



# Cataloging Guide

7.6

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## Getting Started in Cataloging

Polaris Cataloging provides options for adding, modifying, deleting, and managing cataloging records.

See also:

- [Cataloging Options on the Shortcut Bar](#)
- [Cataloging Records](#)
- [Methods for Adding New Records](#)
- [Finding Cataloging Records](#)

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### Polaris Cataloging Overview

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

To streamline your cataloging tasks, Polaris provides tools such as: import profiles for efficiently importing records; bulk creation of item records; bulk change for bibliographic and item records; remote database searching for easy copy cataloging; automatic remote authority control; bibliographic record replacement; and templates to ensure record consistency. Quick navigation between linked records also enhances efficiency.

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

Your Polaris Administrator can use a variety of options to manage cataloging records and specify how titles are displayed in the PAC. See the Cataloging Administration PDF Guide.

For more information on the features and functions available in Polaris Cataloging, see these topics:

### [Getting Started in Cataloging](#)

Overview of Polaris cataloging records; methods for creating new records; how to search for and display bibliographic, authority, and item records.

### [Creating, Copying, and Editing MARC Records](#)

Creating original MARC records; copying MARC records from remote sources; editing MARC records.

### [Using Cataloging Templates](#)

Using templates to streamline your cataloging processes.

### [Setting Up Import Profiles and Importing Records](#)

Setting up import profiles; importing records into your Polaris catalog.

### [Checking Cataloging Records](#)

Checking records for headings, MARC format, and duplicates.

### [Maintaining Item Records](#)

Creating item records and preparing items for circulation; printing labels.

### [Working with Multiple Cataloging Records](#)

Grouping related cataloging records in record sets for bulk processing.

### [Maintaining Your Catalog](#)

Maintaining your catalog; exporting records; identifying unlinked records; deleting records; and using reports to identify problems.

### [Managing Promotions](#)

Creating and editing promotion records to feature resources in PAC.

### [Cataloging Bound-With Materials](#)

When cataloging pamphlets or other materials that have individual titles and individual bibliographic records, but are bound together in physical volumes, libraries can group bibliographic records together.

### [Setting Up Labels](#)

Setting up labels; customizing labels; defining label content; specifying label printers.

### [Generating and Copying Content Carousel Code](#)

Using the Carousel Toolkit (available by separate license) to copy code snippets for content carousels from the Polaris ILS to external web sites.

### [Type of Material Codes \(TOMs\)](#)

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

### [Cataloging Shortcut Keys](#)


List of Cataloging shortcut keys.

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## Cataloging Options on the Shortcut Bar

From the Polaris shortcut bar, you can create new cataloging records, find existing records, import or export records, and initiate automatic processing of cataloging records. Specific permissions are required for creating, modifying, deleting, and processing cataloging records. Course Reserves, Community Records, Promotions, Campaigns, and Carousel Toolkit are available if your library has licenses for these products. For information on the permissions required to do cataloging tasks, see Cataloging Permissions.

#### **Tip:**

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

See also:


- [Creating New Cataloging Records](#)
- [Accessing Existing Cataloging Records](#)
- [Start Cataloging Records Processing](#)

## Creating New Cataloging Records

#### **Tip:**

In the New dialog box, select **Cataloging Objects** in the **View** box to list only Cataloging records.



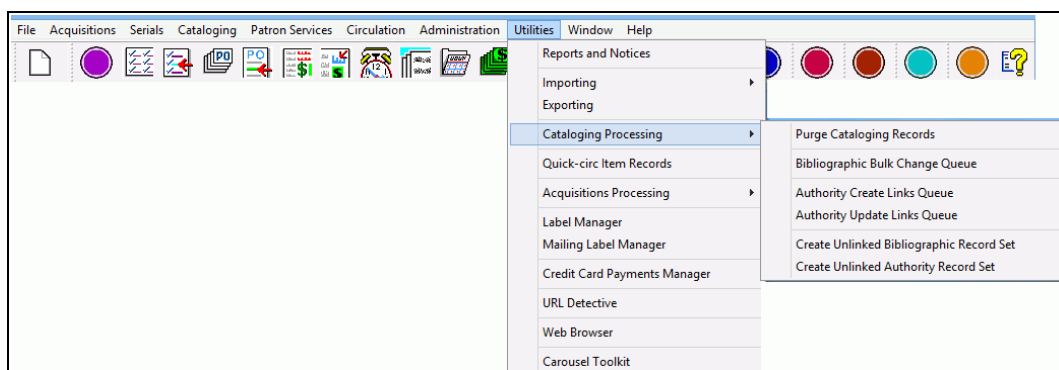
To create a new Cataloging record, select **File > New**, press **CTRL+N** or click . The **New** dialog box appears. If the record type has templates defined, you can select **Existing Template** and choose a template to create a new record. If you are creating several records of the same type using the same template, you can select an existing template, and then click **Make session default**. When you create the next record of the same type, the template you selected will be used. If the record type does not have templates defined, or you want to create a new record without a template, click **OK**. See [Methods for Adding New Records](#).

### Accessing Existing Cataloging Records

Select **Cataloging** and select a menu option. The Find Tool opens for the selected record type. See [Finding Cataloging Records](#).

### Start Cataloging Records Processing

Select **Utilities > Cataloging Processing**. The Cataloging Processing submenu displays the processing utilities, such as purging cataloging records and managing the bulk change queue. See [Cleaning Up the Catalog](#)



### Accessing the Carousel Toolkit

If your library has a license for this product, the Carousel Toolkit is available from the Polaris shortcut bar. For more information, see [Carousel Toolkit](#).

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## Cataloging Records

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

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

See also:

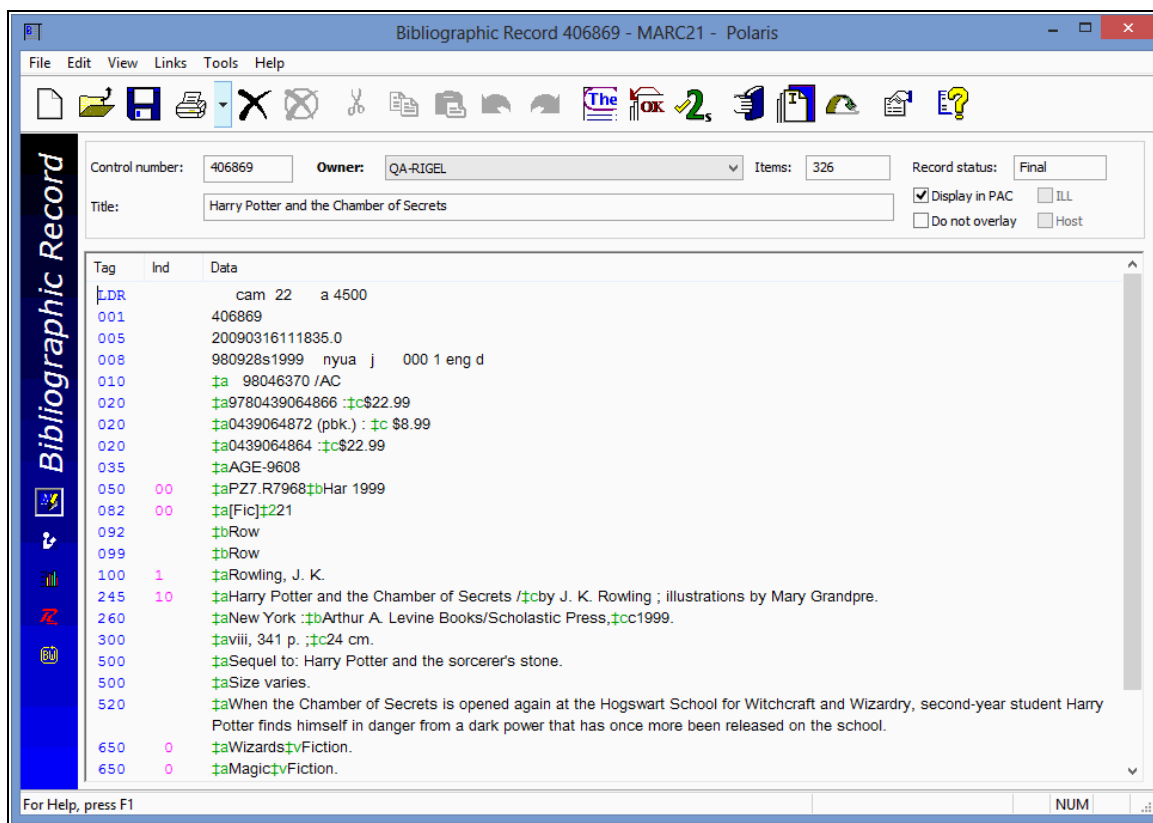
- [Bibliographic Records](#)
- [Item Records](#)
- [Authority Records](#)
- [Cataloging Templates](#)
- [Record Sets](#)
- [Promotion Records](#)
- [Community Records](#)

### **Bibliographic Records**

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

When you save a bibliographic record, it is checked for the correct MARC format and for possible duplicate records already in the catalog. When duplicate bibliographic records are found, you can automatically replace them. You can also replace records that were not identified as duplicates. In addition, headings are checked against authority records

to maintain consistent authority control. See [Checking Authority Headings](#). You can create linked item records from the Tools menu on the Bibliographic Record workform. See [Creating Item Records](#).



## Viewing Circulation Statistics and Linked Item Records

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

The usage statistics in the middle pane include the total number of items and circulations for all branches, and a list of the items and circulations by branch. The popularity of the title is displayed as **High**, **Medium**, or **Low**, based on the number of

circulations and holds. The titles with a popularity of High have circulated *and* had holds placed on the linked items within the last 120 days. The titles with a popularity of Medium have linked items that either circulated *or* had holds placed on them within the last 120 days. The titles that have a popularity ranking of Low have not had any linked items circulated or held within the last 120 days.

All the individual items linked to this bibliographic record are displayed in a list in the bottom pane of the window. You can do the following in the list of items:

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

**Example:**

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

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

LCCN: 99023982  
 ISBN: 9780439136365 (pbk) : \$8.99  
 9780439136358 : \$22.99  
 0439554826 (hc) : \$24.95  
 0439136369 (pbk) : \$8.99  
 0439136350 : \$19.95

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


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

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

Title	Assign...	Colle...	Me...	Sh...	Call...	V...	St...	Barcode	Last Ac...	R...	Cont...
Harry Potter ...								In 000430013...	10/1/2...	F...	204...
Harry Potter ...								In 000430022...	10/23/...	F...	203...
Harry Potter ...								Lost 000430003...	2/26/2...	F...	202...
Harry Potter ...								Lost 000430037...	11/3/2...	F...	205...
Harry Potter ...								Lost 000430046...	2/23/2...	F...	205...
Harry Potter ...								In 000430035...	8/29/2...	F...	209...
Harry Potter ...								Lost 000430061...	4/2/2007	F...	237...
Harry Potter ...								Lost 000430035...	3/13/2...	F...	205...
Harry Potter ...								In 000260012...	3/31/2...	F...	226...
Harry Potter ...								In 000260012...	7/30/2...	F...	225...
Harry Potter ...								In 000260003...	9/13/2...	F...	175...
Harry Potter ...								W... 000600941...	11/22/...	F...	133...
Harry Potter ...								W... 000600964...	8/2/2007	F...	279...
Harry Potter ...								W... 000600963...		F...	278...
Harry Potter ...								In 000600963...	10/2/2...	F...	253...
Harry Potter ...								Lost 000600951...	10/11/...	F...	134...
Harry Potter ...								In 000220016...	7/16/2...	F...	169...
Harry Potter ...								In 000380006...	8/30/2...	F...	139...
Harry Potter ...								In 000380015...	8/31/2...	F...	196...
Harry Potter ...								W... 000570044...	6/13/2005	F...	130...

Preview the Title Display in the PAC

#### Tips:

Click  to display the PAC view. A Polaris Administration profile can be set to always open the Bibliographic Record workform to the PAC view.

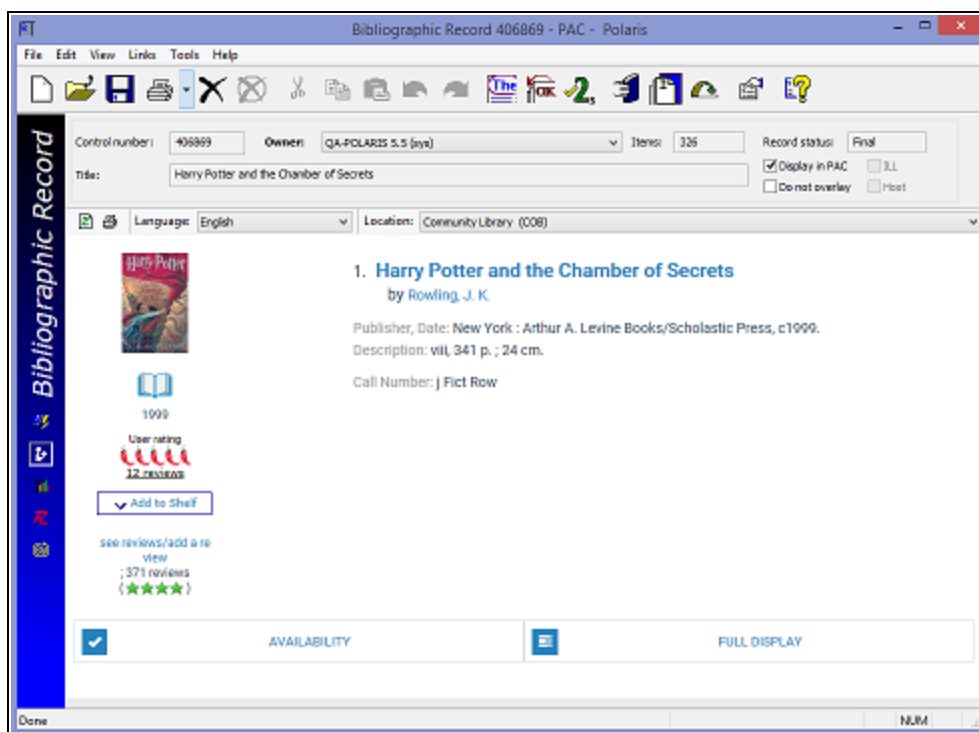
Select **View > PAC** to preview the title's bibliographic data display in Polaris PowerPAC. The view of the PAC from the Bibliographic Record is the same as it appears for your patrons, including all the customization you have set up for your PAC. Some actions that are possible from the PAC may not be possible from this view, such as searching for other records or actions that require the PAC user to log in. Links to external sites open in a new browser window. Web links are active from the PAC view if the record has an

856 tag. For more information on how Web links are displayed in the PAC, see [Web Links Display in the PAC](#).

If you have not resized the bibliographic record workform from its default size, the PAC view appears as it would on a tablet device. If you make the workform larger, the display may change to the way it would appear on a desktop computer. That is, action buttons such as **Availability** and **Full Display** may move from below the title metadata to the right side of the data. The example shows the display at the default workform size.

**Note:**

The title information that is displayed in the PAC can be customized in Polaris Administration. See the Public Access Administration PDF Guide, [Configuring the PowerPAC Title Display](#).

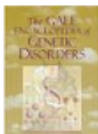


## Web Links Display in the PAC

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

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

856 40 [http://galenet.galegroup.com/servlet/eBooks?ste=22&docNum=CX340559999&q=nysl\\_ca\\_sa](http://galenet.galegroup.com/servlet/eBooks?ste=22&docNum=CX340559999&q=nysl_ca_sa)



2001

1. *The Gale encyclopedia of genetic disorders*

Published: 2001.

... *The Gale encyclopedia of genetic disorders* / Stacey L. Blachford, associate editor. ...

Publisher, Date: Detroit, MI : **Gale** Group, 2001.

often test entity Includes electronic book.

[Web Link](#)

Bibliography: Includes bibliographical references and index.

Description: 1345 p. : ill. ; 29 cm.

Available system-wide: 4 (of 5)

Call Number: R 616.042 Gal

Format (Primary): Book

☒ AVAILABILITY


☐ FULL DISPLAY

☐ PLACE REQUEST

[Add to My List](#)

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

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



2005

[Rate or review](#)

[Add to Shelf](#)

[see reviews/add a review](#)

38 reviews (★★★★★)

8. *The accidental tourist* [electronic resource]

by Tyler, Anne

... *The accidental tourist* [electronic resource] / by Anne Tyler. ...

Publisher, Date: Prince Frederick, MD : Recorded Books ; [Boulder, Colo. : Made available electronically by] NetLibrary, 2005.

Edition: Unabridged.

Web Site: Bibliographic record display [A downloadable audio book accessible through the World Wide Web; click for information](#)

Description: 1 sound file (15 hr., 15 min.) : digital, wma file.

Call Number: Online Resource

☒ AVAILABILITY

☐ FULL DISPLAY


☐ PLACE REQUEST

[Add to My List](#)

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

Web link display instead of the URL in the **856\$u**.

856 42 [Publisher description](http://www.loc.gov/catdir/description/mh031/2002035104.html)



2003

1. *Little League drills and strategies : imaginative practice drills to improve skills and attitude*  
by McIntosh, Ned.  
Published: c2003.

... *Little League drills and strategies : imaginative practice drills to improve skills and attitude* / Ned McIntosh and Rich ...  
Publisher, Date: Chicago : Contemporary Books, c2003.  
often test entity Includes index.

[Publisher description](#)  
Description: xii, 172 p. : ill. ; 24 cm.  
Series: *Little League baseball guide*.  
Available system-wide: 4 (of 4)  
Call Number: 796.357 McI  
Format (Primary): Book

☒ AVAILABILITY

☐ FULL DISPLAY

☐ PLACE REQUEST

[Add to My List](#)

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

856 40 <http://palm Springs.lib.overdrive.com/ContentDetails.htm?ID=E405A7FD-109F-4328-925E-B38AA26DD345> [Click here](#)



2012

User rating  
Rate or review

[Add to Shelf](#)

see reviews/add a review  
10 reviews  
(★★★★★)



1. *Darker after midnight [electronic resource] : a midnight breed novel*  
by Adrian, Lara.  
Publisher, Date: New York : Random House, 2012.  
Web Site: [Web Link Click here](#)  
Description: 1 online resource  
Series: Adrian, Lara. *Midnight breed series* ; bk. 10.

☐ FULL DISPLAY

## Item Records

An item record represents a unique physical or electronic copy of the bibliographic record title to which it is linked. Although information from the linked bibliographic record appears in the Item Record workform's header, item records do not contain




MARC 21 data. Several item records, each representing a separate item, may be linked to the same bibliographic record. Item records are not necessary for ebook titles if the ebook vendor does not integrate with Polaris Circulation.

**Note:**

If you select **File > New > Item Record** from the Polaris shortcut bar, the New Item Record Options dialog box appears. Use this dialog box to create multiple items linked to the same bibliographic record. See [Creating Item Records](#). If you are creating one record, you can click **OK** to go to the Item Record workflow.

**Tip:**

On the Bibliographic Record workflow, select **Links, Item Records**, press

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

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

**Item Record 2049753 - Circulation - Polaris**

File Edit View Links Tools Help

Barcode: 0004300346626 Record status: Final ☐ ILL ☐ EContent ☐ Non-circulating ☐ Display in PAC

Title: Harry Potter and the Chamber of Secrets **Bib control number:** 406869

Author: Rowling, J. K. Parent item: Item control number: 2049753

Call number: YA Fict Row Price: \$6.99 Issue control no.:

**Owner:** Amsterdam Free Library (br) Shelf location: (None)

**Assigned:** Amsterdam Free Library (AMS) Temporary location:

Collection: (None) Circulation status: Withdrawn

Due date: Current borrower:

Check-out date: Loaning branch:

Renewals taken: 0 Limit: 1 Held for patron:

Last renew date: Held at:

Original due date:

Last location Last use

Check-in at: Last borrower: 1004300008449

Date: Loaning branch: Amsterdam Free Library

Wks/User: Last circulated: 6/12/2007 4:50:19 PM

In-transit/Transferred

From:

Sent:

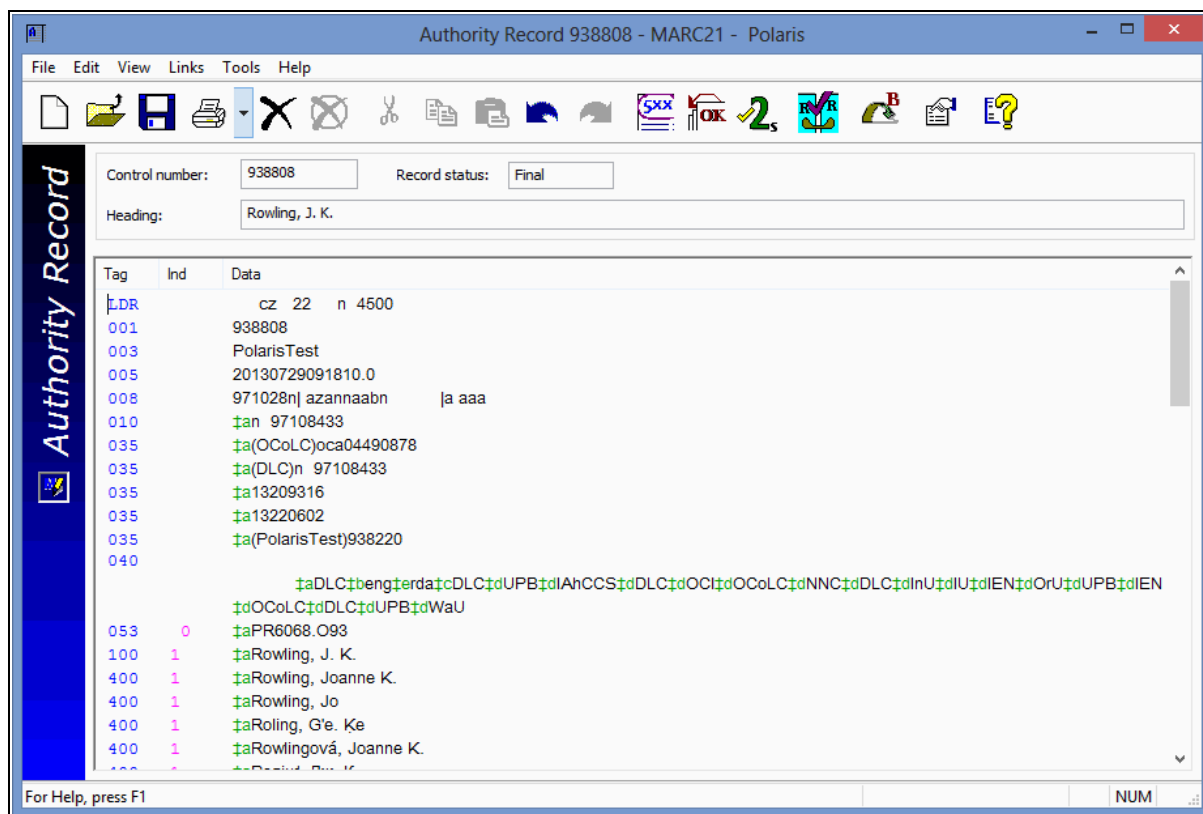
To:

Received:

For Help, press F1 NUM

## Authority Records

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



## Automatic Authority Control Using a Remote Database

If you have a subscription to Polaris ZMARC, you can find and save a new authority record from ZMARC when you save a bibliographic record and no matching authority record is found in the local database. The new authority record is saved and the bibliographic record is linked. See [ZMARC Remote Authority Control](#).

## Authorities Weekly Update Service

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

## Cataloging Templates

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

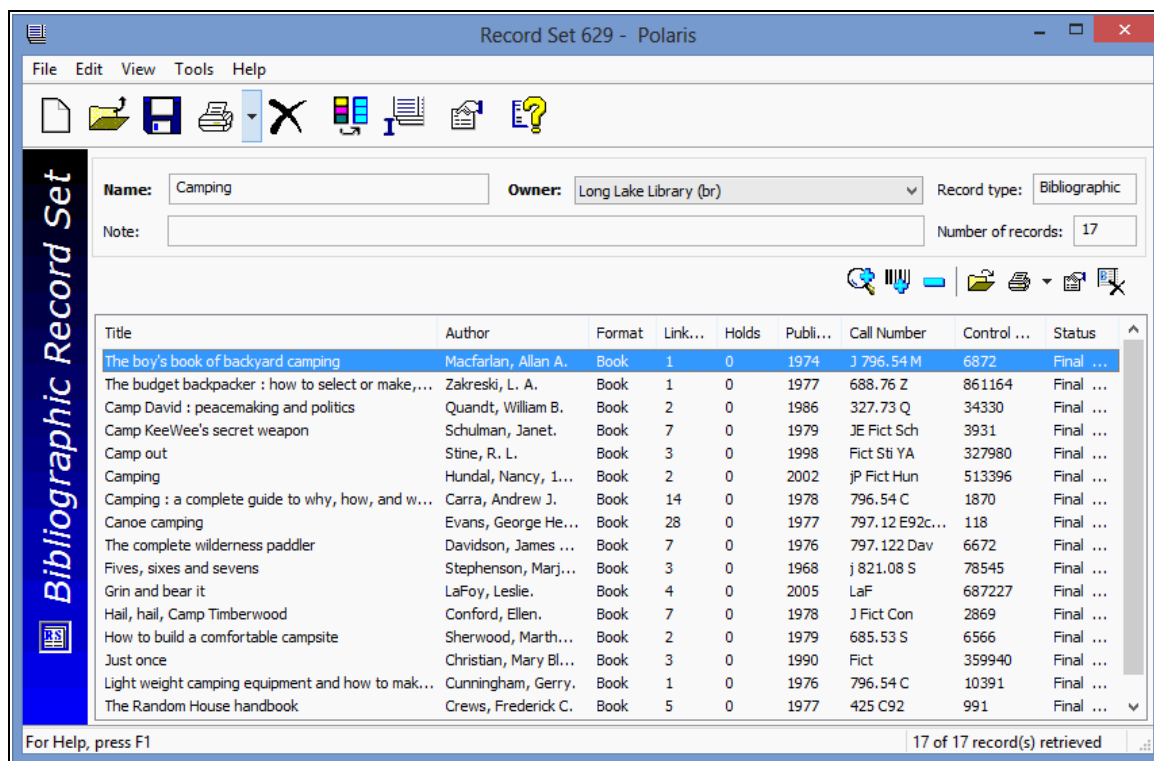
## Record Sets

**Tip:**

You can bulk change item records from lists, such as the Find Tool search results or linked list boxes, without putting the items in a record set. See [Changing Multiple Item Records](#).

Record sets group related records together so you can retrieve them in one step. Bibliographic and item records in a record set can be changed or processed in one step. For example, you can gather bibliographic records in a record set, and then use the bulk change process to make the same changes to all the records in one step. You can create record sets of bibliographic, item, or authority records, but you cannot have different types of records in one record set. See [Working With Multiple Records](#).

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



## Promotion Records

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

Promotion - 1017 - General - Polaris

File Edit View Links Help

Icon bar: New, Open, Save, Print, Cancel, Help

**Promotion**

Name: Art Events for Children Owner: QA-Photo 4,1 R2 (sys) Control: 1017

Schedule

Activation date: 3/25/2012 Expiration date: 3/1/2014

Content

Headline: Art Events for Children

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

Footline:

The record was saved succ. NUM OVR.

## Community Records

If your library has purchased Polaris Community Profiles, a separately licensed product, a staff member with the appropriate permissions can create or edit a community record using the Community Record workflow. After the community record is created, a staff member can designate a patron as a community representative who can update and modify the record from Polaris PowerPAC.

Community Record - 1586

File Edit View Links Tools Help

Organization name: Eastside Community Center

Control number: 1586

Owner: Community Library (Cobleskill) (br)

Record status: Final

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

Organization type: Organization or Club

☒ Display in PAC

Profile More info Events Social Services Subjects Organization Rep Preview Statistics

Logo

Logo URL: http://t1.gstatic.com/images?q=tbn:ANd9GcT48LzDCnky5RQqZn4KQ6Jx61L8\_hBGd9Y17Tvd4Vjv0mLSPuA

Logo description: Eastside Community Center

\* logo size will not exceed 100 pixels X 100 pixels

Primary address: Address: 826 Euclid Ave. City: Syracuse State / Province: NY Postal code: 13210 Phone number: 315-111-1111 TTY: Fax number: Contact person: Susan Sreytho E-mail address: ssreytho@niskot.org

For Help, press F1

## Methods for Adding New Records

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

Polaris also provides multiple methods for creating item records. You can quickly create multiple items for copies of the same title by entering information common to all the items, and then entering the branch and collection for each copy. If you are creating a single item record, you can enter the information on the Item Record workform. In either case, whether you are creating a single or multiple item records, you can use an item record template. In addition, item records can be created automatically by importing bibliographic records with embedded holdings.

See also:

- [Original Cataloging](#)
- [Importing Records](#)

- [Copying MARC Records from Other Sources](#)
- [Creating Preliminary Bib Records in Acquisitions](#)
- [Creating Multiple Items for a Single Title](#)
- [Automatic Remote Authority Control](#)
- [Creating Digital-Collection Bibliographic Records in Polaris Fusion](#)

## Original Cataloging

Polaris has several tools to make original cataloging faster and easier. With the MARC Editor, you can select data from lists, check the MARC format, enter international characters, and use macros to automatically enter standard information. In addition, you can use templates that have default cataloging data already filled in. For more information, see [Creating MARC Records](#).

## Importing Records

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

## Copying MARC Records from Other Sources

You can modify an existing record in Polaris, or you can display and copy bibliographic and authority records from other sources. Such sources may be other libraries, suppliers, or cataloging services that make their catalog records available at no cost or for a fee. If you subscribe to ZMARC, you can search for and save bibliographic or authority records from the ZMARC database. See [Copying MARC records](#).

## Creating Preliminary Bib Records in Acquisitions

You can create brief bibliographic records by typing the bibliographic information in a purchase order line item, or by pulling in title information from a supplier's database using Titles to Go. See the Acquisitions PDF Guide, Ordering topic.



## Creating Multiple Items for a Single Title

You can create multiple item records linked to the same bibliographic record using the New Item Record Options dialog box where you specify the distribution information for each item. See [Create multiple item records for a single title](#).

## Automatic Remote Authority Control

If your library has a subscription to a remote database of authority records, the remote database is automatically searched when no matching authority record is found. The new authority record is saved in the database and linked to the new bibliographic records. For more information, see the Cataloging Administration PDF Guide, Managing Authority Control..

## Creating Digital-Collection Bibliographic Records in Polaris Fusion

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

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## Finding Cataloging Records

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

**Important:**

Before you can search remote databases from the Polaris Find Tool, your Polaris administrator must set up the remote databases as targets.

When you do a search, the records are displayed in the results list, or if you selected **Count Only**, a count of the matching records is displayed. You can select a **Sort by** option to sort the records so that they display in a specified order. From the results list, you can open the record in the appropriate workform, or you can right-click the record and perform other actions from the context menu. The results list can be sorted and printed to create a quick report. You can also send the records to a record set from

the Find Tool, with or without displaying them in the results list. For basic information about using the Find Tool, see [Finding Polaris Records](#).

See also:

- [Searching Tips](#)
- [Shortcut Keys to Find Bibliographic and Item Records](#)
- [Viewing Serial Item Records in the Polaris Find Tool](#)
- [Access Points for Cataloging Records](#)
- [Searching for Items or Bib Records by RFID Tag](#)
- [Sorting the Results List](#)
- [Automatic Suggestions for Keyword & Phrase Searches](#)
- [Linking Between Records](#)
- [Find Cataloging Records in Your Library's Database](#)
- [Preview Bibliographic Records from the Find Tool](#)

## Searching Tips

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

### Note:

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

## Ignore Initial Articles in Titles

If the **Use Initial Articles** checkbox is checked, the initial article in a title is ignored or “stripped out” if that article is defined in the Initial Articles table in Polaris Administration. You can clear the **Use Initial Articles Table** checkbox to help find records where the non-filing indicators are set improperly.

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

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

### **Shortcut Keys to Find Bibliographic and Item Records**

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

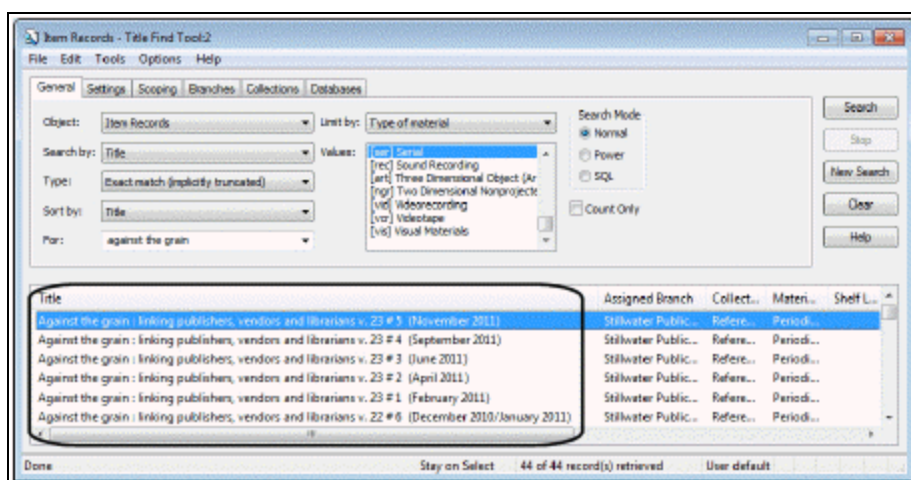
- Bibliographic Records - **F12**
- Item Records - **Ctrl+Alt+F9**

For a list of other shortcut keys, see [Cataloging Shortcut Keys](#).

### **Viewing Serial Item Records in the Polaris Find Tool**

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

**Title** column border right to expand it. The serial item's designation is displayed at the end of the title.



## Access Points for Cataloging Records

### Tip:

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

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

You can customize the Find Tool with your preference for searching by setting up your search for a specific type of record, and then selecting **Options > Save as User Default**. See [Customize the Find Tool by user](#).


## Searching for Items or Bib Records by RFID Tag

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

## Sorting the Results List

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

## Automatic Suggestions for Keyword & Phrase Searches

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

## Linking Between Records

Certain types of cataloging records are linked in Polaris. For example, item records are always linked to a bibliographic record. You can easily navigate from a record to its linked records by selecting **Links** from a workform menu, or from the right-click menu in a list of records.

## Find Cataloging Records in Your Library's Database

To find and list bibliographic records, item records, authority records, templates, or record sets in your local database:

### Note:

The available tabs in the Find Tool depend on the type of record selected.

### Tip:

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

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

The Polaris Find Tool appears.

**Tip:**

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

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

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

**Tip:**

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

4. Select the search type in the **Type** box:
  - To find anything that begins with the contents of the **For** box, select **Exact match (implicitly truncated)**.
  - To find anything that has exactly the contents of the **For** box, select **Exact match (explicitly truncated)**.
  - To open an index that begins with the contents of the **For** box, select **Browse**.
  - To find any occurrence of the contents in the **For** box, select **Keyword search**.
  - To find the entries in the **For** box adjacent to each other in the data, and in order, select **Phrase search**.
5. To sort the search results, select an option in the **Sort by** box. Sort is not available in Browse searches.

**Tip:**

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

6. Type your search text in the **For** box.
7. To limit your search results, select an option in the **Limit by** box, and either select a value or type it in the **Value** box. Some **Limit by** options have pre-set selections in the **Value** box. For example, if you select **Language**, a list of languages appears in the **Value** box. If you select **Author**, you type the author's name in the **Value** box.

8. If you would typically search for this type of record using the same search criteria, select **Options > User Default** to save your search options. To set the option back to the system default, select **Options > Revert to System Default**.

**Note:**

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

**Tip:**

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

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

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

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

## Related Information

- Setting limits on the number of records returned - [Set Find Tool Results Limits](#)
- Searching databases other than your library's database - [Searching Remote Databases](#)
- Searching using an SQL query - [Setting Up SQL Searches](#)
- Using the Power Search option - [Doing Power Searches](#)
- Using scoping to narrow your search - [Scoping Searches for Bibs and Items](#)

**Preview Bibliographic Records from the Find Tool**

To preview bibliographic records from the Find Tool results list without opening the records:

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

The Find Tool appears.

