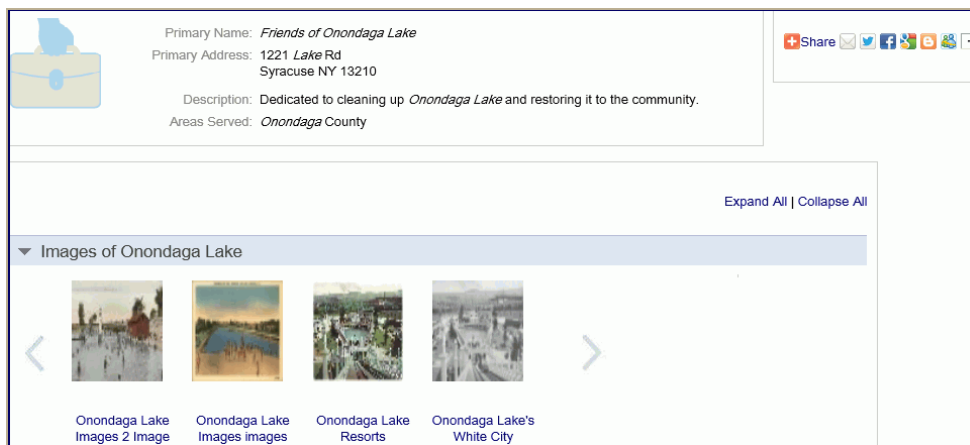


### Digital Collection MARC Records

All the metadata that describe the digital content, aid in its discovery and manage its access reside in the Polaris database on your library's production server in the form of standard MARC bibliographic records. These MARC records are identified as digital collection records (meaning they can be linked to one or more digital resources), when the Leader position 06 (Type of record) is **m** (computer file) and the Leader position 07 (Bibliographic level) is **c** (collection). This combination determines the type of material code (TOM) of **Digital Collection** (dmc) that can be used as a **Limit By** access point in the Polaris Find Tool. Patrons can also limit searches by this TOM in Polaris PowerPAC.

To create these media-enabled MARC records, you can enter the information in the labeled editor in Polaris Fusion or in the Bibliographic Record workform in the Polaris Staff Client. You can also import records in Polaris Fusion.

As with any type of bibliographic record, digital collection bibliographic records can be put into record sets. You can create record sets containing digital collection bibliographic records in the Polaris staff client, or you can send the records directly to a record set from Fusion. Bibliographic record sets containing digital collection MARC records can be used to display “content carousels” in the PAC, either on the PAC portal page or in Community records (if your library also has Polaris Community Profiles). For more information, see Polaris staff client online Help.



## Resource Records

Resource records also reside in the Polaris database, and they are linked to the MARC records that describe the digital content. Each Polaris organization (branch) can have only one resource record attached to a media-enabled MARC record, but multiple digital asset files can be linked to the resource record. Resource records provide metadata regarding the location (repository URL and filename), ownership (Polaris organization), access rules, copyright information, MIME type, and collection of the digital asset file. They also include the date and time when the digital file was created, the creator and modifier of the digital file, and any notes. The actual digital asset files are attached to these resource records.

## Digital Asset Files

The actual digital resources or assets (such as MP3 sound files, pdf files, and digital photograph files) reside in a repository outside of the Polaris database. They can be stored in either a public repository where the content is freely available or in a private repository where access is restricted. A resource record may link to multiple digital files, but each digital file name must be unique within the repository. The digital asset file is identified by the name, MIME type, and the enriched data link description that will appear

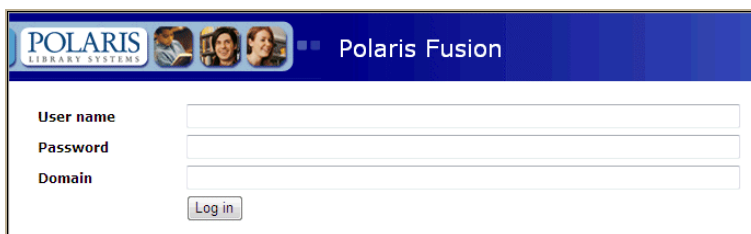
in Polaris PowerPAC. Digital asset files cannot be larger than 999 MB. If this limit is exceeded, a message informs the user that the upload failed.

### Logging in to Polaris Fusion

**Tip:**

Before logging in to Polaris Fusion for the first time, and the first time after every Polaris ILS upgrade, you will need to agree to the terms of use. Read the Terms of Use, select the **I agree to the terms of use box**, and click **Continue**.

When you go to Polaris Fusion through a shortcut on your desktop or an Internet “favorite” link, the login screen appears.

The image shows the Polaris Fusion login interface. At the top, there is a blue header bar with the Polaris Library Systems logo on the left and the text "Polaris Fusion" on the right. Below the header, the login form is displayed. It contains three input fields: "User name", "Password", and "Domain". Each field has a corresponding label to its left. Below the "Domain" field is a "Log in" button. The entire form is enclosed in a thin black border.

To log in to Polaris Fusion.

1. Type your user name in the **User name** box.
2. Type your password in the **Password** box.
3. Type your domain name in the **Domain** box.
4. Click **Log in**.

The Content management tab opens.

### Polaris Fusion Tabs and Subtabs

The Polaris Fusion application has the following main tabs:

- **Content management**
- **User preferences**
- **Attribute administration**
- **Repository set up**
- **Access rules**
- **Help**

Within these main tabs (except the Help tab) are subtabs with settings that you specify by selecting options or entering text.

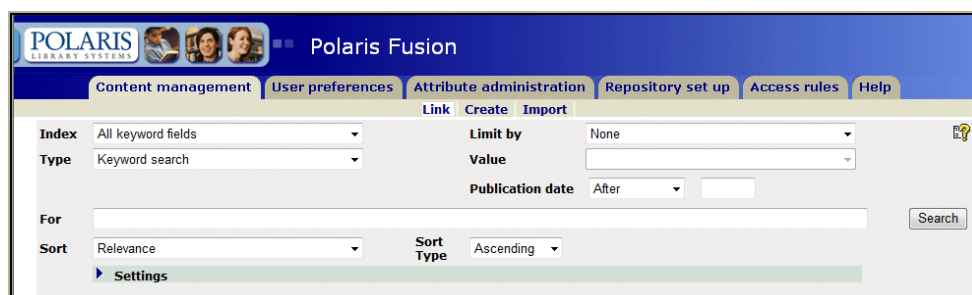
### Content management tab and subtabs

The Content management tab has the following subtabs:

**Link** - Search for an existing MARC record and link the digital content with the MARC record. Create and edit resource records. See "Linking Digital Assets to Metadata" on page 20.

**Create** - Use the labeled editor to create a new MARC record. See "Creating Digital Collection MARC Records" on page 33

**Import** - Import records from other databases and save them as digital collection MARC records. See "Importing Records Using Fusion" on page 37.



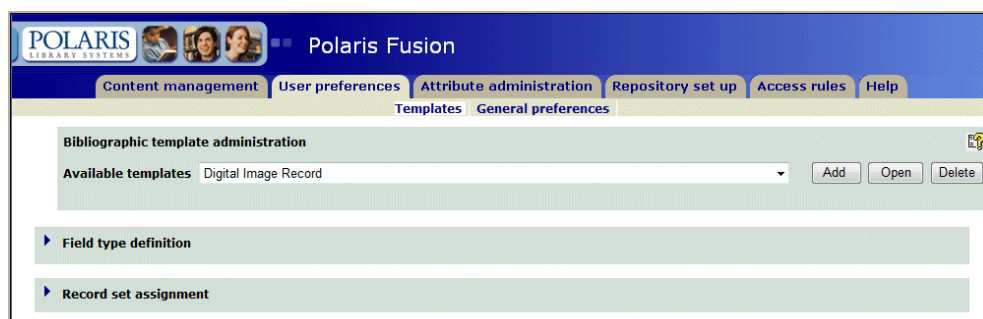
The screenshot displays the Polaris Fusion web application interface. At the top, the 'POLARIS LIBRARY SYSTEMS' logo is on the left, and the title 'Polaris Fusion' is on the right. Below the header is a navigation bar with tabs: 'Content management' (selected), 'User preferences', 'Attribute administration', 'Repository set up', 'Access rules', and 'Help'. Under the 'Content management' tab, there are three subtabs: 'Link' (selected), 'Create', and 'Import'. The 'Link' subtab contains a search form with the following fields: 'Index' (set to 'All keyword fields'), 'Type' (set to 'Keyword search'), 'Limit by' (set to 'None'), 'Value' (empty), 'Publication date' (set to 'After'), 'For' (empty), 'Sort' (set to 'Relevance'), and 'Sort Type' (set to 'Ascending'). A 'Search' button is located to the right of the 'For' field. At the bottom of the search area is a 'Settings' link with a right-pointing arrow.

### User preferences tab and subtabs

The User preferences tab has the following subtabs:

**Templates** - Create templates for specific types of digital media to allow staff members unfamiliar with cataloging practices to catalog digital media quickly and accurately. See "Managing Fusion Bib Templates" on page 42.

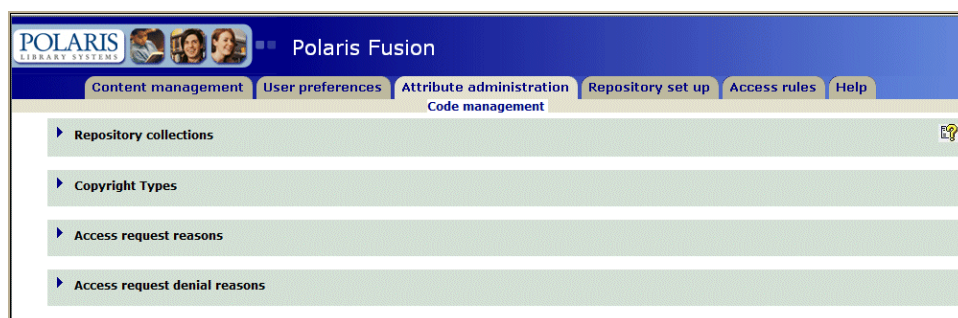
**General preferences** - Specify database connections and set application defaults. See "Defining Database Connections & Fusion Defaults" on page 52.



### Attribute administration tab and subtabs

The Attribute administration tab has the following subtab:

**Code management** - Set up repository collections, copyright types, access request reasons, and access request denial reasons. See "Defining Collections, Copyright Types, & Request/Denial Reasons" on page 59.

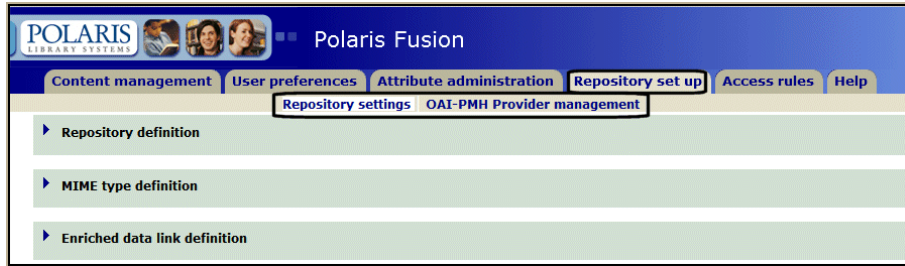


### Repository set up tab and subtabs

The Repository set up tab has the following subtabs:

**Repository settings** - Add, modify, and delete repository definitions, MIME types, and enriched data link definitions. See "Defining the Repository, MIME Types, and Enriched Data Links " on page 71.

**OAI- PMH Provider management** - Modify and update OAI-PMH settings. See "Managing the OAI-PMH Provider " on page 77.



## Access rules tab and subtabs

The Access rules tab has the following subtabs:

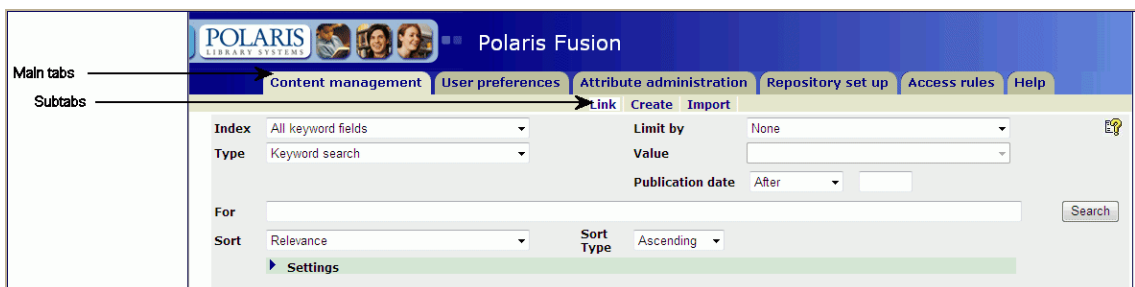
**Authentication method management** - Define rules that control access to certain digital assets. See "Defining Authentication Methods" on page 81.

**Access control list management** - Specify which patrons or groups of patrons can access specific asset files residing in the private repository. See "Managing Access Control Lists " on page 85.

**Manage PAC access control list requests** - When patrons submit an access request form in the PAC to gain access to a digital file that has a cost, the request appears in the **Outstanding access requests** lists on this subtab. You can see details of the access request and grant access, deny access, or grant access without a fee. See "Managing PAC Access Requests" on page 89.



## Using Polaris Fusion: Tips



To navigate through Polaris Fusion, first click a main tab. When you click a tab, the tabbed page that first appears corresponds to the highlighted subtab. Click a subtab to go to the next tabbed page.

Expand an area within a tabbed page by clicking a right-facing arrow . These areas contain fields where you can enter data by selecting from lists of options or by typing in text boxes.

Close an expanded area by clicking on the down-facing arrow .