**Tip:**

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

2. Search for the bibliographic record or records. See [Find cataloging records in your library's database](#).

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

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

**Tip:**

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

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

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

## Finding Polaris Records

You use the Polaris Find Tool to search for existing records in your local database and to perform actions with these records without having to open them. You can use the Find Tool to do a basic search, or you can use various options to focus your search more precisely. If your library has established connections to other remote databases, you can also use the Polaris Find Tool to search these databases.

**Note:**

For information about searching for Polaris Administration records, such as libraries, branches, staff members or workstations, see the *Polaris Administration Guide*, Find an administration record. For information about searching for permissions, see the *Polaris Administration Guide*, Finding Permissions.

See also:

- [Polaris Find Tool Overview](#)
- [Doing a Basic Search](#)
- [Doing a Browse Search](#)
- [Doing a Keyword Search](#)



- [Doing a Phrase Search](#)
- [Doing Power Searches](#)
- [Setting Up SQL Searches](#)
- [Scoping Searches for Bibs and Items](#)
- [Searching Branches](#)
- [Searching Collections](#)
- [Searching Remote Databases](#)

## Polaris Find Tool Overview

With over 600 access points as well as relevancy ranking, sorting, limiting, proximity searching, CCL queries, scoping, SQL searches, and automatic suggestions, the Polaris Find Tool provides search options for all types of tasks. You can save user defaults for the types of searches you do most often.

The “count only” option gives you a simple count, such as the number of DVDs in a certain collection, without returning the search result list. You can add records to a record set from a “count only” search without returning the records in the results list, or you can select the records from the results list and put them in a record set.

Your library can set up Z39.50 targets for external databases that you can search directly from the Find Tool - allowing you to save new records to the local database in one step.

If you have the required permissions, you can create and save a SQL search in the Polaris Find Tool. SQL searches are used for data retrieval only; data cannot be manipulated through the Find Tool. Once a SQL query is saved, other staff members can use the saved search even if they do not have permission to create and save one.

In addition to the many methods and access points available for searching in the Find Tool, you can perform tasks on single or multiple records listed in search results, provided you have the required permissions. If you select a single record, you can select **Links** to access the linked records. From the bibliographic search results, you can select **Preview** to see the titles’ circulation statistics. Other options include checking in multiple serial issues and bulk-changing multiple item records.

You can also use the Polaris Find Tool to create quick reports from the search results list. For example, if the library needs to see a list of items in a certain collection that have not circulated in the last three years, you can create a report in the Find Tool by printing the results list.

See also:

- [Find Tool Tab Display](#)
- [Set Find Tool results limits](#)
- [Get a count of records without displaying them](#)
- [Customize the Find Tool by user](#)

#### Find Tool Tab Display

When you search for bibliographic or item records, all the Find Tool tabs are displayed: **General, Settings, Scoping, Branches, Collections, and Databases.**

All tabs are also displayed when you search for an object that has bibliographic or item records in the **Object** list. For example, when you search for Community Records, Bibliographic Records or Item Records can be selected in the **Object** list.

However, if the tab cannot be used in the context of the search, a message appears on the tab. For example, if you are searching for a bibliographic record using a Browse search type, and you select the Scoping tab, the message **Scoping is not applicable in this context** appears.

For most other records (objects), such as Acquisitions, Serials, and Patron records, only the General and Settings tabs are displayed.

#### Set Find Tool Results Limits

The greater the number of records retrieved and displayed in the results list, the slower the retrieval time. To ensure optimal performance, a default retrieval limit is set in Polaris Administration, but you can change the limit for a specific search. You can also increase the amount of time the system will search before timing out. For information on Find Tool error messages and how you can resolve them, see [Resolving Find Tool Search Issues](#).

#### Note:

For more information on the Find Tool profiles in Polaris Administration, see the *Polaris Administration Guide*, Setting Find Tool Profiles.

To specify how you want retrieval results to be handled:

1. Open the Find Tool.
2. Create your search query, but do not click **Search** yet.
3. Select the **Settings** tab.

#### Tip:

These settings remain in effect until you click **New search** or close the

Find Tool. Changing the settings here does not affect the default settings in Polaris Administration. You can restore the default settings by clicking **Reset to Default**.

The Settings tab appears.

4. If you want to create a record set from the results, check **Send Results to a New Record Set**. Search the Polaris help for "Create a record set from all the Find Tool results."
5. If you want to change the default settings, do the following:

**Tip:**

If the number of records returned in a search is equal to the retrieval limit, increase the retrieval limit to make sure all records that meet your search criteria are retrieved.

- Type a different number to change the number of records that are retrieved in the **Retrieval Limit** box. The default limit is set in Polaris Administration with the profile **Find Tool: Default number of records to return in a result set**. See the *Polaris Administration Guide*, Set Find Tool defaults. To set the retrieval limit back to the default, click **Reset to Default**.
- Type a different number in the **Search Timeout (sec)** to increase or decrease the amount of time (in seconds) that the system will search before timing out. The default is 30 seconds.

**Tip:**

If you want Polaris to sort records, you must select a **Sort by** option on the Find Tool's General page.

- Check or clear the **Use Initial Articles Table** checkbox. If this box is checked, the initial article in a title is ignored if that article is defined in the Initial Articles table (see the *Polaris Administration Guide*, Defining Leading Articles).

#### Get a Count of Records Without Displaying Them

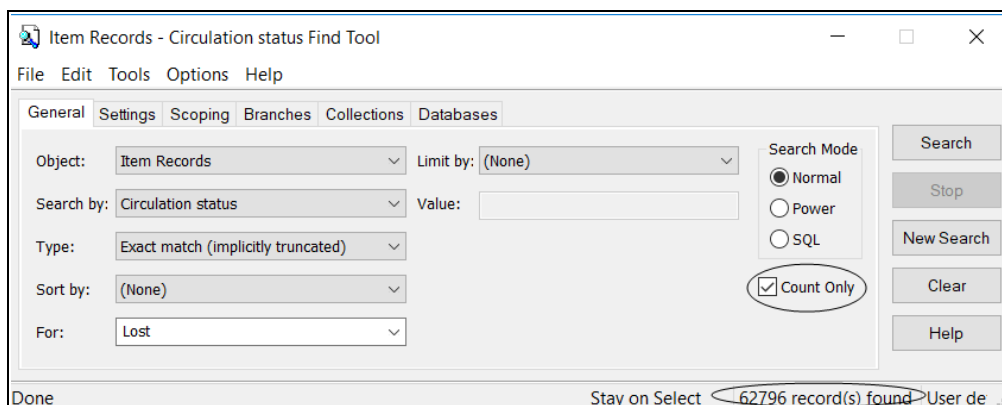
You can use the **Count only** option with any type of search, including an SQL search. To search for specific types of records and get a count of the records without displaying them in a list:

1. Enter your search criteria on the Find Tool- General tab.
2. Select **Count only**.

**Tip:**

If you want to add the records to a record set, go to the **Settings** tab and enter the information for the record set before clicking **Search**.

3. Click **Search**. A count of the records appears in the status line of the Find Tool.

**Note:**

When you select **Count only**, the **Retrieval Limit** on the **Settings** tab is ignored so that the count includes all records that meet the selected criteria, but the **Search timeout** setting is still in effect.

**Customize the Find Tool**

You can customize the Find Tool to [save default general search criteria](#) and, for bibliographic record searches, to [save default remote search databases](#).

Your custom default search settings are associated with your user account and are used each time you sign in with your user ID. You can change your default search settings at any time.

**Save Default General Search Criteria**

You can set the Find Tool to default to the same selections in the **Search by**, **Type**, **Sort by**, and **Limit by** boxes each time you search for the same type of record.

Values that can be selected from drop-down lists are also saved, but free-text values are not. For example, if you select **Genre** in the **Search by** or **Limit by** box, enter a free-text value, and select **Save as User Default** > **Genre** will be retained, but not the free-text value.

To customize the Find Tool:

1. Open the Find Tool.
2. Select the record type you want to find.
3. Select an option from the list in the **Search by** box.
4. If you want the search results sorted the same way every time you search for that type of record, select an option in the **Sort by** box.
5. If you want the search results limited in the same way every time you search for that type of record, select an option in the **Limit by** box, and select a value in the **Limit by values** box.

**Note:**

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

6. Select **Options > Save as User Default** from the Find Tool menu bar.

**Tip:**

If you save a Power search as the user default, the Find Tool will open to the Power Search tab the next time you search for the same type of record, but the search criteria are not saved.

The Find Tool is customized to search for the record by the option you selected in the **Search by** box. To set the Search by option back to the default for the record type, select **Revert to System Default**.

**Note:**

If you set user defaults for the bibliographic or item record Find Tool, these defaults are in effect in the Find Tool shortcuts (**F12** for bibs and **Ctrl+Alt+F9** for items).

## Save Default Remote Search Databases

**Note:**

Default search databases can only be saved for bibliographic record searches.

To save default search databases:

1. Open the Find Tool for bibliographic records and navigate to the **Databases** tab.
2. Select the remote databases you would like to search.
3. Select **Options > Save as User Default**.

Polaris saves your preferred remote search databases. When you open the Find Tool for bibliographic records in the future, your preferred search databases are already selected.

To clear saved default search databases:

1. Open the Find Tool for bibliographic records, and navigate to the **Databases** tab.
2. **Select Options > Revert to System Default**.

#### Resolving Find Tool Search Issues

If you enter the search criteria and the results do not appear or are fewer than expected, try the following:

- On the **Settings** tab, increase the number in the **Retrieval Limit** box. This resets the retrieval limit for the current search only. If you select **New Search**, the retrieval limit reverts to the default set in Polaris Administration.
- Select the **Count only** checkbox with the same search criteria selected. This will give you the actual count of all the records that meet your search criteria, regardless of the number in the **Retrieval Limit** box.
- On the **Settings** tab, increase the number in the **Search Timeout (sec)** box.
- If you enter the search criteria, and you encounter a CCL Syntax error that states, **Invalid Search. Please verify the query and then resubmit the search.**, you can enter the primary search criteria on the General tab and then use the Scoping tab to refine the search. For example, the **Invalid Search** message appears if you select **Type of material** in the **Limit by** box and select all values except for **Book**. In this case, the **Limit by** option is being used to exclude the **Book** type of material, but include all other values.
- Instead of using the **Limit by** option to exclude a specific type of material, you could enter the primary search criteria, on the **General** tab, then go to the **Scoping** tab to exclude the book format. The search results display the bibliographic records with that title in every format except book.

## Doing a Basic Search

The Find Tool appears when you select a subsystem and record type from the Polaris Shortcut Bar, or when you click **Find** on workforms and dialog boxes. You can also press **F12** from anywhere in the Polaris staff client application to open the Find Tool and search for bibliographic records, or **Ctrl+Alt+F9** to search for item records.

When the Find Tool opens, select the type of record to search for (object), the access point to search by, and the type of search. Then type the word or phrase to use for the search. In addition, you can use various options on the Find Tool to narrow your search results, specify how to sort the results, or get a simple count of the number of records.

Depending on the type of record, you can display the records in the Find Tool results list and add them to a record set, or select **Count only** and add them all to a record set without having to display them in a list. If you want to add specific records to a record set, you can display them in the results list, right-click the selected records, and select **Add to Record Set** from the context menu.

If you usually search for records using the same criteria, you can save the search options as your user default. For example, if you usually search for bibliographic records by title and limit the search by material type, you can set this up as your default. You can also specify sorting options as part of your user default. Each time you search for bibliographic records, the options are set automatically. For more information, see [Customize the Find Tool by user](#).

You can have multiple Find Tools open at once. The title bar of each Find Tool displays the object and access point selected for that search. For example, if you are searching for an item record by barcode, the title bar displays **Item Records - Barcode Find Tool**.

### Important:

Your Polaris administrator may set the Find Tool so that search results are filtered according to your staff member permissions and those of the workstation you are using. In Polaris Administration, if the Staff Client profile **Find Tool: Filter search results by permission** is set to **Yes**, you will see only the records for which you have **Access** permission. If it is set to **No**, you can see records in the search results even if you do not have permission to access (open) them.

See also:

- [Set Up a Search](#)
- [Search for a record](#)

### Set Up a Search

A search query is a structured request for database information. The simplest query uses default settings, and you simply type a word or phrase to describe the records. This word or phrase might be, for example, a full or partial title, the last name of an author, a patron's name, or a purchase order number.

A standard search query on the Find Tool requires the following four criteria:

- Record (**Object**)
- Access point (**Search by**)
- Type of search (**Type**)
- Search string (**For**)

You can also narrow your search by selecting an option in the **Limit by** box, and then a value in the **Value** box. To sort the results before they are returned, select an option in the **Sort by** box. The options in the **Limit by** and **Sort by** boxes depend on the type of record you selected in the **Object** box.

#### Record (Object)

The record types that you can select in the **Object** box depend on the menu option, workflow, or field where you accessed the Find Tool. For example, in a Purchase Order workflow, if you click **Find** in the Supplier field, the Find Tool opens with **Supplier** in the **Object** box. When you open the Find Tool from the **Funds** field, **Fund** is selected in the **Object** box.

#### Access Point (Search by)

You select the access point in the **Search by** box. The list of access points depends on the record type you selected in the **Object** box. For example, access points for bibliographic records include **Title**, **Author**, and **Subject** (among others). You can set your own default **Search by** access point for each record type. Then, whenever you log on with your user ID and search for a record using the Find Tool, the **Search by** option is automatically set for the record type. See [Customize the Find Tool by user](#). You can set the option back to the system default at any time.

#### Search Type

The available search types depend on your selections in the **Object** box and the **Search by** box.



**Tip:**

When you do a title search, Polaris checks fields in the bibliographic record indexed for title searching, such as the 245, 246, 440, and 740 tags.

- Exact match (implicitly truncated) - Displays all the records beginning with the letters or numbers in the **For** box. No asterisk is needed after the term in this type of search. However, you may want to enter an asterisk before the search term. See [Using Wildcard Characters in Searches](#).

**Example:**

Type **energy** in the **For** box for a bibliographic title search. The results list includes all titles that begin with energy.

- Exact match (explicitly truncated) - Displays only the records that exactly match the letters or numbers in the **For** box. If you use an asterisk, the Results list displays the same records as those of an implicitly truncated search.

**Example:**

Type **energy** in the **For** box for a bibliographic title search. The results list includes only items titled energy.

If you type **energy\***, the results are the same as for an implicit search of energy.

- Browse - Display the specified index headings, beginning with entries that start with text similar to the text in the **For** box. For example, a browse title search for trains displays the portion of the title index containing the first title that starts with trains. Browse searching is Unicode-compliant, so you can enter diacritics or special characters and the headings display that begin with the characters. See [Doing a Browse Search](#).
- Keyword search - Finds records that include the exact search term or terms you input, in any order. There is an implied and between multiple words. For example, a keyword title search for trains displays a list of items that have the word trains anywhere in the title. See [Doing a Keyword Search](#).
- Phrase search - A special kind of keyword search for multiple words in the exact order in which you entered them. See [Doing a Phrase Search](#).

Sort By

**Tip:**

The **Sort by** option is not available for browse searching.

If you want search results to display in a specific order, you can select an option in the **Sort by** box. The sort option can be part of your user default settings when you are searching for a specific type of record. For information on setting a user default search, see [Customize the Find Tool by user](#).

The available options in the **Sort by** box depend on the record. For example, if you are searching for a bibliographic record, you can select from the following sort options:

- Author
- Author, the Publication Date
- Author, then Title
- Call Number
- Call Number, then Author
- Call Number, then Publication Date
- Call Number, then Title
- Control Number
- Most Popular
- Publication Date
- Publication Date, then Author
- Publication Date, then Relevance
- Publication Date, then Title
- Relevance
- Title
- Title, then Author
- Title, then Author, then Type of Material
- Title, then Publication Date
- Title, then Type of Material
- Type of Material

#### Search String (For)

You specify the search string in the **For** box by typing one or more characters. Polaris ignores letter case, multiple spaces, and all punctuation (except quotation marks) entered in the **For** box. The search does consider special characters and diacritics. Consider the following when entering text in the **For** box:

## Initial articles

If the **Use Initial Articles Table** checkbox is checked on the Settings tab, the initial article in a title is ignored or “stripped out” if that article is defined in the Initial Articles table in Polaris Administration (see the Polaris Administration PDF Guide, Defining Leading Articles.).

**Example:**

Searching for *The Great Gatsby* yields the same results as searching for *Great Gatsby*.

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

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

## Reusing a search string

All the search strings you type in the **For** box are retained during a Polaris session. To use a search string for another search, select the string in the **For** box.

Using an implicitly truncated search - A title search for “bulletin” could be done using the following string: **bulle**.

**Note:**

If you can use an ampersand (&) in a search string for phrase and keyword searching, it is equivalent to the word **and**. The ampersand and the word **and** are not interchangeable for exact match or browse searching.

## Using Wildcard Characters in Searches

Wildcard characters are the special characters asterisk \* or question mark ?, which you can use in a search to represent the rest of the word in keyword and exact match - implicitly truncated searches. A wildcard character is not necessary after the search term in an exact match - implicitly truncated search because the truncation is implied. However, you may want to enter an asterisk before your search term if you are not sure if something comes before the search term.

**Examples:**

**Keyword searching** - The entry **King\*** for a keyword author search yields results such as King, Kingsley, and Kingford. The entry **\*King\*** for a keyword author search yields results such as *Talking Heads*, *Dykinga*, and *Polkinghorne*.

**Exact match (implicitly truncated)** - The entry **material** for a selection list line item notes search gets no search results. However **\*material** finds the selection list line item that has the note: **This is printed music, but the material type is set to 28 Youth**. The search finds the results because it looks for **material** anywhere in the note.

## Limit By

**Tip:**

The **Limit by** option is not available in Browse searches.

You can limit your search to narrow the results. For example, you can search for a title and limit the format to **DVD**. Some **Limit by** options have pre-set selections in the **Value** box. For example, if you select **Language**, a list of languages appears in the **Value** box. But, if you select **Author**, you type the author's name in the **Value** box. You must be precise when you enter free text in the **Value** box because there is no implicit truncation. When you enter only a part of the value you want to limit by, you must also enter an asterisk.

**Example:**

If you are searching for item records by title, and you limit by **Current borrower**, type the patron's name in the **Value** box in these formats:

**last name\***

**last name, first name\***

**last name, first name middle name**

You must include the comma and the wildcard character as shown. The last name alone will not work in the **Value** box.

The specific languages listed in the **Value** box are set in the **MARC Language Scoping Display** policy table. This list is used if the Staff Client profile **Find tool: Use language scoping display** is set to **Yes** in Polaris Administration. See the Polaris Administration PDF Guide, Setting Language Display.

#### Search for a Record

To do a simple search for records:

**Note:**

If you encounter any issues with your search, see [Resolving Find Tool Search Issues](#).

1. Open the Find Tool using one of these methods:
  - Select a menu option from the Polaris Shortcut Bar.
  - Click **Find** on a workform.
  - If you are searching for a bibliographic record, press **F12**.

The General tabbed page of the Find Tool appears.
2. If the object selected is not what you wanted to search for, select the record type to search for in the **Object** box.

**Tip:**

To quickly locate an item in a list box, type the first letter. For example, to search by genre, open the **Search by** list and press **G**.

3. Select the access point to search by in the **Search by** box.

**Note:**

If you select a date option in the **Search by** box (for example, you are searching for serial issues and select **Expected arrival date**), the Find Tool displays date range boxes where you select the beginning and ending dates from a calendar.

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

**Tip:**

If you have selected an access point and a search type, but then decide to change the access point, the search type is retained. For example, if the search type is **Keyword** and the access point is **Author**, you can switch the access point to **Title** and the search type will be retained because both access points can be used with keyword searching.

5. If you want to sort the results before they appear in the list, select an option in the **Sort by** box.
6. Type a search string in the **For** box.

If you have entered a search string but decide to search for a different object, you can switch the object while retaining the same search string.

**Example:**

You search for bibliographic records by author and then you want to search for item records with the same author. You can select **Item Records** in the **Object** box and the author's name remains in the **For** box.

7. If you want to narrow your search, select an option in the **Limit by** box, and select or type a value in the **Value** box.

**Note:**

The **Value** box lists options for some **Limit by** settings, while other settings require a text entry in the **Value** box. For example, if you select **Language** in the **Limit by** box, the **Value** box contains a list of languages. If you select **Author** in the **Limit by** box, you type the author's name in the **Value** box. If you enter a portion of a Limit by value, you must enter an asterisk. For example, select **Author** in the **Limit by** box and enter **Kin\*** in the **Value** box to display works by authors named King, Kings, Kingsley, and others. See [Limit By](#).

**Tip:**

The results list automatically clears when you start another search. You can also click **New Search** to close the results list, return the Find Tool to its default settings, and clear the **For** box.

8. Click **Search** or press **ENTER**. If you want to cancel the search, click **Stop** or start a new search with a different query. The results list appears in the Find Tool window.

**Important:**

If you see the message **Could not connect to the Z3950 search engine**, try increasing the search timeout limit. Select the **Settings** tab, and type a larger number in the **Search Timeout (sec.)** box. For example, if the timeout is set to 30 seconds, increase it to 60 seconds. The search process continues for 60 seconds, if necessary.

**Tip:**

Check the status line to see if all results are displayed. If not, you can press **CTRL+SHIFT+A** to return all results.  
To sort the list after the results appear, you can click on the column headers.

9. To work with a record in the results list, do one of the following actions:
  - Double-click a line item to open the record in a workform (search Polaris help for "Using Polaris Workforms").
  - Right-click a line item, and select an option from the context menu. The specific context menu options depend on the selected record type. Search the Polaris help for "Use the context menu in the Find Tool results list."

## Related Information

- [Customize the Find Tool by user](#)
- [Doing a Browse Search](#)
- [Doing a Keyword Search](#)
- [Doing a Phrase Search](#)
- [Doing Power Searches](#)

- [Setting Up SQL Searches](#)
- [Scoping Searches for Bibs and Items](#)

## Doing a Browse Search

You can select **Browse** as a search type only when you are searching for bibliographic records by **Author**, **Call number**, **Series**, **Subject**, or **Title**. When you browse by author, series, or subject, the index opens to the authorized heading that begins with what you entered in the **For** box. You select the heading to display the titles associated with it. When you browse by title, the results list displays the portion of the alphabetical title index that begins with the text you typed. When you browse by call number, the portion of the catalog that begins with the call number is displayed. Browse searching includes Unicode support for searching by author, subject, series, and title. You can enter diacritics and other characters when browse searching.

### Note:

The **Limit by**, **Count only**, **Sort by** and **Add to Record Set** options do not apply to browse searches.

See also:

- [Browse by Author, Series, or Subject](#)
- [Browse by Call Number or Title](#)

### Browse by Author, Series, or Subject

To browse search for bibliographic records by author, series, or subject authorized headings:

### Note:

You cannot browse by author, series, or subject when using the Find Tool from within a workform.

1. On the Find Tool, General tabbed page, select **Bibliographic Records** in the **Object** box.
2. Select **Author**, **Series**, or **Subject** in the **Search by** box.
3. Select **Browse** in the **Type** box.

### Tip:

Type the name of the author using the format: *last name first*



*name*. For example, type William Shakespeare as **Shakespeare William**.

4. Type the name of the author, the series name, or the subject word in the **For** box.

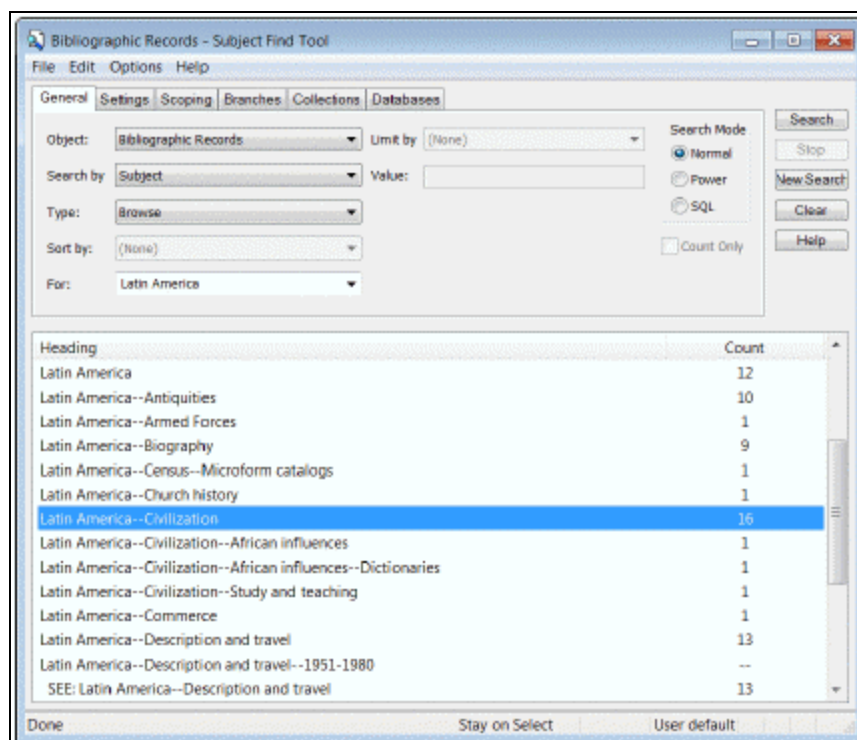
**Note:**

You do not need to type the entire index heading.

5. Click **Search** to begin searching. Author, subject, or series headings appear in the results list. The numbers in the **Count** column specify how many records are associated with that heading.

**Note:**

You can select a See or See A/so cross reference.



6. Double-click a heading. The Heading dialog box displays the titles associated with the heading.

Subject Heading: Latin America--Civilization.

Title	Author	Format	Link...	Public...
Hispanic America and its civilizations : Spanish Americans and Anglo-Americans	Urbanisi, Edmund Stefan.	Book	1	1978
Latin America : the development of its civilization.	Bailey, Helen Miller.	Book	1	1960
Latin America : the development of its civilization	Bailey, Helen Miller.	Book	1	1975
A concise history of Latin American culture.	Henriquez Ureña, Pedro, 1884-1945.	Book	1	1965
A cultural history of Spanish America : from conquest to independence.	Picón-Salas, Meriemo, 1901-1965.	Book	2	1962
Ten keys to Latin America.	Tannenbaum, Frank, 1893-1969.	Book	2	1962
Literary currents in Hispanic America.	Henriquez Ureña, Pedro, 1884-1945.	Book	1	1945
The people and politics of Latin America.	Williams, Mary Wilhelmine, 1878-1944.	Book	1	1935
The buried mirror : reflections on Spain and the New World.	Fuentes, Carlos.	Book	3	1992
A century of Latin American thought	Crawford, William Rex, 1898-	Book	1	1944
The Virgin and the bull [videorecording]		Videotape	1	1991
Conflict of the gods [videorecording]		Videotape	1	1991
The Age of gold [videorecording]		Videotape	1	1991
The Price of freedom [videorecording]		Videotape	1	1991
Unfinished business [videorecording]		Videotape	1	1991
The decline and fall of the lettered city : Latin America in the Cold War	Franco, Jean.	Book	1	2002

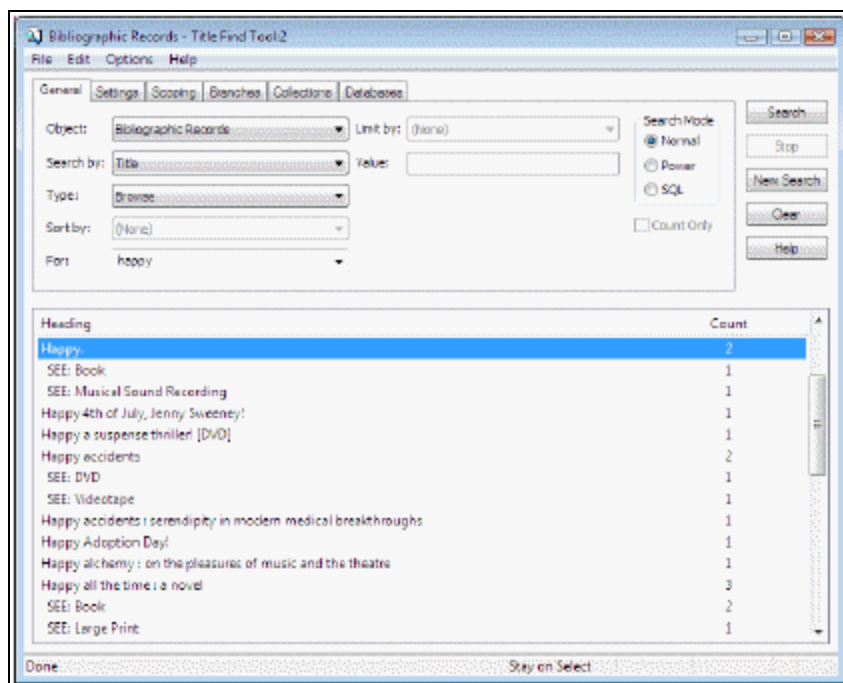
Done 16 of 16 recs

7. If you want to open the record, double-click it in the list. The Bibliographic Record workform opens for the title you selected.

#### Browse by Call Number or Title

To browse search for bibliographic records by bib call number or title:

1. On the Find Tool, General tabbed page, select **Bibliographic Records** in the **Object** box.
2. Select **Call number** or **Title** in the **Search by** box.
3. Select **Browse** in the **Type** box.
4. Type the call number or title in the **For** box. You do not need to type the entire title or call number.
5. Click **Search**. The results list displays the portion of the title or call number index that begins with your search text.



- Right-click a title line item, and select **Open** from the context menu to display the record in the Bibliographic Record workform.

## Doing a Keyword Search

When you select a record type in the Object box and an access point in the Search by box, Keyword search appears in the Type list if available for this combination of record type and access point.

For some types of records, keyword searching is available because the selected Search by access point actually searches in linked records. For example, when you search by Title for a line item in a selection list, purchase order, or invoice, Keyword search appears in the Type box because the system searches for the line item by the title in the linked bibliographic record.

Keyword searching is available for the following types of records (depending on the selection in the Search by box):

- Acquisitions
  - Claims
  - Invoice Line Items

- Purchase Order Line Items
- Selection List Line Items
- Cataloging
  - Authority
  - Bibliographic
  - Community
  - Course Reserves
  - Items
  - Promotions
  - Reserve Items
- Patron Services/Circulation
  - Course Reserves
  - Hold Requests
  - ILL
  - Patron Records
- Serials
  - Claims
  - Issues
  - Parts
  - Route Lists
  - Subscriptions

See also:


- [Automatic Suggestions in Keyword or Phrase Searching](#)
- [Search by keyword](#)

#### Automatic Suggestions in Keyword or Phrase Searching

If your library system has the Cataloging parameter **Auto-suggest feature enabled** set to **Yes**, a list of suggestions appears as you type if you are doing a keyword or phrase search for a record by an access point that is keyword-indexed. Automatic suggestions do not appear if you are searching a remote database. See the Cataloging Administration PDF Guide, Managing Auto-Search Suggestions..

#### Note:

You can turn automatic suggestions off by selecting **Hide Suggestions** at

the bottom of the list of suggestions. To turn them back on, click  in the **For** box.

#### Automatic suggestions for patron records

When you do a keyword or phrase search for a patron record using any of the following access points, a list of suggestions appears automatically as you type:

- Phone Number
- Address (StreetOne, StreetTwo)
- City, State PostalCode (ZipPlusFour)
- Email Address
- Name (First, Middle Last)
- Name (Last, First Middle)

#### Automatic suggestions for bibliographic or item records

When you do a keyword or phrase search for a bibliographic record or item record using any of the following access points, a list of suggestions appears automatically as you type:

- Author
- General notes
- Genre
- Publisher
- Subject
- Title

#### Automatic suggestions for authority records

When you do a keyword or phrase search for an authority record using any of the following access points, a list of suggestions appears automatically as you type:

- Heading
- All keyword fields
- Conference name
- Corporate name
- Genre/Form subject
- Geographic name

- LC children's subject
- LC subject
- Name
- Personal name
- Subdivision heading
- Topic term
- Tracing/Reference

### Search by Keyword

To find records using keyword searching:

1. On the Find Tool, General tabbed page, select the record type that uses keyword searching in the **Object** box.
2. Select an access point for which you can use keyword searching in the **Search by** box:
3. Select **Keyword search** in the **Type** box.

**Tip:**

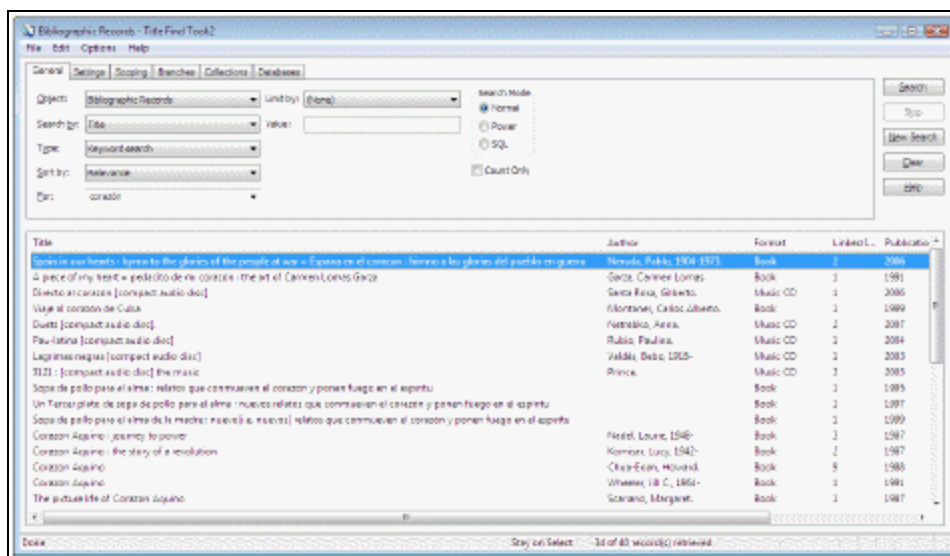
You can type part of a word and use a wildcard character. For example, if you type **King\*** for a keyword author search, then the results list includes works by authors named King, Kings, Kingsley, and others. You can also use wildcards in the beginning of a word to indicate that something may come before it. See [Using Wildcard Characters in Searches](#).

4. Type one or more keywords, in any order, in the **For** box.

**Note:**

Automatic suggestions may appear as you type. See [Automatic Suggestions in Keyword or Phrase Searching](#).

5. If automatic suggestions appear, and one is the search term you want to use, select it. The results appear as soon as you select an automatic suggestion.
6. If no automatic suggestions appear, or they are not useful, click **Search** to begin searching. Titles appear in the results list.



## Doing a Phrase Search

A phrase search looks for multiple words in the exact order you type them. You can do a phrase search for bibliographic and item records. When you select **Phrase** in the **Type** box and type a phrase in the **For** box, the search looks in all indexed fields for that phrase in the same word order. You can also narrow the search to look for the phrase in specific fields. Phrase searching is not available for all access points. For example, if you are searching for a bibliographic record and select **Call number** in the **Search by** box, phrase searching is not available in the **Type** box.

To do a phrase search:

1. On the Find Tool, General tabbed page, select **Bibliographic Records** or **Item Records** in the **Object** box.

### Tip:

You can use wildcards in the beginning, middle, or end of phrase search strings to indicate that other words come before, in the middle, or at the end of the search string.

2. Select one of the following access points in the **Search by** box:
  - **All Keyword Indexed Fields**
  - **Author**
  - **General notes**
  - **Genre**

- **Series**
  - **Subject**
  - **Title**
3. Select **Phrase** in the **Type** box.
  4. Type the phrase in the **For** box.

**Note:**

A list of suggestions may appear as you type. See [Automatic Suggestions in Keyword or Phrase Searching](#).

5. If automatic suggestions appear, and one of the suggestions is the phrase you want to search by, select it. The results appear as soon as you select an automatic suggestion.
6. If no automatic suggestions appear, or they are not useful, continue typing the entire phrase, and click **Search**. Titles appear in the results list.

## Doing Power Searches

With power searching, you can construct complex, precise searches by writing Common Command Language (CCL) queries. Power searching is a good way to list records that share a combination of very specific characteristics. To construct a power search, you can begin with a basic search expression and then add more search expressions to it, or you can write the entire query.

**Note:**

You can do complex searches for cataloging records and have Polaris format the information you provide into CCL for you. See [Scoping Searches for Bibs and Items](#).

See also:

- [Setting Up CCL Queries](#)
- [Mnemonic Codes for Access Points](#)
- [CCL Operators](#)
- [Wildcard Characters](#)
- [Quotation Marks in Power Searching](#)
- [Power-Searching for Multiple ISBNs](#)
- [Write a power search query](#)



### Setting Up CCL Queries

CCL queries in the Find Tool consist of one or more search expressions. Each search expression is a search string and a series of symbols and operators specifying the desired search results.

**Tip:**

You can change the time out for the search from the default of 30 seconds to another length of time by typing `TIMEOUT=(number)`. For example, if you want to search for United States and increase the time out to 60 seconds, type:

**KW=United States and TIMEOUT=60**

A search expression includes the following components:

- Access point - A search field identifier, such as author or title. Also known as a qualifier.
- Operator - The logical link between an access point and a search string, or between search expressions.
- Search string - A string of characters identifying the item for which you are searching. Also known as an item description, search term, or value.

**Example:**

The following query, composed of two search expressions linked by AND, finds the works of author Asimov published in or after 1970:

**AU=asimov AND PD >= 1970**

where

AU and PD are access points (Author and Publication Date)

=, AND, >= are operators

asimov and 1970 are search strings

You can group search expressions with parentheses to direct the order of operations.

### Mnemonic Codes for Access Points

When you are creating queries, you must use the mnemonic code, and not the full term, for the following access points:

**Note:**

Branches and collections are available only with normal searches.

- Find Tool **Search by** options
- Language (LA)
- Target audience (TA)
- Collection (COL) - Click the **Collections** tab on the Find Tool to see the abbreviations for your system.
- Assigned Branch (AB) - Click the **Branches** tab on the Find Tool to see the abbreviations for your system.

**CCL Operators**

The following are CCL operators:

- Boolean (logical) operators - AND, OR, NOT logically connect items
- Proximity (nearness) operators - Specify the location of and distance between items
- Relational operators - Specify comparative relationships between items, such as greater than, less than, or equal to

**Boolean Operators**

The Boolean operators AND, OR, and NOT combine search expressions in logical sequences:

- AND - A record must match both the search expression before and the expression after the operator to be included in the search results.

**Example:**

**AU=isaac asimov AND TI=planets**

Finds only the items written by Isaac Asimov that have the word planets in the title.

- OR - A record must match either the search expression before or the expression after the operator, or both, to be included in the search results.

**Example:**

**AU=isaac asimov OR TI=planets**

Finds all items written by Isaac Asimov and all items with the word planets in the title by any author.

- NOT - A record must match the search expression before the operator, but not the expression after the operator to be included in the search results. The expression after the operator must be enclosed in parentheses.

**Example:**

**AU=isaac asimov NOT (TI=planets)**

Finds only those items written by Isaac Asimov that do not have the word planets in the title.

You may build a more complex query using the Boolean operators. When using multiple operators in the same query, use parentheses to group the search expressions so that they are done in the correct order, from left to right.

#### Proximity Operators

The proximity operators N, Nn, W, and Wn specify the relative position of search terms in the search results. Proximity operators are used with a number representing the distance between the two terms (the proximity distance). Adjacent terms have a proximity distance equal to 1, and the default proximity relation is LE (less than or equal to).

If the proximity operator begins with **N**, it indicates the search terms may be separated by the specified number of words in any order. For example, a power search for **KW="United States" N2:EQ KW="Union"** searches for records where the phrase **United States** appears exactly two words before or after the keyword **Union**.

If the proximity operator begins with **W**, it indicates the search terms must be within the specified number of words in the specified order. For example, a power search for **KW="Harry Potter" W10:LT KW="J.K. Rowling"** searches for records where the phrase **Harry Potter** appears less than 10 words before the phrase **J.K. Rowling**.

- N or % - Indicates the search terms should be next to each other in any order.

**Examples:**

**AU="james" N AU="joyce"**

**AU="james" % AU="joyce"**

Finds any items with authors that have the names James and Joyce next to each other, such as James Joyce or Joyce James.

- **Nn** - Indicates the search terms may be separated by the specified number of words (*n*) in any order, where *n* is a number between 1 and 9.

**Example:**

**AU="james" N4 AU="joyce"**

Finds any items with authors that have the names James within four words of the name Joyce, such as James C. Joyce or Joyce and Roberta James.

- **W or !** - The search terms must be next to each other in the specified order.

**Examples:**

**AU="james" W AU="joyce"**

**AU="james" ! AU="joyce"**

Finds any items written by James Joyce, but ignores items written by Joyce James.

- **Wn** - The search terms must be within the specified number of words (*n*) in the specified order, where *n* is a number between one and nine.

**Examples:**

**AU="james" W4 AU="joyce"**

**AU="james" !4 AU="joyce"**

Finds any items written by James C. Joyce and James Robert Collins Joyce, but ignores items written by Joyce C. James.

### Relative Operators

The relative operators include the following mnemonic codes for comparing items:

Operation	Mnemonic Code/Relative Operator
Equal to specified item	EQ or =

Operation	Mnemonic Code/Relative Operator
Not equal to specified item	NE or <>
Less than specified item	LT or <
Less than or equal to specified item	LE or <=
Greater than specified item	GT or >
Greater than or equal to specified item	GE or >=
Equal to specified item	EQ or =

**Examples:**

- The following example finds items published in or after 1987:

**PD GE 1987**

- The following example finds items published before 1932 that have the words solar system in any indexed field:

**KW=solar system AND PD < 1932**

**Wildcard Characters**

You can use the following special characters to search for character pattern matches to the item description:

**Tip:**

Enter as much of the base search term as you can because the shorter the base, the more imprecise the search. For example, entering **bee\*** can yield search results of **bees**, **beer**, or **Beecher**.

- Question mark (?) - Indicates 0 or more characters. For example, type **child?** to find child, children, child's, and so forth.
- Asterisk (\*) - Indicates 0 or more characters. For example, type **west\*** to find west, western, West's, and so forth.
- Number sign (#) - Indicates 0 or 1 character. For example, type **wash#** to find **wash**, **washi**, **washy**, and so forth.

### Quotation Marks in Power Searching

**Tip:**

You can enclose any search string in quotation marks. If you are not sure whether to enclose the search string in quotation marks, you can always safely use them.

Strings containing the following words and characters must be enclosed in quotation marks if they are used as part of an item description in a CCL search:

**Tip:**

The number sign (#) is treated as a single-character wildcard and not as the character itself. Therefore, a power search for TI="#\*" does not limit the results to records with # in the title. Instead, use an embedded SQL search with 9999 as the Bib-1 Use attribute for ADHOC.

To search for bibliographic records with # in the title, enter the following in the Power Search Criteria box:

```
[9999]="SELECT RecordID FROM Z3950_AP_BR_TI_S WHERE Term LIKE '#%'"
```

To search for item records with # in the title, enter the following in the Power Search Criteria box:

```
[9999]="SELECT RecordID FROM Z3950_AP_IR_TI_S WHERE Term LIKE '#%'"
```

N	?
N[1-9]	#
%	=
W	<>
W[1-9]	eq
!	gt
and	lt

or	ge
not	le
*	-
&	

**Examples:**

- To find the title Bud, Not Buddy, you type the following command:

**TI = "bud not buddy"**

The string must be enclosed in quotation marks because in a CCL command, **not** is ordinarily a Boolean operator.

- To find the telephone number 453-7890, you type the following command:

**PHONE = "453-7890"**

The string must be enclosed in quotation marks because in a CCL command, the hyphen (-) ordinarily separates two values, indicating a range of values between the two.

**Power-Searching for Multiple ISBNs****Tip:**

If you are pasting the ISBNs from another source (such as a Word document) that uses the curved "smart quote" characters, change the quotation marks to straight quotes in the search command.

The internal limit to the number of search terms you can enter with no parentheses is 10. If you search for multiple ISBNs, you can avoid this limit by placing each ISBN in quotation marks. The example shows the syntax you can use:

**Example:**

Each number represents an ISBN.

**ISBN={"1", "2", "3", "4"}**

**Write a Power Search Query**

To do a complex, precise search by writing a query in Common Command Language (CCL):

**Note:**

Search expressions are not case-sensitive. That is, you can use uppercase

letters, lowercase letters, or a combination of both. They do not affect the results.

**Tip:**

To delete all the information in the **Power Search Criteria** box, click **Clear**.  
To start a new search with a basic search expression, click **New Search**.

1. To create a basic query first, select a record type in the **Object** box and enter the search criteria in the **Search by**, **Type**, and **For** boxes on the Find Tool - General tabbed page. See [Doing a Basic Search](#).
2. Click **Power**. The General page displays a **Power Search Criteria** box. If you created a query in the previous step, the query appears in the **Power Search Criteria** box.

**Important:**

You must write your power search queries precisely. This means you may need to edit search expressions that are carried over to the **Power Search Criteria** box. For example, to find the works of all authors with names beginning with Shake, type **AU=shake\*** in the **Power Search Criteria** box. If you type **AU=shake**, only the works of authors named Shake are found.

3. Input additional criteria or edit existing criteria in the **Power Search Criteria** box, using CCL syntax.
4. Click **Search** to begin searching. The results list appears.

## Setting Up SQL Searches

You can do a search for records using Structured Query Language (SQL). SQL is a computer language used to create, modify, retrieve and manipulate data from relational database management systems, such as Polaris. In the Polaris Find Tool, SQL is used for data retrieval only. You cannot manipulate data in the Polaris database through SQL searching.

To use all the options for SQL searching in the Find Tool, you must have permissions set in Polaris Administration. Separate permissions are required for accessing the SQL searching mode and saving search strings to the database. See the Polaris Administration PDF Guide, Special Permissions for SQL Searches in the Find Tool.

**Tip:**

You can save text, even if it is not a legitimate SQL search, as a rough SQL



template that users can use as a basis for searching. They can edit the search in the Search Criteria box without saving the changes to the template.

In the Polaris Find Tool, the SQL query must use the following structure:

**SELECT** *Column* **From** *Table* **Where** *Limit criteria*. The column name must match the column name in the database.

#### Examples:

To find item records without an assigned collection, type: **SELECT ItemRecordID FROM CircItemRecords WHERE AssignedCollectionID IS NULL**

To find item records with no statistical code, type: **SELECT ItemRecordID FROM CircItemRecords WHERE StatisticalCodeID IS NULL**

To find item records with the circulation status of Lost, type: **SELECT ItemRecordID FROM CircItemRecords WHERE ItemStatusID = 7**

To find item records that have a temporary shelf location, type: **SELECT ItemRecordID FROM ItemRecordDetails WHERE TemporaryShelfLocation IS not NULL**

To find patron records where the registration expiration date is before or equal to October 31, 2009, type: **SELECT PatronID from PatronRegistration WHERE ExpirationDate <= '10/31/09'**

The **SELECT** command retrieves zero or more rows from one or more tables in a database. Commonly available keywords related to **SELECT** include:

- **FROM** - Indicates the tables from which the data is to be taken, as well as how the tables join to each other.
- **WHERE** - Identifies which rows to retrieve, or applied to **GROUP BY**.
- **GROUP BY** - Combines rows with related values into elements of a smaller set of rows.

- **HAVING** - Identifies which of the “combined rows” are to be retrieved. **HAVING** acts much like **WHERE**, but it operates on the results of the **GROUP BY** function.
- **ORDER BY** - Identifies which columns are used to sort the resulting data.

When the search results are displayed, you can print the results for a quick report. Search Polaris help for "Print search results from the Find Tool."

See also:

- [Do a SQL search](#)
- [Search using a saved SQL search](#)

#### Do a SQL Search

To search using SQL:

1. Select the type of record you want to search for in the **Object** box on the General tab of the Find Tool.

#### Tip:

You can save the SQL search mode as the default search mode setting. See [Customize the Find Tool by user](#).

2. Select **SQL**. The SQL Search Criteria box appears.

#### Note:

To search using an existing SQL search, see [Search using a saved SQL search](#).

3. Type the SQL search criteria and click **Search**.
4. If you want to save the SQL search criteria, click **Save**, type the name of the saved search in the Save SQL Search dialog box, and click **OK**. You can use this saved search when you search for the same type of record (object).
5. Click **Search**. The search results appear.

#### Search Using a Saved SQL Search

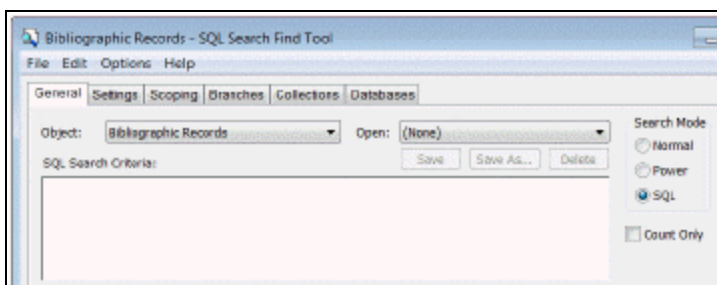
To use a saved SQL search:

1. Select the type of record you want to search for in the **Object** box on the General tab of the Find Tool.

**Tip:**

You can save the SQL search mode as the default search mode setting. See [Customize the Find Tool by user](#).

2. Select **SQL**. The SQL Search Criteria box appears.



3. Select the saved search in the **Open** box.

**Note:**

The saved SQL searches listed in the **Open** box are those associated with the selected record (object).

The saved SQL search appears in the Search Criteria box.

4. Click **Search**.

**Note:**

If you have permission, you can edit a saved search, and click **Save As...** to rename it. See the Polaris Administration PDF Guide, Special Permissions for SQL Searches in the Find Tool.

## Scoping Searches for Bibs and Items

Scoping is a method of further focusing your search beyond the basic search expression. Scoping, like power searching, allows you to conduct complex, precise searches with the Common Command Language (CCL). However, power searching requires you to know CCL and write your own queries. With scoping, you select the access points (qualifiers), operators, and search strings (values), and Polaris formats the information into CCL. You can use scoping with exact match, keyword, and phrase searches for bibliographic and item records.

To do a complex, precise search by scoping:

1. On the Find Tool - General tabbed page, fill in the **Object**, **Search by**, **Type**, and **For** boxes (see [Doing a Basic Search](#)).
2. Click the **Scoping** tab to display the Scoping tabbed page. The search expression you created on the General tabbed page appears in the **Current Criteria** box.
3. Choose one of the following Boolean operators (see [Boolean Operators](#)):
  - If the search results must match both search expressions, click **And**.
  - If the search results can match either search expression, click **Or**.
  - If the search results must match the first search expression, but not the second one, click **Not**.
4. Select an access point or modifier in the **Qualifier** box.
5. Choose one of the following relative operators:

**Tip:**

You can choose [=] or [<>] for all the qualifiers.

You can choose the following relative operators for the Publication date only: [<], [<=], [>], or [>=].

- Click [=] for results equal to the value.
  - Click [<>] for results not equal to (excluding) the value.
  - Click [<] for publication dates less than the value.
  - Click [<=] for publication dates less than or equal to the value.
  - Click [>] for publication dates greater than the value.
  - Click [>=] for publication dates greater than or equal to the value.
6. Select or type a value for the query in the **Value** box. For additional information, see:
    - [Proximity Operators](#)
    - [Wildcard Characters](#)
    - [Quotation Marks in Power Searching](#)
  7. Click **Add** to add the search expression to the **Current Criteria** box. If the search expression is longer than the width of the **Current Criteria** box, a horizontal scroll bar is displayed. The status bar displays **SC** to indicate scoping is in effect.
  8. To add another search expression, do these steps:

**Tip:**

The original search expression, created on the General page, can be modified on the General page.

- a. In the **Current Criteria** box, select the expression which you want to precede the new expression.
- b. Select a Boolean operator, qualifier, relative operator, and value.
- c. Click **Add** to add the search expression to the **Current Criteria** box.

**Tip:**

To remove a search expression created on the Scoping page, select it in the **Current Criteria** box and click **Remove**. To delete all the search expressions, *except* for the expression that you created on the General tabbed page, click **Clear**.

9. To edit a search expression created on the scoping page, do these steps:
  - a. Select the search expression in the **Current Criteria** box.
  - b. Change the operators, qualifier, or values.
  - c. Click **Update** to update the search expression in the **Current Criteria** box.
10. Click **Search** to begin searching. The results list appears.

## Searching Branches

When you are searching for bibliographic and item records, you can choose which branches you want Polaris to search, as well as which collections to search within each branch. The Find Tool's Branches tabbed page lists all the assigned branches, along with their collections, in your library system. Searches for bibliographic records by branch or collection return results based on the linked item records. If the bibliographic record is not linked to any item records with that assigned branch, it does not appear in the results list on the Branches tab. If the bibliographic record is not linked to any item records with that collection, it does not appear in the results list on the Collections tab. Bibliographic records without linked item records do not appear in the results list.

**Important:**

Search results, except for bibliographic titles and call number browse searches, may be filtered so the results list includes only those results that you have permission to access. If the Staff Client profile **Find Tool: Filter search results by permission** is set to **Yes**, you will see only those

records for which you have **Access** permission. For more information about setting permissions in Polaris, see the Polaris Administration PDF Guide, Setting Administration Permissions.

**Tip:**

If you want to find bibliographic records owned by a certain branch but with no linked item records, do a Scoping search instead of a Branch search. A branch search looks for bibliographic records with linked items assigned to the branch. If no items are linked, the bibliographic record is not found.

To search for bibliographic and item records by branch and by collection associated with each branch:

**Note:**

You can search by branches only in normal search mode.

1. On the Find Tool - General tabbed page, fill in the **Object**, **Search by**, **Type**, and **For** boxes (see [Doing a Basic Search](#)).
2. Click the **Branches** tab to display the Branches tabbed page.

By default, all branches and collections are selected.

**Tip:**

To search all branches, click **Select All**.

3. Click **Unselect All** to clear the checkboxes for all branches and collections. The status bar displays **BR** to indicate that you are searching by branch.
4. If you want to search all the collections in a branch, select the checkbox next to each branch to be searched.
5. If you want to search by particular collections in a branch, follow these steps:
  - a. Click the plus sign [+] next to the branch. The plus sign is replaced by a minus sign [-]. All the collections for the branch appear.
  - b. Select the checkbox next to each collection you want to search. The checkbox next to the branch is grayed out to indicate that one or more collections are not to be searched within the branch.

**Tip:**

To start a new search, click **New Search**. The General tabbed page appears. To reset the list, click **Reset**.

6. Click **Search** to begin the search. The results list appears.

## Related Information

When searching by branch and collection, you can also use other searching features. See also:

- [Write a Power Search Query](#)
- [Do a SQL search](#)
- [Scoping Searches for Bibs and Items](#)

## Searching Collections

You can search for item records or bibliographic records by collection, but when you search for bibliographic records by collection, the search is actually looking for the linked item records with the selected collection. If the bibliographic record has no linked items in that collection, the bibliographic record is not included in the results. The Find Tool's Collections tabbed page lists all the assigned collections in the system, along with their associated branches. You can search by collection and by the branches that share the collection.

To search for bibliographic and item records by collection and by branch:

**Note:**

You can search using collections only in normal search mode.

1. On the Find Tool - General tabbed page, fill in the **Object**, **Search by**, **Type**, and **For** boxes (see [Doing a Basic Search](#)).

**Tip:**

If you search for bibliographic records by collection, the search looks for bibliographic records linked to item records in that collection. Bibliographic records that are not linked to item records do not appear in the results list.

2. Click the **Collections** tab to display the Collections tabbed page.

By default, all collections and the branches that use each collection are selected.

**Tip:**

To search all collections, click **Select All**.

3. Click **Unselect All** to clear the checkboxes for all collections and their branches. The status bar displays **CO** to indicate that you are searching by collection.
4. If you want to search all the branches that use a collection, select the checkbox next to each collection to be searched.
5. If you want to search by particular branches associated with a collection, follow these steps:
  - a. Click the plus sign [+] next to the collection. The plus sign is replaced by a minus sign [-]. All the branches for the collection appear.
  - b. Select the checkbox next to each branch you want to search. The checkbox next to the collection is grayed out to indicate that one or more branches that use the collection are not to be searched.

**Tip:**

To start a new search, click **New Search**. The General tabbed page appears. To reset the list, click **Reset**.

6. Click **Search** to begin the search. The results list appears.

## Related Information

When searching by branch and collection, you can also use other searching features. See also:

- [Do a power search](#)
- [Do a SQL search](#)
- [Scoping Searches for Bibs and Items](#)

## Searching Remote Databases

When you are searching for bibliographic records, you may be able to search remote sites using Z39.50 standard search protocol. If you have a subscription to Polaris ZMARC, the Polaris ZMARC databases appear in the list of databases. You can choose to search the local Polaris database simultaneously along with one or more remote databases.

Z39.50 searching depends on standard Bib-1 Use attributes for search access points. If a standard Bib-1 Use attribute has not been defined for a search access point, Polaris



relies on proprietary Bib-1 Use attributes. (Bib-1 Use attributes between 5,000 and 10,000 are reserved for these proprietary attributes). These non-standard search access points may not work with Z39.50 target sites. For example, the UPC barcode does not have a standard Bib-1 Use attribute. If you search bibliographic records at a Z39.50 target site for the UPC barcode number, setting the **Search by** field to **UPC number** in the Polaris Find Tool, the search will likely fail. However, if you search for the UPC barcode number by **Other system number** (a standard access point), you will likely find the title. For a list of standard and proprietary Bib-1 Use Attributes, see the Polaris Administration PDF Guide, Bib-1 Use Attributes in Polaris Searches. .

**Note:**

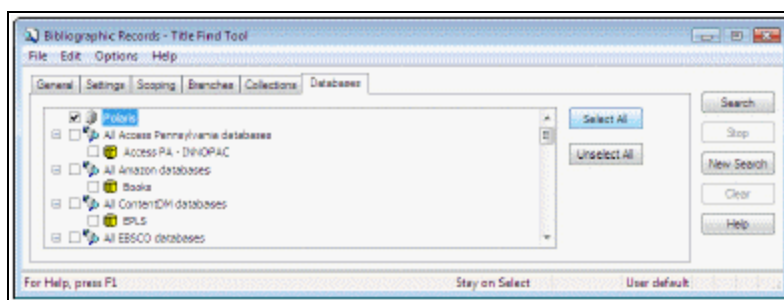
Before you are able to search a remote database, it must be registered as a Z39.50 target and set to display in the Find Tool. See the Polaris Administration PDF Guide, Registering Remote Resource Servers and Controlling Database Access in the Staff Client.

To search for records in multiple and remote databases:

**Note:**

You can search remote databases in normal and power search modes.

1. On the Find Tool - General tabbed page, fill in the **Object**, **Search by**, **Type**, and **For** boxes on the General tabbed page (see [Doing a Basic Search](#)).
2. Click the **Databases** tab.



If you have saved default search databases, they are selected on the **Databases** tab. If you have not saved default search databases, your Polaris database is selected by default. For more information about saving default search databases, see [Customize the Find Tool](#).

3. Select the databases to be searched:

**Tip:**

Click the minus (-) sign next to a site to display only the site, without its associated databases. Click the plus (+) sign next to a site to display the site's associated databases.

- To select the Polaris databases and all remote sites' databases, click **Select All**.
- To select one or more sites (including all the listed databases at the sites), select the checkbox next to each site.
- To select one or more databases at a site, select the checkbox next to each database that you want to search. The checkbox next to the site is automatically selected, but it is also dimmed to indicate that one or more databases at the site are not selected.

The status bar displays **DB** to indicate that you are searching by database.

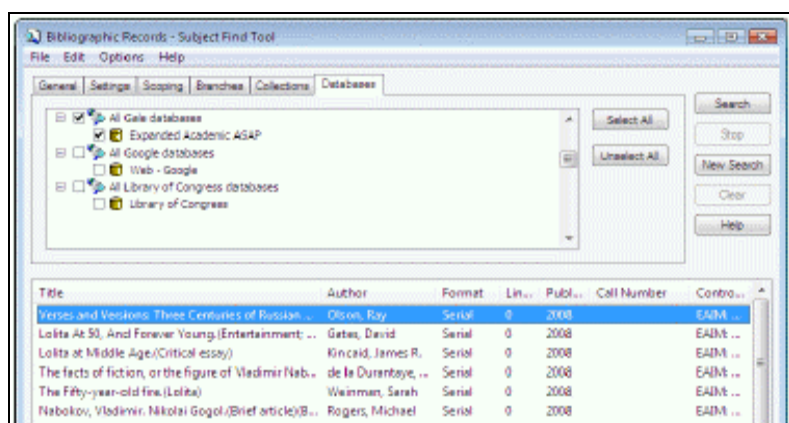
**Tip:**

To start a new search, click **New search**. The General tabbed page appears.

To reset the list, click **Reset**.

4. Click **Search** to begin searching.

The database results list appears with a count of the records found. If you searched multiple databases, the records from each database are displayed in separate result sets.



5. Double-click a database to display its results. A dialog box displays the list of records for the selected database.
6. Double-click a record in the list to open it in a Polaris workform.

## Related Information

- [Do a power search](#)
- [Do a SQL search](#)
- [Scoping Searches for Bibs and Items](#)
- [Copy a MARC record from a remote source](#)

## Creating, Copying, and Editing MARC Records

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

For information on creating item records, see [Maintaining Item Records](#).

**Note:**

You can also add MARC records to your catalog by importing or copying them. See [Setting Up Import Profiles and Importing Records](#).

See also:

- [Creating MARC Records](#)
- [Copying MARC Records](#)
- [Editing MARC Records](#)
- [Browse Headings Display](#)

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

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

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

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

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### Creating MARC Records

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

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

**Note:**

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

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

**Note:**


When you save a bibliographic record and there are no matching authority records for a heading, you can automatically create an authority record to match the heading. See [List and resolve unlinked headings](#).

See also:

- [Create a new bibliographic record](#)
- [Create a new authority record](#)

## Create a New Bibliographic Record

To manually create a new bibliographic record in the Polaris database:

1. Select **File > New**, press **CTRL+N**, or click  on the shortcut bar.

The New dialog box appears.

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

**Note:**

For more information on creating templates, see [Using Cataloging Templates](#).

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

**Note:**

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

- b. Click **OK**.

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

4. Indicate whether you want the record to display in the public catalog by selecting the **Display in PAC** checkbox to display the title in the PAC, or by clearing the checkbox to limit the title to staff display only.
5. Select the owner of the bibliographic record in the **Owner** box.

**Note:**

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

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

**Tip:**

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

7. Enter the values for Leader positions 05, 06, 07, 08, 17, 18, and 19. See [Change the MARC Leader](#).
8. Edit the values for the 006, 007, or 008 fixed fields, as needed. See [Edit the 008 field in a MARC record](#) or [Add 006 and 007 fixed fields](#).

**Tip:**

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

9. Type additional tags, subfields, and enter data.
10. When you finish adding the bibliographic tags, save the record by choosing one of the following options:

- If the record is ready for use in Polaris, select **File > Save**, press **CTRL+S** or click the Save button.

**Tip:**

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

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

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

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

## Related Information

- [Preview the Title Display in the PAC](#)
- [Web Links Display in the PAC](#)
- [Editing MARC Records](#)
- [Checking Authority Headings](#)
- [Checking MARC Format](#)
- [Checking for Duplicate Records](#)
- [Type of Material Codes \(TOMs\)](#)

**Create a new authority record**

To create an original authority record in Polaris:

1. Select **File > New**, press **CTRL+N**, or click New from the Polaris shortcut bar to display the New dialog box.
2. Select **Authority Record** from the Objects list.
3. To use a template to create the new authority record, do the following steps:

**Note:**

For more information on creating templates, see [Using Cataloging Templates](#).

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

**Note:**

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

- b. Click **OK**.

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

**Tip:**

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

- c. Use the MARC Editor commands to add tags and subfields as needed. See [Editing MARC Records](#).

**Note:**

When you save an authority record, it is automatically checked for MARC format, duplicates, and authority headings. However, you can resolve any problems before saving the record by performing these checks first (see [Checking Cataloging Records](#)).

4. Select **File > Save** to save the authority record.

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

## Related Information

- [Checking MARC Format](#)
- [Checking for Duplicate Records](#)



- [Checking Authority Headings](#)

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## Copying MARC Records

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

If you want to remove specific MARC tags from remote records when they are saved to your library's local database, the tags must be defined in the Bibliographic Tags to Retain/Delete policy table, and the **Delete MARC tags when saving Z39.50 records to local database** profile must be set to **Yes**. See the *Cataloging Administration Guide*, Deleting MARC Tags from Incoming Bibs.

To copy bibliographic or authority control records from a remote database:

**Important:**

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

1. From the Polaris shortcut bar, select **Cataloging** and select **Bibliographic Records** or **Authority Records**

The Polaris Find Tool appears.

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

**Note:**

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

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

**Note:**

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

search results may not work with remote databases. See [Results Returned from Remote Databases](#).

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

**Note:**

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

5. Select **Databases** to display the remote databases.
6. Select the checkbox next to the remote database or databases you want to search.
7. Click **Search** to start the catalog search.

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

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

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

9. Do the following checks as needed:

**Note:**

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

- To check for duplicate records, select **Tools > Check For Duplicates** (see [Checking for Duplicate Records](#)).
  - To check authority headings, select **Tools > Check Headings** on the Bibliographic Record workform or **Tools > Check See Also From References** on the Authority Record workform. See [Checking Authority Headings](#) for detailed instructions on checking headings.
  - To check MARC format, select **Tools > Check MARC21 Format**. See [Checking MARC Format](#) for detailed instructions on using this tool.
10. Make changes to the record as needed.

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

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

### Results Returned from Remote Databases

Most Likely to Return Results	May Not Be Indexed in Target Catalog (Less Likely to Return results)
All indexed fields (both searches)	CODEN
Author (bibliographic search)	Dewey Classification
Heading (authority search)	General Notes
ISBN (bibliographic search)	Genre
ISSN (bibliographic search)	Gov Doc Classification
LCCN (both searches)	LC Classification
Series (bibliographic search)	NAL Classification
Subject (bibliographic search)	NLC Classification
Title (bibliographic search)	NLM Classification

Most Likely to Return Results	May Not Be Indexed in Target Catalog (Less Likely to Return results)
Tracing/Reference (authority)	Other system control number
	Publisher
	Publisher's Number
	STRN
	UDC Classification

#### Related Information

- Set up a remote database target - See the *Polaris Administration Guide*, Set up a server record for a Z39.50 or other search server.
- Polaris ZMARC - Innovative Interfaces offers a subscription to the Polaris ZMARC database that gives you access to over 11 million bibliographic records and 7 million authority records cataloged by the Library of Congress. Innovative Interfaces sets up ZMARC as a Z39.50 target in Polaris Administration. You can select the ZMARC databases from the list of established targets on the Database tabbed page of the Polaris Find Tool. After ZMARC is established as a remote database that you can search, you can set it up for a source of authority records for automatic authority control. See [Checking Authority Headings](#).

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## Editing MARC Records

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

**Tip:**

To see how the title will appear in Polaris PowerPAC, select **View >**

**PAC** on the Bibliographic Record workform. The type of material icon that displays in Polaris PowerPAC is determined by the primary type of material. For more information, see [Type of Material Codes \(TOMs\)](#).

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

**Tip:**

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

- Ability to enter diacritics or vernacular script -You can use a character picker dialog box to enter single characters or a diacritical mark. Or, if you frequently enter text in languages other than English, you can change your keyboard settings in Windows to add an international keyboard. See [Enter diacritics/characters using an IME keyboard](#). The Polaris catalog supports full UTF-16 Unicode.

See also:

- [Change the MARC Leader](#)
- [Edit the 008 field in a MARC record](#)
- [Add 006 and 007 fixed fields](#)
- [Add a MARC tag to a record](#)
- [Insert a subfield in a MARC record](#)
- [Move a block of text](#)
- [Enter diacritics/characters using an IME keyboard](#)
- [Choose characters/diacritics from a chart](#)
- [Insert a character/diacritic using a code](#)
- [Record a macro](#)
- [Apply a Macro to Edit a MARC Record](#)
- [Change a macro](#)
- [Delete a macro](#)

## Change the MARC Leader

To change the values for the Leader positions in a bibliographic or authority record:

1. Open the Bibliographic Record or Authority Record workflow.

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

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

### Tip:

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

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

Tag	Ind	Data
LDR		nam 22 4500
008		061229

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

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

**Tip:**

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

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

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

#### Coding the MARC Leader for Digital Collections

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

### Edit the 008 Field in a MARC Record

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

To edit the values in the 008 fixed field:

1. Open the Bibliographic Record or Authority Record workflow.

**Tip:**

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

2. Double-click the 008 tag.

A dialog box appears.

**Note:**

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

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

The 008 field is updated.

### Add 006 and 007 Fixed Fields

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

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

The Bibliographic Fixed Field Selection dialog box appears.

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

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

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

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

### Add a MARC Tag to a Record

To add a tag to a MARC record:

#### Tip:

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



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

### Insert a Subfield in a MARC Record

To insert a subfield into a tag in a MARC record:

**Important:**

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

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

**Note:**

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

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

### Move a Block of Text in a MARC Record

To select and move a line or multiple lines of text in a MARC record:

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

**Tip:**

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

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

**Important:**

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

6. Release the command button.

The highlighted text appears in the new location.

**Enter Diacritics/Characters Using an IME Keyboard****Note:**

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

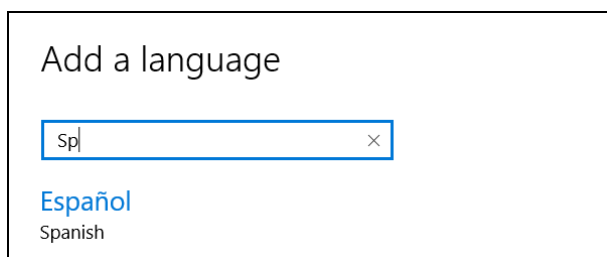
If you frequently enter diacritics or vernacular script using non-Roman characters, add Input Method Editor (IME) keyboards so you can switch back and forth between English and other languages using the keyboard. To enter single characters or diacritics, you can select characters from a dialog box. See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

To enter diacritics or non-Roman characters using an Input Method Editor (IME) keyboard:

**Tip:**

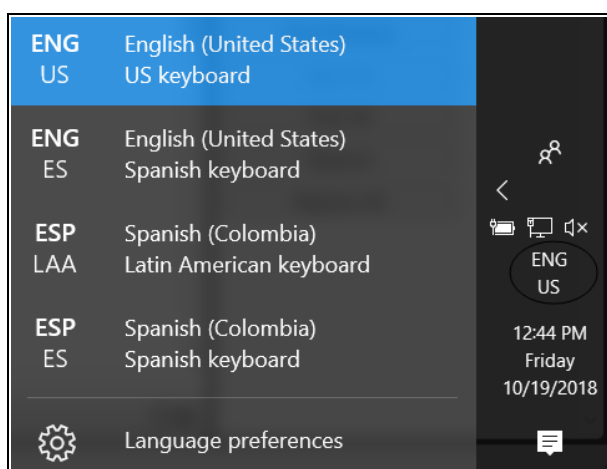
The steps for using IME keyboards differ slightly depending on which version of Windows is installed. For more information, see Microsoft's web site at [www.microsoft.com](http://www.microsoft.com).

1. Go to **Settings** on the PC.
2. Select Time & Language.
3. Select Region & language
4. Select **Add a language**.
5. On the Add a language dialog box, start typing the language to add.



The language appears.

6. If the language has variants by region, select the appropriate regional language.
7. In the Region & language window, select the added language, and select **Options**.
8. Select Add a keyboard and select the keyboard to add.
9. In the taskbar, select the keyboard (**ENG US**), and all keyboards appear.



10. Select the added keyboard from the list.
11. Start typing in the MARC Editor.
12. When you are finished with the added keyboard, press the Windows key and then the spacebar.

The keyboard changes.

**Important:**

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

### Choose Characters/Diacritics a Dialog Box

To insert an international character into a MARC record by selecting the character or diacritic mark from the Character Picker dialog box:

**Tip:**

If you frequently enter diacritics, you can add Input Method Editor (IME) keyboards and switch back and forth from the English keyboard to the

international keyboards. See [Enter diacritics/characters using an IME keyboard](#).

**Important:**

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

1. Open the Bibliographic Record or Authority Record workform.
2. Position the text cursor where you want to insert the character.
3. Select **Tools, Diacritics** or right-click anywhere in the workform, and select **Diacritics** from the context menu. Or, press **ALT+D**. The Character Picker dialog box opens with the (MARC-8)Basic Latin code chart displayed and a space selected.