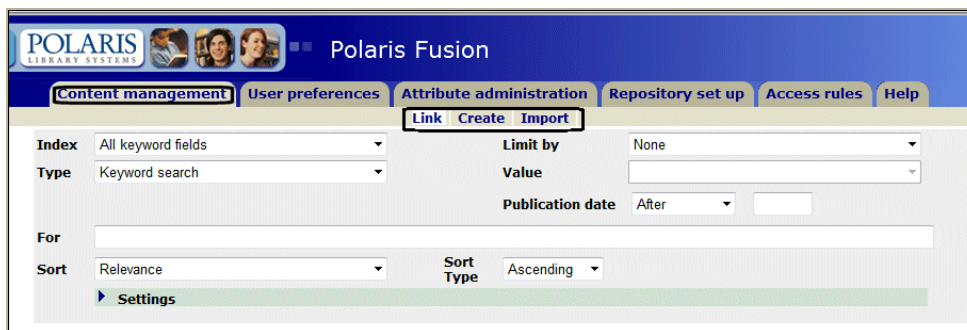
To add new records or elements in Polaris Fusion, click **Add**, enter data in the fields, and then click **Save**.

To modify existing records or elements, click **Open**, edit the fields, and then click **Update**.

To delete existing records or elements, click **Delete**.

## Managing Digital Content

The Content management tab contains subtabs for managing the library's digital content. Use the Link subtab to link digital asset files to the metadata that describe and locate the file; the Create subtab to create MARC records from a Fusion template; and the Import subtab to import data from remote sources to create new MARC records.



The screenshot shows the Polaris Fusion web interface. At the top, there's a header with the Polaris Library Systems logo and the text "Polaris Fusion". Below the header is a navigation bar with tabs: "Content management", "User preferences", "Attribute administration", "Repository set up", "Access rules", and "Help". The "Content management" tab is selected, and within it, the "Link" subtab is active. The main content area contains several search and filter options: "Index" set to "All keyword fields", "Type" set to "Keyword search", "Limit by" set to "None", "Value" set to an empty field, "Publication date" set to "After", and "Sort" set to "Relevance" with "Sort Type" set to "Ascending". A "Settings" link is visible at the bottom left of the main content area.

See also:

- "Linking Digital Assets to Metadata" on the next page
- "Creating Digital Collection MARC Records" on page 33
- "Importing Records Using Fusion" on page 37



## Linking Digital Assets to Metadata

Use the **Link** subtab of the **Content management** tab to link digital assets to the metadata that describe, organize, and categorize the assets and aid in their discovery. First, you select a digital collection MARC record that describes the digital asset and helps patrons find it in the PAC. Then, you link the MARC record to a resource record that provides information about the digital file itself, including the file's name and its location in the repository; the digital collection to which the file belongs; the file's creation date and MIME type; the copyright type and access rules (if any) that control access to the digital file; and notes. When you link the digital file to the resource and MARC records, it is uploaded to the repository collection specified in the resource record. For more information about digital collection MARC records and resource records, see "Polaris Fusion Records" on page 12.


### Select an existing MARC record

The search indexes and search types use the same rules as the Find Tool in the Polaris staff client, and the indexed fields are equivalent to the options in the Search by box in the Find Tool. You can optionally limit and sort the search results.

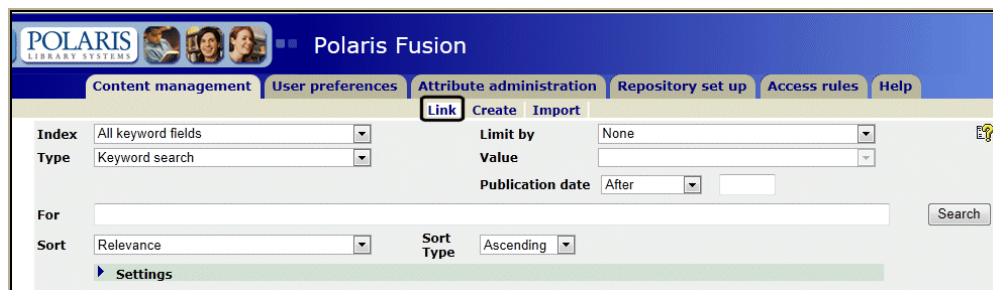
When you search for MARC records in Fusion, only the records coded as digital medial records are returned in the search results because only these records can link to digital files.

To search for and select a MARC record to link to the resource record:

**Tip:**

If you want to change the search settings defaults, expand the Settings section by clicking the arrow  **Settings**. See "Specify Polaris Fusion application defaults" on page 54.

1. Select the Content management tab. The Link subtab is displayed.



The screenshot shows the Polaris Fusion web interface. At the top, there's a blue header with the Polaris Library Systems logo and the text "Polaris Fusion". Below the header is a navigation bar with tabs: "Content management", "User preferences", "Attribute administration", "Repository set up", "Access rules", and "Help". The "Content management" tab is selected, and within it, the "Link" subtab is active. The "Link" subtab has three sub-sections: "Create", "Import", and "Link". The "Link" sub-section is currently selected. It contains several search and filter options: "Index" (set to "All keyword fields"), "Type" (set to "Keyword search"), "Limit by" (set to "None"), "Value" (empty), "Publication date" (set to "After"), and "Sort" (set to "Relevance"). There is also a "Sort Type" dropdown set to "Ascending". A "Search" button is located on the right side of the search area. At the bottom of the "Link" subtab, there is a "Settings" link with a right-pointing arrow.

2. Select the field to search in the **Index** box.

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

**Note:**

The available search types depend on the index you selected.

**Tip:**

Limiting searches and sorting search results are optional.

4. To limit the search, select a **Limit by** filter, and select a value in the **Value** box.

**Note:**

You can filter the search by **Access list control**, **Assigned organization**, **Copyright type**, **Enriched data link description**, **Language**, **MIME type**, **Repository collection**, or **Target audience**. The values depend on the **Limit by** selection. The **Language** and **Target** audience options filter by fields in the MARC record. The other options limit the MARC record results by characteristics of the resource records and digital assets linked to the MARC record. If you select a **Limit by** option that filters by characteristics of the resource records, MARC records appear in the results list only if they are linked to resource records/digital assets with the selected characteristics.

5. To limit the search by publication date, do the following steps:

**Tip:**

The publication date (MARC publication date 008 Pos. 07 - 10) limit may be used separately or in combination with a limit selected in the **Limit by** box.

- a. Select **After**, **On or after**, **Before**, **On or before**, **Exactly**, or **Between** in the **Publication date** box.

**Note:**

When you select **Between**, a second text box appears where you enter an ending publication year.

- b. Type a publication year in the box to the right of your selection, or if you selected **Between**, type a beginning year and an ending year.

6. Type the search term in the **For** box.

You can use an asterisk at the beginning or end of the term to indicate left or right truncation.

7. To sort the results, select a sort option in the **Sort** box.

**Note:**

You can sort by relevance, author, call number, title, popularity, control number,

ISBN, LCCN, publication date or publisher. The default sort option depends on the index you selected to search.

8. If you selected **Sort**, select **Ascending** or **Descending** in the **Sort Type** box.

9. Click **Search**.

The bibliographic records that appear in the results list are eligible to link to digital media. The search results are organized in the following columns: **Title**, **Author**, **Date** (publication date), **Call number**, and **Ctrl number** (Polaris bibliographic record control number).


**Note:**

If you did not find a suitable MARC record, you can create a new MARC record or import a record in Polaris Fusion. Or, you can create a digital collection MARC record in the Polaris staff client. See "Digital Collection MARC Records" on page 12.

10. Select the MARC record you want to link to your digital asset.
11. After selecting the MARC record, link a resource record to it. See "Add a resource record to a MARC record" on the next page.

## Change the search settings

To change the search settings:

1. On the Content Management tab, Link subtab, click  to expand the **Settings** area.
2. To change the number of records to be retrieved, type a number in the **Retrieval limit** box. The default retrieval limit is 1500, but it can be set to a maximum number of 99,999.

**Important:**

Setting the retrieval limit too high may result in the following browser error message:  
*Stop running this script? A script page is causing internet explorer to run slowly. If it continues to run, your computer might become unresponsive.*

3. To change the amount of time before the search times out, type the number of seconds in the **Search timeout (sec)** box.

**Note:**

The **Database** box specifies the database to search. You can add resource records only to titles found in your library's repository, so you do not need to change the database.

4. To strip out initial articles (such as *The* or *An*) when searching the titles or series index, select **Strip initial articles**.

### Add a resource record to a MARC record

Resource records link digital assets to MARC records. The Resource Record box lists any resource records already attached to the selected MARC record. When an existing resource record is selected, a brief PAC preview displays. If no resource records are attached to the MARC record, the resource record box is empty. Multiple branches can have resource records linked to the same MARC record, but each branch can have only one linked resource record for each MARC record.

**Note:**

Before adding a resource record, you must select a MARC record. See "Select an existing MARC record" on page 20 if you are linking the resource record to an existing MARC record. If you are linking a resource record to a new MARC record created in Polaris Fusion, see "Create a MARC record using the Polaris Fusion labeled editor " on page 34.

To add a resource record to an existing MARC record:

1. Select the Content management tab. The Link subtab is displayed.
2. Search for and select a MARC record. See "Select an existing MARC record" on page 20.
3. Click the **Add** button next to the **Resource Record** box.

The screenshot shows the Polaris Fusion interface. At the top, there's a navigation bar with tabs: Content management, User preferences, Attribute administration, Repository set up, Access rules, and Help. Below this, there's a search bar with fields for Index, Type, Limit by, Value, and Publication date. The search results table shows a list of records with columns: Title, Author, Date, Call number, and Ctrl number. The record for "[Dogs of Polaris] [graphic]" is highlighted. Below the table, the "Number of records found: 6" is displayed. The detailed view for the selected record shows a thumbnail image, the title, a description, and the Ctrl #. At the bottom, there's a "Resource Record" section with a dropdown menu and buttons for Add, Open, and Delete.

Title	Author	Date	Call number	Ctrl number
Polaris Cataloging Guide 4.1	Polaris Library Systems	2012		913829
Polaris Serials Guide 4.1	Polaris Library Systems	2012		913828
Polaris Acquisitions Guide 4.1	Polaris Library Systems	2012		913827
Polaris Technical Services System Administr...	Polaris Library Systems	2012		913830
[Dogs of Polaris] [graphic].				795174
Hima-liya- ki- bma-suri- = The flute in the Him...	Ramachandran, A.		823.914	761738

Number of records found: 6

5. [Dogs of Polaris] [graphic].  
 ... 1 photographic print : color ... [Dogs of Polaris] [graphic]. ...  
 Pub date:  
 Description: 1 photographic print : color  
 Ctrl #: 795174

Resource Record: Polaris dogs : Community Library (Cobleskill) - org: (25) [Add] [Open] [Delete]

The area below the resource record list expands to display the resource record fields.

## Note:

You cannot edit the **Creation date**, **Modification date**, or **Resource record ID**. These fields are updated when the resource record is saved.

The screenshot shows the "Resource Record" form. It has a dropdown menu for "Resource Record" with the value "Movie trailers and clips : All Libraries - org: (1)". Below this, there are fields for "Creation date", "Modification date", and "Resource record ID". The "Resource record identifier" field is empty. The "Repository collection" dropdown is set to "1981 Copy Work Collection" and the "Organization" dropdown is set to "All Libraries - System". There are also fields for "Public note", "Provenance note", "Rights note", and "Non-public note". A "Save" button is at the bottom.

Resource Record: Movie trailers and clips : All Libraries - org: (1) [Add] [Open] [Delete]

Creation date: [ ] Modification date: [ ] Resource record ID: [ ]

Resource record identifier: [ ]

Repository collection: 1981 Copy Work Collection Organization: All Libraries - System

Public note: [ ]

Provenance note: [ ]

Rights note: [ ]

Non-public note: [ ]

[Save]

- In the **Resource record identifier** box, type up to 80 characters describing the resource record.
- Select the collection in the **Repository collection** box. This associates the resource record's digital content with a copyright type, a repository, and a collection.

## Note:

See "Defining the Repository, MIME Types, and Enriched Data Links " on page 71 for information on setting up repository collections.

- Select the organization in the **Organization** box.

This is the organization that owns the digital asset associated with the resource record. The organization and the collection define the rules for accessing digital assets from the PAC.

7. (Optional) To enter a note that the public can see in the PAC, type the note in the **Public note** box.
8. (Optional) To enter a note regarding the provenance of the digital files to be associated with the resource record, type a maximum of 4,000 characters in the **Provenance note** box. This note cannot be viewed by the public.
9. (Optional) To enter a note regarding the rights associated with the digital files, type a maximum of 4,000 characters. This note cannot be viewed by the public.
10. (Optional) To enter additional notes that cannot be viewed by the public, type a maximum of 4,000 characters in the **Non-public note** box.
11. Click **Save** to save the resource record.

**Note:**

If your organization already has a resource record attached to the same MARC record, you cannot save the record.

The resource record's creation date and ID appear and the **Linked resources** box is displayed.

12. Click  next to the **Linked resources** box.

The area expands.

13. Follow the steps in "Link digital files to the resource record" on page 27.

## Edit an existing resource record

To edit an existing resource record:

**Tip:**

For more information on searching for MARC records, see "Select an existing MARC record" on page 20.

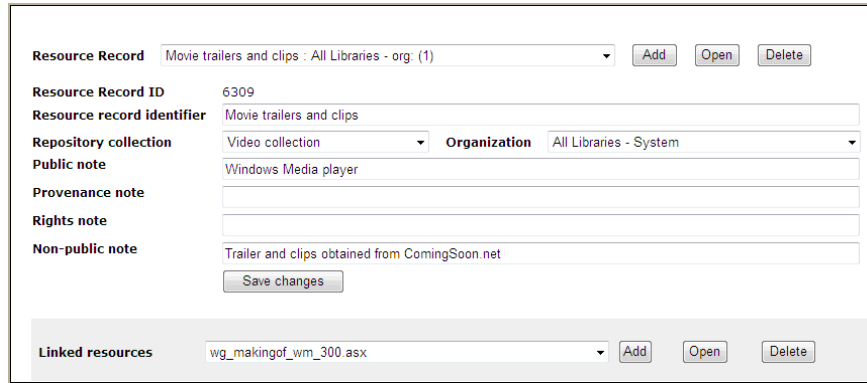
1. Select the Content management tab. The Link subtab is displayed.
2. Search for and select a MARC record.

3. Select an existing record in the **Resource Record** box, and click .

The area expands to show details about the resource record.

**Tip:**

The Resource Record ID cannot be edited.



**Resource Record** Movie trailers and clips : All Libraries - org: (1) Add Open Delete

**Resource Record ID** 6309

**Resource record identifier** Movie trailers and clips

**Repository collection** Video collection **Organization** All Libraries - System

**Public note** Windows Media player

**Provenance note**

**Rights note**

**Non-public note** Trailer and clips obtained from ComingSoon.net

Save changes

**Linked resources** wg\_makingof\_wm\_300.asx Add Open Delete

4. To change the description of the resource, type a different description in the **Resource record identifier** box.
5. To change the collection to which this resource belongs, select a different collection in the **Repository collection** box.
6. To change the organization to which this resource belongs, select a different organization in the **Organization** box.
7. To enter a public note that displays in the PAC, type a maximum of 4,000 characters in the **Public note** box.
8. To enter or change a note regarding the source or origin of the digital asset, type a maximum of 4,000 characters in the **Provenance** box. This note is optional and is not visible in the PAC.
9. To enter or change a note about the rights to the digital files that are attached to this resource record, type a maximum of 4,000 characters in the **Rights note** box. This note is not visible in the PAC.
10. To enter or change an additional note for staff members only that cannot be viewed in the PAC, enter a maximum of 4,000 characters in the **Non-public note** box.
11. Click **Save changes**.
12. To associate the resource record with other digital content, see "Link digital files to the resource record" on the next page.

## Delete a resource record

You cannot delete a resource record if digital files are associated with it.

To delete a resource record.

**Tip:**

For more information on searching for MARC records, see "Select an existing MARC record" on page 20.

1. Select the Content management tab. The Link subtab is displayed.
2. Search for and select a MARC record, and select the resource record you want to delete in the **Resource record** box.
3. Click **Delete** next to the **Resource record** box.

The resource record is deleted if it has no digital files linked to it.

## Link digital files to the resource record

If there are digital files attached to the resource record, they are listed in the **Linked resources** box. To add a new digital asset to the resource record.

**Important:**

The maximum size for a digital asset file is 999 MB; larger files cannot be linked to resource records.

**Tip:**

See "Add a resource record to a MARC record" on page 23 or "Edit an existing resource record" on page 25.

1. Select the Content management tab. The Link subtab is displayed.
2. Click the Add button next to the **Linked resources** box.

The window expands to display the **Link a new resource to this record** area.



3. Select the type of use to associate with this digital asset in the **Copyright type** box.

**Tip:**

You can associate copyright types with Polaris suppliers and expiration dates for linked digital s. See "Defining Collections, Copyright Types, & Request/Denial Reasons" on page 59.

**Note:**

When you select a file in the **File Name** box, the MIME type is determined and selected from the list automatically. If the MIME type cannot be determined automatically, you can select it in the **MIME Type** box.

4. Select the data link description in the **Enriched data link description** box. This description is displayed in the PAC.
5. (Optional) To display a different data link description in the PAC, type it in the **Extended data link description (optional)** box.
6. Point to the digital asset file using one of the following methods:

- Select **File Name** and type the file's name and path, or click **Browse** to locate the file. When you select the file, the name appears in the **File Name** box, and the associated MIME type is selected.
- Select **URL** and type the URL of the file you want to link.

If the file you select has a MIME type of **Image**, a **Generate Thumbnail** box appears.

7. To generate your own thumbnail for an image file, select the **Generate Thumbnail** box.

The thumbnail image is a smaller version of the image you selected.

**Note:**

Thumbnail images are generated automatically for all other MIME types. See "Automatic Thumbnail Generation" on the next page.

8. If you want to control access to the digital asset, do the following steps:

- a. Select **Uses access control list**.

**Note:**

If the **Uses access control list** box is not checked, the file will be placed in the public repository. If this box is checked, the file will be added to the private repository and placed under the control of the access control list. See "Managing Access Control Lists" on page 85.

The area expands.

**Tip:**

You can select both **Purchase required** and **User must request access** if you want patrons to request access before they can purchase and download the file.

- b. If you want to require a purchase before patrons can access the digital file, select **Purchase required**, and type a price in the **Price** box.

**Note:**











If the digital collection to which the digital asset belongs was set up with a default price, it appears in the Price box. You can type a different price for the digital asset if necessary.

- c. If you want to require patrons to request access, select **User must request access**.

9. Click **Link** to link the file or the URL to the resource record.

## Automatic Thumbnail Generation

After the first linked digital asset is added to a bibliographic record, a thumbnail image appears in the PAC. These thumbnails are generated automatically depending on the MIME type as follows:

Thumbnail File	MIME Content Type	MIME Format Icon
programs.jpg	application, model, i-world, x conference, x-world, pdfs	
pic.jpg	drawing or image	
sound.jpg	audio	
speech.gif	message	
paleovu.gif	paleovu (PaleoVu is a complete browse and visualization tool for all types of paleoclimate and paleoecological data.)	
text.jpg	text	
inet.jpg	URL or unknown content type	
vid.jpg	video	
windows-logo.jpg	windows	
cmllogo.gif	chemical	
xgl.jpg	xgl	

## Modify a digital asset's information

To modify a digital asset attached to a resource record.

**Tip:**

See "Add a resource record to a MARC record" on page 23 or "Edit an existing resource record" on page 25.

1. Select the Content management tab. The Link subtab is displayed.
2. Search for and select the MARC record linked to the digital asset.
3. Select the linked asset from the **Linked resources** list, and click **Open**.

The window expands to display the **Modify an asset currently attached to a resource record** area.

**Tip:**

The **Asset name** field is a link you can click to go to the actual digital file or asset.

4. To change the copyright type for the selected digital asset, select a different value in the **Copyright type** box.
5. To change the MIME type, select a different value in the **MIME type** box.
6. To change the description of the enriched data link, select a different value in the **Enriched data link description** box.
7. To change the extended data link description, select a different value in the **Extended data link description** box.
8. Click **Save changes**.

The digital asset information is updated with your changes.

## Delete a digital asset

To delete a digital asset:

1. Select the Content management tab. The Link subtab is displayed.

2. Search for and select the MARC record linked to the digital asset.
3. Select the digital asset you want to delete in the **Linked resources** box.
4. Click **Delete**.

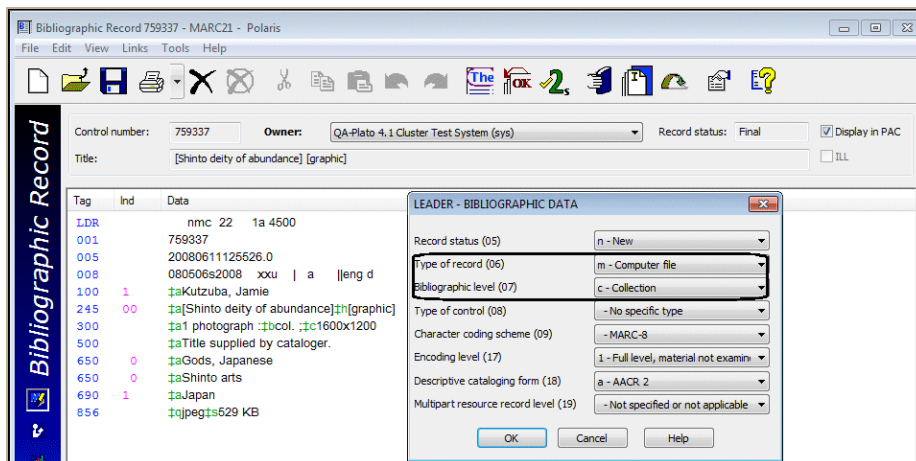
The digital asset file is deleted.

## Creating Digital Collection MARC Records

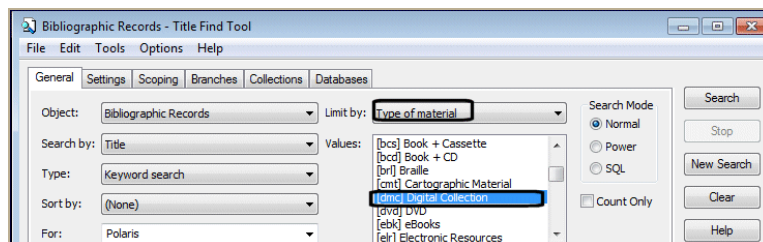
You can create digital collection MARC records in the Polaris staff client or in Polaris Fusion. Whether created in the staff client or in Fusion, digital collection MARC records are saved in the Polaris database, and they can be accessed from the staff client and Fusion.

### Digital Collection MARC Records in the Polaris Staff Client

If you create a bibliographic record in the Polaris staff client, it must have a TOM of **Digital Collection (dmc)** to be available in Polaris Fusion. To produce this type of material, the MARC record in the Polaris staff client must have the following in the LDR: **06=m (computer file)** and **07=c (collection)**. You can create templates in the Polaris staff client for your various types of digital media and use these templates to create the MARC records in the staff client. You can open and edit these digital collection MARC records using all the functions available from the Bibliographic Record workflow. And, you can include digital collection records in bibliographic record sets.



You can search for digital collection bibliographic records in the Polaris Find Tool by selecting **Type of material** in the **Limit by** box and **[dmc] Digital Collection** in the **Values** box.



## Digital Collection MARC Records in Fusion

Before you can create a MARC record in Polaris Fusion, a template must be set up in Fusion for the digital media type you are cataloging. All Fusion templates contain at least these required fields: **Title**, **Language**, **Place** (place of publication), and **Pub year** (date of publication). Some fields may contain default text if it was entered in the template. For information on creating templates, see "Managing Fusion Bib Templates" on page 42.

**Note:**

Bibliographic templates created in the Polaris staff client are not available for selection in Polaris Fusion. However, you can set up bibliographic templates for the different types of digital media in the staff client, use these templates to create the digital collection MARC records in the staff client, then link the MARC records to the digital content in Polaris Fusion.

To create a new MARC record in Polaris Fusion, you select a template and enter information in the Fusion labeled editor fields, which are mapped to MARC fields. When you save the record in Fusion, it is saved in the Polaris database in bibliographic record format with a Type of Material (TOM) of **Digital Collection (dmc)**.

## Create a MARC record using the Polaris Fusion labeled editor

To create a new MARC record for digital media.

**Tip:**

To create a template, select the User preferences tab, Templates subtab.

1. Select the Content management tab, and select the Create subtab.
2. Select a template in the **Template** box.

**Note:**

For information on creating Polaris Fusion templates, see "Managing Fusion Bib Templates" on page 42.

3. Click .

The area expands to display the fields in the template.

**Note:**

The **Template name**, **Description**, and **Template ID** fields cannot be changed.

4. To change the maximum number of authority search results, type a different number in the **Maximum authority search results** box.
5. Select the language in the **Language** box.
6. Select the place of publication in the **Place** box.
7. Select the format of the digital content in the **Type of computer file** box.
8. Type the year that the digital content was published or created in the **Pub year** box.

**Note:**

The **Display in PAC** box is checked by default. Clear the **Display in PAC** check box if you do not want the record to display in the PAC.

9. Type the title in the **Title** box. A title is required for the MARC record.
10. Enter or select data in the other fields as necessary to complete the digital media bibliographic record.
11. To search for existing authority records for a field, type a search term in the field and click Search next to that field.

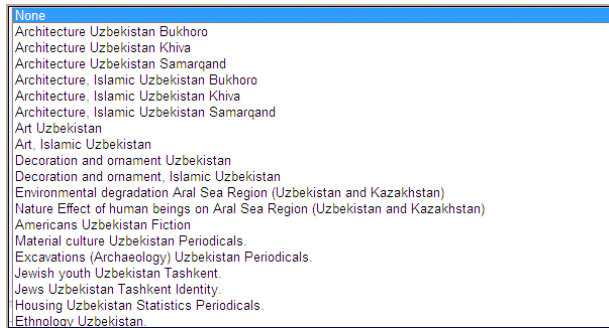
**Note:**

Only the fields that can be authorized have a Search button next to them.

A drop-down list appears above the field.



12. Open the list and select the heading to use.



13. When you are finished entering data in the fields, click .

**Tip:**

If you want to edit the MARC record later, you can open it in the Bibliographic Record workflow in Polaris Cataloging.

A window appears with the bibliographic record ID of the record you created and an area where you can specify the resource record you want to attach to this new MARC record.

A screenshot of a form with a light gray background. At the top, there are two fields: "Bibliographic record ID" with the value "779432" and "Title" with the value "Lake in the Clouds". Below these fields, there is a "Resource Record" label followed by a dropdown menu. To the right of the dropdown menu are three buttons: "Add", "Open", and "Delete".

For information on linking resource records to MARC records, see "Add a resource record to a MARC record" on page 23.

## Importing Records Using Fusion

Use the Import subtab to search for and import records from other databases into the Polaris Fusion repository. Any record that appears in the search results list can be imported into the repository, and the fields in the incoming record are mapped to create a MARC record, even if the incoming record is not in MARC format. Only fields that can be mapped to a MARC field display in the Import subtab. When you save an imported record, it is coded as a digital collection MARC record. See "Digital Collection MARC Records" on page 12.

### Import a record from another database

To import a record from another database.

**Note:**

Limiting, sorting and changing settings are optional.

1. Select the Content management tab, and select the Import subtab.
2. Select an index in the **Index** box.

**Note:**

The list of indexes is populated based on the databases configured on the General Preferences subtab of the User Preferences tab.

3. Select the search type in the **Type** box.
4. To limit the search, select a value in the **Limit by** box.
5. If you selected a limit by criterion, select a value in the **Value** box.

**Note:**

You can use the publication date limits in combination with the options in the **Limit by** box.

6. To further limit the search by the publication date, select one of the following options:
  - Select the **Publication date** box, and select one of these options:
    - **After**
    - **On or after**
    - **Before**
    - **On or before**

- **Exactly**
- **Between**
- Type the publication year or years. If you selected **Between**, two boxes appear where you enter the beginning year and the ending year.