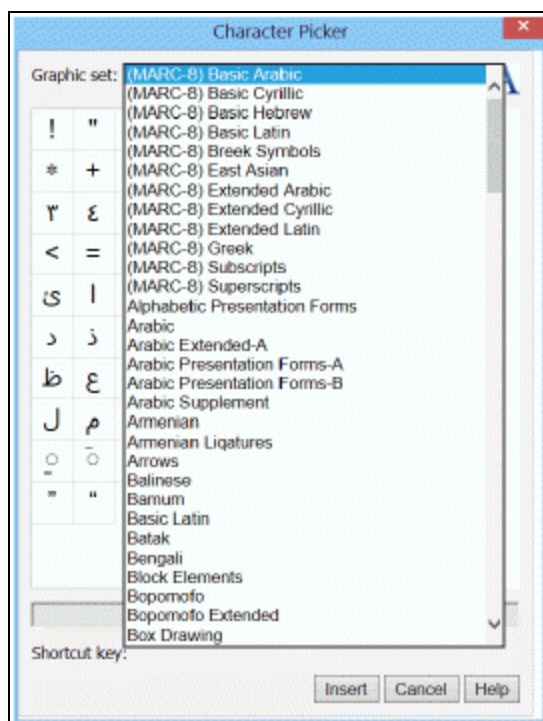


4. Select the graphic set in the **Graphic set** box.

**Note:**

The Graphic set drop-down list contains the traditional MARC 8 code

ranges and most Unicode code charts. When you select a graphic set, the characters belonging to the selected graphic set appear.



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

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

### Insert a Character/Diacritic Using a Code

To insert an international character into a MARC record by typing the character code on the numeric keypad:

#### Tip:

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

**Important:**

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

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

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

**Example:**

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

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

The international character is displayed in the MARC 21 view.

**Record a Macro**

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

To record the keyboard actions to include in a macro:

**Note:**


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

**Tip:**

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

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



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

**Tip:**

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

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

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

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

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

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

**Example:**

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

**Important:**

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


8. Click **Start Recording**.

The Record Macro dialog box closes.

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

**Tip:**

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

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

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

#### Related Information

- [Apply a Macro to Edit a MARC Record](#)
- [Change a Macro](#)
- [Delete a Macro](#)
- Print Macros - You can print reports that list authority record and bibliographic record macros. Search Polaris help for "Cataloging Reports."

### Apply a Macro to Edit a MARC Record

To use a macro to edit a MARC record:

1. Open the Bibliographic Record or Authority Record workform.
2. Place the cursor in the MARC record where you want the macro playback to occur.

#### Tip:


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

3. Select **Tools > Macros** to display the Macros tool bar.

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

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

The Macro Selection dialog box appears.

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

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

### Change a Macro

To change the name, description, or shortcut key of an existing macro in your macro list:

#### Note:

You cannot change the recorded contents of the macro.



1. Open the Bibliographic Record or Authority Record workform.

**Tip:**

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

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

The Edit Macro dialog box appears.

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

The macro is changed.

## Delete a Macro

To delete a macro:

1. Open the Bibliographic Record or Authority Record workform.

**Tip:**

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

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

The Edit Macro dialog box appears.

4. Click **Delete**.

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## Browse Headings Display

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

To update a browse display heading:

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

The browse search results appear.

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

The Select Heading Results dialog box appears.

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

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

4. (Optional) To update the bibliographic records that are linked to the unwanted heading, do the following:
  - a. Select the heading that you **do not** want to display.
  - b. Click **Show Bib Records**. A list box displays the bibliographic records that have this heading.
  - c. Double-click on the bibliographic records to open them, change the records to match the preferred heading, and save them.

## Using Cataloging Templates

Using templates to create bibliographic, authority, and item records greatly reduces the time it takes to do original cataloging because much of the information is already present in the template. In addition, templates ensure consistency in your records and facilitate acquisitions and serials processing workflows. You can create a template by renaming an existing template or by saving an item, bibliographic, or authority record as a template.

**Note:**

If you have a contract with an eContent vendor that integrates with Polaris, eContent item records are created automatically using an ebook item template.

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

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

The following types of templates are used outside of Cataloging:

- On-order bibliographic templates - Available from a purchase order line item to create brief bibliographic records from title information added to a purchase order line item.
- On-order item templates - Automatically create on-order item records when purchase orders are released.
- On-the-fly item templates - Used for circulating uncataloged materials.
- Reserve item templates - Used for circulating uncataloged materials and instructor-supplied course reserve materials.
- **INN-Reach ILL item templates** - Used for circulating items requested through INN-Reach if your library has a license to use INN-Reach.

See also:

- [Save an existing record as a template](#)
  - [Create a template from the Shortcut Bar](#)
- 

## Save an Existing Record as a Template

To create a new template based on an existing bibliographic, authority, or item record:

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

The Template Setup dialog box appears.

3. Type the name of the template in the **Name** box.
4. Select the template's owner in the **Owner** box.
5. Click **OK** to submit your settings.
  - If the template's name and owner combination are being used, a message appears, and you cannot save the template until you change the name, owner or both.
  - If the template's name and owner combination is unique in your system, the message **The record was saved as a template successfully** appears in the workform status bar.

The new template is displayed in the appropriate cataloging workform.

6. Change the template to remove information specific to the original record and make any other changes.
  7. Select **File > Save** to save the template.
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## Create a Template from the Shortcut Bar

To create a bibliographic, authority, or item record template from the shortcut bar:

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

- **Item Template**

The appropriate template workform appears.

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

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

## Setting Up Import Profiles and Importing Records

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

**Tip:**

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

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

- Perform MARC validation
- Save records as provisional or final
- Check duplicates based on system- or profile-defined rules
- Specify tags to retain from overlaid records using system- or profile-defined tags
- Specify tags to delete using system- or profile-defined tags
- Check the preferred cataloging source when merging duplicate authority records
- Create or update item records from embedded holdings data in the bibliographic records
- Protect the incoming records from being overlaid in the future
- Group the imported records in record sets for easy retrieval and bulk processing.

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

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

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

See also:

- [Setting Up Import Profiles](#)
- [Importing Records](#)
- [Using the Import Jobs Queue](#)
- [Automatic Processes During Import](#)

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## Setting Up Import Profiles

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

### Tip:

To review all the settings in an import profile, you can print a report from the Import Profile Manager. See [Print an import profile](#).

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

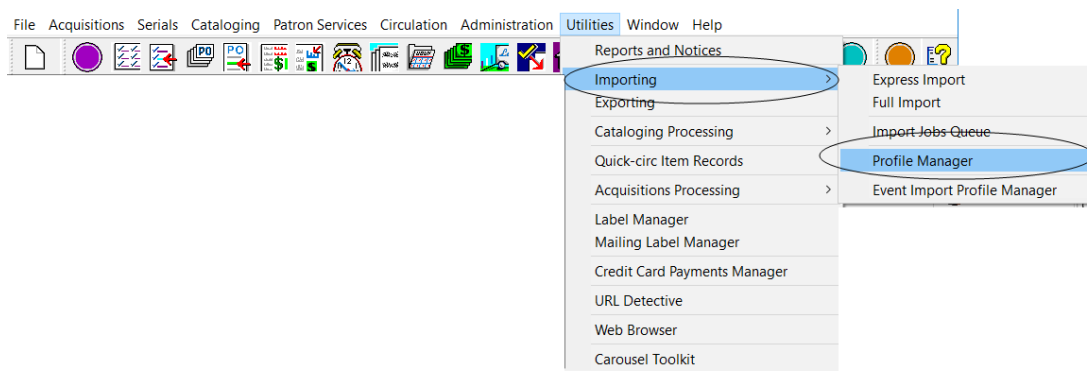
See also:

- [Polaris Read-Only Import Profiles](#)
- [Copy a Polaris Read-Only Import Profile](#)

- [Create a New Import Profile](#)
- [Set Import Options for Bibliographic Records](#)
- [Set Import Options for Item Records](#)
- [Set Import Options for Authority Records](#)
- [Set Import Options for Record Sets](#)
- [Print an Import Profile](#)
- [Modify an Import Profile](#)
- [Delete an Import Profile](#)

### Polaris Read-Only Import Profiles

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



The Import Profile window opens.

Select PolarisExec in the **Creator** box to limit the list to only the Polaris read-only import profiles.

Polaris includes the following read-only import profiles that are designed for specific types of import processing: Acquisitions Bibs Import Profile, Authority Update Import, Enriched EDI Orders, Integrated ebook Bibs, Polaris default, and Polaris default (with item creation). The Integrated ebook Bibs import profile is used exclusively for importing eContent bibliographic records.



## Acquisitions Bibs Import Profile

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

Copy the Acquisitions Bibs profile for each vendor you use to import records, name each copy of the Acquisitions Bibs profile with the name of the vendor, and make any changes to the settings.

**Important:**

To ensure that the most-recently entered ISBN or UPC is retained, you **must** add the 020 (ISBN) and 024 (UPC) tags to the profile-defined retention tags. When these tags are retained from an incoming record that is a duplicate of an existing record, and the existing record has multiple ISBNs or UPCs, the most-recently added ISBN or UPC is at the top of the list in a purchase order line item.

## Authority Update Import Profile

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

**Important:**

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

## Enriched EDI Orders Import Profile

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

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

### Tip:

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

The system matches the content of the 949\$e in the incoming bibliographic record to the purchase order line item segment, and the linked on-order item is updated with the full item data from the imported bibliographic record. The updated item is ready to circulate once it is checked in.

However, if there are 949 tags with a purchase order line item segment ID in tag 949 \$e and a volume designation in 949 \$v, a final item record will be created even if no matching on-order item is found. The new final item record is linked to the purchase order line item segment in \$e. This allows holds that were placed at the bibliographic level for an on-order set to go to the first volume of the set.

## Polaris Default Import Profile

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

## Polaris Default (with item creation) Import Profile

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

## Copy a Polaris Read-Only Import Profile

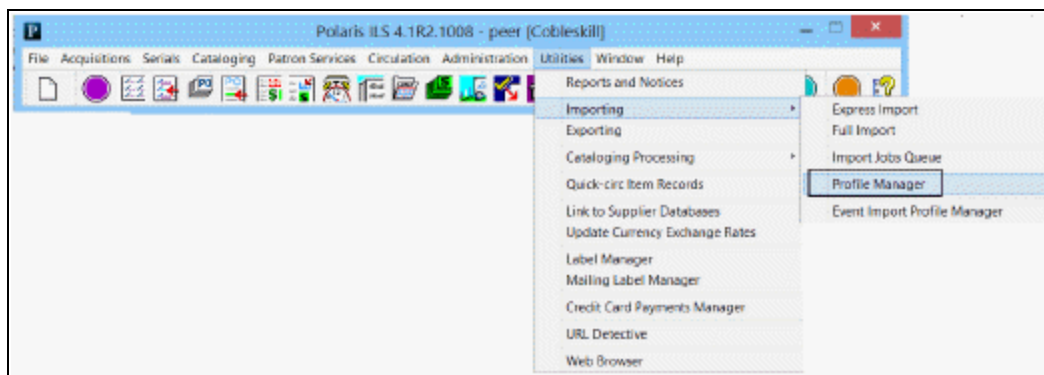
You can start with an existing Polaris read-only import profile and copy it. See [Polaris Read-Only Import Profiles](#) for a list of the Polaris import profiles and their intended purpose. The advantage to starting with one of these existing profiles is that they are already set up to handle duplicate detection, overlay, and other processing. You can rename the profile to make it more descriptive and make slight changes without affecting the overall efficiency of the automatic processing. For information on the permissions required for creating and modifying import profiles, see the Cataloging Administration PDF Guide, Set Cataloging Security topic.

### Tip:

You can print an import profile and review all the settings. See [Print an import profile](#).

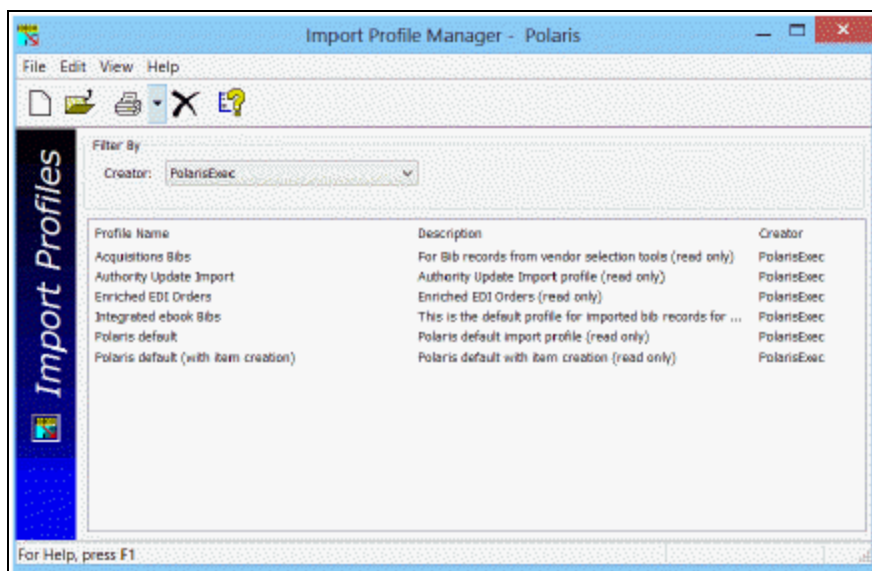
To create a new import profile from an existing Polaris read-only profile:

1. Select **Utilities > Importing > Profile Manager** from the Polaris shortcut bar.



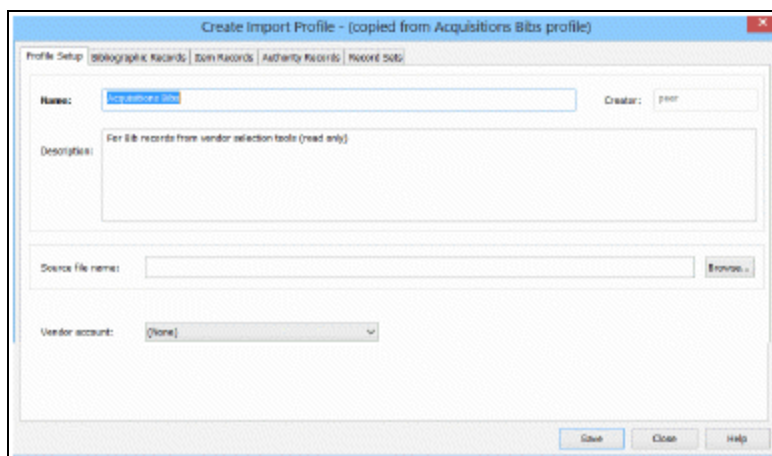
The Import Profile Manager appears.

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



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

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



4. Type a name for the profile in the **Name** box, and an optional description in the **Description** box.

**Tip:**

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

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

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

6. Click **Save**.

The profile is saved. The Create Import Profile window remains open.

7. If you need to make changes to the import profile, click the following tabs and set the import options:
  - **Bibliographic Records** - See [Set import options for bibliographic records](#).
  - **Item Records** - See [Set import options for item records](#).
  - **Authority Records** - See [Set import options for authority records](#).
  - **Record Sets** - See [Set import options for record sets](#).
8. When you have finished setting up the relevant import options, click **Save**, and click **Close** to close the saved profile.

### Create a New Import Profile

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

To create a new import profile:

1. Select **Utilities > Importing > Profile Manager** from the Polaris shortcut bar.  
The Import Profile Manager appears.
2. Select **File > New**, press **CTRL+N**, or click the New button.  
The Create Import Profile window appears.

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

**Note:**

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

6. Click **Save** to save the new import profile.

When you save the import profile, the title of the dialog box changes to Modify Import Profile.

**Note:**

The **Vendor account** is used only when you are setting up an import profile for an ebook vendor.

7. Select the following tabs and set the import options:
  - **Bibliographic Records** - See [Set import options for bibliographic records](#).
  - **Item Records** - See [Set import options for item records](#).

- **Authority Records** - See [Set import options for authority records](#).
  - **Record Sets** - See [Set import options for record sets](#).
8. After setting up the relevant options on each tab, click **Save** to save the new import profile.
  9. Click **Close** to close the saved profile.

## Set Import Options for Bibliographic Records

To set the import profile options for bibliographic records:

1. Select the **Bibliographic Records** tab in the Modify Import Profile window.

The Bibliographic Records tabbed page appears.

### Note:

To create item records from embedded holdings when importing bibliographic records, see [Set Import Options for Item Records](#).

The screenshot shows the 'Modify Import Profile - New Import Profile 1' window with the 'Bibliographic Records' tab selected. The window is divided into several sections:

- Bibliographic Save Options:**
  - Radio buttons: ☒ Save all records as final, ☐ Save all records as provisional, ☐ Do not save any records.
  - Checkboxes: ☒ Display in PAC, ☐ Do not overlay.
  - Record owner: QA-POLARIS 6.0 (sys)
  - ☐ Delete MARC Tags on incoming record (with sub-options: System defined deletion tags, Profile defined deletion tags).
- When Saving Bibliographic Records as Final:**
  - ☒ Perform MARC 21 Validation:
    - If validation errors are found: ☒ Save record as provisional, ☐ Ignore errors; save record as final.
  - ☐ Perform Authority Control:
    - If no matching heading is found: ☐ Automatically create new authority record; save bibliographic record as final, ☐ Do not create authority record; save bibliographic record as final, ☐ Do not create authority record; save bibliographic record as provisional.
- Duplicate Detection:**
  - ☒ Perform Duplicate Detection:
    - ☒ Use system defined duplicate detection rules, ☐ Use profile defined duplicate detection rules.
    - If a suspected duplicate is found: ☒ Save incoming record as provisional, ☐ Save incoming record as final; do not replace database record, ☐ Save incoming record as final; replace database record, ☐ Save record with highest encoding level. If encoding levels match: ☐ Save incoming record as final; replace database record, ☐ Reject incoming record, ☐ Save incoming record as provisional (Ignore 'Keep MARC Tags'), ☐ Reject incoming record; add MARC retention tags to database record.
  - ☐ Keep MARC Tags (with sub-options: System defined overlay retention tags, Profile defined overlay retention tags).

Buttons at the bottom: Save, Close, Help.

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


**Note:**

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

3. Select one of the following options under **Bibliographic Save Options**:
  - **Save all records as final** to save all the incoming records as final.
  - **Save all records as provisional** to save the incoming records as provisional.
  - **Do not save any records** to reject all incoming bibliographic records.

**Note:**

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

4. If you do not want the imported records to display in the PAC, clear the **Display in PAC** checkbox. The **Display in PAC** box is checked by default.
5. To protect all incoming records that are saved to the database so that they cannot be overlaid in future processing, select the **Do not overlay** box. All other import processing defined in the import profile is performed first, and only records that are saved to the database are flagged with the **Do not overlay** checkbox that prevents the records from being overlaid.
6. To delete specific MARC tags from incoming records as they are saved to the database, select the **Delete MARC Tags on incoming records** checkbox, and select one of the following options:
  - **System defined deletion tags** - Deletes the tags that are defined in the Bibliographic Tags Retain/Delete policy table in Polaris Administration. See the *Cataloging Administration Guide*, "Specify Tags to Retain from Overlaid Bibs."
  - **Profile defined deletion tags** - Deletes tags that are defined in the import profile.
7. If you select **Profile defined deletion tags**, do the following steps to specify the tags you want to delete:
  - a. Select  to add a deletion tag.  
The Delete Tags dialog box appears.
  - b. In the **Tag** box, type the tag you want to delete from the incoming record.



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

**Note:**

Select a highlighted indicator value to remove it.

- d. Select **OK** to add the tag and indicator values to the list of tags to be deleted.

**Tip:**

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

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

**Note:**

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

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


**Tip:**

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

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

**Note:**

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

- a. Select the duplicate detection rules from the **Rules to select list**.
- b. Select  to add the rule to the **Rules to apply (as unique groups)** list.

**Note:**

You can select more than one rule, but these rules are applied as separate groups, so only one of the rules needs to be met for a record to be considered a duplicate. See the *Cataloging Administration Guide*, "Change bibliographic or authority deduplication tables."

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

- **Save incoming record as provisional** - The incoming duplicate record is saved as provisional. Only the resident record with a status of final is indexed.
- **Save incoming record as final; do not replace database record** - The incoming duplicate record is saved as final but does not replace the database record. Two similar or identical bibliographic records are saved to the database and both are indexed and searchable.

**Tip:**

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

- **Save incoming record as final; replace database record** - The existing record is overlaid by the new incoming record but its control number is retained. You can also select **Keep MARC tags** and select **System defined overlay retention tags** or **Profile defined overlay retention tags**.
- **Save record with highest encoding level. If encoding levels match:**
  - **Save incoming record as final; replace database record** - This option is selected by default. You can also choose to reject the incoming record or save the incoming record as provisional. The control number is retained only when saving the record as final. You can also select **Keep MARC tags** (either system- or profile-defined) to retain specific tags from the replaced database record.

**Tip:**

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

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

the incoming record that was rejected.

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

**Tip:**

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

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

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

**Important:**

When the profile is set to reject incoming duplicate records but retain certain MARC tags, these tags are retained in the database record, and the database record is added to the record set. See [Set import options for record sets](#).


- **System defined overlay retention tags** - Retains the tags that are defined in the Bibliographic Tags to Retain/Delete policy table in Polaris Administration policy tables. For more information about how retentions and deletions are processed, see the *Cataloging Administration Guide*, "Specify tags to retain from overlaid bibs."

- **Profile defined overlay retention tags** - Retains tags that are defined in the profile.

**Note:**

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

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

- a. Select  to add a retention tag.

The Retain Tags dialog box appears.

- b. In the **Tag** box, type the tag you want to retain from the existing record.
- c. If you want all indicator values included, leave all the values in the **Indicator 1** and **Indicator 2** boxes highlighted.

**Note:**

Select a highlighted indicator value to remove it.

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

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

16. Select **Close** to close the profile or select another tab to make other settings.

## Setting Profile-Defined Duplicate Detection Rules

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

Duplicate Detection on the 024 (Other standard identifier)

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

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

The screenshot shows the 'Perform Duplicate Detection' window. Under 'Rules to select', 'incoming 035 \$a = existing 035 \$a' is selected. Under 'Rules to apply (as unique groups)', 'incoming UPC = existing UPC' is selected.

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

The screenshot shows the 'Perform Duplicate Detection' window. Under 'Rules to select', 'incoming 035 \$a = existing 035 \$a' is selected. Under 'Rules to apply (as unique groups)', 'incoming ISBN = existing ISBN' is selected.

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

The screenshot shows the 'Perform Duplicate Detection' window. Under 'Rules to select', 'incoming 035 \$a = existing 035 \$a' is selected. Under 'Rules to apply (as unique groups)', 'incoming 024 \$a = existing 024 \$a' is selected.

## Set Import Options for Item Records

To set the import profile options for item records:

### Tip:

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

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

The Item Records tabbed page appears.

**Create Import Profile**

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

When Saving Bibliographic Records as Final

☐ **Build item records**

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

If a duplicate item record (barcode) is found:

☐ Save duplicate item record as provisional  
☐ Do not save duplicate item record

If no item record (barcode) is found:

☐ Save item record as final  
☐ Save item record as provisional  
☐ Do not save item record

☐ Display in PAC (when not explicitly found)

Item template (for fields that are missing):

☐ Update items (enriched EDI)

If an update error is encountered:

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

Embedded holdings field/MARC subfield mapping

Holdings tag number:

Assigned Branch:	<input type="checkbox"/>	Loanable Outside System:	<input type="checkbox"/>
Assigned Collection:	<input type="checkbox"/>	Material Type:	<input type="checkbox"/>
Barcode:	<input type="checkbox"/>	Name Of Piece:	<input type="checkbox"/>
Call Number Prefix:	<input type="checkbox"/>	Non Circulating:	<input type="checkbox"/>
Call Number Suffix:	<input type="checkbox"/>	Non Public Note:	<input type="checkbox"/>
Circulation Status:	<input type="checkbox"/>	Owning Branch:	<input type="checkbox"/>
Classification Number:	<input type="checkbox"/>	Physical Condition:	<input type="checkbox"/>
Copy Number:	<input type="checkbox"/>	POLI-Segment ID:	<input type="checkbox"/>
Cutter Number:	<input type="checkbox"/>	Price:	<input type="checkbox"/>
Display In PAC:	<input type="checkbox"/>	Public Note:	<input type="checkbox"/>
Fine Code:	<input type="checkbox"/>	Renewal Limit:	<input type="checkbox"/>
Free Text Block:	<input type="checkbox"/>	Shelf Location:	<input type="checkbox"/>
Funding Source:	<input type="checkbox"/>	Shelving Scheme:	<input type="checkbox"/>
Holdable:	<input type="checkbox"/>	Statistical Code:	<input type="checkbox"/>
Library Assigned Block:	<input type="checkbox"/>	Temporary Shelf Location:	<input type="checkbox"/>
Loan Period Code:	<input type="checkbox"/>	Volume Number:	<input type="checkbox"/>

Save Close Help

- To create item records when you import bibliographic records, select the **Build item records** checkbox.

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

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

information but the template does, the field on the item record is filled in from the template.

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

**Note:**

If you use a template, the setting for **Display in PAC** in the item template overrides any setting made here.

7. To use a template to fill in information not specified in the holdings data, select **Item template (for fields that are missing)** and select the item template from the list.

**Note:**

The **Update items (enriched EDI)** option is used only if you are importing full MARC records and creating shelf-ready items. The Enriched EDI Order import profile is already set up to update these items. See [Enriched EDI Orders Import Profile](#).

8. Under **Embedded holdings field/MARC subfield mapping**, type the tag number where the holdings data is located in the **Holdings tag number** box.

**Tip:**

The data in the circ status subfield of the embedded holdings field is used except if the circ status code would result in a circulation status that is



not allowed for new item records. If the circ status in the embedded holdings is a status such as Lost or Held, the template value is used (if a template is specified) or the item circ status gets the default value of In.

9. In each item record field box, type the subfield letter or number for the bibliographic subfield in the embedded holdings tag that contains this information.

**Important:**

To create item records from embedded holdings in imported bibliographic records, the data in certain required fields must match the data in Polaris. For example, if your profile has defined 852 tag subfield a for the Assigned Branch, the data in \$a must match an ID or abbreviation for a branch in your system, and it must not exceed 15 characters. For information on the data conventions in embedded holdings data, see [Item Records Created from Embedded Holdings Tags](#).

10. Click **Save** to save the import profile.
11. Click **Close** to close the profile or click another tab to make other settings.

#### Related Information

- Embedded holdings data details and data entry conventions - See [Item Records Created from Embedded Holdings Tags](#).
- Holdings tags retained during overlay marked with \$9 - If the import profile is set to retain embedded holdings tags (such as the 852 or 949) from overlaid records, the specified tags are retained in the bibliographic record before item records are created. If the bibliographic record also has existing embedded holdings tags, they are marked with a \$9 and the text **Tag retained from duplicate overlay**. Item records are not created from embedded holdings tags marked with a subfield \$9. See [Bib Tags Marked to Prevent Creation/Updates of Items](#).
- Mark embedded holdings tags as processed - If this Polaris Administration parameter is set to **Yes**, when item records are created successfully from embedded holdings tags, a \$9 is inserted into the embedded holdings tags in the bibliographic records with the following automatic processing information: **Item generated mmm dd yyyy hh:mm[AM/PM]**. See the Cataloging Administration PDF Guide, Mark embedded holdings data as processed.

- Clean up embedded holdings tags marked with \$9 - A utility can be set up to delete embedded holdings tags and other tags (970s) marked with a subfield 9 and specific system-generated text. See the Cataloging Administration PDF Guide, Set up the Subfield 9 cleanup utility.
- Polaris read-only import profiles - Polaris has read-only import profiles set up to do certain types of processing. You can use these import profiles or rename them while keeping all the settings. See [Polaris Read-Only Import Profiles](#).
- Shelving scheme - The shelving scheme comes from the subfield in the **Embedded holdings field/MARC** subfield mapping. If no subfield is specified there, the shelving scheme comes from the template selected in the **Item template (for fields that are missing)** box. If no template is selected, or if the template does not include a shelving scheme, and the embedded holdings are in the 852 tag, the shelving scheme comes from the first indicator of the 852 tag. If the first indicator of the 852 tag has an invalid value, or the embedded holdings are contained in a different tag, use the default shelving scheme defined in the Polaris Administration Cataloging profile **Default shelving scheme for new item records**. See the Cataloging Administration PDF Guide, Setting Item Copy and Save Options.

### Set Import Options for Authority Records

To set the import profile options for authority records:

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

The Authority Records tabbed page appears.

**Create Import Profile**

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

**Authority Save Options**

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

**When Saving Authority Records as Final**

☒ Perform MARC 21 Validation

If validation errors are found:

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

☐ Perform Duplicate Detection

If a suspected duplicate is found:

☒ Save incoming as provisional   ☐ Save incoming as final; do not replace existing   ☐ Merge duplicate records

☐ Perform See Also From Reference Linking

If no matching heading is found:

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

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


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

Save   Close   Help

**Tip:**

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

2. Select one of the following save options:
  - **Save all records as final**
  - **Save all records as provisional**
  - **Do not save any records**
3. If you chose to save the incoming authority records as final, and you want to check the MARC format, select the **Perform MARC 21 Validation** checkbox, and choose one of the following options:
  - Select **Save record as provisional** to save the record provisionally if errors in MARC format are detected.
  - Select **Ignore errors; save record as final** to save authority records as final when they have errors in MARC format.
4. To check for duplicate authority records that already exist in the Polaris database, select **Perform Duplicate Detection**, and choose one of the following options:

- Select **Use system duplicate detection rules** to use the standard duplicate detection rules.
  - Select **Use custom duplicate detection rules** to specify what tags will be used to match the incoming records with existing records to identify duplicates.
5. If you selected **Use custom duplication detection rules**, do the following steps:
    - a. Select the duplication detection rules from the **Rules to select** list.
    - b. Click  to add the rule to the **Rules to apply (as unique groups)** list.
  6. If you selected **Perform Duplicate Detection**, indicate how you want Polaris to handle duplicate records by selecting one of the following options:
    - Select **Save incoming as provisional** to save the incoming duplicate records as provisional.
    - Select **Save incoming as final; do not replace existing** to save the incoming duplicate records as final but not replace the existing records.
    - Select **Merge duplicate records** to merge incoming authority records with duplicate authority records already in your database.
  7. If you selected **Merge duplicate records**, select the branch whose preferred cataloging source you want to use in the **Preferred cataloging source for** box.
  8. To perform *See Also From* reference linking when no match exists in the database, select the **Perform See Also From Reference Linking** checkbox, and select one of the following options:
    - Select **Automatically create new see also reference; save authority record as final** to create a new “see also” reference and save the record as final.
    - Select **Do not create see also reference; save authority record as final** if you do not want to create a “see also” reference, and you want to save the record as final.
    - Select **Do not create see also reference; save authority record as provisional** if you do not want to create a “see also” reference, and you want to save the record as provisional.
  9. Click **Save** to save the profile, and click another tab or close the profile.

### Set Import Options for Record Sets

When you are importing records, you can specify that certain types of records are to be grouped in record sets to facilitate record retrieval or bulk processing. If you are

importing multiple files in a single import job, each file of MARC records has its own record set. You can set up record sets for grouping the following types of cataloging records: final bibliographic records, provisional bibliographic records, bibliographic records with a deleted status, final authority records, provisional authority records, authority records with a deleted status, final item records, and provisional item records.

To set the profile options for record sets:

**Note:**

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

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

The Record Sets tabbed page appears.

**Tip:**

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

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

**Note:**

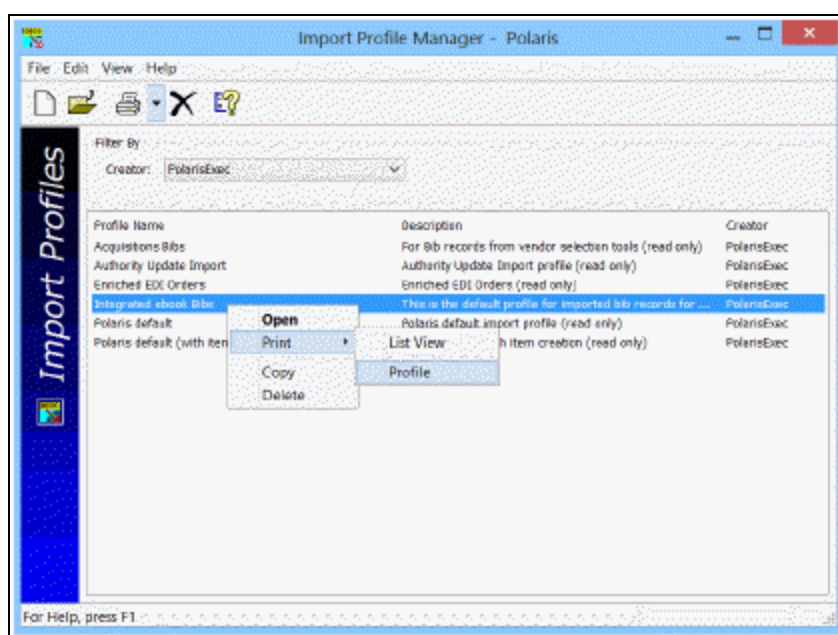
If you have specified a record set for records with a status of Deleted, imported records with a status of Deleted are put in a record set. In addition, existing records that are overlaid by duplicate incoming records are put in the Deleted record set.

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

## Print an Import Profile

To print an import profile.

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



The Import Profile document appears in the report preview window.

Import Profile		
Name:	Acq. Baker & Taylor2	
Description:	Baker & Taylor Acquisitions Site	
Creator:	per	Modifier:
Creation date:	10/22/2010 3:10:31 PM	Modification date:
Bibliographic save option:	Save as final	
Record source:	QA-Plate 4.1 Cluster Test System	Display in PAC:
NAFIC validation:	No NAFIC validation	
Authority control:	No authority control	
Duplicate detection:	Perform duplicate detection. If errors are found, ignore and enforce encoding level restrictions. If encoding levels match, save incoming record as final, replace database record	
Use system duplicate rules:	Yes	Retain date:
		Use system retention rules:
Bibliographic duplicate criteria:		
Author/Title		
ISBN		
ISSN		
Just Title and LCCN		
Rule group 1		
Rule group 2		
Title/ISSN		
Title/LCCN		
Retention tag	Indicator one	Indicator two
070	Mark 0,1,2,3,4,5,6,7,8,9	Mark 0,1,2,3,4,5,6,7,8,9
Authority save option:	Do not save	
Item save option:	Do not save	
Bibliographic final record set:		
Name (owner):	AcquisitionsBibFinal (QA-Plate 4.1 Cluster Test System)	
New or existing:	New	
Bibliographic provisional record set:		
Name (owner):	AcquisitionsBibProvisional (QA-Plate 4.1 Cluster Test System)	
New or existing:	New	

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

## Modify an Import Profile

If you have the required permissions, you can modify import profiles except for those created by Polaris. These read-only profiles have the creator name **PolarisExec**. You can copy and rename PolarisExec import profiles. See [Copy a Polaris read-only import profile](#).

To modify an import profile other than a PolarisExec profile:

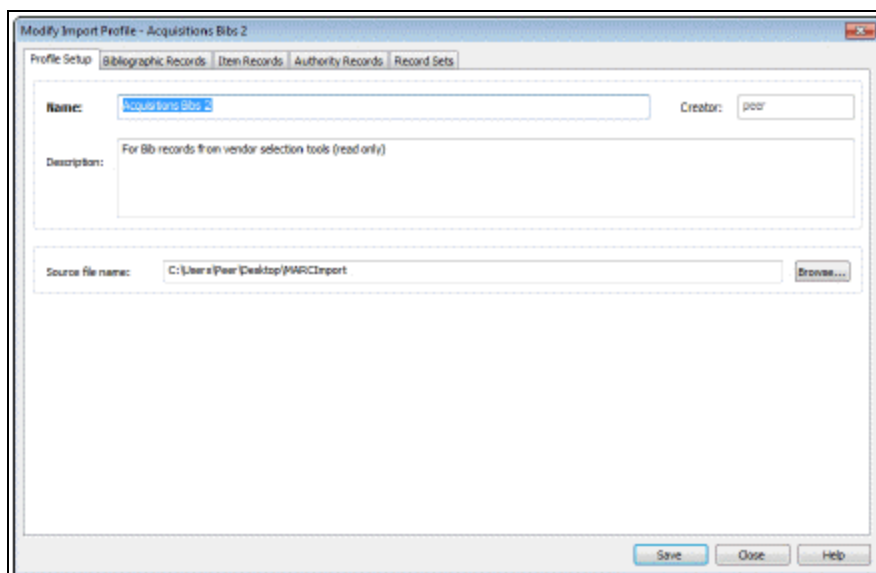
1. Select **Utilities > Importing > Profile Manager** from the Polaris Shortcut Bar.

The Import Profile Manager appears.

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

The Modify Import Profile window appears.





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

**Note:**

You can check your settings by printing the profile. See [Print an import profile](#).

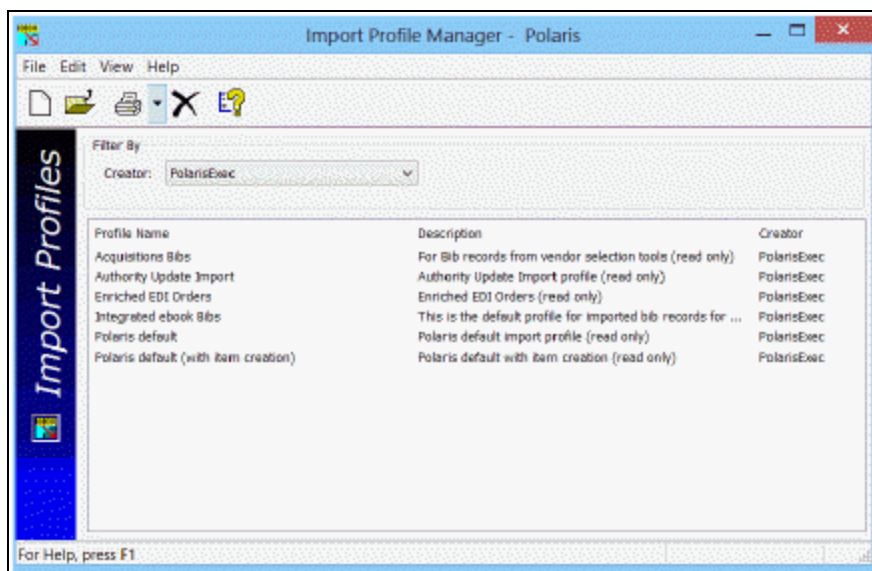
9. Click **Close** to close the profile after you have saved it.

## Delete an Import Profile

To delete an import profile:

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

The Import Profile Manager appears.



2. Right-click the profile you want to delete, and select **Delete** from the context menu.  
A confirmation message appears.
3. Click **Yes** to delete the profile.

---

## Importing Records

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

### Notes:

- Separate permissions control express and full importing. For more information, see the *Cataloging Administration Guide*.
- When importing MARC records, the system assumes the staff member conducting the import has access to any record sets defined in the import profile. The system creates or modifies record

sets according to the profile configuration and not based on the staff member's permissions.

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

### Note:

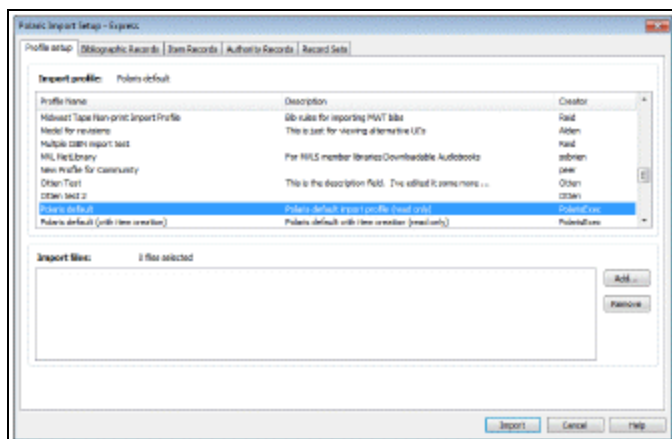
Importing large quantities of records may slow response times for other processes in Polaris. Therefore, you may want to start the import process when the library is closed and when it will not interfere with scheduled system backups.

## Use Express Import to Import Records

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

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

The Polaris Import Setup window appears.



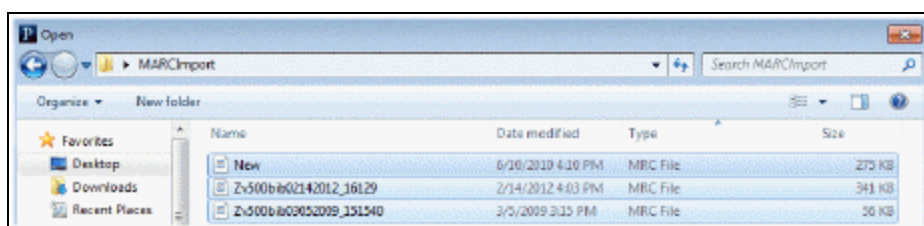
**Tip:**

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

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

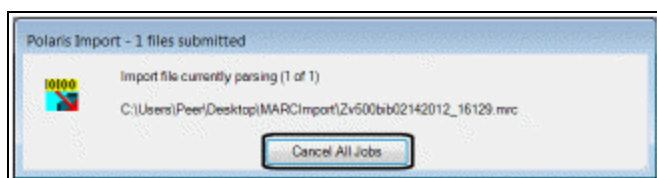
**Tip:**

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



4. Select the MARC or MARCXML file or files, and click **Open**.  
The files are listed in the Import Setup window.
5. To change the defaults for record sets, click the **Record Sets** tab, and follow the steps in [Set import options for record sets](#).
6. Click **Import** to import the records.

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



When initializing has completed, another message box appears.

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

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

#### Related Information

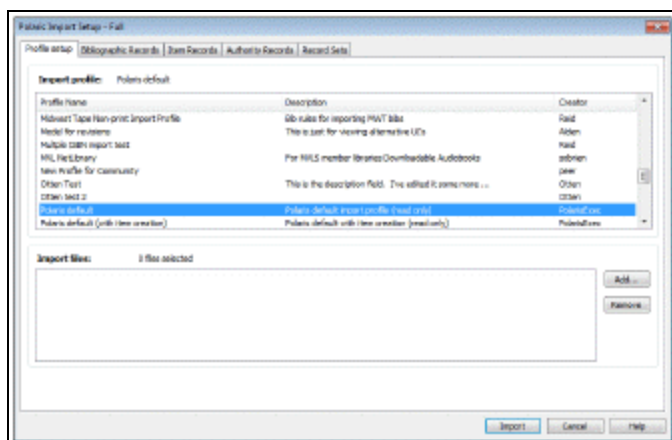
- [View Import Jobs in the Queue](#)
- [Print Import Reports from the Import Jobs Queue](#)

### Use Full Import to Import Records

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

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

The Polaris Import Setup - Full window appears.



2. To manually set the import options, see:

- [Set Import Options for Bibliographic records](#)
- [Set Import Options for Item Records](#)
- [Set Import Options for Authority Records](#)
- [Set Import Options for Record Sets](#)

#### Tip:

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

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

4. Select the profile from the list.

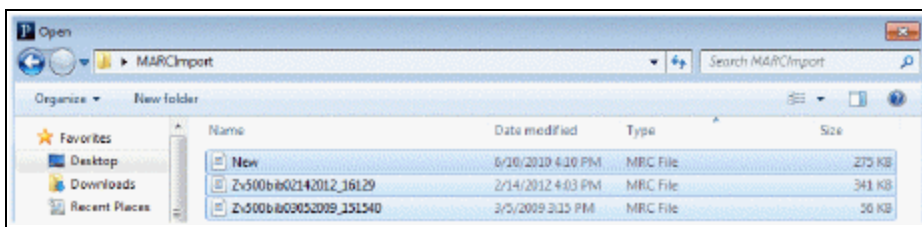
**Tip:**

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

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

**Tip:**

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



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

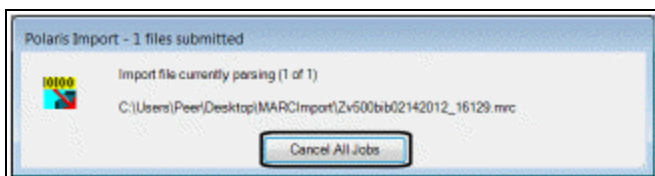
**Note:**

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

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

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

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



When initializing has completed, another message box appears.

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

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

#### Related Information

- [View Import Jobs in the Queue](#)
- [Print import reports from the Import Jobs Queue](#)

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### Using the Import Jobs Queue

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

The Import Jobs Queue contains the following columns:

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

See also:

- [View Import Jobs in the Queue](#)
- [Stop an Import Job from the Import Jobs Queue](#)
- [Delete an Import Job from the Import Jobs Queue](#)
- [Print Import Reports from the Import Jobs Queue](#)

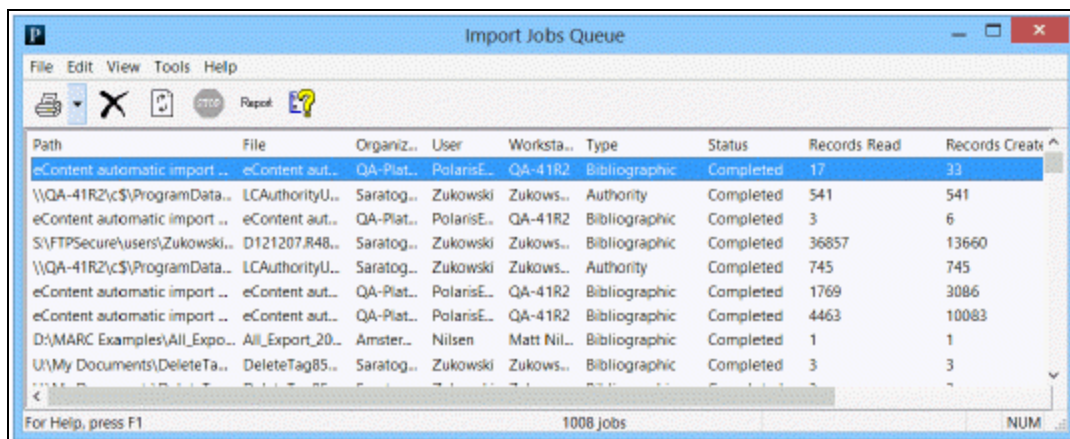
## View Import Jobs in the Queue

To view import jobs in the Import Jobs Queue:

1. Select **Utilities > Importing > Import Jobs Queue** to open the Import Jobs Queue window.  
By default, the jobs are sorted by the date and time posted. If multiple files were selected for import, each file appears on a separate line. Completed jobs remain in the queue until an authorized user manually deletes them. Automatic imports for eContent are also listed.
2. Click any column heading to sort the list.

### Note:

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



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

For Help, press F1

1008 jobs

NUM

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

### Related Information

- [Delete an Import Job from the Import Jobs Queue](#)
- [Print Import Reports from the Import Jobs Queue](#)



## Stop an Import Job from the Import Jobs Queue

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

To stop an import job from the Import Jobs Queue:

### Important:

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

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

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

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

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

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

## Delete an Import Job from the Import Jobs Queue

Import jobs remain in the Import Jobs Queue until they are manually deleted by an authorized user when there is no further use for them or the report.

To delete a completed import job:

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

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

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

### Print Import Reports from the Import Jobs Queue

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

**Tip:**

You can also print the New Titles Imported report from the Cataloging Reports menu. The New Titles Imported report shows the titles that were imported for an organization or organizations within a specific time period. For more information, search Polaris help for "Cataloging Reports."

To print details of an import job from the Import Jobs Queue:

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

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

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

The Import Report pdf appears in the preview window.

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

**Tip:**

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

### Import Report

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

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

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

Import Report		
Bibliographic record: 914999		
Title: A catalogue of the pictures, sculptures, models, drawings, prints, &c. exhibited by the Society of Artists of Great Britain, at the Great Room in Spring-Garden, Charing-Cross, May the 9th, 1761. (Being the second year of their exhibition.)		
Begin time:	3/21/2013 1:38:00 PM	Record status: Final
End time:	3/21/2013 1:38:01 PM	LDR status: c
Record set: DeleteTagTest1 - F (QA-Plato 4.1 R2)		
Duplicate	Reason	Title
914888	AuthorTitle>Title/260 \$c	A catalogue of the pictures, sculptures, models, drawings, prints, &c. exhibited by the Society of Artists of Great Britain, at the Great Room in Spring-Garden, Charing-Cross, May the 9th, 1761. (Being the second year of their exhibition.)
914962	Rule group 2:AuthorTitle>Title/260 \$c	A catalogue of the pictures, sculptures, models, drawings, prints, &c. exhibited by the Society of Artists of Great Britain, at the Great Room in Spring-Garden, Charing-Cross, May the 9th, 1761. (Being the second year of their exhibition.)
Message(s)		
Tag was deleted from incoming record: 938 #aKrtac Technologies, Inc.#KRTS#529450		
Tag was deleted from incoming record: 948 #hNO HOLDINGS IN GBR - 10 OTHER HOLDINGS		
Tag was deleted from incoming record: 952 #a4968910#zYUS#bYALE UNIV LIBR#Full OCLC member#LCC#u20121220		
Tag was deleted from incoming record: 952 #a229258101#zHUV#bHUNTINGTON LIBR ART & BOTANICAL GARDEN#Full#u20100729		
Tag was deleted from incoming record: 952 #a612564927#z#HGH#bHARVARD UNIV. HOUGHTON LIBR#Less-than-full batch#u20100919		
Tag was deleted from incoming record: 952 #a702795849#zYUS#bYALE UNIV LIBR#Full#u20120229		
Tag was deleted from incoming record: 994 #aZ0#bGBR		
Bibliographic record: 915000		
Title: A garden for all seasons : choosing the best plants for wonderful spring, summer, autumn and winter displays		
Begin time:	3/21/2013 1:38:01 PM	Record status: Final
End time:	3/21/2013 1:38:02 PM	LDR status: c
Record set: DeleteTagTest1 - F (QA-Plato 4.1 R2)		
Duplicate	Reason	Title
914889	ISBN.AuthorTitle>Title/260 \$c:Just Title and	A garden for all seasons : choosing the best plants for wonderful spring, summer, autumn and winter displays

The last section lists the import statistics.

Import Report			
IMPORT STATISTICS			
Begin time:	3/27/2013 10:46:00 AM	End time:	3/27/2013 10:46:40 AM
Bibliographic records:			
Final: 12	Provisional: 0	Deleted: 0	Rejected: 0
Updated records: 0		Resource entities created on new records: 0	
		Resource entities created on updated records: 0	
Authority records:			
Final: 0	Provisional: 0	Deleted: 0	Rejected: 0
Remote authority control generated: 0		System generated: 30	
Item records:			
Final: 0	Provisional: 0	Updated: 0	Rejected: 0
Total records read from files: 21			
Total records created: 51			

---

## Automatic Processes During Import

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

This topic contains the following sections:

- [MARC Records Validated](#)
- [Authority Control Performed](#)
- [Records Checked for Duplicates](#)
- [Specific MARC Tags Removed from Incoming Bibs](#)
- [Incoming Bibs Protected from Being Overlaid](#)
- [Bib Tags Marked to Prevent Creation/Updates of Items](#)
- [Authority Records Deleted](#)
- [Item Records Created from Embedded Holdings Tags](#)
- [Duplicate Records Overlaid](#)
- [Tags Retained from Duplicate Records](#)
- [Bibliographic Overlay Based on Encoding Level](#)
- [Specific MARC Tags Removed from Incoming Bibs](#)
- [Authority Record Overlay Based on Cataloging Source](#)

### MARC Records Validated

If validation is selected in the import profile, the records are validated according to the following Polaris Administration Cataloging profiles: **MARC validation:**

**Bibliographic** and **MARC validation: Authority**. However, if the incoming records contain indicators or subfields with data that cannot be validated, the data is replaced with the following defaults: Indicators default to ' ' and subfields default to '?'. For more information, see the Cataloging Administration PDF Guide, Administering MARC Validation and Display.

### Authority Control Performed

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

### Records Checked for Duplicates

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

### Specific MARC Tags Removed from Incoming Bibs

If the import profile is set up to automatically remove tags from incoming bibliographic records, the tags are removed from the records before they are saved in the Polaris database. Search Polaris help for "Set import options for bibliographic records."

### Incoming Bibs Protected from Being Overlaid

If the import profile is set up to check the **Do not overlay** box on the incoming records, they are saved as protected records that cannot be overlaid. Search Polaris help for "Set import options for bibliographic records."

### Bib Tags Marked to Prevent Creation/Updates of Items

If you are using an import profile that is set to create item records from embedded holdings tags, an automatic process first checks the bibliographic records for the presence of pre-existing holdings tags with the same tag number specified in the import profile. If pre-existing tags are found that match the retained tags under **Keep MARC tags** in the import profile, and these tags do not already have a \$9 subfield, then a

system-supplied \$9 with the text **Tag retained from duplicate overlay** is inserted into the tag. Pre-existing embedded holdings tags that do not already have a \$9 subfield are marked automatically without a Polaris Administration parameter.

When embedded holdings tags are used to create new items or to update on-order items to shelf-ready items, a \$9 with the text **Item generated** is inserted into the tag if the Polaris Administration Cataloging parameter **MARC embedded holdings tags as processed** is set to **Yes**. During the import process, item records are not created or updated if the embedded holdings tags are marked as follows:

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

Or

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

Your Polaris Administrator can use a utility to automatically scan for specific tags marked with \$9 and remove them. See the Cataloging Administration PDF Guide, Setting Utility to Delete Bib Tags Marked with Subfield 9.

### Authority Records Deleted

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

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

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

### Item Records Created from Embedded Holdings Tags

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

Polaris Item Record Field	Subfield	Required	Data Entry Conventions
Assigned (branch)	\$a	Yes	Must match a branch ID or abbreviation. 15 characters max.
Collection	\$b	No	Must match a collection ID or abbreviation. 15 characters max.
Barcode	\$p	No	20 characters max.
Call Number Prefix	\$k	No	60 characters max.
Call Number Suffix	\$m	No	60 characters max.
Circ Status	N/A	No	ID or description. 80 characters max. Certain circ statuses



Polaris Item Record Field	Subfield	Required	Data Entry Conventions
			are not allowed in new item records, for example <b>Lost</b> . If the ID or description in the circ status is not allowed, the circ status is taken from the template or from system defaults for item records.
Classification Number	\$h	No	60 characters max.
Copy Number	\$t	No	60 characters max.
Cutter Number	\$i	No	60 characters max.
Display in PAC	\$4	Yes	0 = No, 1 = Yes
Fine code	\$r	Yes	FineCodeID (ID or description). 80 characters max.
Free Text Block	N/A	No	255 characters max.
Funding Source	\$1	No	50 characters max.
Holdable	\$5	Yes	0 = No, 1 = Yes
Library Assigned Block	N/A	No	ID or description. 80 characters max.
Loan Period Code	\$u	Yes	LoanPeriodCodeID, ID, or description. 80 characters max.
Loanable Outside System	\$7	Yes	0 = No, 1 = Yes
Material Type	\$w	Yes	MaterialTypeID, ID, or

Polaris Item Record Field	Subfield	Required	Data Entry Conventions
			description. 80 characters max.
Name of Piece	N/A	No	255 characters max.
Non Circulating	N/A	No	0=No, 1=Yes
Non-Public Note	\$x	No	255 characters max.
Owner (branch)	\$o	Yes	Must match a branch ID or abbreviation. 15 characters max.
Physical Condition	\$q	No	255 characters max.
POLI-Segment ID	N/A	No	Number
Price	\$0	No	Monetary value (Format: ##.## No '\$' should be in the subfield. Include a decimal where appropriate.)
Public Note	\$z	No	255 characters max.
Renewal Limit	\$y	Yes	0-99
Shelf Location	\$c	No	Must match shelf location ID or description. 80 characters max.
Shelving Scheme	\$j	Yes	0=No information, 2=Library of Congress 3=Dewey Decimal 4=National Library of

Polaris Item Record Field	Subfield	Required	Data Entry Conventions
			Medicine 5=Superintendent of Documents 6=Shelving Control Number 7=Title 8=Shelved Separately 9=Other
Statistical Code	\$d	No	ID or description. 80 characters max
Temporary Shelf Location	\$l	No	25 characters
Vol (volume)	\$v	No	60 characters max.

### Duplicate Records Overlaid

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

### Tags Retained from Duplicate Records

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

**Note:**

The Bibliographic Tags to Retain/Delete policy table can also be used to

identify tags to delete from incoming records whether they are duplicates or not.

For more information on these tables, see the *Cataloging Administration Guide*, "Specify Tags to Retain from Overlaid Bibs" and "Specify Tags to Retain from Overlaid Authority Records."

For bibliographic records, you can also select the option **Profile-defined overlay retention tags** in the import profile and select additional bibliographic tags to retain. See [Set import options for bibliographic records](#).

### Bibliographic Overlay Based on Encoding Level

If the import profile is set to compare the encoding levels of duplicate records, the value in Leader position 17 is checked.

**Note:**

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

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

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

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

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

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

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



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

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

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

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

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

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

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

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



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

### Authority Record Overlay Based on Cataloging Source

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

**Note:**

For information on setting up this policy table, see the *Cataloging Administration Guide*, "Specify preferred cataloging sources for authority records."

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

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

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

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

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

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

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

## Checking Cataloging Records

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

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

See also:

- [Checking Authority Headings](#)
- [Checking MARC Format](#)
- [Checking for Duplicate Records](#)

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### Checking Authority Headings

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

**Note:**

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

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

You can also create links automatically from an open authority record to new bibliographic or authority records whose headings match, or are very close to, the

heading in the open record. When you make new links to authority records or update links, you can see the changes by selecting **Utilities > Cataloging Processing > Authority Create Links Queue** or the **Authority Update Links Queue**.

See also:

- [Authority Control for Local Headings](#)
- [ZMARC Remote Authority Control](#)
- [List and Resolve Unlinked Headings](#)
- [Create Links from Authority Records to Other Records](#)
- [Edit Authority Records and Update Linked Records](#)
- [View and Print Logs for New or Updated Authority Links](#)

### Authority Control for Local Headings

**Note:**

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

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

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

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

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

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

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

### ZMARC Remote Authority Control

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

An authority create links job is added to the queue automatically if other unlinked bibliographic or See *Also* headings in the database can be authorized by the new automatically-created authority record.


You enable remote automatic authority control through the **Remote automatic authority control** Cataloging profile in Polaris Administration. See the Cataloging Administration PDF Guide, Managing Authority Control.


### List and Resolve Unlinked Headings

To check for unlinked headings in a bibliographic or authority record:

1. Open the Bibliographic Record or Authority Record workform.

#### Tips:

Click  to check headings in the bibliographic record.

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

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

#### Note:

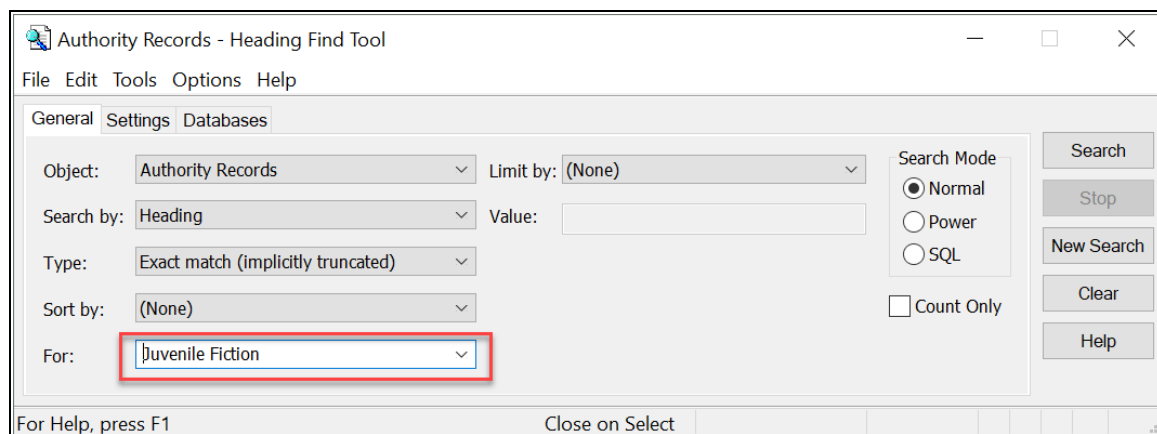
If the headings are linked, the following message appears: **No**

**heading problems were found.** Click **OK** to acknowledge the message and skip the rest of these steps.

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

If there are unauthorized headings, the Check Headings Assistant dialog box appears.

3. Select a single heading or multiple headings to edit:
  - If there are multiple headings and you want to create new headings or leave the bibliographic headings unlinked for all the headings listed, select all the headings and click **Details**. The Check Headings Details dialog box appears with the headings listed.
  - Select **Create new authority record** or **Leave unlinked**, and click **OK**.
  - To see more options, select a single heading, and click **Details** on the Check Headings Assistant or Check See Also From References Assistant dialog box. The Check Heading(s) Details dialog box appears with the other options.
4. Use one of the following options to resolve the unauthorized heading:
  - Change the heading to match an existing authority record - If a heading is listed under **Possible Authority Records**, select it. Or, click **Find** and use the **Authority Records - Heading Find Tool** to search for and select a valid authority record. The **For** option in the Find Tool is automatically populated when you are working with unlinked headings if that administrative setting has been enabled.



Then, select **Adjust** on the Check Headings Details dialog box, and select one of the following options:

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

The Check Headings Assistant dialog box displays the solution.

#### Tips:

To see how the authority heading appears in the record, click **Preview**. The Preview window appears.

If you created a new authority record, it is listed in a dialog box, and you can double-click to open it in the Authority Record workform.



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

The Bibliographic Record workform or the Authority Record workform appears.

7. Select **File > Save** to save the record.

## Related Information

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

## Create Links from Authority Records to Other Records

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

To create links from an authority record to a bibliographic record or another authority record:

1. Open the Authority Record workform.
2. Select **Tools > Create Links to Bibliographic Records** or **Tools > Create Links to Authority Records**.

The Link Bibliographic Headings Assistant or Link Authority Headings Assistant dialog box appears with a list of authority headings that can link or are close. If the headings can be linked, they are listed in the top of the dialog box.

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

The linking process begins.


4. To check the linking job, or to generate a report that lists the new and updated links, see [View and Print Logs for New or Updated Authority Links](#).

## Edit Authority Records and Update Linked Records

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

To edit authority records and update linked records:

### Tip:

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

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

### Note:

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


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

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

- To remove links to any bibliographic headings linked to the edited authority record, click **Unlink the headings** (or **references**). The heading remains in the bibliographic or authority record as an unauthorized heading.
5. Click **Continue Saving** to update the linked headings automatically.

#### Related Information

Check headings before saving changes to the authority record - To see the linked headings that would be affected by your changes, select **Tools > Check For Linked**

**Records** or click  from the Authority Record workflow. The Check for Linked Records Results dialog box appears if there are linked records that would be affected by the change. If no linked headings or no heading problems were found, a **No records were affected** message appears. You can click **Show Linked Bibliographic Headings** or **Show Linked See Also References** to see a list of the linked records.

#### View and Print Logs for New or Updated Authority Links

An authority create links job is added to the queue automatically if remote automatic authority control is enabled and other unlinked bibliographic or See Also headings in the database can be authorized by the new automatically-created authority record. To check the queue:

1. On the Polaris shortcut bar, select **Utilities > Cataloging Processing > Authority Create Links Queue** or **Authority Update Links Queue**.

A window lists the new or updated links.

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

The log appears in the report preview window.

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

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#### Checking MARC Format

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

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

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

**Note:**

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

See also:

- [Check MARC format from a workform](#)
- [Change invalid fields](#)

### Check MARC Format from a Workform

To verify that the catalog record displayed in the Bibliographic Record or Authority Record workform meets the MARC 21 format guidelines:

1. Open the Bibliographic Record or Authority Record workform.



**Tip:**

Click to check the format.

2. Select **Tools > Check MARC21 Format** from the workform menu bar.

**Note:**

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

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

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

### Change Invalid Fields

To change invalid content designators in the record:

1. Click **Edit Record** on the Check MARC21 Format Results dialog box.  
The focus changes to the record workform.
2. Make the appropriate changes to the invalid tags.



**Tip:**  
Click to check the format.

3. Select **Tools > Check MARC21 Format** to restart the MARC 21 check.  
If all content designators are valid, **No MARC21 formatting problems were found** appears, or if the record still contains invalid fields, the Check USMARC Format Results dialog box appears.
4. Do one of the following actions:
  - If **No MARC21 formatting problems were found** is displayed, click **OK** to return to the workform.
  - If the Check MARC21 Format Results dialog box is displayed, repeat steps 2-3 of this procedure until all MARC 21 formatting problems are resolved.

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### Checking for Duplicate Records

Polaris duplicate detection helps you avoid adding duplicate bibliographic or authority records to your database. Duplicate detection is automatically run when you save a bibliographic or authority record. You can also select **Tools > Replace/Check for duplicates** from the Bibliographic Record workform, or **Tools > Check for Duplicates** on

the Authority Record workform. The following Polaris Administration settings control duplicate detection and how records are overlaid in Polaris Cataloging:

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

**Note:**

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

See also:

- [Detect duplicate or replace bibliographic records](#)
- [Detect duplicate authority records](#)

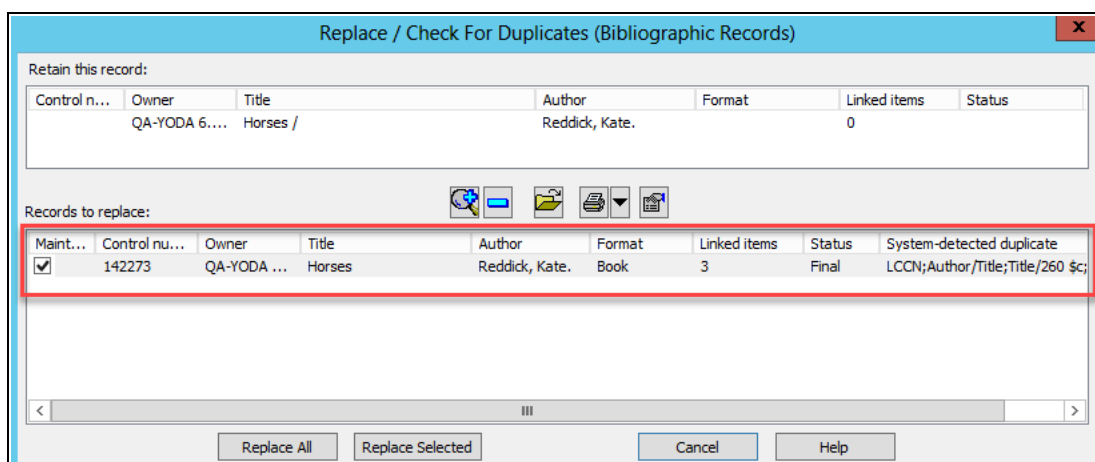
### Detect Duplicates or Replace Bibliographic Records


You can check for duplicate bibliographic records and replace them with a new or existing record. You can also replace records even if they were not determined to be duplicates. When you save a bibliographic record, Polaris checks for duplicate records. If duplicates are found, the Replace/Check for Duplicates dialog appears and lists the duplicate records. If no duplicates are found, Polaris saves the bibliographic record.

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

To check for duplicate bibliographic records and replace them, or replace records that are not determined to be duplicates:



1. Open the Bibliographic Record workform.
2. Do one of the following:
  - Select **File > Save**, select the **Save** button, or press **CTRL+S**. If no duplicates are detected, the record is saved, and no additional message appears. If duplicates are detected, the Replace/Check For Duplicates dialog appears and lists the duplicate records.



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

**Tip:**

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

- Add records to the **Records to replace** list - Select  to open the Polaris Find Tool. Search for and select single or multiple bibliographic records or bibliographic record sets, right-click and choose **Select**. To see the records in a record set, right-click and select **Open**. When you select a record set, all the member records are added to the list.
- Remove records from the **Records to replace list** - Select the records to remove, and select .
- Replace the records displayed in the **Records to replace** list - Select **Replace All**. Or select specific records to replace using the Maintain control number column to select which of the Records to replace will have its control number retained, and select **Replace Selected**. Select **Yes** to confirm that you want to replace the record or records.

**Notes:**

- Records with a status of provisional are not eligible for this feature.



- This feature applies only when new records are being saved, not when two existing records in your database are suspected of being duplicates. In that situation, you must perform the duplicate detection and replace operation from the record whose control number you wish to retain.
- If the overlaid records include tags configured to be retained in the Bibliographic Tags to Retain/Delete policy table, these tags are copied to the new bibliographic record. See [Related Information](#) for more information on what gets saved in the retained record.

#### Related Information



- Records that cannot be added to the Records to Replace list:
  - Records with a Deleted status
  - Records linked to digital media in Polaris Fusion
- Setting deduplication rules - The rules that detect duplicates are applied using rule groups in the Bibliographic Deduplication database table or the Authority Deduplication table.
- Results of replacing records - When you choose to replace a record or records in the **Records to replace** list with the record displayed in the Bibliographic Record workform, the saved record has the following characteristics:
  - The selected or single control number of the existing records are retained.
  - Specific tags from overlaid records are retained - Tags that are configured to be retained in the Bibliographic Tags to Retain/Delete policy table are copied to the new bibliographic record.
  - Links from overlaid records are transferred to the newly saved record - If the duplicate records had links to other records, they are maintained in the new record, including links to:
    - hold requests
    - item records
    - item templates
    - authority records
    - selection list line items
    - selection lists

- promotion records
  - purchase order line items
  - purchase orders
  - invoice line items
  - invoices
  - serial holdings records
  - standing order parts
  - subscription records
  - record sets
- Non-MARC settings are specified in the newly saved record - The **Display in PAC** setting and other non-MARC settings are not copied from the replaced records.
  - First available date is earliest in any of the records - The new bibliographic record's first available date is the earliest first available date of any of the records, including those that were overlaid. This means that in some situations the creation date of the retained record is after the first available date.
  - Circulation counts increase - The Lifetime circulation count and Lifetime in-house circulation count are increased by the counts in the replaced records.
  - If the **MARC validation immediately after bib overlay** Cataloging profile is set to **Yes**, MARC coding is checked after records are overlaid. This setting also ensures that non-repeatable tags from the overlaid records do not accumulate in the new bibliographic record.
  - If the **Check headings immediately after bib overlay** Cataloging profile is set to **Yes**, headings are checked in the retained record. If any problems are detected with the headings, the Check headings assistant dialog appears.

### Detect Duplicate Authority Records

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

To check for authority records in the Polaris database that may be duplicates of the record displayed in the Authority Record workflow:

1. Open the Authority Record workform.
2. Do one of the following:
  - Select **Check for Duplicates** .
  - Select **Save** .

Polaris checks for duplicate records using the rules defined in the [Authority Duplicate Detection Rules Reference](#). If duplicates are found, the 'Check For Duplicates' Results dialog appears, listing the reasons the record was identified as a duplicate.

3. To resolve duplicate records on the 'Check for Duplicates' Results dialog, select one of the following options:
  - **Continue Saving** — Saves the record displayed in the Authority Record workform even though it may be a duplicate of the record or records listed in the dialog.

**Note:**

This option is only available if you saved the record in step 2.

- **Open** — Opens the selected duplicate record.
- **Replace** — Replaces the selected duplicate with the record displayed in the Authority Record workform.

**Note:**

This option is only available if you saved the record in step 2.

- **Cancel** — Closes the 'Check For Duplicates' Results dialog.

## Related Information

Setting deduplication rules - The rules that detect duplicates are applied using rule groups in the Authority Deduplication database table. For more information, see the Cataloging Administration Guide, Change bibliographic or authority deduplication tables.

## Maintaining Item Records

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

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

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

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

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

**Note:**

To specify how hold requests operate in your library, see the Patron Services Administration Guide, [Setting Up Holds and ILL Request Processing](#) Setting Up Hold and ILL Loan Request Processing .