**Tip:**

To indicate that the text may be only a part of the term, type an asterisk (\*). You can type an asterisk before or after the text.

7. Type the text you want to search for in the **For** box.
8. To sort the results list, select a sort option in the **Sort** box, and select the sort type in the **Sort Type** box.

9. Click  next to **Settings**.

The window expands to show the settings options.

10. Do the following to change the settings, if necessary:
  - Type a different number in the **Retrieval limit** box. The default retrieval limit is 1,500 records and the maximum retrieval limit is 99,999.

**Important:**

Setting the retrieval limit too high may result in the following browser error message: Stop running this script? A script page is causing Internet Explorer to run slowly. If it continues to run, your computer might become unresponsive.

- Type a different number in the **Search timeout (sec)** box. The default is 999 seconds.
  - Select a different database to search in the **Database** box.
  - Check or uncheck the **Strip initial articles** check box. This check box is selected by default so that initial articles (such as *The* or *An*) are not considered when searching for titles.
11. Click **Search**.

The system searches the selected database according to your search criteria and displays the results in the results list.

Title	Author	Date	Call number
Letters from the park.		1988.	
Yellowstone and the Great West : journals, lett...		c1999.	
Grand Canyon /	Halvorsen, Lisa.	2000.	
Zion /	Halvorsen, Lisa.	c2000.	
Ernest Hemingway, selected letters, 1917-1961 /	Hemingway, Ernest,	2003. (...)	
Civil War minutes.	Hemingway, Ernest,	2006.	
ParaSpheres : extending beyond the spheres of l...	Hemingway, Ernest,	2006.	

Number of records found: 7

12. Select a title in the list.

The window expands and displays the MARC tags, indicators, subfields, and content of the MARC fields in the record.

Language English

Place United States

Type of computer file Numeric data

Pub year

☒ Display in PAC

Result number: 1

035			\$ a	354935
035			\$ a	AFI-0515
092			\$ a	VC
245	0	0	\$ a	Letters from the park.
			\$ h	[videorecording]
260			\$ b	Fox Lorber Home Video.
			\$ c	1988.
300			\$ a	1 videocassette (VHS) (85 min.) :
			\$ b	sd., col. ;
			\$ c	1/2 in.
500			\$ a	Starring Victor Laplace, Ivonne Lopez, Miguel Paneque.
500			\$ a	Subtitled.
500			\$ a	Original story by Gabriel Garcia Marquez from Love in the time of cholera.
520			\$ a	Echoing the tale of Cyrano De Bergerac, this film unfolds as two shy young lovers enlist the help of the local poet to write passionz
650		0	\$ a	Foreign films.
700	1		\$ a	García Márquez, Gabriel.
			\$ d	1928-
			\$ t	Amor en los tiempos del cólera.
			\$ l	English.
700	1		\$ a	Laplace, Victor.
700	1		\$ a	López, Ivonne.
700	1		\$ a	Paneque, Miguel.
913			\$ a	AFI-0515
913			\$ a	AFI-0515
			\$ b	GISMS

Save

13. To edit the record before saving it, do the following:

## Tip:

The values in the **Language**, **Type of computer file**, **Place**, and **Pub year** are used to create the 008 tag in the new MARC record. If the incoming record contains an 008 tag, it is replaced by this information. You can leave the default values or change them.

- Select the language in the **Language** box. The default language is English.
- Select the place of publication in the **Place** field. The default place is the United States.
- Select the file type in the **Type of computer file** box.
- Type the year of publication in the **Pub year** field. The record can be saved with the default pipes if you do not know the publication year.
- Type different values in the tag, indicator, or subfield boxes.
- Type text in the fields to change the content of the fields.
- Remove text to remove the whole tag or subfield.

14. Click **Save**.

**Tip:**

After saving the record in Polaris Fusion, you can go to the Polaris staff client, open the record in the Bibliographic Record workform, and edit it. The new record contains a default 005 tag with the date and time the record was saved.

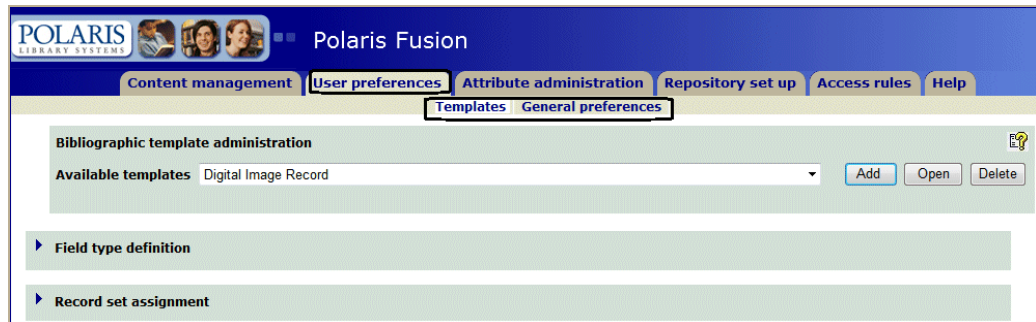
The selected title is imported into the Polaris database, and the **Resource Record** box appears.

15. Add a resource record to link to the new MARC record. See "Add a resource record to a MARC record" on page 23.

## Defining Templates, Database Connections & Fusion Defaults



The User Preferences tab contains subtabs for defining templates, setting database connections, and setting Fusion application defaults. Use the Templates subtab to create, modify and delete templates, and to define template elements. Use the General preferences subtab to define database connections and Fusion application defaults.



See also:

"Managing Fusion Bib Templates" below

"Defining Database Connections & Fusion Defaults" on page 52

## Managing Fusion Bib Templates

### Tip:

Catalogers can create MARC records for digital assets using the Bibliographic Record workform in the Polaris staff client and then link digital assets to the MARC records in Polaris Fusion. See "Creating Digital Collection MARC Records" on page 33.

To create MARC records in Polaris Fusion, you must first set up bibliographic templates in Fusion. Then, you select a bibliographic template and enter the information in the appropriate fields and save the record in the Polaris database.

### Note:

If you prefer to create digital collection MARC records in the Polaris staff client, you can use a template or a blank Bibliographic Record workform, but the record must be coded as a digital collection MARC record to make it available in Polaris Fusion.

Polaris requires the following tags to create a MARC record that can be indexed: the Leader, 245\$a, 005, and 008. Therefore, these tags are automatically included in all Polaris Fusion bibliographic templates. To link digital content to a MARC record, the

record must have a Type of Material (**TOM**) of **Digital Collection**. The Leader in all Polaris Fusion MARC records is **nmc 22 a 4500**. If you add an authorized field to a template, the user creating the MARC record can select an authorized heading to link to the new bibliographic record.

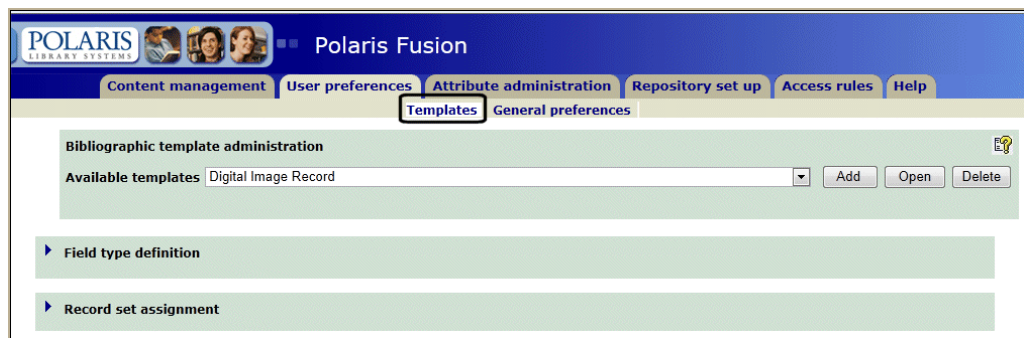
If you have the appropriate permissions, you can create, modify, and delete Polaris Fusion templates. You can also add a template element that corresponds to a MARC tag and subfield, or a Dublin Core element.



### Create a Fusion bibliographic template

To add a new bibliographic template in Polaris Fusion.

1. Select the User preferences tab. The Templates subtab is displayed.



2. Click  next to the **Available templates** box.

The window expands.

3. (Required) Type the name of the template in the **Template name** box.

The template name can be up to 80 characters.



4. (Optional) Type a description for the template in the **Description** box.

The description can be up to 4000 characters.

5. Type the number of authority record hits in the **Authority search results** box.


This defines the default number of authorities that appear in the list box in the labeled editor when you search for authorized headings. The default value is 25.

**Note:**

The **Display in PAC** check box is checked by default. If you do not want MARC records created using this template to display in the PAC, clear the check box.

6. Click .

**Tip:**

Click  to preview the template.

The window displays the template elements drop-down list box, which contains the following default elements that cannot be changed:

**Title**

**Date Issued (008 position 07-10)**

**Language (008 position 25-37)**

**Place of publication (008 position 15-17)**

**Type of computer file (008 position 26)**

**Note:**

When you preview the default template fields, the Place of publication field is labeled **Place** and the Date issued field is labeled **Pub year**. The labels for default fields cannot be changed.

7. To add more elements to the template, see "Add a new bibliographic template element" on page 46.

## Modify an existing bibliographic template

To change a template.


8. Select the User preferences tab. The Templates subtab is displayed.
9. Select a template in the **Available templates** box.

10. Click  next to **Available templates** box.

The area expands to show the name, description, and the number of authority hits associated with the selected template.

11. Type new text or change the text in the **Template name**, **Description**, or **Authority search results** boxes.

**Tip:**

Click  to preview the template.

12. Click .


The template is updated.

13. To change the template elements (the fields that appear on the template or the field labels), see "Modify a template element" on page 47.



## Delete a Polaris Fusion bibliographic template

To delete a Polaris Fusion bibliographic template.

14. Select the User preferences tab. The Templates subtab is displayed.
15. Select a templates in the **Available templates** box.
16. Click .

The template is deleted.



## Add a new bibliographic template element

A template element is a field corresponding to a MARC tag and subfield, or Dublin Core element, that appears when the user opens the template in the Polaris Fusion labeled editor. You can select the tag from the list of field types to create the field on the template, and specify the label for the field.

**Tip:**

To create a template, see "Create a Fusion bibliographic template" on page 43

To add a new template element.

17. Select the User preferences tab. The Templates subtab is displayed.

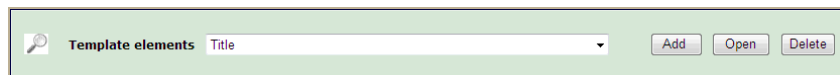
18. Create a new template or select a template in the **Available templates** box.

19. Click  to open the template.

The area expands.

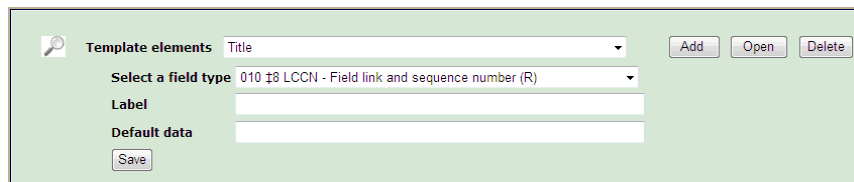
20. Click  next to **Template elements**.

The area expands.



21. Click .

The area expands again.



22. Select a field type in the **Select a field type** box.


**Note:**

To add a new field type, see "Add a new field type" on page 48. To modify an existing field type, see "Modify an existing field type" on page 49.

23. Type a label that describes the field in the **Label** box.

A label is required for each template element, and it can be up to 80 characters.


24. (Optional) If you want the field to have default data, type it in the **Default data** box.

25. Click  to save the new template element.

The element you added appears in the **Template elements** box.

**Tip:**

If the field is under authority control, the user can search for an authority record.

26. To see how the element will appear when a staff member uses this template to create a new MARC record in Polaris Fusion, click  next to **Template elements**.



## Modify a template element

To change an element for an existing template.

27. Select the User preferences tab. The Templates subtab is displayed.

28. Select a template in the **Available templates** box.

29. Click  to open the template.

The area expands.

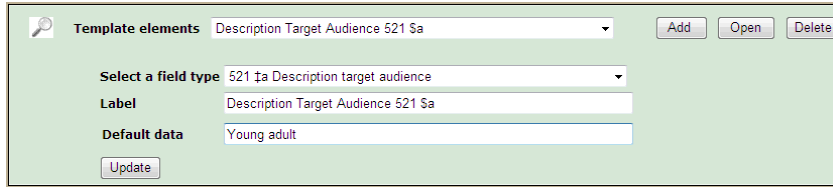
30. Click  next to **Template elements**.

**Note:**

If you try to open a required template element, a message states that the template element is required and cannot be modified.

31. Click .

The area expands below **Template elements** to show the field type, label, default data, and default value (if applicable) for the template element you selected.




The screenshot shows a panel titled "Template elements" with a search icon. Below the title is a dropdown menu showing "Description Target Audience 521 Sa". To the right of the dropdown are three buttons: "Add", "Open", and "Delete". Below the dropdown is a section labeled "Select a field type" with a dropdown menu showing "521 Ia Description target audience". Below that is a section labeled "Label" with a text input field containing "Description Target Audience 521 Sa". Below that is a section labeled "Default data" with a text input field containing "Young adult". At the bottom of the panel is an "Update" button.

32. To specify a different field type, select it in the **Select a field type** box.

33. To change the label for the element, type it in the **Label** box.

**Tip:**



Click  to preview the template.

34. To enter or change default data for the field, type the data in the **Default data** box.

35. To enter or change the default value for the field, select the value in the **Default value** box.

36. Click  under **Default data**.

The template element is changed in the **Template elements** box.



## Add a new field type

To add a new field type for Fusion templates.

37. Select the User preferences tab. The Templates subtab is displayed.




38. Click  next to **Field type definition**.

The Field type definition area expands.

39. Click .

The Field type definition area expands again.