See also:

- [Creating Item Records](#)
- [Changing Item Records](#)

- [Printing Cataloging Labels](#)

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## Creating Item Records

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

- Import bibliographic records and automatically generate item records based on the holdings data in the 852 tag or in a locally-defined tag. See [Set import options for item records](#).
- Release a purchase order and create on-order items. See the Acquisitions PDF Guide, Release a purchase order.
- Create an on-the-fly item at checkout - The on-the-fly (OTF) function creates a minimal-level item record so items can be checked out before they are fully cataloged. See the Patron Services PDF Guide, Create an on-the-fly item at checkout.
- Import bibliographic records for eContent titles and automatically create eContent items - See [EContent Item Records](#).

**Note:**

You can specify the default shelving scheme to use for all new item records for your organization. See the Cataloging Administration PDF Guide, Setting Item Copy and Save Options.

See also:

- [Create multiple item records for a single title](#)
- [Create a single new item record manually](#)
- [Enter basic information for an item record](#)
- [Enter circulation information for an item record](#)
- [Enter notes and blocks for an item record](#)
- [Enter acquisitions information for an item record](#)
- [Edit item information for course reserves](#)
- [View item's circulation history and edit float setting](#)
- [Create a subordinate \(child\) item record](#)
- [Link subordinate items to different records](#)

- [View other item records linked to the same bib](#)
- [View the linked bib from an item record](#)

### Create multiple item records for a single title

To create one or more item records linked to the same bibliographic record:

#### Note:

Item records can be created automatically when importing bibliographic records with embedded holdings data. Search Polaris help for "Set import options for item records."

1. Do one of the following actions:

#### Tip:

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

- From the Polaris shortcut bar, select **File > New**, press **CTRL+N**, or click the New button and select **Item Record** from the New dialog box. Then, select a template or click **OK**.
- Press **F12** to open the Bibliographic Record Find Tool, search for the bibliographic record and open it in the Bibliographic Record workflow.

Then, select **Tools > Create Item Record**, or click .

- From the Item Record workflow, select **Tools > Create Item Record**.

The New Item Record Options dialog box appears.

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

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

copied from the bibliographic record to the New Item Record Options dialog box if the profile **Bring price from bib to item record when link is made** is set to **Yes** in Polaris Administration.

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

**Tip:**

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

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

**Note:**

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

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

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

**Tip:**

Each call number field can contain up to 60 characters.

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

**Notes:**

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

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

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

**Tip:**

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

- b. Type the prefix for the call number in the **Prefix** box.
- c. Type the class number in the **Class** box.
- d. Type the cutter number in the **Cutter** box.
- e. Type the suffix for the call number in the **Suffix** box.
- f. Type the volume number in the **Vol** box if you are creating an item record for a volume in a multi-part monographic set.

**Important:**

If you enter a volume number, be sure to format it



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

**Internal spaces and all punctuation affect a match:**

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

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

**Case does not matter.**

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


**Beginning and trailing spaces are ignored.**

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

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

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

- g. Type the copy number in the **Copy** box if you are creating an item record with copy information.
7. (Optional) If the price is not filled in, type the dollar amount in the **Price** field. If the bibliographic record contains a price, it is filled in automatically.
  8. If you are not using templates, or the templates are missing information that you want in the item records, fill in the fields above the distribution grid.
    - Select the circulation status in the **Circ status** box.
    - Select the renewal limit in the **Renewal Limit** box.
    - To display the item records in the PAC, check the **Display in PAC** box.
    - If the item should not circulate, select **Non-circulating**.

- To allow the items to be loaned outside of your library system, select **Loanable outside system**.
  - To allow holds to be placed on this item, select **Holdable**.
9. If you did not use templates, enter the item distribution information in the grid under **Distribution** as follows:
- Type the number of copies for the branch and location in the Items box.
  - Type the number of items in the **Items** box, select the **Branch, Collection, Shelf location, Material Type, Loan Period, Fine Code, Statistical Code, and Owner**.
10. Click  to add the next blank row.
11. To enter barcodes for the item records, do one of the following steps:
- Move the cursor into the **Item Barcode(s)** field, and scan the item barcodes. The **Barcode total** displays the number of barcodes, and the **Item total** displays the total number of items that will be created.

**Note:**

You can create items without barcodes.

- Select **Use system assigned barcodes**.
12. Click **OK** to create the new item records.
13. If you selected **Use system assigned barcodes**, enter the following information on the Item barcode range dialog box:
- a. Select the type of barcode in the **Type of barcode** box.
  - b. Type the beginning barcode number in the **Start of range** box.
  - c. Type the ending barcode number in the **End of range** box.
  - d. Use the up or down arrows to specify the next barcode number to be assigned after the starting number in the **Next to be assigned** box.
  - e. Click **OK**.

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

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

The Label Manager appears. For information about Label Manager, see [Printing Cataloging Labels](#).

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

**Tip:**

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

The item record opens in the Item Record workflow.

**Tip:**

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

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

## Related Information

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

**Create a Single New Item Record Manually**

To create a new item record manually:

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

The New Item record dialog box appears.

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

The new Item Record workflow, Cataloging view appears.

4. Enter information for the item record by following the steps in [Enter basic information for an item record](#).

### Enter Basic Information for an Item Record

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

To enter the item record's bibliographic and identifying information:

**Tip:**

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

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

The **Title** and **Author** boxes are filled in.

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

**Note:**

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

7. Enter the item's location and identifying information as follows:

**Note:**


The owning branch controls permissions based on ownership of the

record. The assigned branch governs the circulation policies applied to transactions involving this item and its display in the PAC.

8. Select the item's owner in the **Owner** box.
9. Select the item's assigned branch in the **Assigned** box.
10. Select the collection to which the item will be assigned in the **Collection** box.
11. Select the location for the item in the **Shelf location** box.
12. To indicate a temporary location, type the location in the **Temporary location** box.
13. Select the circulation status for the item in the **Circ status** box.
14. Enter the item's circulation information. See [Enter circulation information for an item record](#).

### Enter Circulation Information for an Item Record

To enter the item record's circulation parameters, call number, and hold request information for an item record:

1. Open the Item Record workflow.
2. Select **View > Cataloging** or click .

The Cataloging view of the Item Record workflow appears.

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

#### Note:

The **Scheme** box displays the default shelving scheme for your organization. See the *Cataloging Administration Guide*, Specify the default shelving scheme for item/holdings records.

4. If the call number is not filled in, enter the information in the following fields:
  - **Prefix**
  - **Class**

- **Cutter**
- **Suffix**

**Note:**

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

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

**Important:**

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

**Internal spaces and all punctuation affect a match:**

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

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

**Case does not matter:**

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

**Beginning and trailing spaces are ignored:**

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

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

To enable first available copy hold requests for multipart titles, go to

**Polaris Administration, Parameters, Requests, Holds Options.** For more information, see the *Patron Services Administration Guide*, Set Holds options: Enabling, Item Status Restrictions, First Available Copy.

6. Specify how the item is to be held by selecting or clearing the checkboxes under **Request:**

- **Loanable outside system** - If checked, the item can be loaned outside your library system. If unchecked, the item cannot be loaned outside your library system.

**Note:**

Selecting the **Loanable outside system** checkbox contributes the item record to INN-Reach, but does not impact standard ILL.

- **Do not mail to patron** - If checked, the item cannot be mailed to a patron using **Borrow By Mail** circulation. See *Patron Services Guide*, Borrow By Mail Circulation.
- **Holdable** - If checked, hold requests can be placed on the item. If unchecked, no hold requests can be placed on the item. To indicate limits on the holds, use the checkboxes under **Limit to:**
  - **Pickup at** - Limits the item to filling hold requests only at a selected branch, not just the item's assigned branch. From this list, only one branch can be selected. When you select this option, you can also select **Patrons from this library and branches** or **Patrons from this branch only**.
  - **Patrons from this library and branches** - Limits the item to filling hold requests from patrons registered at the item's assigned branch and other branches associated with the same parent library. When you select this option, you can also select **number of days past first available**.
  - **Number of days past first available** - Sets the number of days a new item is available only to the assigned library's patrons. During the specified number of days, patrons from all other libraries can still find the new item and place a hold. After the specified number of days, holds on the new item placed by patrons from other libraries can be filled.

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

7. Select one of the following save options for this item:

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

**Note:**

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


Related Information

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

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

## Enter Notes and Blocks for an Item Record

To enter notes according to your library's policy; notes are optional:

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

The Notes and Notices view of the Item Record workform is displayed.



3. Type notes in the following fields, if applicable:

**Tip:**

If you add notes to the item record, the icon changes to yellow. If you add blocks, the Notes view icon turns red.

- **Public note** box - The notes will be displayed in the PAC for this item.
- **Non-public note** box - The notes are intended for library staff only.
- **Physical condition** box - The notes describe the physical condition of the item.

4. To place a block on the item record, specify the type of block as follows:

- To place a library-defined circulation block on the item, select the block in the **Library-assigned** box. Library-assigned blocks are set in Polaris Administration. See the *Patron Services Administration Guide*, Defining Item Blocks.
- To place a block on the item for any reason not covered by a library-assigned block, type up to 255 characters as the explanation for a block in the **Free text** box.

5. Select **File > Save**, press **CTRL+S**, or click the Save button to save the item record.

## Enter Acquisitions Information for an Item Record


**Note:**

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

To enter source and acquisition information for an item record if the information was not copied from the purchase order and fund records in Acquisitions:


**Note:**

This view also displays circulation statistics for the item.

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

**Note:**

If the item was created automatically from the embedded holdings information in an imported bibliographic record, the **Import date, Bib record, and Source** boxes are filled in.


4. Select **File > Save**, press **CTRL+S**, or click .

**Edit Item Information for Course Reserves**

To edit information for items that are reserved for academic courses:

**Note:**

Course reserve functions are available by specific contract.

1. Open the Item Record workform.
2. Select **View > Reserves** or click .

The Reserves view appears.

**Note:**

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

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

**Note:**

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

- **Assigned**
  - **Collection**
  - **Shelf location**
  - **Loan period**
  - **Fine code**
  - **Renewal limit**
4. Select **Holdable** to allow holds on the item while it is reserved.
  5. Select **Purchase** if the library needs to purchase additional copies of this title.
  6. Select **Library use only** if the item should not leave the library.
  7. Select **Requires full cataloging** if the item and bibliographic record have not been fully cataloged.
  8. For photocopies, indicate the copyright information as follows:
    - Select **Fee required** if there is a fee associated with the item.
    - Select **Fee paid** and type the amount in the **Fee** box if the fee was paid.
    - Select **None** if the reserve item is not a photocopy.
    - Select **CCL** if the photocopies comply with copyright law.
    - Select **CCG** if the photocopies comply with copyright guidelines.
  9. Indicate what to do with the item when the reserve is over:
    - Select **Discard** to discard the item after the item is taken off reserve.
    - Select **Return to collection** to return the item to its normal collection.
    - Select **Return to owner** if the item is owned by an instructor, and you want it returned to the instructor.
    - Select **Auto-delete** to delete the item record and associated bibliographic record when the item is taken off reserve. This option is often used for temporary items such as photocopies and items that belong to instructors.
  10. Indicate the copy owner as follows:
    - Select **Instructor** if the instructor owns the copy.
    - Select **Library** if the library owns the copy.
  11. To enter information regarding this item's course reserve, type the note in the **Note** box.

**Note:**

At the bottom of the Reserves view, you can see information on the

courses to which the item is linked, including the course, the reserve status, the dates of the reserve, and the count of circulations (check-outs and renewals) of the item while on reserve for that course. You can double-click the course to open the Course Reserve workflow.

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

#### Related Information

- See the *Patron Services Administration Guide*, Setting Up Course Reserves


### View item's circulation history and edit float setting

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

#### Note:

For more information about floating collections, see the *Patron Services Administration Guide*, Setting Up Floating Collections.

To view an item's circulation history and change the home branch and floating option:

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

The Circulation History view appears.

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

#### Item Circulation History

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

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

- **Created via Circulation**
- **Created via Serials**
- **Marked for deletion**
- **Undeleted**
- **Checked in via In House**
- **Inventory date was updated**
- **Barcode replaced via Check In**
- **Non public note modified via Manage Item dialog from Check In**
- **Free text block modified via Manage Item dialog from Check In**
- **Library assigned block modified via Manage Item dialog from Check In**
- **Assigned collection modified via Manage Item dialog from Check In**
- **Material type modified via Manage Item dialog from Check In**
- **Bulk checked out via Outreach Services**
- **Bulk checked out via Borrow by Mail**
- **Modified via Receive Shipment**
- **Linked to new bib**
- **Linked to new bib via Serials**
- **First overdue notice: Mail**
- **First overdue notice: Email**
- **First overdue notice: Phone**
- **First overdue notice: Text Message**
- **Second overdue notice: Mail**
- **Second overdue notice: Email**
- **Second overdue notice: Phone**
- **Second overdue notice: Text Message**
- **Third overdue notice: Mail**
- **Third overdue notice: Email**
- **Third overdue notice: Phone**
- **Third overdue notice: Text Message**
- **Bill notice: Mail**
- **Bill notice: Email**
- **Bill notice: Phone**

- **Bill notice: Text Message**
- **Due date reset**
- **Held for hold request**
- **Held for ILL request**
- **Inventory date was updated - Offline**
- **Renewal - PAC**
- **Renewal - Phone**
- **Checked out - Self Check**
- **Renewal - Self Check**
- **Checked out - Offline**
- **Checked out - PAC**
- **Checked out - Mobile PAC**
- **Renewal - Mobile PAC**
- **Checked out - Third party software**
- **Renewal - Third party software**
- **Added copy created by API consumer service.**
- **Item was unlinked from a bibliographic resource entity.**
- **Item was transferred to a different bibliographic resource entity.**
- **Modified by API consumer service**

### **Create a Subordinate (child) Item record**

Use this procedure for creating subordinate items in a multiple-part holding. This procedure links all item records in the multiple-part holding to the same bibliographic record. To link the items to different bibliographic records, see [Link subordinate items to different records](#).

#### **Example:**

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

**Tip:**

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

**Note:**

You cannot delete a child item after you create it.

To create a subordinate (child) item record automatically linked to a primary (parent) item record:

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

The New Item Record Options dialog box appears.

3. Enter information for the subordinate item (see [Create multiple item records for a single title](#)).
4. Click **OK**.  
The system creates a draft workform for the child item. To discard the draft item, close the workform without saving changes.
5. Add a barcode and other required information to the draft child item.
6. Select **Save**.

The system saves the child item record.

**Note:**

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

## Link Subordinate Items to Different Records

This procedure can also be used to create an item record where you manually link the new item to a bibliographic record. You may need to link items to different bibliographic records when the items are in a different medium. To do this, you need to know the item control number of the primary item record.

**Note:**

See [Create a subordinate \(child\) item record](#) to link the primary and subordinate item records to the same bibliographic record.



To link a primary (parent) item and related subordinate (child) item records to different bibliographic records:

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

The New dialog box appears.

4. Select **Item Record** in the Objects list.

The New Item Record Options dialog box appears.

5. Enter the information for the subordinate item in the New Item Record Options dialog box, and click **OK**. See [Create multiple item records for a single title](#).


The Item Record workform appears.

6. In the **Parent item** box, enter the item control number of the primary item record to which you are linking the subordinate item record.

7. Select **File > Save**, press **CTRL+S**, or click  to save the record.

### View Other Item Records Linked to the Same Bib

To see a list of all the other item records linked to the same bibliographic record:


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

The Linked Item Records dialog box appears.

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

### View the Linked Bib from an Item Record

To see the linked bibliographic record from an item record:

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

The Bibliographic Record workform appears.

## Related Information

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

---

Changing Item Records

You can change an existing item record by opening it in the Item Record workflow. To make the same change in multiple item records, you can use the Bulk Change process; see [Bulk-Changing Item Records](#).

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

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

**Note:**


For information on setting these Cataloging profiles, see the *Cataloging Administration Guide*, Displaying Warning Messages for Bibs and Items.

See also:

- [Change an existing item record from the workflow](#)
- [Change an existing item record's linked bib](#)

## Change an Existing Item Record from the Workform

To change an existing item record:

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

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

## Change an existing item record's linked bib

To link an existing item record to a different bibliographic record:

### Tip:

If you need to change the linked bibliographic record for multiple items, put the item records in a record set and change the control number using bulk change. See [Bulk-Changing Item Records](#).

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

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

### Related Information

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

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## Printing Cataloging Labels

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

**Note:**

See [Setting Label Profiles](#).

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

To change the default label type and print method without using Polaris Administration profiles, select **Cataloging > Options** from the Polaris Shortcut Bar, and make the changes on the Cataloging Options dialog box. See [Change label options from Cataloging](#).

Other settings, such as the font, dimensions, and content of the labels, are defined in the Label Configuration dialog box that you can access from the Label Manager. See [Configuring Existing Label Types](#). If your library system or consortium processes materials centrally, all libraries and branches should agree on the same label stock, content, and configuration.

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

Some label stock contains sets of labels intended for a single item. For example, a label set may contain a spine label and two pocket labels. All three labels are attached to a single item, and they can be printed together.

To print labels you must set up your printing preferences on the computer where you are doing the cataloging or serials processing. The label printer must be set up in Microsoft Windows, and it must be connected to the workstation or the same local area network as the workstation.

See also:

- [Change label options from Cataloging](#)
- [Print spine and pocket labels from an item record](#)
- [Print labels from Find Tool, record sets, or list boxes](#)
- [Edit labels](#)
- [Insert diacritics or special characters into a label](#)
- [Create multiple copies of a label](#)
- [Save a Label File](#)

### Change Label Options from Cataloging

You can change the print method and the default label type at the staff level without setting profiles in Polaris Administration. However, once you change the settings, your staff member login no longer inherits the settings made at the system, library, or branch level in Polaris Administration.

To change label options from Cataloging:

1. Select **Cataloging > Options** from the Polaris shortcut bar.

The Cataloging Options dialog box appears.

2. Select the label type from the **Label Type** box.

To always use this label type, select **Open Label Manager using this default**.

3. Select the printing method for Cataloging labels in the **Print Method** box.
  - **On Demand** - Users must request a label for each item.
  - **Quick Print** - Labels are printed without opening Label Manager.
  - **Batch** - Multiple labels are generated when the user requests them, but they are not printed until the user opens Label Manager and prints them.

4. Click **OK**.



The Cataloging labels settings are changed for your staff member login. When you log in to Polaris, labels will be generated and printed according to the settings you made.

## Print Spine and Pocket Labels from an Item Record

To print a spine or pocket label:

### Tip:

If you are printing labels for multiple items using label sheets, set the profile **Labels: Cataloging print method** to **Batch**. See [Change label options from Cataloging](#).

1. Open the Item Record workform.
2. Complete the item record information required for your labels.
3. Select **File > Label Request**, and select one of the following options:
  - **Single Label** or click  - Print a single label (typical).
  - **Multi-Label** or click  - Print multiple labels (this option is used when cataloging item sets such as encyclopedias). See [Create multiple copies of a label](#).

If the printing method for cataloging labels is set to **On Demand**, the Label Manager appears with the labels you requested.

If the printing method is set to **Batch**, the Label Manager does not automatically appear. Continue cataloging items, and select **Utilities > Label Manager** from the Polaris Shortcut Bar when you want to print all the labels.

### Note:

You cannot generate more than 500 labels at a time in Label Manager.

4. To make changes to the label, see [Edit labels](#).
5. If Label Manager is open, select **File > Exit** to close it.

## Related Information

- Editing labels - See [Edit labels](#).
- Setting Polaris Administration profiles for labels - Search the Polaris help for "Set label profiles in Polaris Administration."
- Configuring labels - See [Set up existing label types](#).
- Specifying content for labels - See [Define the label content](#).

**Print Labels from Find Tool, Record Sets, or List Boxes**

To print labels from the Find Tool, an item record set, or an item record list box:

1. Select the item or items in the Find Tool results list, an item record list box, or an item record set.
2. Right-click, and select **Print > Labels**.

**Tip:**

You can select **Quick Print** as the print method in the Cataloging Options dialog box to print all the labels without opening the Label Manager. See [Change label options from Cataloging](#).

The Label Manager appears.

3. Select **File > Print** from the Polaris Label Manager menu.

**Edit Labels**

To edit an existing label:

**Note:**


If the profile **Labels: Cataloging Print Method** is set to **Quick Print**, the label is printed without opening Label Manager.


**Tip:**

To modify a label type so that it has the same characteristics each time you use it, select **Tools > Label Settings and Content** and change the label configuration. See [Configuring Existing Label Types](#).

1. Access the Label Manager:

- From the Polaris Shortcut Bar, select **Utilities > Label Manager**.
- In Cataloging, from the Item Record workform, select **File > Label Request >**

**Single**, or click . The Label Manager appears if you have the profile **Labels: Cataloging Print Method** set to **On Demand** in Polaris Administration.

- In Serials, from the Issue, Part, or Check In workform, select **File > Label Request > Single**, or click . The Label Manager appears if you have the profile **Labels: Serials Print Method** set to **On Demand**.

**Note:**

If you are requesting labels from a serial or item record, and the print method is set to **Batch**, go to **Utilities > Label Manager** to see the labels you created.

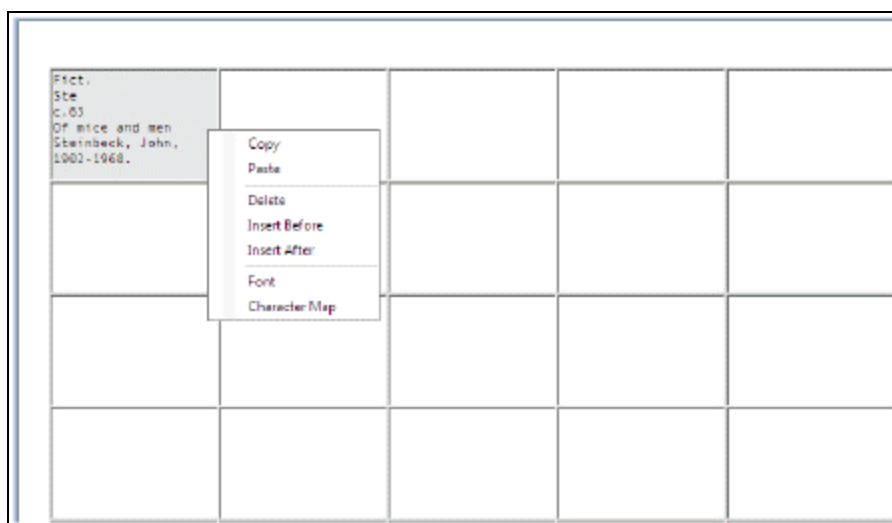
The Label Manager opens with the most recently generated label request displayed.

**Tip:**

You can also type text directly into the label.

2. Select the label you want to modify and right-click.

The context menu appears.






3. Select from the following options on the context menu:

- **Copy** - Select the text that you want to copy. The selected text is copied to the clipboard, and you can paste it into another label.
- **Paste** - If you have copied text to the clipboard, you can paste it into the label.
- **Delete** - Select the text and select **Delete**.
- **Insert Before** - To insert labels before the label you selected, type the number of labels in the Insert Blank Label box.
- **Insert After** - To insert labels after the label you selected, type the number of labels in the Insert Blank Label box.
- **Font** - The Font dialog box appears. You can change the font size, font family, and font characteristics. This changes the font for the label where the cursor is located.

**Tip:**

To change the font for all the labels, go to the **Tools > Label Settings and Content** to open the Label Configuration dialog box. Then locate the type of label, change the font for the type of label you are using and save. Then

click  to refresh the labels. Different fonts can be used on individual labels within a label set.

- **Character Map** - The Character Map dialog box appears. Use the Character Map dialog box to insert special characters into the label. See [Insert diacritics or special characters into a label](#).

4. Select **File > Save**, press **CTRL+S**, or click the Save button to save your changes.

### Insert Diacritics or Special Characters into a Label

If diacritics or special characters are included in the MARC record in fields that are printed on the label, for example in the **Title** or **Author** fields, they appear in the label. It is not necessary to add the characters in the label unless they are not part of the MARC record.

**Tip:**

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

To insert diacritics or special characters into a label in the Label Manager:

1. Right-click in a label in the Label Manager, and select **Character Map** from the context menu.


The Character Picker dialog box appears.

2. Follow the steps in [Choose characters/diacritics from a chart](#).

### Create Multiple Copies of a Label

You can create multiple labels from a single basic label when you have several volumes in a set (such as an encyclopedia) that have the same call number.

To create multiple copies of a label:

1. Open the Item Record workflow.
2. Select **File > Label Request > Multi-Label** or click .

The Insert Multiple Labels dialog box appears.

3. Type a number in the **Number of labels to insert** box and click **OK**.

The Label Manager appears.

4. To preview the layout of the labels, select **File > Print Preview**.
5. To edit the labels, see [Edit labels](#).
6. Select **File > Print** or click the Print button to print the labels.

### Save a Label File

You can save a label file in a .dat file format, and reopen the file at another time. To save a label file:

1. Select **Utilities > Label Manager** from the Polaris Shortcut Bar, and set up labels.
2. Select **File > Save As**.

The Save As dialog box appears.

3. Specify the location for the label file, and type the label file name in the **File name** box.

The label file is saved, and you can open it to use it again.

#### Note:

To open the saved label file, open Label Manager, select **File > Open** from

the Label Manager menu, locate the label file with the .dat extension, and double-click it. The labels appear in Label Manager.

## Working with Multiple Cataloging Records

Record sets group related cataloging records together for a particular purpose, but they do not actually contain the records. Since a record set merely points to the records within it, removing a record from a record set does not delete the record itself.

You can create record sets for bibliographic, authority, or item records, but you cannot mix record types in the same record set. Grouping cataloging records in record sets makes it easier to retrieve records, apply changes to multiple records (bulk change), or add multiple titles to a purchase order.

Record sets can also help you maintain your catalog. For example, you can gather all unlinked bibliographic or authority records into a record set, and then delete them or do other processing.

In addition, you can create record sets to group titles together and make them readily accessible in the PAC. One method is to publish the URL to the record set on the Polaris PowerPAC portal page, a page dashboard, or a Web site page. Another method is to use record sets to create visual representations of titles in a “content carousel” that displays on the PowerPAC portal page or a Community Profile page (if your library has Polaris Community Profiles). See [Create a URL link to a record set in the PAC](#).

If you want to make changes to multiple bibliographic or item records at once, you can gather the records into a record set and then change them using the Bulk Change dialog box. You can also make bulk changes to multiple item records by selecting the item records in lists, such as Find Tool results or linked list boxes and selecting the **Ad hoc Bulk Change** option from the right-click menu.

See also:

- [Using Cataloging Record Sets](#)
- [Bulk-Changing Bibliographic Records](#)
- [Bulk-Changing Item Records](#)

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### Using Cataloging Record Sets


You can create item, bibliographic or authority record sets using various methods, such as: adding cataloging records from Find Tool results; creating record sets of linked records from another cataloging record set; sending imported records directly to a

record set; and creating record sets of unlinked records. For more information, search Polaris help for "Creating and Using Record Sets."

**Note:**

If you are using Polaris Inventory Manager (PIM), you can automatically create record sets of items for weeding or other processing. If you are using SimplyReports, you can automatically create record sets of bibliographic, item, or authority records.

**Tip:**

The icon  next to an authority record listed in a record set indicates that the authority record is not linked to any other record.

After cataloging record sets are created, you can use them to maintain and update cataloging records by bulk changing item or bibliographic records; deleting unlinked records; processing imported records; and grouping records for retrieval and review.

Cataloging record sets can also be used to make certain titles readily accessible in Polaris PowerPAC by publishing a URL link to the record set that patrons click to see the titles, or displaying a "content carousel" of titles. See [Create a URL link to a record set in the PAC](#).

See also:

- [Open an existing cataloging record set](#)
- [Create an item record set from bib record set](#)
- [Create a bib record set from an item record set](#)
- [Create a bib record set from an authority record set](#)
- [Create an authority record set from a bib record set](#)
- [Retrieve records using a record set](#)
- [Print a list of cataloging records from a record set](#)
- [Display record set titles in PAC content carousels](#)
- [Display record set titles in Community content carousels](#)
- [Bulk-Changing Bibliographic Records](#)
- [Bulk-Changing Item Records](#)

### Open an existing cataloging record set


Do one of the following actions to open an existing cataloging record set:

- Select **Cataloging > Record Sets** from the Polaris Shortcut Bar, and use the Polaris Find Tool to search for and open an existing record set. You can limit the search by Name, Owner, or Type.
- Right-click a cataloging record in the Find Tool's results list, and select **Links > Record sets** from the context menu (the record must be in a record set).
- Select **Links > Existing > Record Sets** from a cataloging record workform. If the record belongs to a record set, the record set opens. If the record belongs to more than one record set, a list of the record sets appears. Select a record set in the list.

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

### Create an Item Record Set from Bib Record Set

To create a record set of the linked item records from a bibliographic record set:

1. Open the Bibliographic Record Set workform.
2. Select **Tools > Create Item Record Set**, click , or press **Ctrl+T**.


The Item Record Set Setup dialog box appears.

3. Type a name for the item record set in the **Name** box, select a different record set owner in the **Owner** box to change it, and click **OK**.

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

### Create a bib record set from an item record set

To create a record set of the linked bibs from an item record set:

1. Open the Item Record Set workform.
2. Select **Tools > Create Bibliographic Record Set**, click , or press **Ctrl+T**.

The Bibliographic Record Set Setup dialog box appears.

3. Type a name for the bibliographic record set in the **Name** box, select a different record set owner in the **Owner** box to change it, and click **OK**.

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

### Create a Bib Record Set from an Authority Record Set

To create a record set of the linked bibliographic records from an authority record set:

1. Open the Authority Record Set workform.
2. Select **Tools > Create Bibliographic Record Set**.

The Bibliographic Record Set Setup dialog box appears.

3. Type a name for the bibliographic record set in the **Name** box, select a different record set owner in the **Owner** box if you want to change the owner, and click **OK**.

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

### Create an Authority Record Set from a Bib Record Set

To create a record set of the linked authority records from a bibliographic record set:

1. Open the Bibliographic Record Set workform.
2. Select **Tools > Create Authority Record Set**.

The Authority Record Set Setup dialog box appears.

3. Type a name for the authority record set in the **Name** box, select a different record set owner in the **Owner** box if you want to change the owner, and click **OK**.

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


### Add Records to a Record Set

You can add bibliographic records, item records, or patron records to a record set by searching for the records or by scanning item or patron barcodes. For patron record sets only, you can select an Excel file to populate the record set. No data is imported from the Excel file; if the patron ID in the file matches an existing patron record in the Polaris database, the record is added to the record set.

To add records to a record set:


**Note:**

You can use the Find Tool to search for an existing record set by the record set name, owner, or creation date. See [Doing a Basic Search](#).

1. Open the Record Set workform for a new or existing record set.
2. Use one of the following methods to add the records:
  - **Search for the records to add** - Select **Tools > Add**, press **CTRL+E**, or click . The Polaris Find Tool appears. Search for the record, and select it from the results list.

**Note:**

Scanning a patron's barcode on the Patron Record Set workform adds the patron record to the record set, and scanning an item's barcode on the Item Record Set workform adds the item record to the record set. However, scanning an item record on the Bibliographic Record Set adds that item's linked bibliographic record to the record set.

- **Use a file to add patron records.** Select **Tools > Add > Add from file**, or click . The Add from file dialog box opens.
    - Select **Browse** to locate the Excel file containing the patron IDs for the patron records to add.
    - In the **Worksheet/Column containing Polaris PatronID** drop-down list box, select the location of the PatronID in the Excel file.
    - Click **Add** to add the records to the record set. For information on using this method to manage patron records that will be sent to a second collection agency, see the *Patron Services Guide*, Second Level Collection Agency Management.
3. Select **File > Save** to save the record set. After the record set is saved, the **Number of records** box displays the current number of records in the record set.

### Retrieve Records Using a Record Set

When you group records in a record set, you can easily retrieve the records for further review. You might want to create a record set of provisional records when importing and



then make the necessary changes to each record. For more information on creating records sets while importing, see [Set import options for record sets](#).

To retrieve records from a record set:

1. Select **Cataloging > Record Sets** from the Polaris Shortcut bar.

The Polaris Find Tool appears with **Record Sets** selected in the **Objects** box.

**Tip:**

You can also search for a record set by owner.

2. Select an option in the **Search by** box.
3. To sort the results, select a **Sort by** option.
4. To limit the results, select a **Limit by** option and enter a value.
5. Type the search term in the **For** box.
6. Click **Search**.

The record sets that meet your search criteria appear in the results list.

7. Double-click the record set you want to open.

The record set appears in the Record Set workflow.

8. Double-click any record listed in the Record Set workflow.

The record appears in the appropriate workflow.

### Print a List of Cataloging Records from a Record Set

**Tips:**

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

To print a list of records from a record set:

1. Open the item, bibliographic, or authority record set.

**Note:**

You can sort the records by clicking on the record set column headings. The record set will be printed in the order in which it was sorted.

2. To print a list of all the records in the record set, do one of the following steps:

- Select **File > Print > Record Set** from the record set workform menu.
- Select **File > Print > List view** from the record set workform menu.
- Right-click in the list of records, and select **Print > List view**.

**Note:**

If you select **Record Set**, the record set appears in a Adobe pdf preview window, and you select **File > Print** to print the pdf. You can select specific pages to print. If you select **List view**, the Print dialog box appears without the preview window.

3. To print from a bibliographic record set, do the following:

- a. Select **Edit > Select All** or press **Ctrl+A** to select all the records in the list, or select specific records. The records you selected are highlighted.
- b. Right-click in the list of highlighted records, and select one of the following options:
  - **Bibliographic Full**
  - **Bibliographic Brief**
  - **Chicago Manual of Style**
  - **American Psychological Assoc.**

**Important:**

When you format the list in a bibliographic style, check the formatting requirements of the school, college or journal for which you are creating the bibliography.

An Adobe pdf viewer window appears with the records in the format you selected.

4. Select **File > Print** from the Adobe pdf viewer to print the record list.

### Create a URL Link to a Record Set in the PAC

You can create record sets and then make the titles readily accessible in Polaris PowerPAC using several methods. One method is to create a URL link to the record set and publish it as a Web part in Polaris PowerPAC.

**Tip:**

To find a record set that appears in Polaris PowerPAC, select it to display the URL in the top of the PAC browser window. Then select and copy the

bibliographic record set ID that appears after the equal (=) sign. For example, select **13221** in this URL: `http://qa-orion/view.aspx?brs=13221`. Then, search for the record set in the staff client Find Tool: select **Record set ID** in the **Search by** box, and paste the record set ID in the **For** box.

To create a URL link to a record set in the PAC:

1. Create the record set containing the titles you want to make available in Polaris PowerPAC.
2. Define a URL link to the record set that references the record set(s) by control number or by name.

**Examples:**

(single record set by number) `http://{PowerPACURL}/view.aspx?brs=1234`  
 (multiple record sets by number) `http://{PowerPACURL}/view.aspx?brs=1234,12345,123456`  
 (single record set by name) `http://{PowerPACURL}/view.aspx?brsn='bibrecordsetname'`  
 (multiple record sets by name) `http://{PowerPACURL}/view.aspx?brs='TotSummer','TeenSummer','AdultSummer'`

3. Create a custom web part for the record set URL.
4. Assign the custom web part to a specific page. See the *Public Access Administration Guide*, Defining Web Parts for Dashboards - Overview.

## Display Record Set Titles in PAC Content Carousels

You can publish content in Polaris PowerPAC using visual representations of titles or “content carousels” on the portal page. And, if your library has Polaris Community Profiles, you can display content carousels in community records in Polaris PowerPAC.

To display record set titles in PAC content carousels:

1. Create the record set containing the titles you want to include in the content carousel.

**Note:**

For content carousels to include cover images, enriched data options for cover images must be set in Polaris Administration. See the *Public Access Administration Guide*, Enabling Enriched Data.

2. Search for and select the record set in the **Portal page content carousels** PowerPAC profile in Polaris Administration. See the *Public Access Administration Guide*, Content Carousels on the PowerPAC Portal Page.

## Display Record Set Titles in Community Content Carousels

To display record set titles in Community profile content carousels:

1. Create the record set containing the titles you want to include in the community record's content carousel.

### Note:

For content carousels to include cover images, enriched data options for cover images must be set in Polaris Administration. See the *Public Access Administration Guide*, Enabling Enriched Data.

2. Create or open a community record in the Polaris staff client. Search the Polaris help for "Community Records in the Staff Client."
3. Search for and select the record set on the Social tab of the Community Record workflow.

## Bulk-Changing Bibliographic Records

You can gather multiple bibliographic records in a record set and simultaneously change specific data in all the bibliographic records in the record set using the Bulk Change process. The changes to the records are made via a Bulk Change job, and you can check the status of the job in the Bulk Change Job Queue. When the job is completed, you can run a report that displays the start and end time of the bulk change job, the number of records that were changed, and any exceptions where records could not be changed.

Use the bulk change process to change the following information in multiple bibliographic records at once:

### Tip:

You must have the permission **Access bibliographic bulk change: Allow** to do any bulk changes of bibliographic records. To bulk change values in the LDR, 006, 007, 008 (control fields), you must have the additional permission **Access bibliographic fixed fields bulk change: Allow**.

- **Non-MARC data** - Change the indicator in the bibliographic records so that all the records display (or do not display) in the PAC. You can also change the owner of the records from one owner to another or change provisional records to final. The option to create resource entities is used only for linking ebook bibs to vendor accounts.
- **Data Fields** - Insert or delete tags, subfields, and indicators. You can change, insert or delete specific values in tags, subfields, and indicators. You can also check and correct non-filing indicator values.
- **Leader** - Change values in the Leader for all the records in the record set. If the Leader/06 is changed, a message warns the user to make appropriate changes to the 008 tag.
- **006 Tag** - Change the 006 tag (material characteristics). The code in the 006/00 (form of material) determines the data elements you can define for subsequent character positions. In addition, the codes in field 006/00 correspond to those in Leader 06 (type of record). You can change, insert, and delete values in the 006 tag.
- **007 Tag (1) and 007 Tag (2)** - Change the 007 tag (the physical description). The codes in the 007 tag are defined by position, and the number of character positions depends on the code contained in 007/00. You can insert, delete, and create tags and change the category of material. You can also change a value to another value.
- **008 Tag** - Change the 008 tag that provides coded information about the record as a whole as well as special bibliographic aspects of the item, such as the target audience.

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

You cannot use bulk change to modify values in the following fields:

- Polaris record status
- Bibliographic control number (001)
- Standard numbers used in deduplication routines (010\$a, 020\$a, 022\$a, 024\$a, 028\$a, 035\$a, 037\$a).

- LDR values in positions other than 05, 06, 07, 08, 09, 17, 18, 19 (the values in these positions can be changed). You cannot change the Leader/05 to a value of “d”.
- 008, positions 008/7-10 (beginning date of publication) because it is used in deduction routines.

When you change a field that is under authority control and the change invalidates the existing link, the link to that authority record is broken, and a background process attempts to re-link and re-index the record. If the change is made to a field subject to authority control, but the change does not invalidate the link, the link is not broken. The most efficient way to make changes for subfields in fields under authority control is to change the authority record. Then the changes filter down to the linked bibliographic records. See [Edit authority records and update linked records](#).

See also:

- [Bulk change non-MARC data in bibliographic records](#)
- [Bulk change data fields in bibliographic records](#)
- [Bulk change the Leader in bibliographic records](#)
- [Bulk change the 006 tag in bibliographic records](#)
- [Bulk change the 007 tag in bibliographic records](#)
- [Bulk change the 008 tag in bibliographic records](#)
- [Check the bulk change queue and run the report](#)

## Bulk Change Non-MARC Data in Bibliographic Records

### Tip:

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

To change non-MARC data in multiple bibliographic records:

1. Open the Bibliographic Record Set workform.

### Tip:



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

2. Select **Tools > Bulk Change**.

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

3. Choose from the following options:

**Tip:**

If the Cataloging parameter **Bibliographic record Do not overlay feature enabled** parameter is set to **No**, the **Do not overlay** checkbox does not appear on the Bibliographic Record Bulk Change dialog box. See the *Cataloging Administration Guide*, Enable the Do not overlay feature.

- To display (or not display) the records in the PAC, select **Display in PAC**, and select **On** or **Off**.
  - To change the setting that specifies whether the bibliographic records can be overlaid, select **Do not overlay**, and select **On** or **Off**.
  - To change the owner of the records, select **Record owner**, select the current owner in the **From** box, and select the new owner in the **To** box.
  - To change provisional bibliographic records to final records, select **Save provisional records as final**.
  - To create resource entities to manage electronic resources, select **Create resource entities**, and select the vendor account.
4. Click **OK** to initiate the bulk change process, or click another tab to make other changes to the records.

If you click **OK**, the Summary of Changes dialog box appears.

5. Click **Continue** on the Summary of Changes dialog box to continue with the bulk change. See [Check the bulk change queue and run the report](#).

## Bulk Change Data Fields in Bibliographic Records

You can make the following types of bulk changes to data fields in bibliographic records:

**Note:**

The following tags/subfields cannot be modified or deleted because they are used in duplicate detection: 10\$a, 20\$a, 22\$a, 24\$a, 28\$a, 35\$a, and 37\$a.

- Insert a new tag
- Insert a subfield in a tag in any location within that tag, or insert a subfield before or after a specific subfield
- Delete the first instance of a tag, the last instance of a tag, or all instances of a tag

- Delete a subfield with any data, with specific data, or delete the last instance of the subfield
- Change a specific tag's subfield code without changing the data in the subfield
- Replace a tag's subfield data with specific data
- Change a tag's indicator only
- Correct non-filing indicators

To bulk change data fields in multiple bibliographic records:

**Note:**

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

1. Open the record set that contains the bibliographic records you want to change.



**Tip:**

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

2. Select **Tools > Bulk Change**.
3. Select the **Data Fields** tab.

The Data Fields tabbed page appears.

4. In the **Operation** box, select the operation you want the bulk change to perform on the data fields you specify.

**Note:**

The options available depend on the operation you selected. If you selected **Correct non-filing indicator values (initial articles 'a', 'an', or 'the')**, skip to step 10.

5. In the **Tag number** box, select the number of the tag to insert, delete, replace, or identify.
6. Select the first and/or second indicators in the **Indicator fields, One** and **Two** boxes.
7. Type a subfield code in the **Subfield \$** box, and type a value for the subfield in the larger box to the right of the code.



**Note:**

You must specify at least one subfield when you are inserting a tag.

8. Enter or select other criteria depending on the option you chose. For example, if you selected **Replace a tag's subfield (with specific data)**, enter the data you want to change to in the **Change to** box.

**Tip:**

You can use diacritics in subfields. For example, the author's name includes diacritics, but some of your bibliographic records do not have the correct name. You can select **Replace a tag's subfield (with specific data)**, type the existing author's name in the **Subfield** box and insert diacritics in the author's name in the **Change to** box by clicking on the **Diacritics** button. Select the character in the Character Picker box.

9. When you are finished specifying the changes, click **Add Change to Queue**.

The changes appear under **Bulk change queue for data fields**. You can move the changes up or down in the queue by selecting the change, and clicking the **Up** or **Down** buttons. To remove a change, select it, and click **Remove**.

10. Click **OK** to initiate the bulk change process, or click another tab to make other changes to the records.

If you click **OK**, the Summary of Changes dialog box appears.

11. Click **Continue** on the Summary of Changes dialog box to continue with the bulk change. See [Check the bulk change queue and run the report](#).

## Bulk Change the Leader in Bibliographic Records

To bulk change the Leader in multiple bibliographic records:

**Note:**

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

1. Open the Bibliographic Record Set workform.

**Tip:**

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

2. Select **Tools > Bulk Change**.

3. Select the Leader tab.

The Leader tabbed page appears.

4. Select the position you want to change.

**Note:**

When you select the LDR/06, a message reminds you to make the appropriate changes to the 008.

The **From** and **To** boxes become active when you select the position.

5. In the **From** box, select the value to change.

**Tip:**

If you are correcting invalid values, you can type an invalid value for the position in the **From** box, or you can select **All invalid values** from the list. The bulk change process will replace the invalid values with the selection in the **To** box.

6. In the **To** box, select the value to put in the selected position.
7. Select any other positions you want to change in the 008 tag, and specify the **From** and **To** values.
8. Click **OK** to initiate the bulk change process, or click another tab to make other changes to the records.

If you click **OK**, the Summary of Changes dialog box appears.

9. Click **Continue** on the Summary of Changes dialog box to continue with the bulk change. See [Check the bulk change queue and run the report](#).

## Bulk Change the 006 Tag in Bibliographic Records

To bulk change the 006 tag in multiple bibliographic records:

**Note:**

You can insert or delete 006 tags, but you cannot replace an existing 006 tag. The code you specify in the Form of material position (006/00) determines the data elements you can define for subsequent character positions.

1. Open the Bibliographic Record Set workflow.

**Tip:**

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

2. Select **Tools > Bulk Change**.

The Bibliographic Record Bulk Change dialog box appears.

3. Select the **006 Tag** tab.

The 006 Tag tabbed page appears.

4. To insert or replace an entire 006 tag, select **Insert** or **Replace**, and do the following steps:
  - a. Select the form of material code in the **(00)** box.
  - b. Click **Define**. The appropriate dialog box appears, depending on the form of material.
  - c. Define the subsequent positions in the 006 tag by selecting the appropriate codes from the lists in the dialog box.
  - d. Click **OK** when you have finished defining the character positions. The results of your selections appear to the right of the **Define** button.
  - e. If you are inserting a new 006 tag, select **As first** if you want the tag to be the first 006 tag, or select **As last** if you want the tag to be the last 006 tag. If you are replacing a specific 006 tag, select **First** or **Last**.
5. To delete a specific 006 tag, select **Delete** and do the following steps:
  - a. In the **(00)** box, select the value that matches the 006 tag you want to delete.
  - b. Select **First instance** to delete only the first 006 tag that contains that value, **Last instance** to delete the last occurrence of the tag, or **All instances** to delete all 006 tags with this value.
6. To change a specific value in the Form of material **(00)** code in the 006 tag, do the following steps:
  - a. Select the checkbox that corresponds to the form of material you want to change, for example **Books**.
  - b. In the **From** box, select the value to change.
  - c. In the **To** box, select the value to put in this position
7. Click **OK** to initiate the bulk change process, or click another tab to make other changes to the records.

If you click **OK**, the Summary of Changes dialog box appears.

8. Click **Continue** on the Summary of Changes dialog box to continue with the bulk change. See [Check the bulk change queue and run the report](#).

## Bulk Change the 007 Tag in Bibliographic Records

To bulk change the 007 tag in multiple bibliographic records:

1. Open the Bibliographic Record Set workflow.



**Tip:**

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

2. Select **Tools > Bulk Change**.
3. Select the 007 (1) or 007 (2) tab.  
The 007 Tag (1) or 007 Tag (2) tabbed page appears.
4. To insert or replace an entire 007 tag, select **Insert** or **Replace**, and do the following steps:
  - a. Select the category of material code in the **(00)** box.
  - b. Click **Define**. The appropriate dialog box appears, depending on the category of material.
  - c. Define the subsequent positions in the 007 tag by selecting the appropriate codes from the lists in the dialog box.
  - d. Click **OK** when you are finished defining the character positions. The Insert/Replace dialog box closes, and the results of your selections appear to the right of the **Define** button on the Bulk Change dialog box.
  - e. If you are inserting a new 007 tag, select **As first** if you want the tag to be the first 007 tag, or select **As last** if you want the tag to be the last 007 tag. If you are replacing a specific 007 tag, select **First** or **Last**.
5. To delete a specific 007 tag, select **Delete** on the Bibliographic Bulk Change dialog box, and do the following steps:
  - a. In the **(00)** box, select the value that matches the 007 tag you want to delete.
  - b. Select **First instance** to delete only the first 007 tag that contains that value, **Last instance** to delete the last occurrence of the tag, or **All instances** to delete all 007 tags with this value.
6. To change a specific value in the Category of material **(00)** code in the 007 tag, select the **007 Tag 1** or **007 Tag 2** tab on the Bibliographic Bulk Change dialog

box, and do the following steps:

- a. Select the checkbox that corresponds to the category of material you want to change, for example **Video recording** (007 Tag 2 tab).
- b. Click the **From** button. A dialog box appears with the values for that category of material.
- c. Select the value you want to change, and click **Ok**. The Bibliographic Record Bulk Change dialog box displays the value you selected in the **From** box.
- d. Click the **To** button. A dialog box appears.
- e. Select the value to put in this position, and click **OK**.

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

7. Click **OK** to initiate the bulk change process, or click another tab to make other changes to the records.

If you click **OK**, the Summary of Changes dialog box appears.

8. Click **Continue** on the Summary of Changes dialog box to continue with the bulk change. See [Check the bulk change queue and run the report](#).

## Bulk Change the 008 Tag in Bibliographic Records

To bulk change the 008 tag in multiple bibliographic records:

1. Open the Bibliographic Record Set workflow.



**Tip:**

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

2. Select **Tools > Bulk Change**.
3. Select the **008 Tag** tab.

The 008 Tag tabbed page appears.

4. Select the checkbox that corresponds to the 008 tag you want to change.
5. Click **From**.

The Bulk Change 008 – (From) box appears based on the checkbox you selected.

6. Select the positions you want to change in the 008 tag of all records in the record set.

7. Click **OK** to return to the Bibliographic Record Bulk Change dialog box.
8. Click **To**.

The Bulk Change 008 -- To dialog box appears based on selections you made in the Bulk Change 008 -- From dialog box. For example, if you specified a change to the Language (35-37), you can select only the Language in the Bulk Change 008 -- From dialog box. If there were multiple selections in the **From** box, you can select multiple values for the **To** box.

9. Click **OK** to return to the Bibliographic Record Bulk Change dialog box.
10. Click **OK** to initiate the bulk change process, or click another tab to make other changes to the records.

If you click **OK**, the Summary of Changes dialog box appears.

11. Click **Continue** on the Summary of Changes dialog box to continue with the bulk change. A message tells you the change was added to the bulk change queue. See [Check the bulk change queue and run the report](#).

## Check the Bulk Change Queue and Run the Report

After you submit the bulk change, you can confirm that it was processed, and you can run a report. To open the bibliographic bulk change queue and run the report:

1. Select **Utilities > Cataloging Processing > Bibliographic Bulk Change Queue**.

The Bibliographic Bulk Change Job Queue dialog box appears.

### Tip:

To delete a pending or completed bulk change job, select it and click **Delete**. When a job is running, you cannot cancel or delete it. If you delete a pending job, the bulk changes are not processed. After a job is deleted, you cannot run reports on that bulk change job.

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

The Bibliographic Bulk Change Report appears in the preview window.

## Bulk-Changing Item Records

### Note:

To bulk change item records, you need the **Access item record bulk**

**change: Allow** permission set at the system level, and the **Item record: Bulk change** permission for each item's owning branch.

You can make bulk changes to multiple item records at once using either of the following workflows:

- Create an item record set, then select **Tools > Bulk Change**.
- Select multiple item records from any list of item records in Polaris, then right-click and select **Ad hoc Bulk Change**. For example, select multiple items in the Find Tool results list, then right-click and select **Ad hoc Bulk Change**.

You can also save and reuse item record bulk change settings as item record bulk change templates. This option requires the appropriate permissions. See [Item Record Bulk Change Templates](#).

**Note:**

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

With these methods, you can change the location, circulation information, bibliographic information, notes, and other information for multiple item records using the checkboxes and free-text fields in the Bulk Change Item Record dialog. When you are changing notes or other free-text fields, you can replace the text, add to the end of the text, or add to the beginning of the text.

Certain circulation statuses cannot be modified using bulk change because of the effects these changes might have in other records and processes. For example, you cannot use bulk change to change the circulation status of **Out** to **In** because some of the items might fill a hold request or be overdue. If an item with holds changed from **Out** to **In**, the patron record and the hold request record would need to be updated and notification sent. Any fines would need to be resolved and the item might need to go in-transit. In addition, in-transit slips, hold slips and fine receipts might need to be generated.

The following table lists the circulation statuses that can be changed using bulk change.

From Circulation Status	To Circulation Status
Bindery	In
	In Process (Leap only)
	In Repair
	Missing
	On Order (Leap only)
	Unavailable
	Withdrawn
In	Bindery
	In Repair
	Missing
	Unavailable
	Withdrawn
In-Process	Bindery
	In
	In Repair
	Missing
	On Order (Leap only)
	Unavailable
	Withdrawn



From Circulation Status	To Circulation Status
In Repair	Bindery
	In
	In Process (Leap only)
	Missing
	On Order (Leap only)
	Unavailable
	Withdrawn
Missing	Bindery
	In
	In Process (Leap only)
	On Order (Leap only)
	Unavailable
	Withdrawn
On Order (Leap only)	Bindery
	In Process
	In Repair
	Missing
	Unavailable
	Withdrawn

From Circulation Status	To Circulation Status
Unavailable	Bindery
	In
	In Process (Leap only)
	In Repair
	Missing
	On Order (Leap only)
	Withdrawn

### To bulk change item records

1. Select the item records you want to change using one of the following methods:
  - If the items are in a list, such as the Find Tool results list, a linked list box, or the Bibliographic Record Preview window, do the following:
    - a. Select the records.
    - b. Right-click and select **Ad hoc bulk change**.
  - If the items are in a record set, do the following:
    - a. Open the record set.
    - b. Select **Tools > Bulk Change** to bulk change all item records in the record set. You can also select multiple records, right-click, and select **Ad hoc bulk change**.

The Item Record Bulk Change dialog appears.

2. Select one of the following tabs to change fields for all the item records in the record set or for all the items selected in the linked list box:
  - **Location** - Use this tab to change the item records' location information.
    - To change the items' location information, select the **Owner**, **Assigned branch**, **Assigned collection**, **Shelf location**, or **Home branch** box, and select a corresponding value from the list.
    - To enter a temporary location for the items, select **Temporary location**, and type the location. If you leave the text field blank, the **Temporary location** will be blank in all the item records in the record set.

- **Circulation** - Use this tab to change the item records' circulation information.
  - To change basic circulation information, select the **Circulation status**, **Material type**, **Loan period code**, **Fine code**, **Statistical code**, or **Renewal limit** box and select a corresponding value from the list.
  - To allow or disallow holds on the items, select the **Holdable** box. Then, select the checkbox to allow holds on the items, or leave the checkbox blank to prevent holds on the items.
  - To change hold limits, select the **Holdable** box and select the checkbox to allow holds. Then, select one of the hold limit settings, and select the checkbox to the right of the setting to limit the holds, or leave the right checkbox empty to deselect the limit.

**Example:**

To allow all items in the record set to be held and then picked up at any library, select the **Holdable** checkbox, select **Pickup at this branch**, but leave the checkbox to the right empty. This will clear the **Pickup at this branch** setting for all items in the record set that have this limit setting selected.

- To change the **Non circulating** setting for all item records, select the **Non circulating** box, and either select the checkbox to the right or leave it blank. If you select the checkbox, all the items in the record set will not circulate. If you leave the checkbox blank, all the items will have the **Non circulating** checkbox cleared, allowing them to circulate.
- To change the **Do not float** setting for all item records, select the **Do not float** box, and either select the checkbox to the right or leave it blank. If you select the checkbox, all the items in the record set will not float to other branches' collections. If you leave the checkbox blank, the items are eligible to float to other branches' collections.
- To change the **Do not mail to patrons** setting for all item records, select the **Do not mail to patrons** box, and either select the checkbox to the right or leave it blank. If you select the checkbox, all items in the record set will not be mailed to patrons. If you leave the checkbox blank, the items can be mailed to patrons.

- To change the **Loanable outside the system** setting for all items in the record set, select the **Loanable outside the system** box, and either select the checkbox to the right, or leave it blank. If you select the checkbox, the items can be loaned outside the system. If you leave the checkbox blank, the items cannot be loaned outside the system.
- **Call Number** - Use this tab to change the item records' call number information, or to assign call numbers to the item records.

**Tip:**

If you select **Use call number fields from bib record** and also enter a new bib control number on the Misc tab, the call number is taken from the new bibliographic record.

- To assign or change call numbers by taking the call number from each item's linked bibliographic record, select **Use call number fields from bib record**. To use this option, the Polaris Administration profile **Bring call number fields from bib to item record when link is made** must be set to **Yes**. If it is set to **No**, the checkbox is disabled.
  - If the **Use call number fields from bib record** box is selected, the call number fields are copied subfield-by-subfield. If the bibliographic record has the subfield, it is copied to the item record. If the bibliographic record does not have the call number subfield, the field does not change in the linked item record.
  - If the shelving scheme is left blank in the dialog, the shelving scheme from the item record is used to determine the tags and subfields to copy from the bibliographic record. This allows the bulk change process to copy the call number information from linked bibliographic records even when the items have different shelving schemes.
- To change the shelving scheme for all the items in the record set, select **Shelving scheme**, and select a value from the list.

**Note:**

If you enter a shelving scheme and the **Use call number fields from bib record** box is also selected, the shelving scheme is copied to the item records unless there are no tags in the

item's linked bibliographic record that are consistent with the shelving scheme in the dialog. In this case, neither the call number nor the shelving scheme are changed, and the following error message appears on the report: **No call number for the selected shelving scheme was found in bib record.**

- To change the call number information for all the items in the record set (without copying from the linked bibliographic record), select **Call number prefix**, **Classification number**, **Cutter number**, or **Call number suffix**, and type a value in the corresponding box.

**Tip:**

If the **Use call number fields from bibliographic record** box is selected, you cannot select the checkboxes for any of the six call number fields (prefix, class, cutter, suffix, volume, copy).

- To change the volume or copy number for all the items in the record set, select **Volume number** or **Copy number**, and type a value in the corresponding box.
- **Notes/Blocks** - Use this tab to change the item records' notes and blocks.
  - To change the notes information for all item records in the record set, select **Public note**, **Non-public note**, or **Physical condition**, and type the text in the box to the right of the note you selected. Then, select **Replace** to replace any existing notes with the note you typed, **Prepend** to add the notes to the beginning of any existing notes, or **Append** to add the notes to the end of any existing notes.
  - To change a library-assigned block, select the **Library assigned** checkbox, and select a value from the list box to the right.
  - To change a free-text block, select the **Free text block** checkbox, and type the text for the free-text block you want to add. Then, select **Replace** to replace the text for any free-text blocks, **Prepend** to add the text to the beginning of any existing free-text blocks, or **Append** to add the text to the end of any existing free-text blocks.
- **Misc** - Use this tab to change miscellaneous information on the item records, or to assign barcodes to items that do not have a barcode.

- To change the bibliographic control number for all item records, select **Bib control no.** Then, if you know the bibliographic control number, enter it in the box and press **Tab**, or select **Find**, and search for the bibliographic record. All item records in the record set will be linked to this bibliographic record.
- To change the **Display in PAC** setting for all item records in the record set, select the **Display in PAC** box, and select the checkbox to the right, or leave it blank. If you select the checkbox, all the item records will have the **Display in PAC** setting checked, which means they will all display in the PAC. If you leave the checkbox blank, all the item records will have the **Display in PAC** setting unchecked, which means none of the items will display in the PAC.
- To change the parent item for all the records in the record set, select **Parent item**, and type a value in the box to the right. If you leave the text field blank, the **Parent item** field will be blank in all the item records in the record set.
- To change the funding source for all the item records in the record set, select **Funding source**, and type a value. If you leave the text field blank, the **Funding source** field will be blank in all items in the record set.
- To change the price of all the items, select **Price** and type the price. If you leave the text field blank, the **Price** field will be blank in all the items in the record set.
- To assign barcodes to all the items that do not have barcodes, enter the barcode range by selecting the **Use system assigned barcodes** box, or by scanning (or typing) the barcodes into the **Item barcode(s)** box. The number of barcodes is displayed in the **Barcode total** box.

**Tip:**

If an item already has a barcode, it is not changed.

**Note:**

If you selected **Use system assigned barcodes**, enter the following information on the Item barcode range dialog: select the barcode type, type the beginning and ending barcodes, and specify the next barcode to be assigned.

- Barcodes are automatically assigned to the item records in the order in which they are sorted in the linked item list box, or in the order in which they appear in the record set. If all the records have not been loaded into the record set at the time the bulk change is launched, the items are processed in item record control number order.
- If a duplicate barcode is encountered, the process skips that barcode and goes to the next one. If there are not enough barcodes, a message appears on the error report: **No barcode was assigned because not enough barcodes were specified in the range.**

**Note:**

You can skip the next step if you do not want to create a record set of the items that did not get changed or rename the report. If you do not enter a report name, a default report name is used: ItemBulkChange\_\_ with a 16-character representation of the current date/time.

3. Select the **Report/Record Set** tab to specify the bulk change report and error record set as follows:
  - If you want to change the default report name, type the location and file name, or select **Browse** to locate the file. The report also shows errors for items that could not be bulk changed either due to their status or lack of permissions. See [Bulk Change Report Details](#).
  - To create a record set of the items for which the changes could not be made, select the box under **Error Record Set**, type a name for the record set in the **Name** box and select an owner in the **Owner** box.

**Note:**

An error record set is not required. However, specifying an error record set makes it easier to locate the item records that have errors. If no errors are found, no error record set is created.

4. Select **OK** or press **Enter** to start the bulk change process.

The Summary of Changes message box displays the following details:

- The number of item records to be changed
- The name and owner of the record set that contains the item records being changed
- The error record set name and owner, if the error record set is requested
- The path and file name specified for the bulk change report
- A summary of all the fields to be changed and their new values

5. Select **Continue**.

The bulk change process applies the changes to the item records.

A message informs you when the bulk change process is finished and indicates if there were errors.

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

After the bulk change process, the list display is updated as follows, depending on whether changed the items from a record set or from a list:

- Record set - The record set workform is refreshed and sorted by the default sort order. You can re-sort the list in barcode order.
- Item list using Ad hoc Bulk Change - The list view is refreshed immediately after the Ad hoc Bulk Change and any changes to fields that display in the list view are you can see the results of the bulk change to fields that display in the list view. If the bib control number was changed, the new title displays in the list view.

#### Bulk Change Report Details

The default name of the bulk change report is **ItemBulkChange\_\_** with a 16-character representation of the current date and time. It shows the total number of records in the record set, the number of records that were changed, and the number of records that were not changed. Below the statistics are details about the records that could not be changed and the reason they were not changed. It also shows warning messages for item records when the assigned and home branches are different, and item records that will not display in the PAC.

If you have attempted to assign barcodes in the Item Bulk Change dialog, and barcodes could not be assigned for any or all of the items, the summary information displays the number of items for which barcodes could not be created and the reason:

**Example: (Barcodes not assigned)**

Number of barcodes not assigned because of detected duplicates:



Number of barcodes not assigned because of incorrect format:  
 Number of items not assigned a barcode because not enough barcodes specified:  
 Number of items not assigned a barcode because item already had a barcode:

The detailed section lists each item for which barcodes could not be assigned and the reason.

The following are examples of errors where items could not be changed because the circulation status prevented the change, or the user lacked permissions:

**Example: (Lack of permissions)**

```

BULK CHANGE REPORT
5/9/2011 1:56:17 PM
Filename: C:\Documents and Settings\User 1\Desktop\BulkChangePer.txt
GENERAL INFORMATION
User name: User 1
Processed record set name: bulk change permission testing
Processed record set owner: User 1
Error record set name: BulkChangePermissionTestOne
Error record set owner: User 1
SUMMARY OF CHANGES:
Display in PAC: No
STATISTICS:
Processing time: 00 hours 00 minutes 02 seconds
Number of items in record set: 40
Number of items changed: 38
Number of errors: 2
Number of items unchanged due to 'lack of permission' error: 2

*****
ERROR DETAILS:
*****
Item Record: 1895964
Barcode number: 0003500045236
Title: A new guide to better fishing: over 200 fishing techniques that will
  
```

help you catch more fish, more often  
Reason(s) for error: User does not have permission to bulk change item records owned by 'Cambridge Public Library'

Item Record: 1982897  
Barcode number: 0004100044306  
Title: Magic and the night river  
Reason(s) for error: User does not have permission to bulk change item records owned by 'Green Library'

### **Example: (Item's status prevents the change)**

BULK CHANGE REPORT  
5/10/2011 11:29:33 AM  
Filename: C:\Users\Peer\Desktop\POLARIS 4.x PROJECT  
LIST\ItemBulkChangeReport\_20090710112504.txt

#### GENERAL INFORMATION:

User name: peer  
Processed record set name: Bulk change  
Processed record set owner: peer  
Error record set name:  
Error record set owner:

\*\*\*\*\*

#### SUMMARY OF CHANGES:

Circulation status: In

\*\*\*\*\*

#### STATISTICS:

Processing time: 00 hours 00 minutes 01 seconds  
Number of items in record set: 27  
Number of items changed: 24  
Number of errors: 3

\*\*\*\*\*

#### ERROR DETAILS:

\*\*\*\*\*

Item Record: 1641186  
Barcode number: 0001900246677  
Title: 1 2 3  
Reason(s) for error: Circulation status change violation: Status was 'Lost'

Item Record: 1622822  
Barcode number: 0001900024157  
Title: 10 lb. penalty  
Reason(s) for error: Circulation status change violation: Status was 'Out'

Item Record: 1621873  
Barcode number: 0001900011196  
Title: 1 Ragged Ridge Road  
Reason(s) for error: Circulation status change violation: Status was 'Withdrawn'

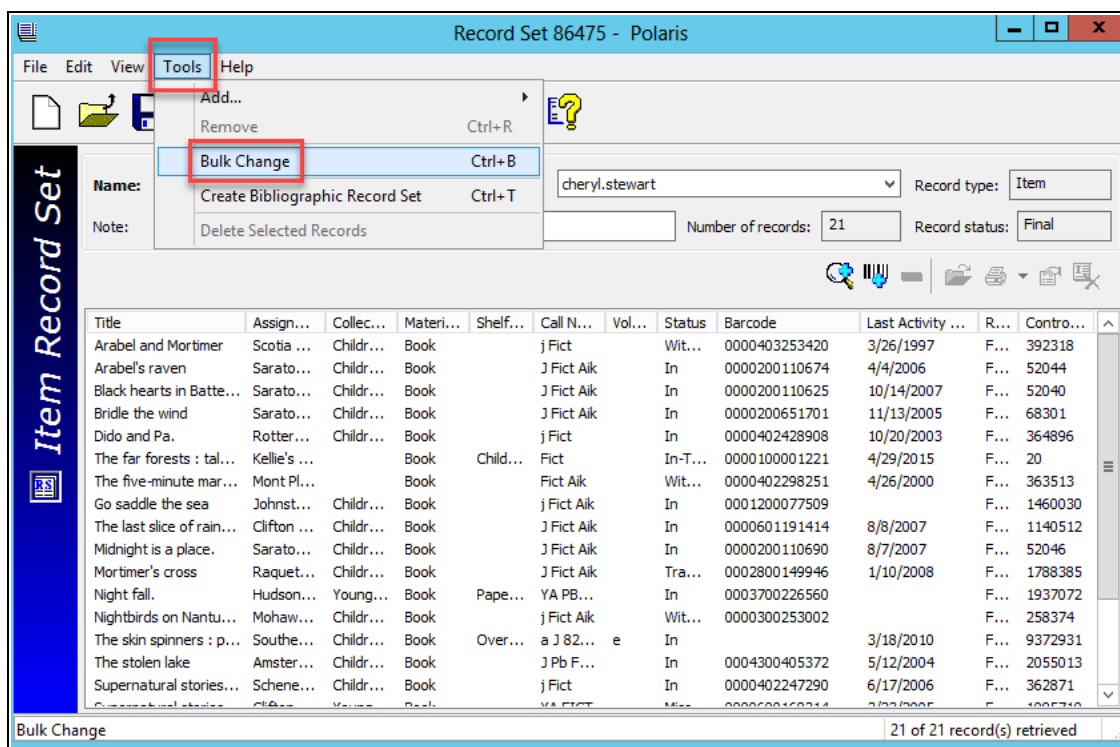
### **Item Record Bulk Change Templates**

You can save and reuse item record bulk change settings as Item Record Bulk Change Templates. This option requires the appropriate permissions.

#### **Create an Item Record Bulk Change Template**

You can use an entire record set or a selection of items to create a template.

1. Open an existing record set or create a new one.
2. Use the entire record set or select items from it.

3. Select **Tools > Bulk Change**.

4. The Item Record Bulk Change dialog opens. Change the relevant criteria > **Save As.**

5. Enter a name for the template > **OK.**

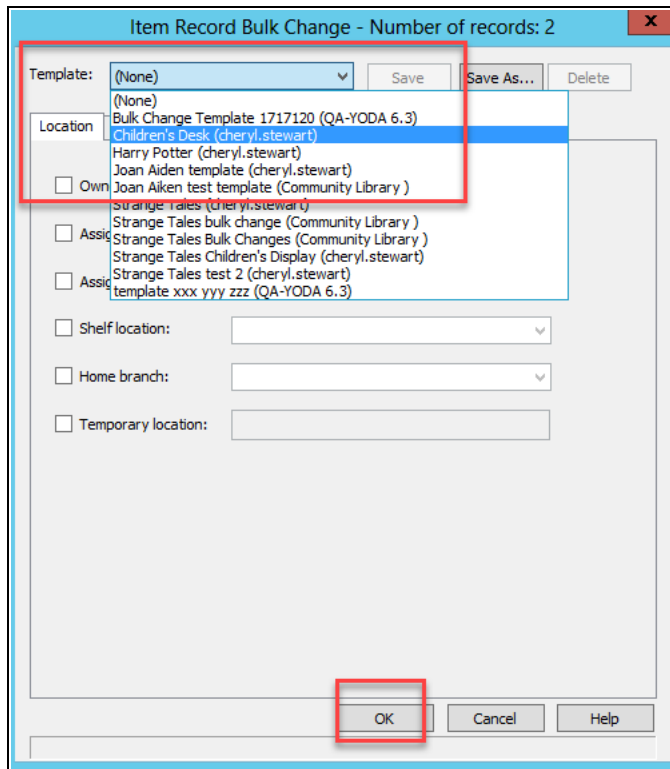
You will see one of the following messages:

- The template was created successfully.
- The template could not be created because a duplicate name was used.
- The template was created but with errors and an option to access an error report.

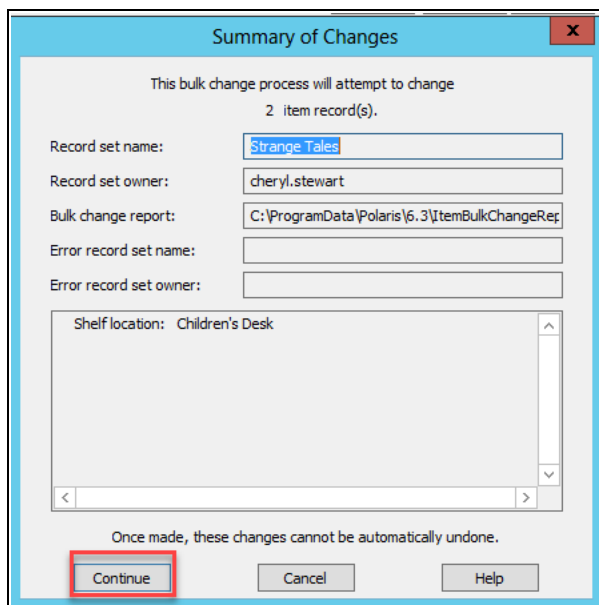
## Use a Template to Make Item Record Bulk Changes

You can use a template to make bulk changes to an entire record set or a selection of items from it.

1. Open an existing record set or create a new one.
2. Use the entire record set or select items from it.
3. Select **Tools > Bulk Change**.
4. Select a template from the drop down list of templates that you have access to > **OK**.



5. Review the **Summary of Changes** > **Continue**.



The image shows a 'Summary of Changes' dialog box. At the top, it states: 'This bulk change process will attempt to change 2 item record(s)'. Below this, there are five input fields: 'Record set name:' with the value 'Strange Tales', 'Record set owner:' with 'cheryl.stewart', 'Bulk change report:' with 'C:\ProgramData\Polaris\6.3\ItemBulkChangeRep', 'Error record set name:', and 'Error record set owner:'. Below these fields is a list box labeled 'Shelf location:' containing the text 'Children's Desk'. At the bottom, there is a warning: 'Once made, these changes cannot be automatically undone.' and three buttons: 'Continue' (highlighted with a red box), 'Cancel', and 'Help'.