40. Type the MARC qualifier in the **MARC qualifier** box.
41. Select a Dublin Core element in the **Dublin Core** box, or select **None** if not applicable.
42. Type the tag in the **Tag** box.
43. Type the subfield in the **Subfield** box.
44. To enter indicators, type them in the **Indicator one** and **Indicator two** boxes.
45. Click .



## Modify an existing field type

To modify an existing field type definition.

46. Select the User preferences tab. The Templates subtab is displayed.




47. Click  next to **Field type definition**.

The Field Type area expands.



48. Select a field type in the **Field type** box, and click .

The Field Type area expands to display the field type details.

49. To change the qualifier, type the new qualifier in the **MARC qualifier** box.
50. To change a Dublin Core element, select it in the **Dublin Core** element box, or select **None**.
51. To change the tag, type in the **Tag** box.
52. To enter a subfield, type in the **Subfield** box.
53. Click .



## Delete a field type

To delete a field type.

54. Select the User preferences tab. The Templates subtab is displayed.



55. Click next to **Field type definition**.

The Field Type area expands.

56. Select a field type in the **Field type** box, and click .

The selected field type is deleted if it is not used in a template. If the field type is used in a template, it cannot be deleted.

### Associate a Polaris Fusion user with a record set

When you associate a Polaris Fusion user with a bibliographic record set, all MARC records created or imported in Fusion by the selected user are saved in that record set. You can use this feature if your library allows non-catalogers to create or import MARC records in Fusion, but the library requires these MARC records to be reviewed by cataloging staff.

**Note:**

First, the record sets must be created in the Polaris staff client.


To associate a Polaris Fusion user with a record set.

57. Select the User preferences tab. The Templates subtab is displayed.

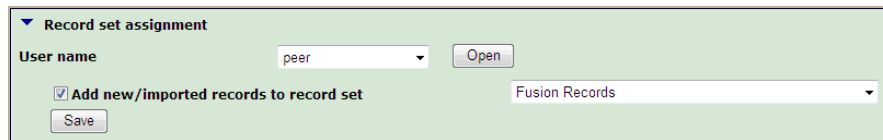
58. Click  next to **Record set assignment**.

The area expands.

59. Select the Polaris Fusion user in the **User name** box.

Click .

The area expands again.



The screenshot shows a form titled "Record set assignment" with a dropdown arrow on the left. Inside the form, there is a "User name" label followed by a dropdown menu showing "peer" and an "Open" button. Below this, there is a checked checkbox labeled "Add new/imported records to record set" and a "Save" button. To the right of the checkbox is a dropdown menu showing "Fusion Records".

60. Select **Add new/imported records to record set**, and select a record set in the drop-down list box. The list contains record sets that already exist in the Polaris database.

61. Click .

All new records created by or imported by the selected user will be saved in the selected record set.



## Defining Database Connections & Fusion Defaults

Use the General Preferences subtab on the User Preferences tab to specify connections to external databases and define default settings for the Polaris Fusion application. The external databases must already be set up in the Polaris staff client.

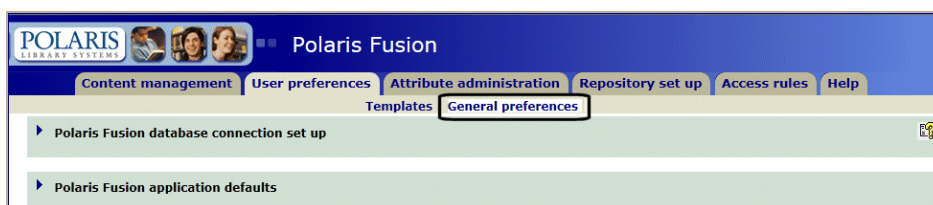
### Add a connection to an internal or external database


To specify a connection between Polaris Fusion and an internal or external database.

Note:

To set up the connection, the database and search server must already be set up in the Polaris staff client. The added databases display on the Import subtab of the Content Administration tab in Fusion. See “Set up a server record for a Z39.50 or other search server” in the *Polaris Administration Guide* or Polaris online Help.

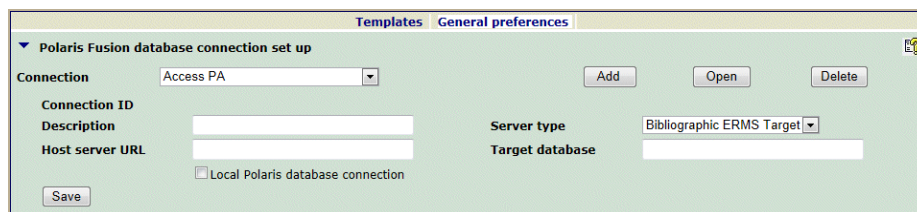
1. Select the User preferences tab, and select the General preferences subtab.



2. Click  next to **Polaris Fusion database connection set up** to expand the area and view the list of database connections (if any).

3. Click  next to the **Connection** box.

The database connection setup area expands again.



4. Type a description for the connection in the **Description** box.
5. Type the host server's URL in the **Host server URL** box. Enter just the base URL, not the entire URL.

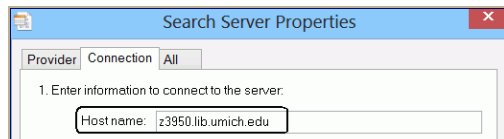
**Note:**

The host server is the library's server that will host the incoming data, not the external host.

6. Select the server type in the **Server type** box.
7. Type the database name in the **Target database** box.

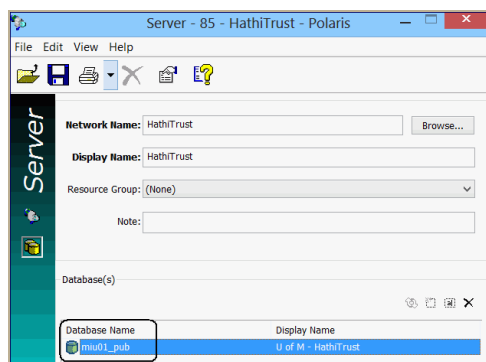
This is the server address of the target database consisting of the following:

The host name, found on the Connection tab in the Search Server Properties dialog box in Polaris Administration.



A slash / character.


The database name, found on the databases view of the Server workform in Polaris Administration.



**Example:**

z3950.lib.umich.edu/miu01\_pub

8. If the database connection is to the local Polaris database, select **Local Polaris database connection**.

9. Click  to save the connection.



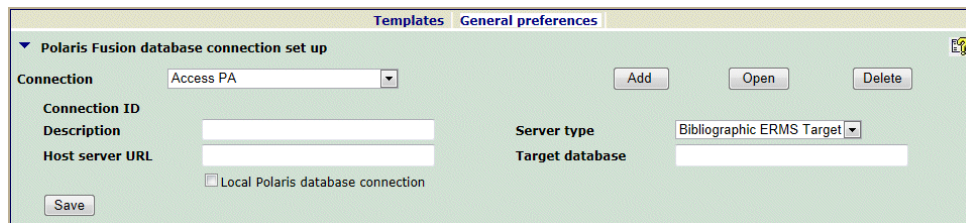
## Delete a connection to an internal or external database

To delete a connection between Polaris Fusion and an internal or external database.

10. Select the User preferences tab, and select the General preferences subtab.



11. Click  next to **Polaris Fusion database connection set up** to expand the area and view the list of database connections.



12. Select a connection in the **Connection** box.

13. Click .

The database connection is deleted.

### Important:

Do not delete the local Polaris database connection.



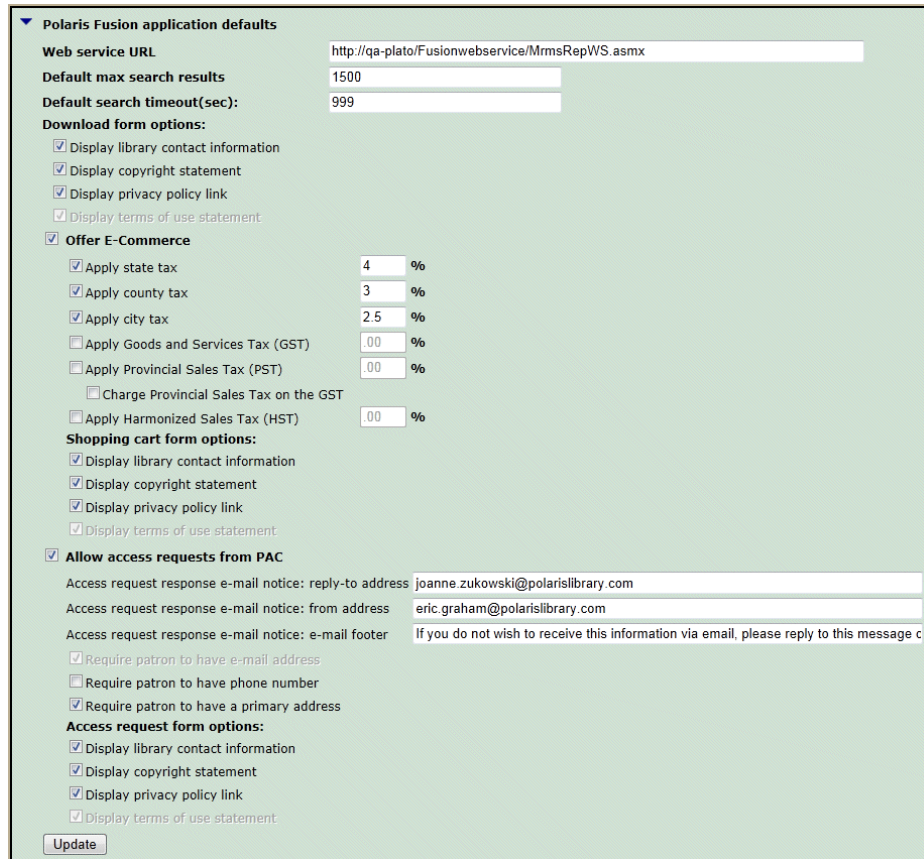
## Specify Polaris Fusion application defaults

To set defaults for Polaris Fusion.

14. Select the User preferences tab, and select the General preferences subtab.

15. Click  next to **Polaris Fusion application defaults** box.

The application defaults area expands.



16. Type the URL for the enriched data Web service in the **Web service URL** box.

17. Type the default for the maximum number of search results to return for searches in Polaris Fusion in the **Default max search results** box.

**Note:**

This value can be changed up to 99,999. However, if the maximum is set too high, the browser may become unresponsive and result in an IIS timeout.

18. Type the default timeout for the search in the **Default search timeout (sec)** box. The search will stop if it does not find any results within the number of seconds you specify.

19. To include or exclude information on the download forms that display in the PAC, select or de-select the following check boxes:

Display library contract information

Display copyright statement

Display privacy policy link

Display terms or use statement

20. If your library offers digital content for sale in Polaris PowerPAC, select **Offer E-Commerce**, and select or de-select the following options:

**Apply state tax** - Type a state tax percentage

**Apply county tax** - Type a county tax percentage

**Apply city tax** - Type a city tax percentage

**Note:**

The GST, PST, and HST taxes apply only to Canada.

**Apply Goods and Services Tax (GST)** - Type a percentage

**Charge Provincial Sales Tax on the GST (PST)** - Select this check box if you selected **Apply Goods and Services Tax (GST)**.

**Apply Harmonized Sales Tax (HST)**

21. If you selected **Offer E-Commerce**, select or de-select the following boxes under **Shopping cart form options** to include or exclude information in patrons' shopping carts in Polaris PowerPAC:

Display library contact information

Display copyright statement

Display privacy policy link

Display terms of use statement

22. To allow patrons to place access requests from the PAC, select the **Allow access requests from PAC** box, and enter the following information:

Type the **To** e-mail address for the access request response in the **Access request response e-mail notice: reply to address box**.

Type the **From** e-mail address for the access request response in the **Access request response e-mail notice: from address box**.

Type the footer to appear on the access request response e-mails in the **Access request response e-mail notice: e-mail footer**.

23. To require that the patron record contain certain information for an access request to be placed, select from the following options:

**Require patron to have e-mail address** (selected by default)

**Require patron to have a phone number**

**Require patron to have a primary address**

24. To include or exclude information on the access request form, select or de-select the following check boxes under **Access request options**:

**Display library contract information**

**Display copyright statement**

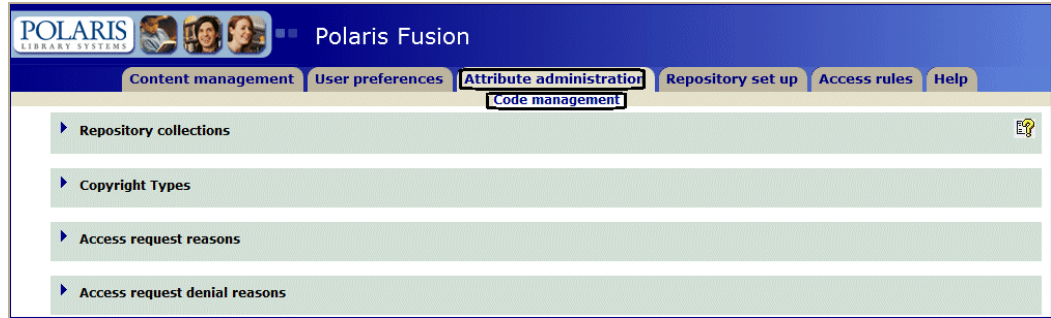
**Display privacy policy link**

**Display terms of use statement**

25. Click  to update the application defaults.

## Defining Fusion Attributes

The Attribute administration tab contains a single Code management subtab. Use the Code management subtab to set up, edit, and delete repository collections; add, modify, and delete copyright types; add, modify and delete access request reasons; and add, modify and delete access request denial reasons.



See also:

"Defining Collections, Copyright Types, & Request/Denial Reasons" on the next page





## Defining Collections, Copyright Types, & Request/Denial Reasons

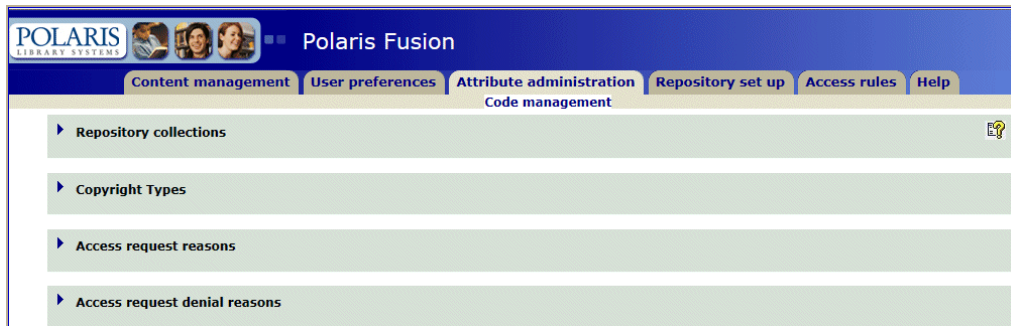
Use the Code management subtab on the Attribute administration tab to manage repository collections, copyright types, access request reasons, and access request denial reasons.

### Add a new repository collection



To add a new repository collection.

1. Select the Attribute administration tab. The Code management subtab is displayed.



2. Click  next to **Repository Collections**.

The area expands, and displays the Collection list box.




3. Click .

The area expands again.

#### Note:

The **Collection ID** is generated when you create a new collection.



4. Type a description in the **Collection description** box. The description can be up to 80 characters.
5. Select a repository in the **Repository** box.
6. Select an authentication method in the **Authentication method** box.
7. If you want to specify a default price for accessing the digital content in this collection, type the dollar amount in the **Default price** box.
8. To specify a limit to the number of times the digital content in the collection can be downloaded, type a number in the **Maximum number of downloads** box.
9. To expose the digital collection to Web crawlers so that the digital content can be found via internet searches, check the **OAI-PMH Set** check box.
10. Click  to save the collection.

## View and edit an existing repository collection


To open and edit an existing repository collection.

1. Select the Attribute administration tab.

The Code management subtab is displayed.


2. Click  next to **Repository Collections**.

The Repository Collections area displays a list of collections.

3. Select the collection you want to edit, and click .

The area expands to display the settings for the selected collection.

The screenshot shows the 'Repository collections' form. It includes a 'Collection' dropdown menu set to 'Audio Collection', an 'Add' button, an 'Open' button, and a 'Delete' button. Below these are several fields: 'CollectionID' (162), 'Collection description' (Audio Collection), 'Authentication method' (Public Use), 'Maximum number of downloads' (9999), 'Repository' (Einstein public repository), 'Default price' (0.00), and three checkboxes: 'Display in PAC' (checked), 'OAI/PMH Set' (unchecked), and 'Enabled' (checked). An 'Update' button is located at the bottom left of the form.

4. To change the description, type the new text in the **Collection Description** box.
5. To change the authentication method, select another option in the **Authentication method** box.
6. To change the setting for displaying the digital content in the PAC, select the **Display in PAC** check box to have the digital content display in the PAC or if it is already checked, select it to clear the check box. If the check box is unchecked, the digital asset will not display in the public access catalog.
7. To expose the digital collection to Web crawlers so that the digital content can be found via internet searches, check the **OAI-PMH Set** check box. Or, if it is already checked and you do not want the digital collection exposed, select the check box to clear it.
8. To change the setting that controls whether the collection appears in the list box on the Link tab, select the **Enabled** check box.
9. To change the default price for the digital content in the collection, type a different price in the **Price** box.
10. To change the number of times the digital content in the collection can be downloaded per patron, type a different number in the **Maximum number of downloads** box.
11. Click  to save your changes to the collection.

## Delete a repository collection

To delete a repository collection.

### Note:

If there are any resource records using the repository collection, you cannot delete the collection.

1. Select the Attribute administration tab.

The Code management subtab is displayed.

2. Click  next to **Repository collections**.

The Repository Collections area expands to display a list of collections.

3. Select a repository collection to delete.

4. Click .

The repository collection is deleted if no resource records are associated with it.

## Add a copyright type

To add a new copyright type.

- 1 Select the Attribute administration tab.

The Code management subtab is displayed.

- 2 Click  next to **Copyright Types**.

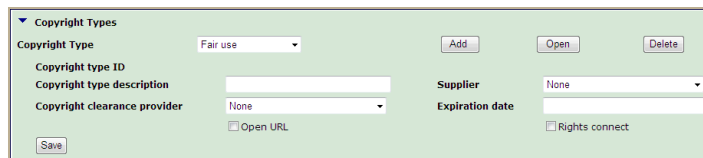
The area expands to display the list of copyright types.

**Tip:**

The **Copyright type ID** is generated automatically when you enter a new copyright type.

3. Click .

The area expands again to show fields for the new copyright type.



The screenshot shows the 'Copyright Types' form. It includes a 'Fair use' dropdown, an 'Add' button, and 'Open' and 'Delete' buttons. The form fields are: 'Copyright type ID' (auto-generated), 'Copyright type description' (text box), 'Copyright clearance provider' (dropdown with 'None' selected), 'Supplier' (dropdown with 'None' selected), 'Expiration date' (text box), and 'Rights connect' (checkbox). There is also an 'Open URL' checkbox and a 'Save' button at the bottom left.

4. Type a description for the copyright type in the **Copyright type description** box. The description can be up to 80 characters.
5. (Optional) To specify a supplier of the digital asset, select the supplier in the **Supplier** box.

**Tip:**

The Supplier Record is available in both the Serials and Acquisitions subsystems.

6. Select **None** or **Copyright clearance center** in the **Copyright clearance provider** box.
7. (Optional) To specify an expiration date for the library's right to provide access to the digital asset, type the date of expiration in the **Expiration date** box.
8. Click **Save**.

The copyright type is saved.

## Modify a copyright type

To change a copyright type:

1. Select the Attribute administration tab.

The Code management subtab is displayed.

2. Click  next to **Copyright Types**.

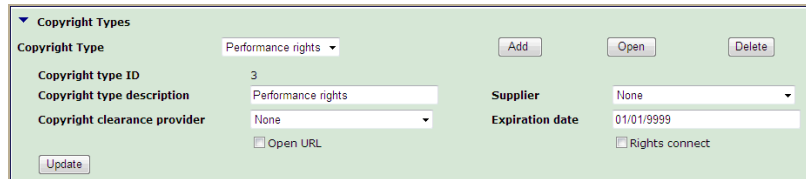
The area expands.

3. Select a copyright type in the **Copyright type** box, and click .


The area expands to display the copyright type fields.

**Tip:**

The **Open URL** and **Rights connect** boxes are not in use at this time.



The screenshot shows a form titled 'Copyright Types'. It contains several fields: 'Copyright type' (a dropdown menu showing 'Performance rights'), 'Add', 'Open', and 'Delete' buttons. Below this, there are four rows of fields: 'Copyright type ID' (value: 3), 'Copyright type description' (value: Performance rights), 'Copyright clearance provider' (value: None), and 'Supplier' (value: None). There are also 'Update', 'Expiration date' (value: 01/01/9999), and 'Rights connect' (checkbox) fields.

4. To modify the copyright type fields do the following:
  - Type text in the **Copyright type description** box.
  - Select a different name in the **Supplier** box.
  - Select a different provider in the **Copyright clearance provider** box.
  - Type a different date in the **Expiration date** box.
5. Click  to save your changes.

## Delete a copyright type

To delete a copyright type.

1. Select the Attribute administration tab.

The Code management subtab is displayed.

- Click  next to **Copyright Types**.

The area expands to display the list of copyright types.

- Select the copyright type to delete.
- Click **Delete**.

The copyright type is deleted.

## Add an access request reason

When you define access request reasons, they appear in a list when a patron requests access to restricted digital media. The patron selects a reason on the Request access form. To define a request reason.

- Select the Attribute administration tab.

The Code management subtab is displayed.

- Click  next to **Access request reasons**.

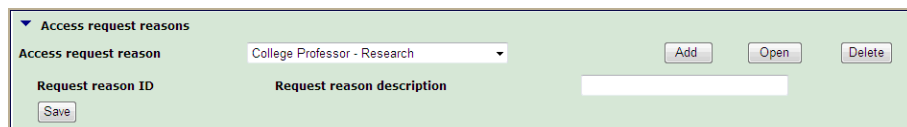
The area expands.

- Click **Add**.

### Tip:

The description appears in the form when the patron requests access to the digital content in the PAC. The Request reason ID is generated automatically when you save the reason.

The area expands again.



- In the **Request reason description** box, type a description for the reason.
- Click **Save**.

## Modify an access request reason

To change an access request reason:

1. Select the Attribute administration tab.

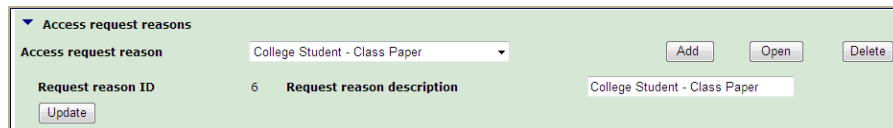
The Code management subtab is displayed.

2. Click  next to **Access request reasons**.

The area expands.

3. Select a reason in the **Access request reason** box, and click **Open**.

The area expands again.



4. Type a new description for the reason in the **Request reason description** box.
5. Click **Update** to save your changes to the access request reason.

## Delete an access request reason

To change an access request reason.

1. Select the Attribute administration tab.

The Code management subtab is displayed.

2. Click  next to **Access request reasons**.

The area expands.

3. Select the access request reason you want to delete.

4. Click  to delete the access request reason.

## Add an access request denial reason

You can define reasons why a patron might be denied access to a restricted digital media file. The denial reasons appear in the PAC when a patron attempts to access the digital content and access is denied. To define access request denial reasons.

**Note:**

For more information on denying access requests, see "Manage an access request" on page 89.

1. Select the Attribute administration tab.

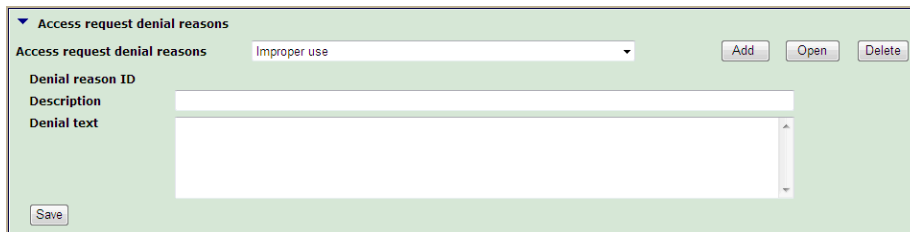
The Code management subtab is displayed.

2. Click  next to **Access request denial reasons**.

The area expands.

3. Click **Add**.


The area expands again.



4. Type a description for the denial in the **Description** box.

**Note:**

The Denial reason ID is generated automatically when you save the reason.

5. Type the text for the denial reason in the **Denial text** box.
6. Click .

## Modify an access request denial reason

To change an access request denial reason.



7. Select the Attribute administration tab.

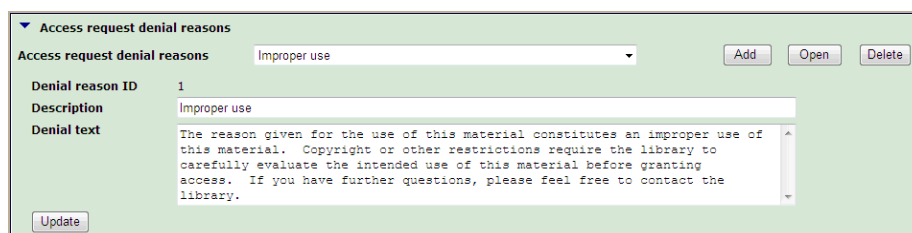
The Code management subtab is displayed.


8. Click  next to **Access request denial reasons**.

The area expands.

9. Select the reason in the **Access request denial reason** box, and click .

The area expands again.



10. Type a new description in the **Description** box.
11. Type the text that will appear when this denial reason is selected in the **Denial text** box.
12. Click  to save your changes to the denial reason.

## Delete an access request denial reason

To delete an access request denial reason.

1. On the Attribute administration tab.

The Code management subtab is displayed.

2. Click  next to **Access request denial reasons**.

The area expands.

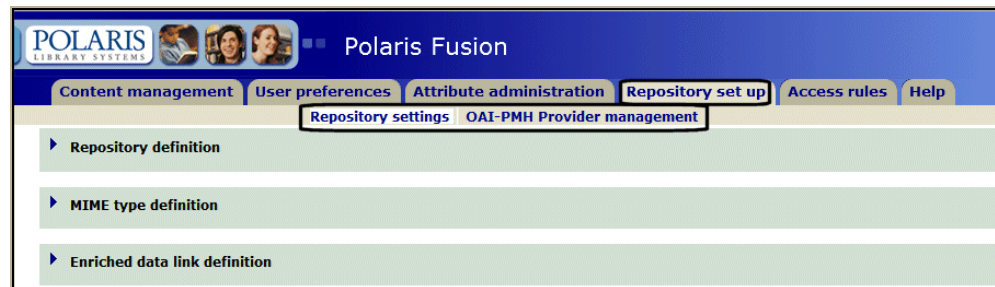
3. Select the reason in the **Access request denial reason** box.

4. Click .

The access request denial reason is deleted.

## Setting Up the Repository & Managing the OAI-PMH Provider

The Repository set up tab contains subtabs for setting up the digital repository and managing the OAI-PMH Provider. Use the Repository settings subtab to manage one or more digital repositories that contain the digital media; manage MIME types; and define the enriched data links that appear in the PAC. Use the OAI-PMH Provider management subtab to manage the OAI-PMH data provider Web service.



See also:

"Defining the Repository, MIME Types, and Enriched Data Links " on the next page

"Managing the OAI-PMH Provider " on page 77

## Defining the Repository, MIME Types, and Enriched Data Links

Use the Repository Settings subtab to add, modify, and delete repositories, MIME types, and enriched data links.

### Define a repository

To define a repository.

**Note:**

The Repository GUID (Globally Unique Identifier), and Repository ID are generated automatically when you define a repository and cannot be changed.

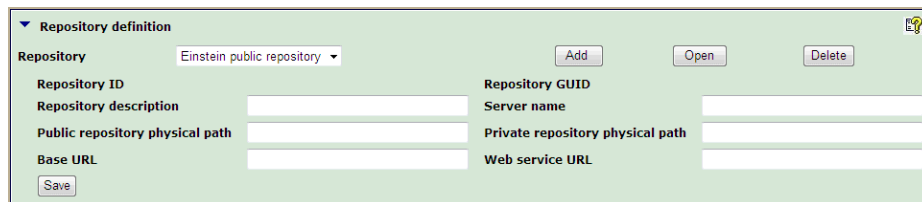
1. Select the Repository set up tab, and select the Repository settings subtab.

2. Click  next to **Repository definition**.

The Repository definition area expands to display a list of repositories.


3. Click .

The area expands to display the repository fields.




The screenshot shows the 'Repository definition' form. At the top, there is a dropdown menu for 'Repository' with 'Einstein public repository' selected. To the right of this dropdown are three buttons: 'Add', 'Open', and 'Delete'. Below the dropdown, the form is divided into two columns. The left column contains fields for 'Repository ID', 'Repository description', 'Public repository physical path', and 'Base URL'. The right column contains fields for 'Repository GUID', 'Server name', 'Private repository physical path', and 'Web service URL'. A 'Save' button is located at the bottom left of the form.

4. Type the description for the repository in the **Repository description** box. The description can be up to 80 characters.
5. Type the name of the server where the repository resides in the **Server name** box.
6. Type the location (file path) of the public repository in the **Public repository physical path** box.
7. Type the location (file path) of the private repository in the **Private repository physical path** box.


8. Type the URL address in the **Base URL** box. This URL corresponds to the public URL of the Web server that offers digital media content to the public. You can enter up to 4000 characters in the Base URL field.
9. Type the location of the Web service in the **Web service URL** box.
10. Click  to save the repository definition.

## Modify a repository definition

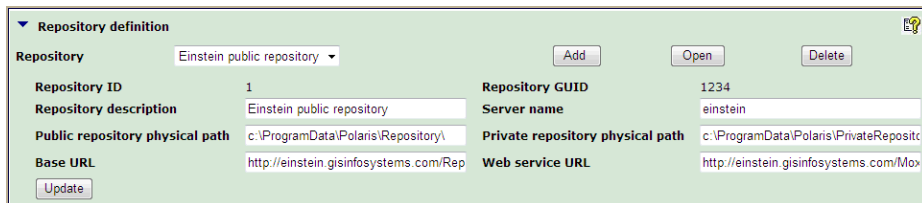
To change a repository definition.

1. Select the Repository set up tab, and select the Repository settings subtab.
2. Click  next to **Repository definition**.

The Repository definition area expands to display a list of repositories.

3. Select the repository to modify in the **Repository** box.
4. Click .

The window expands to display the definition fields for the selected repository.

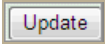


The screenshot shows a window titled "Repository definition" with a dropdown menu set to "Einstein public repository". Below the dropdown are buttons for "Add", "Open", and "Delete". The main area contains several fields:

Repository ID	1	Repository GUID	1234
Repository description	Einstein public repository	Server name	einstein
Public repository physical path	c:\ProgramData\Polaris\Repository\	Private repository physical path	c:\ProgramData\Polaris\PrivateRepository\
Base URL	http://einstein.gisinfosystems.com/Rep	Web service URL	http://einstein.gisinfosystems.com/Mox



At the bottom left is an "Update" button.

5. To change the description, type text in the **Repository description** box. The description can be up to 80 characters.
6. To change the server name, type the name of the server where the repository resides in the **Server name** box.
7. To change the path where the public repository is located, type the location in the **Public repository physical path** box.
8. To change the path where the private repository is located, type the location of the private repository in the **Private repository physical path** box.

9. To change the base URL location, type the location in the **Base URL** box. This URL corresponds to the public URL of the Web server that offers digital media content to the public. You can enter up to 4000 characters in the **Base URL** box.
10. Type the location of the Web service in the **Web Service URL** box.
11. Click  to save your changes.

## Delete a repository definition


To delete a repository definition.

1. Select the Repository set up tab, and select the Repository settings subtab.
2. Click  next to **Repository definition**.  
  
The Repository definition area expands to display a list of repositories.
3. Select the repository to delete in the **Repository** box.
4. Click .

The repository definition is deleted.

## Define a MIME type

To define a MIME type.

1. Select the Repository set up tab, and select the Repository settings subtab.
2. Click  next to **MIME type definition**.

The MIME type box lists the existing MIME types.

**Note:**

For information on MIME types, see "MIME - Multipurpose Internet Mail Extensions (MIME) is an Internet standard that was developed to extend the format of e-mail to support text in languages that use character encodings other than ASCII, as well as 8-bit binary content such as files containing images, sounds, movies, and computer

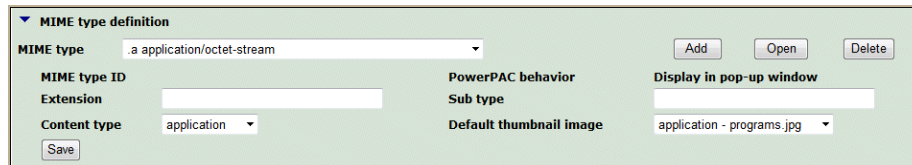
programs. MIME is also a fundamental component of communication protocols such as HTTP." on page 2.


- Click .

The area expands to display the MIME type fields.

**Tip:**

The values in the **MIME type ID** and the **PowerPAC behavior** fields are generated automatically and cannot be modified. **Display in pop-up window** means that digital content with this MIME type will display in a pop-up window in Polaris PowerPAC.




- Type the MIME type extension in the **Extension** box.
- Type the MIME subtype in the **Sub type** box.
- Select the content type in the **Content type** box.
- Select the file name for the image that will display in Polaris PowerPAC for this MIME type in the **Default thumbnail image** box.
- Click  to save the MIME type.

## Modify a MIME type

To modify an existing MIME type.

**Note:**

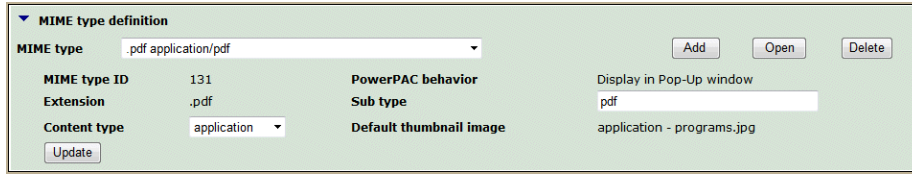
When you modify an existing MIME type definition, you can change only the **Content type** and **Subtype**. The other fields are read-only for existing MIME types.

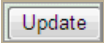
- Select the Repository set up tab, and select the Repository settings subtab.
- Click  next to **MIME type definition**.

The **MIME type** box lists the existing MIME types.

3. Select a MIME type from the list in the **MIME type** box, and click .


The area expands to display the **MIME type** fields.




4. To change the content type, select it in the **Content type** box.
5. To change the content subtype, type a sub-type in the **Sub type** box.
6. Click  to save your changes to the MIME type.

## Delete a MIME type

To delete a MIME type:

7. Select the Repository set up tab, and select the Repository settings subtab.
8. Click  next to **MIME type definition**.

The **MIME type** box lists the existing MIME types.

9. Select the MIME type to delete in the **MIME type definition** box.
10. Click .

The MIME type is deleted.

## Define an enriched data link

To define a new enriched data link to appear in Polaris PowerPAC.

### Tip:

In Polaris PowerPAC, enriched data links are clickable links to additional information about the title. The enriched data is provided by third-party vendors and can consist of




a simple book jacket image, or contents, excerpts, reviews, ratings, and other information related to the title

11. Select the Repository set up tab, and select the Repository settings subtab.

12. Click  next to **Enriched data link definition**.

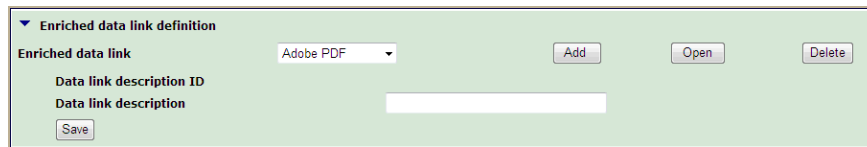
The Enriched data link box lists the existing data links.

13. Click .

The area expands to display the **Enriched data links** fields.

**Note:**

The Data link description ID is assigned automatically.



14. Type a description for the data link in the **Data link description** box.

15. Click **Save** to save the enriched data link definition.


## Modify an enriched data link definition

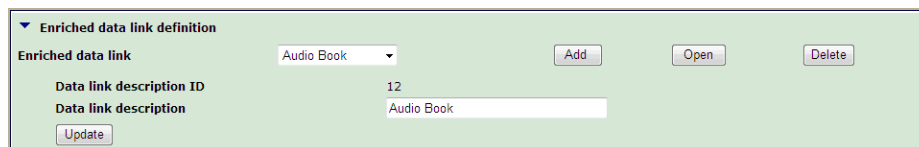
To modify a data link definition.

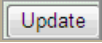
1. Select the Repository set up tab, and select the Repository settings subtab.

2. Click  next to **Enriched data link definition**.

The **Enriched data link** box displays a list of the existing data links.

3. Select a data link description from the list in the **Enriched data link** box, and click .



4. To change the data link description, type the text in the **Data link description** box, and click .

The **Enriched data link** box displays the modified description of the data link.

## Delete an enriched data link definition

To delete an enriched data link definition.

1. Select the Repository set up tab, and select the Repository settings subtab.

2. Click  next to **Enriched data link definition**.

The **Enriched data link** box displays a list of existing data links.

3. Select the data link in the **Enriched data link** box.

4. Click .

# Managing the OAI-PMH Provider

Use the OAI-PMH provider management subtab to modify and update the OAI-PMH provider settings. When your library first implements Polaris Fusion, your Polaris representative enters the OAI/PMH settings. For more information, see "OAI-PMH - The Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH) is a mechanism for repository interoperability. Data Providers are repositories that expose structured metadata via OAI-PMH. Service Providers then make OAI-PMH service requests (verbs) to harvest that metadata. These verbs are as follows:" on page 3.

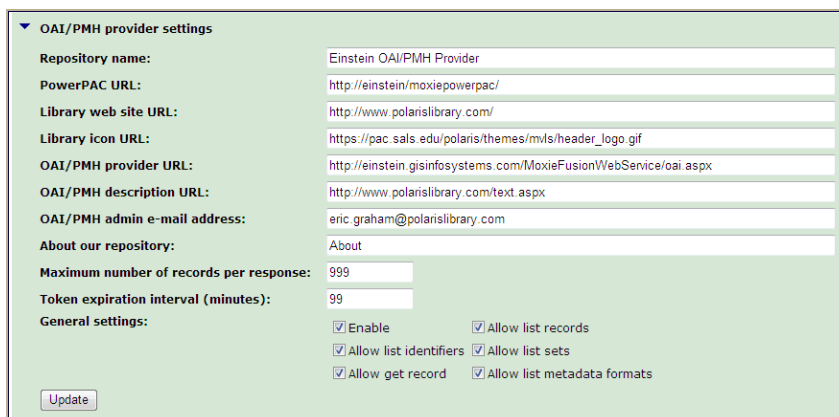
## Modify OAI-PMH provider settings

To modify OAI-PMH provider settings.

1. Select the Repository set up tab, and select the OAI-PMH Provider management subtab.

2. Click  next to **OAI/PMH provider settings**.

The window expands to display the OAI-PMH settings fields.



▼ OAI/PMH provider settings

Repository name: Einstein OAI/PMH Provider

PowerPAC URL: <http://einstein/moxiepowerpac/>

Library web site URL: <http://www.polarislibrary.com/>

Library icon URL: [https://pac.sals.edu/polaris/themes/mvls/header\\_logo.gif](https://pac.sals.edu/polaris/themes/mvls/header_logo.gif)

OAI/PMH provider URL: <http://einstein.gisinfosystems.com/MoxieFusionWebService/oai.aspx>

OAI/PMH description URL: <http://www.polarislibrary.com/text.aspx>

OAI/PMH admin e-mail address: eric.graham@polarislibrary.com

About our repository: About

Maximum number of records per response: 999

Token expiration interval (minutes): 99

General settings:

☒ Enable ☒ Allow list records

☒ Allow list identifiers ☒ Allow list sets

☒ Allow get record ☒ Allow list metadata formats

3. To change the repository name, type a different name in the **Repository name** box.
4. To change the URL for Polaris PowerPAC where the digital content is accessed, type another URL in the **PowerPAC URL** box.
5. To change your library's Web site URL, type in the **Library web site URL** box.
6. To change the icon for your library's Web site, type a different URL in the **Library icon URL** box.
7. To change the OAI-PMH provider URL, type a different URL in the **OAI/PMH provider URL** box.
8. To change the text that appears for the OAI-PMH description, type a different URL in the **OAI-PMH description** box.
9. To change the e-mail address for the OAI-PMH provider, type a different address in the **OAI-PMH admin e-mail address** box.
10. To change the repository description, type a description in the **About our repository** box.
11. To change the number of records allowed per response, type a different number in the **Maximum number of records per response** box.

12. To change the expiration interval for the token, type a different number of minutes in the **Token expiration interval (minutes)** box.
13. Select or deselect the check boxes under **General settings** as follows:

**Note:**

These settings activate or deactivate each of the six OAI-PMH services (verbs).

**Enable** - If this box is checked, the OAI-PMH provider service is enabled.

**Allow list identifiers** - If this box is checked, the OAI-PMH provider is allowed to list identifiers found in the repository.

**Allow get record** - If this box is checked, the OAI-PMH provider will be able to get records found in the repository.

**Allow list records** - If this box is checked, the OAI-PMH provider is allowed to list records found in the repository.

**Allow list sets** - If this box is checked, the OAI-PMH provider is allowed to list sets found in the repository.

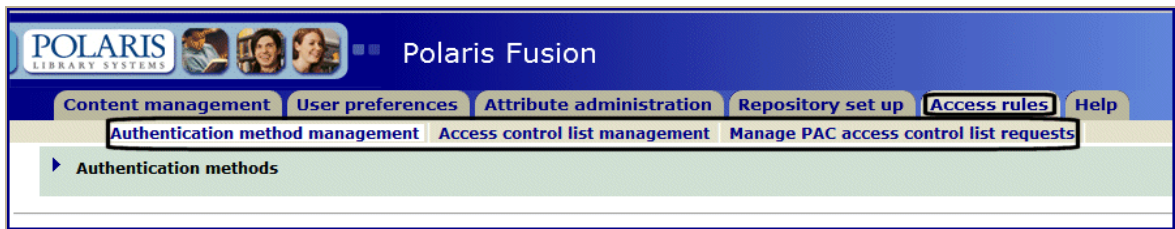
**Allow list metadata formats** - If this box is checked, the OAI-PMH provider is allowed to list metadata formats found in the repository.

14. Click .

The changes are made to the OAI-PMH provider definition.

## Managing Access to Digital Content

The Access Rules tab contains subtabs for managing access to digital content. Use the Authentication method management subtab to define the rules that control access to certain digital assets. Use the Access control list management subtab to specify which patrons or groups of patrons can access specific digital assets residing in the private repository. Use the Manage PAC access control list requests subtab to view access request details, and grant or deny access.



See also:

- "Defining Authentication Methods" on the next page
- "Managing Access Control Lists " on page 85
- "Managing PAC Access Requests" on page 89

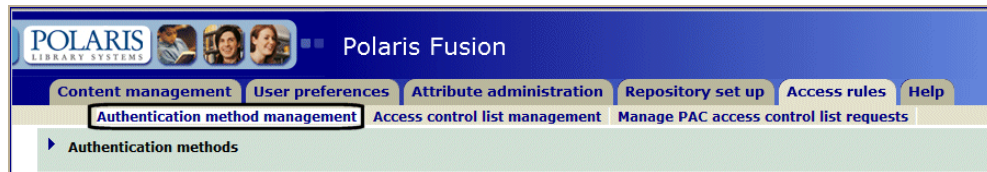
## Defining Authentication Methods

Use the **Authentication method management** subtab to define rules that control access to certain digital assets. If an unauthorized patron attempts to access a protected digital asset in Polaris PowerPAC, the patron receives an error message. Authentication methods are assigned at the collection level. See "Defining Collections, Copyright Types, & Request/Denial Reasons" on page 59.

### Add an authentication method

To add an authentication method.

1. Select the Access rules tab, and select the Authentication method management subtab.



2. Click  next to **Authentication methods**.

The Authentication methods area expands to display a drop-down list box that contains the existing authentication methods.

3. Click the **Add** button.

The area expands to display the authentication fields.

A screenshot of the 'Authentication methods' form in Polaris Fusion. The form has a title bar 'Authentication methods' with a dropdown menu set to 'Public Use' and buttons for 'Add', 'Open', and 'Delete'. Below the title bar, there are several fields: 'Authentication method ID', 'Authentication method description', 'PAC organization(s)', 'Patron branch(es)', and 'Patron code(s)'. To the right of these fields is a list box titled 'Authentication required for this resource' containing several library names. At the bottom left of the form is a 'Save' button.

4. Type the description for the authentication method in the **Authentication method description** box. The description can be up to 80 characters.
5. To specify that authentication is required for accessing the digital content, do the following steps:

Select the **Authentication required for this resource** box.

Select the PAC connection organization for the authentication method in the **PAC organization** box.

Select the branches where the patrons are registered in the **Patron branch(es)** box.

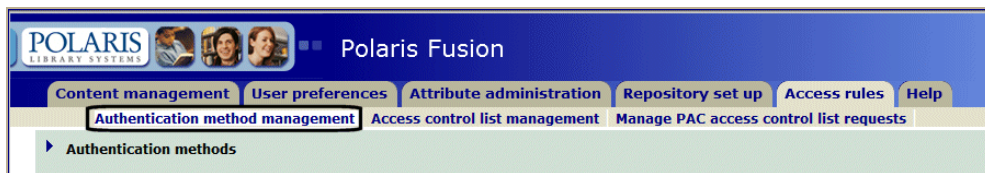
Select the patron codes to which this authentication method applies in the **Patron code(s)** box.

6. Click **Save** to save the authentication method.

## Modify an authentication method

To change an authentication method.

1. Select the Access rules tab, and select the Authentication method management subtab.

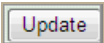


2. Click  next to **Authentication methods**.

The Authentication methods area expands to display a drop-down list box that contains the existing authentication methods.

3. Select the method you want to modify, and click **Open**.

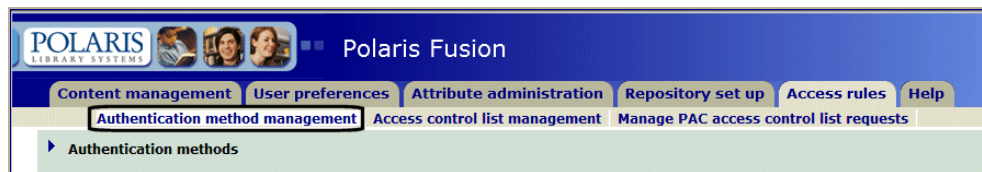
The Authentication method area expands to display the **Authentication method** fields.

4. To change the authentication method description, type a new description in the **Authentication method description** box.
5. To change the setting for requiring authentication, select or deselect the **Authentication required for this resource** box. If you select **Authentication required for this resource**, do the following:
  - Select one or more connection organizations in the **PAC organization(s)** box.
  - Select one or more registration branches in the **Patron branch(es)** box.
  - Select one or more patron codes in the **Patron code(s)** box.
6. Click  to update the authentication method.

## Delete an authentication method

To delete an authentication method.

- 1 Select the Access rules tab, and select the Authentication method management subtab.



2. Click  next to **Authentication methods**.

The Authentication methods area expands to display a drop-down list box that contains the existing authentication methods.



3. Select the method that you want to delete, and click **Delete**.

If the authentication method is linked to a collection, the following message appears:  
**This authentication method may not be deleted. It is linked to 1 collections.**

If the authentication method is not linked to a collection, it is deleted.

## Managing Access Control Lists

Use the Access control list management subtab to specify which patrons can access specific assets residing in the private repository. These records will display in Polaris PowerPAC, but only those patrons whose names are entered in the access control list will have permission to access the digital assets.

If the digital asset resides in the private repository and a patron attempts to access the asset in Polaris PowerPAC, a log-in message appears. Patrons who are on the access control list will be able to log in and gain access. To manage access to digital assets in the private repository, you associate the asset with an asset control list.

If a digital asset is in the private repository and under an access control list, you can also require a patron to fill out an access request form or to purchase the digital download through Polaris PowerPAC. When an access request is granted or the patron purchases the digital download, the patron is automatically added to the access control list for that asset. For more information, see "Managing Patron Access to Digital Media" on page 10.

### Search for a digital asset to manage its access

To search for the digital asset to manage:

1. Select the Access rules tab, and select the Access control list management subtab.
2. Select an index to search by in the **Index** box.
3. To limit the search by library branch, select the branch in the **Branch** box.
4. To use other filters to limit your search, select an option in the **Filter** box, and select a value in the **Value** box.
5. To limit the search by the access date, select a date in the **From** box and a date in the **to** box.
6. Type the search term in the **For** box.


**Note:**

You can type an asterisk (\*) to retrieve all digital asset files within any limits you may have set.

7. Click **Search**.

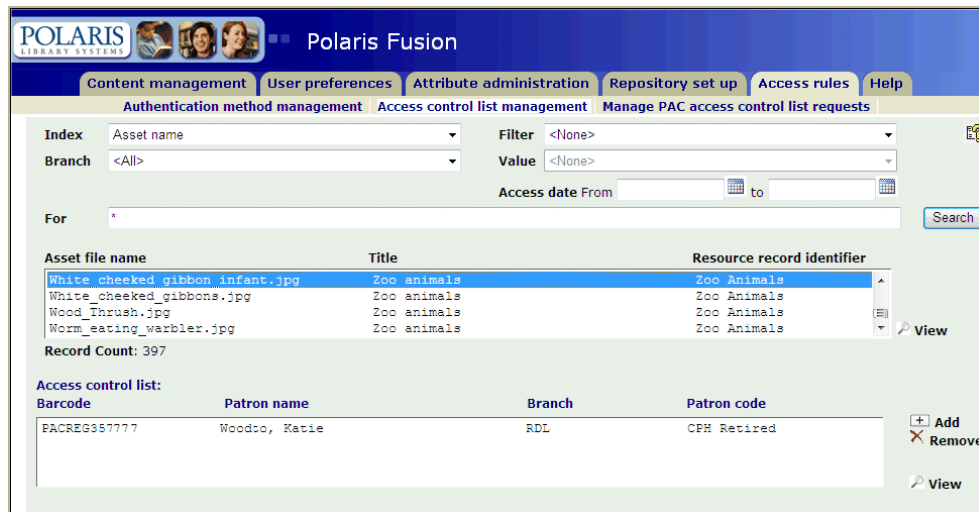
The search results are listed in the search results box by **Asset file name**, **Title** and **Resource record identifier**.

**Tip:**

To see details regarding the digital asset, click  **View**. The area below the selected asset expands to display the file information.

8. Select the asset you want to manage.

The patrons with access to this digital file are listed under **Access control list**.



**POLARIS LIBRARY SYSTEMS** Polaris Fusion

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Authentication method management Access control list management Manage PAC access control list requests

Index Asset name Filter <None> Value <None> Access date From to Search

Branch <All>

For \*

Asset file name	Title	Resource record identifier
White_cheeked_gibbon_infant.jpg	Zoo animals	Zoo Animals
White_cheeked_gibbons.jpg	Zoo animals	Zoo Animals
Wood_Thrush.jpg	Zoo animals	Zoo Animals
Worm_eating_warbler.jpg	Zoo animals	Zoo Animals

Record Count: 397

**Access control list:**

Barcode	Patron name	Branch	Patron code
FACREG357777	Woodco, Katie	RDL	CPH Retired

+ Add  
X Remove  
View

## Add a patron name to an access control list

To add a patron name to an access control list.

1. Select the Access rules tab, and select the Access control list management subtab.
2. Search for and select a digital asset. See "Search for a digital asset to manage its access" on the previous page.

The access control list for the digital asset is displayed at the bottom of the window.

3. Click **Add**.

The area expands to display the search criteria.

4. Select an index to search in the **Index** box.
5. To search for patrons associated with a specific branch or branches, select the branch or branches in the **Branch** box.
6. To limit your search to patron records in a certain statistical class or with a certain patron code, select an option in the **Filter** box, and enter a value to limit by in the **Value** box.
7. Type the search term in the **For** box. You can enter part of the search term and use asterisks to indicate truncation on the left or right. For example, you could search for **\*ita** or **Sa\*** to search for the name *Sabita*.
8. Click **Search**.

The search results display.

9. Select a patron's name.
10. Click **Add**.

The patron's name is added to the access control list and will have access to this digital asset.

## Remove a patron name from an access control list

To remove a patron name from an access control list.

1. Select the Access rules tab, and select the Access control list management subtab.
2. Search for and select a digital asset.

The access control list for the digital asset is displayed at the bottom of the window.

3. Select a patron's name.
4. Click **Remove**.


The patron's name is removed from the access control list.

## Managing PAC Access Requests


Use the Manage PAC access control list requests subtab to see and manage requests for access to digital media and grant access, deny access, or grant access without a purchase. Access requests cannot be sent via Polaris Mobile PAC.

### Manage an access request

Follow these steps to manage patron requests for access to digital content from Polaris PowerPAC.

1. Select the Access rules tab, and select the Manage PAC access control list requests subtab.
2. Click  next to the request in the list.

The Request Details area expands, displaying details about the request and the patron who placed the request.

	164	1/16/2012 9:00:30 AM	Mark M	1000201342622	Finland as it is	Finland_Harmaja_lighthouse.jpg	image/jpeg
--	-----	----------------------	--------	---------------	------------------	--------------------------------	------------

**Request Details**

Request ID	164
Creation date	1/16/2012 9:00:30 AM
Patron name	Mark M
Barcode	1000000000522
Patron phone	315-634-1234
Patron e-mail	@polarislibrary.com
Patron code	Saratoga Resident
Patron stat code	Wilton-Town inside SAR SD
Branch	Saratoga Springs Public Library
Title	Finland as it is
File name	Finland_Harmaja_lighthouse.jpg
File information	image/jpeg
Collection	Copy Collection
Copyright type	Fair use
Price	\$0.00
Requires purchase	False
Request reason	College Professor - Research

**Patron generated note**

Outcome

Subject line Accepted

Email text Your request for access has been accepted

Request information:  
Title: Finland as it is  
File name: Finland\_Harmaja\_lighthouse.jpg

3. Select an entry in the **Outcome** box.

**Note:**

The **Outcome** list includes the value **Accepted** as well as denial reasons that you

can add to or modify. See "Add an access request denial reason" on page 67. If you select **Accepted**, the **Grant access** and **Grant access without purchase** buttons become active. If you select an access request denial reason, such as **Improper use**, the **Deny Access** button becomes active. In addition, the e-mail message changes depending on the selected outcome.

4. Do one of the following actions:

- To allow the patron to access the digital content, click **Grant Access**.
- To allow the patron to access the digital content without paying for it, click **Grant access without purchase**.
- To deny the patron access to the digital content, click **Deny Access**.

An e-mail message is sent to the patron with the text you entered in the **Subject line** box in the subject line of the e-mail, and the text you entered in the **Email text** box in the body of the e-mail message.

**Note:**

The e-mail message is sent automatically by the Polaris E-mail Manager in the same manner as e-mail notices. For more information, see **Delivering Notices by E-mail** in Polaris staff client online Help.

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