You will see one of the following messages:

- The changes were made successfully.
- Changes were made but with errors and an option to access an error report.

## Modify a Template

1. Open a record set.
2. Select **Tools** > **Bulk Change**.

3. Select a template.

The screenshot shows a dialog box titled "Item Record Bulk Change - Number of records: 21". It features a "Template:" dropdown menu currently set to "(None)". A red rectangle highlights the dropdown menu and its list of options. The list includes: "(None)", "Bulk Change Template 1717120 (QA-YODA 6.3)", "Children's Desk (cheryl.stewart)", "Harry Potter (cheryl.stewart)", "Joan Aiden template (cheryl.stewart)" (which is highlighted in blue), "Joan Aiken test template (Community Library )", "Strange Tales (cheryl.stewart)", "Strange Tales bulk change (Community Library )", "Strange Tales Bulk Changes (Community Library )", "Strange Tales Children's Display (cheryl.stewart)", "Strange Tales test 2 (cheryl.stewart)", and "template xxx yyy zzz (QA-YODA 6.3)". Below the dropdown, there are checkboxes for "Own", "Assig", and "Assig", each followed by a text input field. At the bottom of the dialog are "OK", "Cancel", and "Help" buttons.



4. Change the relevant template criteria > **Save**.

5. Select **OK**.

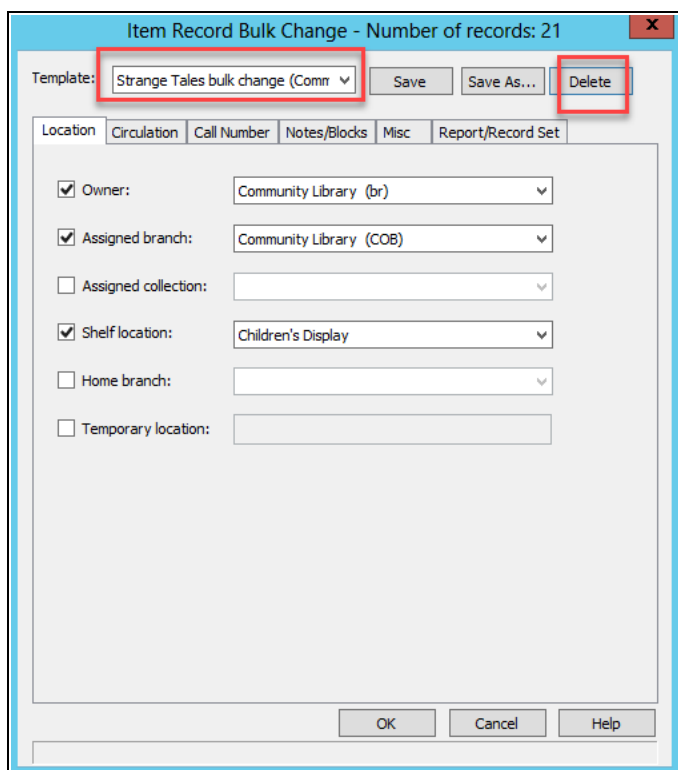
You will see one of the following messages:

- The changes were made successfully.
- Changes were made but with errors and an option to download an error report.

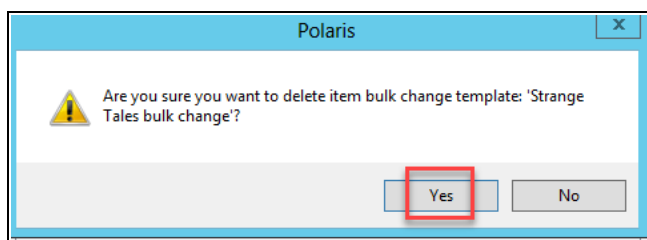
## Delete a Template

1. Open a record set.
2. Select **Tools > Bulk Change**.

3. Select a template > **Delete**.



4. Select **Yes**.



You will see one of the following messages:

- The template was successfully deleted.
- An error message that template was not deleted with an option to download an error report.

## Maintaining Your Catalog

Various features in Polaris help you maintain your catalog and ensure that the records in your database are accurate and current. An export utility lets you export records to report your library's holdings to OCLC or to a consortium. You can easily identify records without links by automatically creating a record set. Records that are no longer used can be deleted immediately, or marked for deletion and removed from the database in batch at a later date. To maintain your authority records, you can subscribe to a weekly update service that checks your existing authority records, matches them to updated records from the Library of Congress, and provides the records to be imported. For more information, see [Setting Up Import Profiles and Importing Records](#).

See also:

- [Exporting Cataloging Records](#)
- [Cleaning Up the Catalog](#)

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### Exporting Cataloging Records

You can export records to report your library's holdings to a union database (such as OCLC) or to a consortium. You configure the export once when you export records for the first time.

See also:

- [Configure the export process](#)
- [Export cataloging records](#)

### Configure the Export Process

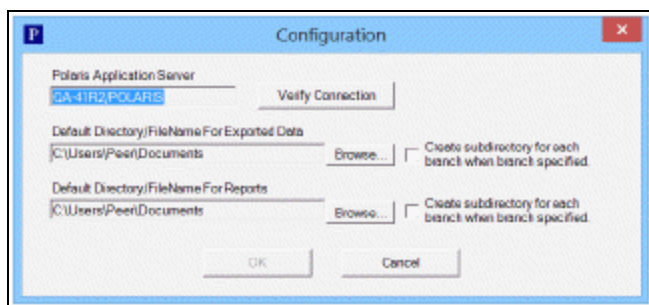
**Note:**

If you have Polaris SimplyReports and Export Express, you can set up specific export jobs and export records in several output formats. See SimplyReports Help for information.

To configure the export:

1. Select **Utilities** > **Exporting** from the Polaris shortcut bar.

The Export Configuration dialog box appears.



2. Type the name of the server in the Polaris Application Server box.
3. Click **Verify Connection** to check the connection to the Polaris Application server.
4. Click **Browse**, and select the destination for the exported data.
5. To create a subdirectory for the exported data file for branches, select the **Create subdirectory for each branch when branch specified** box.
6. Click **Browse**, and select the location for the export report.

When you select the location for the export report, it appears in the **Default Directory/Filename for Reports** box.

7. To create a subdirectory for the branch reports, select the **Create subdirectory for each branch when branch specified** box.
8. Click **OK**. The Polaris Database Export Utility workform appears. See [Export cataloging records](#).

## Export Cataloging Records

### Note:

If you are exporting records for the first time, you first need to configure the export. See [Configure the export process](#).

To export cataloging records:

### Tip:

You can export records only in MARC format using this utility. If you have Polaris SimplyReports and Export Express, you can export records in Dublin Core or LibraryThing formats as well as create custom profiles for exporting MARC records.

1. Select **Utilities > Exporting** from the Polaris Shortcut Bar.

The Polaris Database Export Utility dialog box appears.

2. Select the library with the data to be exported in the **Library to Retrieve Data For** box.
3. Select the branch with the data to be exported in the **Branch to Retrieve Data For** box.
4. Select the type of records to include in the export in the **Select Record Type** box and select from the following options:
  - To include holdings information in the export, select **Include current item holdings information**. For more information on embedded holdings data, see [Item Records Created from Embedded Holdings Tags](#).
  - To include records with a deleted status, select **Include Deleted Records**
  - To include interlibrary loan records, select **Include ILL Records**.
5. Select the one of the following character encoding options in the **Character Encoding** box.
  - **MARC-8** - When **MARC-8** is selected, the LDR/09 is set to blank in the exported record, and the LDR/09 in the database record remains as it is.
  - **UTF-8** - When **UTF-8** is selected, the LDR/09 in the exported record is set to a, and the LDR/09 in the database record remains as it is.
  - **LDR/09 for each record** - When **LDR/09 for each record** is selected, the records are exported depending on the value in the LDR/09 in each record: if the value is

blank, the record is exported in MARC-8 format; if the value is **a**, the record is exported in UTF-8 format.

6. Select the export options:

- To include all final MARC 21 records, select **Extract All Final MARC 21 Records**.

**Tip:**

Exporting all your final MARC 21 records may take a long time. Specifying other criteria, such as a date range or a bibliographic ID number range, reduces the amount of time for the export.

- To export MARC 21 records within a range of bibliographic record identification numbers, type the beginning number in the **Extract Only MARC 21 Records From Bibliographic Record ID** box, and type the ending number in the **To** box.
- To extract MARC 21 records that were added or changed within a certain date range, enter the beginning date in the **Extract Only MARC 21 Records Added/Changed From Date** box, and enter the end date in the **To** box.
- To extract only provisional records, select **Extract Only Provisional Records**.
- To extract only deleted records, select **Extract Only Deleted Records**.
- To extract only records deleted within a specific time period, select the **Include Only Records Deleted From Date** box, and enter the from and to dates.

7. Select **Tools > Export** to export the records.

---

## Cleaning Up the Catalog

Various automated processes identify records that are no longer linked to other records, delete records, retain records after deleting them, and purge deleted records from the database. To identify records that may need to be deleted, you can search for records that meet certain criteria and gather them in a record set automatically. For example, you could search for item records for materials that have not circulated in several years, gather them in a record set, and delete them after removing the materials from the shelves.

If you are looking for records that are not linked to any other records, you can create record sets of unlinked bibliographic or authority records automatically. See [Create a record set of unlinked records](#). Then, you can delete the records right from the record

set if they are no longer needed. You can also use cataloging and circulation reports to identify records that may need to be deleted.

The Polaris Administration Cataloging profiles **Retain deleted bibliographic records**, **Retain item records**, and **Retain authority records** control whether records are immediately removed from the database or marked with a status of deleted and retained until they are permanently removed from the database using a batch purge. See the Cataloging Administration PDF Guide, Retain deleted records. To permanently delete the retained records, you must set up purge criteria in a Purge record. See [Purge cataloging records](#).

**Note:**

If the item record is linked to a serial issue record, and the Polaris Serials/Acquisitions parameter **Delete linked issue/part when serial item is deleted** is set to **Yes**, the issue or part is deleted when you delete the item.

In addition to cleaning up unused records, you can remove tags from bibliographic records after they are marked as processed. These processing tags include 970 tags for building purchase orders, and 852, 949 or other tags used in building item records from embedded holdings tags. See the Cataloging Administration Guide, Setting Utility to Delete Bib Tags Marked with Subfield 9.

See also:

- [Create a record set of unlinked records](#)
- [Delete bibliographic or item records](#)
- [Delete authority records](#)
- [Restore \(undelete\) a deleted cataloging record](#)
- [Purge cataloging records](#)

## Create a Record Set of Unlinked Records

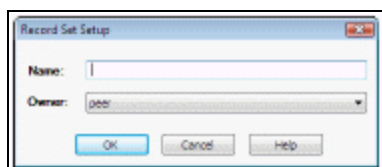
To create a record set of unlinked bibliographic or authority records:

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

**Tip:**

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

The Record Set Setup dialog box appears.

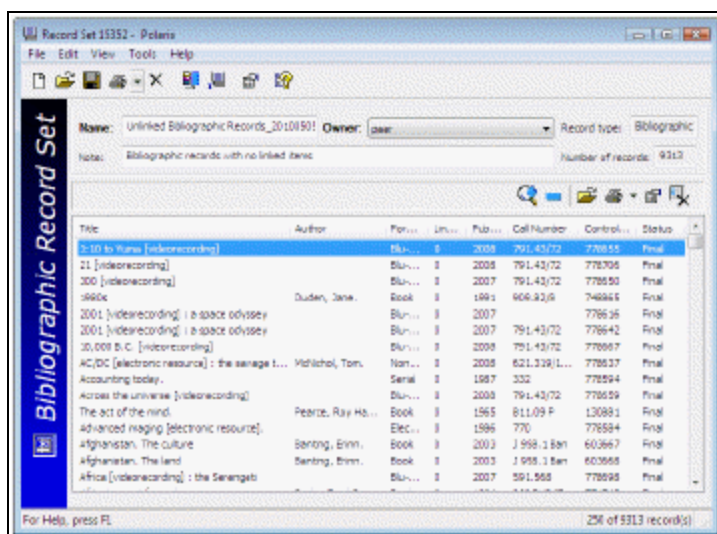


2. Type a name for the record set, and click **OK**.

The new record set appears.

### Note:

Unlinked authority records appear with an unlinked icon .



### Related Information


- [Delete bibliographic or item records](#)
- [Purge cataloging records](#)

### Delete Bibliographic or Item Records

To delete bibliographic or item records:


1. Use one of the following methods to delete cataloging records:



- To delete a record displayed in a workform, select **File, Delete** on the workform, or click .
- To delete a record directly from the Find Tool results list, right-click the record, and select **Delete** from the context menu.

**Tip:**

After you have deleted all the records within the record set, you can delete the record set.

- To delete cataloging records in a record set, open the record set, choose **Edit, Select All**, and click  to delete all the records. Or, select specific records, right-click, and select **Delete** from the context menu.

**Tip:**

If the record already has a Deleted status, and you delete it again, it will be removed from the database, even if the **Retain deleted records** profile is set to **Yes**.

If you are deleting multiple bibliographic or item records, the Multiple Deletion dialog box appears.

2. If you want to delete the records without stopping for warning messages, you can suppress these messages by clearing one or both of the following boxes:

**Note:**

You must have the required permissions to prevent the warning messages from appearing. See [Related Information](#).

- **breakable links** - The records with breakable links will be deleted without any warning messages.
  - **unbreakable links and other stopping conditions** - The records with unbreakable links are skipped over and not deleted, but no warning messages appear.
3. Click **Yes** to delete the selected records.
  4. If the Last Copy Options dialog box appears, select one of the following options:
    - Click **Delete** to delete the record if it does not have unbreakable links or other conditions that prevent deletion.

- Click **Suppress From PAC** to retain the record but prevent it from appearing in the PAC
- Click **Retain** to retain the record without changes.

#### Related Information

Permissions for suppressing warning messages:

- **Suppress warnings for breakable links when deleting multiple bibliographic records: Allow**
- **Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple bibliographic records: Allow**
- **Suppress warnings for breakable links when deleting multiple item records: Allow**
- **Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple item records: Allow**

**Tip:**

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

System-level Cataloging parameters that allow or prevent deletion if the records have linked hold requests:

- **Bibliographic record delete: Allow if there are holds**
- **Item record delete: Allow if there are holds**

Unbreakable links or conditions that prevent item deletion:

- Item is a parent item with child records linked to it
- Item is checked out
- Item has been shipped to fill a hold request
- Item is linked to a routed serial issue

Unbreakable links or conditions that prevent bib deletion:


- The bib is final and it is linked to final/provisional items
- The bib is deleted and the linked items are deleted
- Linked to serial holdings records

- Linked to purchase order lines with a status of Pending
- Linked to invoice lines with a status of Open
- Linked to issue records
- Linked to subscription records
- Linked to resource records (digital media)

Deletion of ILL requests - When ILL requests are deleted, the bibliographic and item records are deleted unless both the Cataloging profiles **Retain deleted bibliographic records** and **Retain deleted item records** are set to **Yes**.


### Delete Authority Records

To delete authority records.

1. Use one of the following methods to delete authority records:
  - To delete a single authority record displayed in a workform, select **File > Delete** on the Authority Record workform, or click .
  - To delete a single authority record directly from the Find Tool results list, select the record, right-click, and select **Delete** from the context menu.

#### Tip:

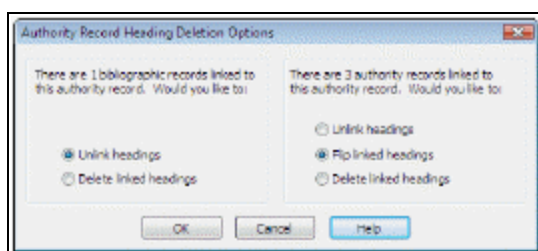
After you have deleted all the records within the record set, you can delete the record set.

- To delete authority records displayed in a record set, open the record set, choose **Edit, Select All**, and click  to delete all the records. Or, select specific authority records, right-click, and select **Delete** from the context menu. You can automatically gather unlinked authority or bibliographic records in a record set.
- To delete authority records from a linked list box, select the record or records, right-click and select **Delete**.

#### Note:

If the record already has a Deleted status, and you delete it again, it will be removed from the database, even if the **Retain deleted records** profile is set to **Yes**.

If the authority record is linked to other bibliographic or authority records, the Authority Record Heading Deletion Options dialog box appears. The options for handling linked authority records are active only when other authority records are linked to the one you are deleting.



2. If the Authority Record Heading Deletion Options dialog box appears, select from the following options:

For linked bibliographic records -

- To delete the heading and tag in the linked bibliographic records - Select **Delete linked headings** (bibliographic)
- To break links to any bibliographic headings linked to the authority record - Select **Unlink headings** (bibliographic). The heading remains in the bibliographic record as an unauthorized heading.

For linked authority records -

- To delete the linked authority headings - Select **Delete linked headings** (authority).
- To break links to any authority records linked to this authority record - Select **Unlink headings** (authority).
- To convert the 5XX tag in linked authority records to a 4XX tag - Select **Flip the linked authority headings**. This converts the 5XX tag (See Also From reference) in the linked records to a 4XX (See reference).

### Restore (undelete) a Deleted Cataloging Record

If you have the Polaris Administration profile **Retain deleted record type records** for the type of record you want to restore set to **Yes**, you can restore or undelete records with a deleted status.

1. To undelete a cataloging record with a status of deleted.

**Tip:**

Click to undelete the record.

2. Open the deleted item record, bibliographic record, or authority record.

**Tip:**

You can search for item records by a record status of **Deleted**. Then, multi-select the records in the Find Tool results list, and select **Undelete**.

3. Select **File, Undelete** from the menu.

A message tells you the record's status will be changed to Final, and if there were links to other records, they need to be reestablished.

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

The record's status changes to **Final**.

## Purge cataloging records

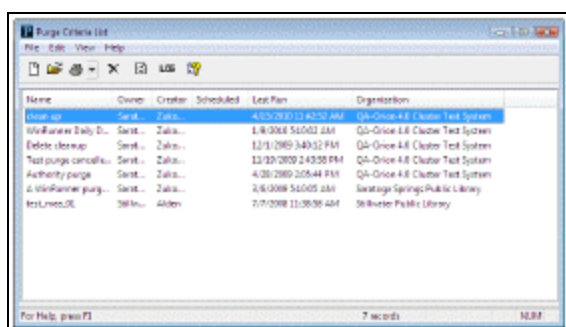
If your library retains deleted cataloging records, you must set up a Purge record that specifies the criteria by which these retained records are automatically removed from the database. To create a Purge record:

**Tip:**

For information on the Polaris Administration profiles for retaining deleted records, see the *Cataloging Administration Guide*, Retain deleted records.

1. Select **Utilities > Cataloging Processing > Purge Cataloging Records** from the Polaris Shortcut Bar.

The Purge Criteria List appears if there are purge records already set up.



**Tip:**

You can also right-click an existing purge record in the list, and select **New** from the context menu.

2. Select **File > New**, press **CTRL+N**, or click the **New** button to create a new purge record.

The Purge Record workform appears.

3. Type a name to identify the purge record in the **Name** box.
4. Select the purge record's owner in the **Owner** box.
5. Enter a date to purge the records in the **Scheduled** box.
6. Select the cataloging record types (**Authority**, **Bibliographic**, **Item**, **Record Set**) that you want to purge in the **Record types** boxes.
7. If you selected **Record Sets**, click **Find** to search for and select the record set you want to purge.

The record set's name appears in the **Name** box.

8. Select the organization for which you want to purge the records in the **Organization** box.
9. Select a date in the **Begin** and **End** boxes to purge records that were deleted within this date range.
10. Select **File > Save**, press **CTRL+S**, or click the **Save** button to save the purge record.

The records will be purged from the Polaris database on the date you specified.

11. To print a log of the purge processing job after it is completed, select a job in the Purge Criteria list, and click **Report**.

**Tip:**

A log is available until the Purge Record is deleted.

The preview window displays the Purge Processing Log. The log shows details about the titles that were deleted, the date and time the purge job was run, the number of titles purged, and other information.

12. Click **Print** to print the log.

**Note:**

You can also generate standard cataloging reports that identify records with problems, list records that do not display in the PAC, and gather other information.

## Integration with Polaris and eContent Vendors

Libraries can implement integration between Polaris and the following eContent vendor applications:

- cloudLibrary from Bibliotheca
- Axis 360 from Baker & Taylor
- OverDrive from Rakuten OverDrive
- RBDigital from Recorded Books.

After a library subscribes to one of these eContent applications and configures Polaris to enable the integration, patrons can search for, place holds on, and check out a vendor's eContent directly from the PAC.

For eContent integration where item records are created as part of the import process, the associated circulation processing and tracking for integrated eContent occurs in Polaris. For RBDigital integration where no item records are created in Polaris, checkouts from the PAC are logged, but not checkouts from the RBDigital application. Although Polaris logs statistics, the eContent vendor is the source of the most accurate and timely circulation data.

The eContent products cloudLibrary and Axis 360 use Polaris API (PAPI) authentication, defined in Patron initiated circulation rules. For these vendors, Polaris requires an SSL certificate for PAPI server security. OverDrive and RBDigital use SIP authentication, defined in Polaris SIP authentication rules. Since authentication takes place via SIP and not PAPI, SSL is not required.

**Note:** Your library can choose to configure Axis 360 to use SIP authentication instead of PAPI.

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

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

- Subscription to the eContent service - The library contracts with the eContent vendor for a subscription to the eContent service.



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

**Tip:**

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

- Vendor Account - The library staff, with the assistance of their Polaris site manager, sets up the integrated vendor account record under the vendor record in Polaris Administration. The vendor account is used to create resource entities for the eContent bibliographic records and eContent item records in Polaris (if item records are created). If the library is using resource groups, the vendor account is also linked to the resource group.
- Integrated EContent Import Profiles - Polaris provides a read-only **Integrated ebook Bibs** import profile that can be renamed and modified. For RBDigital, the import profile is named **Integrated eContent bibs (without items)**. Your library may want to set up multiple import profiles for different tasks. Your Polaris Site Manager can assist you with creating import profiles.

**Important:**

For OverDrive and cloudLibrary, newly-purchased eContent records are imported automatically using the import profile selected in the Vendor Account workform. Newly-purchased RBDigital titles are automatically imported as part of the overnight sync processes. Your library can copy and rename the **Integrated ebook Bibs** profile, but the renamed profile must be selected in the Vendor Account workform.

Your library may also implement the following optional Polaris records and settings:

- **Polaris Digital Branch** - If multiple libraries in your system use the same vendor account (contract), Polaris recommends that you set up a digital branch to represent the account. You can set up multiple digital branches, one per multi-library vendor contract, if necessary. Or, you can set up a single digital branch and associate multiple eContent vendors' materials with this branch. During import processing, the item records are created with the digital branch as the assigned branch. In the PAC, materials associated with the digital branch are available according to the branch's resource group membership. If only one library is involved in the contract, a digital branch is not needed. All the eContent item records are assigned to that library.
- **Resource Groups** - The library can set up resource groups for library organizations that allow their patrons to access the eContent.
- **Patron Services Administration** - The library can set Patron Services parameters and profiles to manage patron initiated circulation of eContent from the PAC (PowerPAC and Mobile PAC):
  - **Patron initiated circulation: Transaction branch** profile - You can change the transaction branch setting from Patron's branch (the default) to Item's branch in the Patron Services profile to track eContent circulation transactions from the PAC separately from check outs and holds for physical items.
  - **Check-out: Require format selection when checking out integrated eContent** parameter - When this parameter is set to **Yes** for the library organization the patron is connected to in the PAC, the patron must select the format when checking out eContent titles.
- **PAC Administration** - The library can set the **Item availability: Suppress for integrated econtent titles** PAC profile to suppress detailed item availability information for integrated eContent. See the Public Access Administration PDF .
- **OverDrive Advantage Vendor Information** - If your library has OverDrive Advantage, you can control access to the Advantage eContent using a setting in the vendor record. See [Create an OverDrive integrated vendor account](#).
- **Preferred Vendor Accounts Policy Table** - This policy table is used for libraries using the cloudLibrary eContent service that also use Bibliotheca's cloudLink groups to share resources.

**Note:**

By default, integrated eContent titles are not included in patron notices.

Polaris administrators can change this setting on the Reminder tab of the Notification options dialog box. See the Patron Services Administration PDF Guide .

See also:

- [Setting Up a Digital Branch for Integrated EContent](#)
- [Resource Entities](#)
- [Axis 360 EContent Integration](#)
- [OverDrive EContent Integration](#)
- [cloudLibrary eContent Integration](#)
- [RBdigital EContent Integration](#)
- [EContent in the Polaris Staff Client](#)
- [Polaris API Consumer Services](#)
- [Suspending and Reactivating an Integrated Vendor Account](#)
- [Non-Integrated EContent in Polaris](#)

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## Managing Patron Access to eContent Using Resource Groups

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

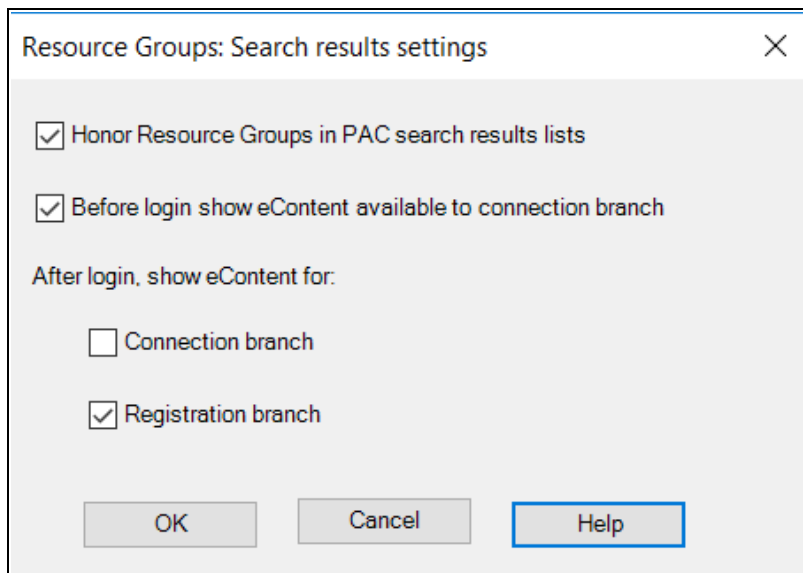
For information about additional options for displaying and circulating eContent, see: [Managing Integrated EContent in the PAC](#).

To set restrictions on the display of integrated eContent titles based on resource groups:

1. Select **File > New > Resource Group**, and select the organizations that will belong to this resource group. Save the resource group. For more details, see [Setting Up Organization Resource Groups](#).
2. Select the resource group in the eContent vendor account. For information on setting up vendor accounts, see one of the following topics:

- [Creating an Axis 360 Integrated Vendor Account](#)
  - [Creating an OverDrive Integrated Vendor Account](#)
  - [Creating a cloudLibrary Integrated Vendor Account](#)
  - [Creating an RBdigital Integrated Vendor Account](#)
3. Select **Administration > Explorer**, select the organization, select **Profiles**, and click the **PAC** tab in the details view.
  4. Double-click **Resource Groups: Search results settings**.

The Resource Groups: Search results settings dialog box opens.



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

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

**Note:**

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

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

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

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

7. Select one of the following options under **After login, show eContent for:**
  - **Connection branch** - If this option is checked, logged in patrons searching the PAC at a connection branch that is not their registered branch will see eContent titles that are not available to check out.
  - **Registration branch** - If this option is checked, logged in patrons searching the PAC at a connection branch that is their registered branch will see the eContent titles that are available to them.

**Note:**

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

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## Setting Up a Digital Branch for Integrated EContent

If multiple libraries in your system use the same Vendor Account (contract) for eContent, Polaris recommends that you set up a digital branch to represent the account. Using a digital branch will make it less likely that extensive bulk changes will be necessary after the eContent items are created. Multiple digital branches, one per multi-library vendor contract, can be created if necessary. In PAC, the materials associated with the digital branch are available according to the branch's resource group membership.

**Important:**

If you plan to use a digital branch, the branch must be set up in Polaris

before you activate the vendor account and start the API Consumer Service.

Note that if only one library is involved in the contract, a digital branch is not necessary; all the eContent item records are assigned to that library.

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## Resource Entities

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

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

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

The screenshot shows a web application window titled "Bibliographic Record 1179415 - Resources - Polaris". The interface includes a menu bar (File, Edit, View, Links, Tools, Help) and a toolbar with various icons. On the left, a vertical sidebar contains the text "Bibliographic Record" and several icons. The main content area displays the "Resource Entities" section, specifically for "OverDrive QA1".

At the top of the main area, there are fields for "Control number: 1179415", "Owner: QA-POLARIS", "Items: 3", and "Record status: Final". Below these are checkboxes for "Display in PAC", "ILL", "Do not overlay", and "Host".

The "Resource Entities" section is expanded, showing details for "OverDrive QA1":

- Vendor Account Name: OverDrive QA1
- Active: Yes
- Resource Group: Overdrive
- Imported MARC Data: 856 40 #3Click for more information#uhttp://integration.api.overdrive.com/v1/collections/v1L1BBQ0AAA2\_/products/743e57e4-526b-46ea-a019-ff34be42c05f#x4425
- Object Identifier: 743E57E4-526B-46EA-A019-FF34BE42C05F
- URL: [http://integration.api.overdrive.com/v1/collections/v1L1BBQ0AAA2\\_/products/743e57e4-526b-46ea-a019-ff34be42c05f](http://integration.api.overdrive.com/v1/collections/v1L1BBQ0AAA2_/products/743e57e4-526b-46ea-a019-ff34be42c05f)
- Link Text: [Click for more information](#)
- Cover Image URL: <http://images.contentreserve.com/ImageType-200/2389-1/{743E57E4-526B-46EA-A019-FF34BE42C05F}Img200.jpg>
- Public Note:
- Non-Public Note:
- Creator: PolarisExec
- Creation Date: 12/23/2014 6:02:21 AM

On the right side of the "OverDrive QA1" section, there are links: "Linked Item Records", "Open Vendor Account", "Revert to MARC tag", and "Delete Resource Entity".

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

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

**Tip:**

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

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

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

- **Linked Item Record** - Links to electronic (eContent) items associated with this resource entity. The eContent checkbox is checked on the Item Record workflow.
- **Open Vendor Account** - Links to the Vendor Account workflow for the resource entity (option available only if user has **Vendor Account: Access** permission)
- **Revert to MARC tag** - Changes the resource entity to an 856 tag. See Convert a resource entity to an 856 tag
- **Delete Resource Entity** - Deletes the resource entity from the bibliographic record.

**Note:**

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

## Deleting a Resource Entity

To delete a resource entity from the Resource view of the Bibliographic Record workflow:

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



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

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

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

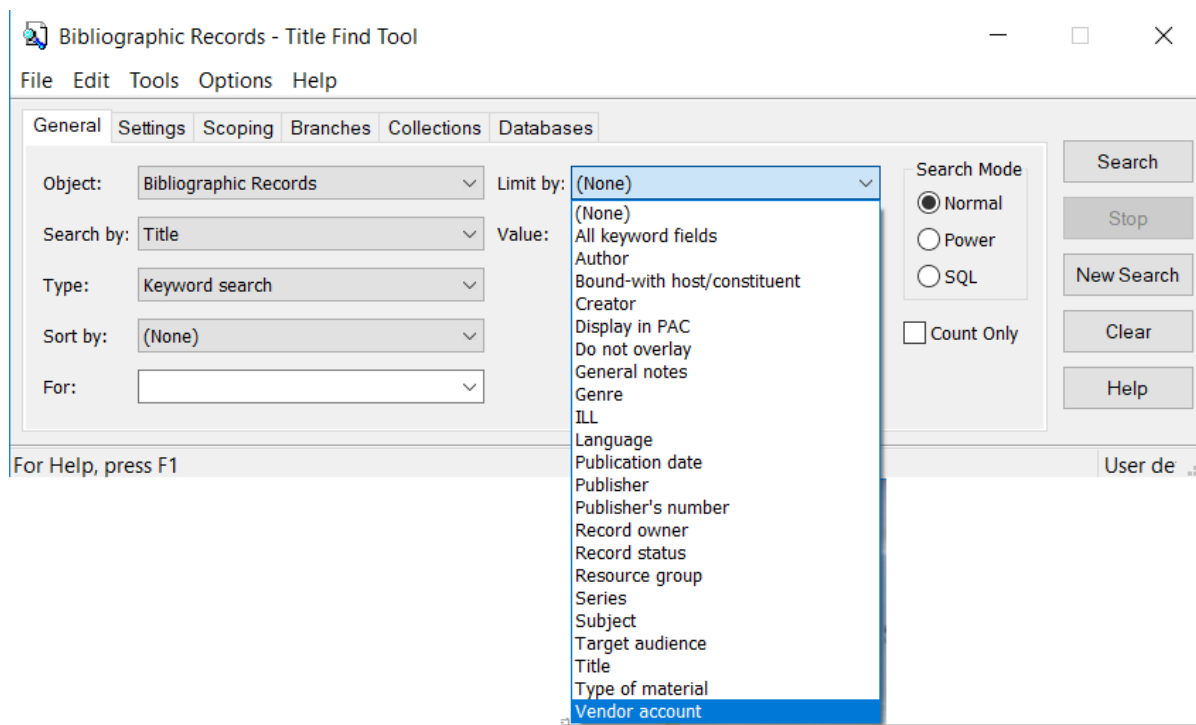
### **Deleting a Bibliographic Record with a Resource Entity**

Before a bibliographic record that has a resource entity can be deleted, all eContent item records must be deleted.

To delete a bibliographic record with a resource entity:

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

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



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

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

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

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

### Copying a Bibliographic Record with a Resource Entity

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

## Converting a Resource Entity to an 856 Tag

To convert a resource entity to a traditional 856 tag.

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

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

## Exporting Bibliographic Records with Resource Entities

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

## Resource Entities Transactions

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

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## Axis 360 EContent Integration

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

Once the library has a subscription with Baker & Taylor's Axis 360 and the Polaris licenses, the library creates an item template, an integrated vendor account, and an import profile in Polaris. The vendor account is in Polaris Administration, not in Acquisitions, and it is used during importing to create resource entities in the eContent

bibliographic records. After the setup is complete, the library imports the eContent MARC data using special features that are required to support the integration.

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

### **Axis 360 and Polaris Synchronization**

Availability and hold counts (total number of copies, number of available copies, and number of holds) for Axis 360 eContent titles appear in the PAC based on the status of the items in the Axis 360 repository, not on the status of the items in the Polaris database. Patrons can see the availability information whether they are logged into their library account or not.

When a library purchases a new title, Axis 360 sends a push notification that the title is available, the import process automatically imports the new titles, and the title appears in the PAC within minutes. The availability counts for existing cloudLibrary titles are automatically updated when the library purchases additional copies or when copies expire because of publisher limits.

When a patron checks out or places a hold on an Axis 360 title in Polaris, the data is immediately updated in the Polaris database and in the vendor's repository. However, when a patron uses the Axis 360 app to initiate circulation, the synchronization process takes longer because the app uses the Polaris API to push the data to Polaris, and then the API consumer service completes the process. The API consumer service also performs a periodic "pull" query of the Axis 360 database and then synchronizes the data if any circulation activity was detected.

The Polaris database and Axis 360 are synchronized according to circulation activity as follows:

- Holds - Real time
- Check-out or Check-in from the PAC - Real time
- Check-out or Check-in from Axis 360- Every 5-15 minutes
- Added copy for an existing title - Once daily (overnight)
- Expired copy for an existing title - Once daily (overnight)
- Added title - new MARC record - N/A

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

See [Implementing EContent Integration - Overview](#) for a checklist of the components necessary for Polaris integration with eContent vendors.

See also:

- [Setting Up Polaris for Axis 360 Integration](#)
- [Integrating Existing Axis 360 EContent](#)
- [Integrating New Axis 360 Bibs \(Pre-Order\)](#)
- [Overlaying Axis 360 EContent Bibs](#)
- [Axis 360 Import Jobs](#)
- [Patron Access to Axis 360 EContent](#)

### Setting Up Polaris for Axis 360 Integration

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

See also:

- [Setting up the Baker & Taylor TS3 MARC Profile List](#)
- [Setting Up the eContent Item Templates for Axis 360](#)
- [Creating an Axis 360 Integrated Vendor Account](#)
- [Creating the Axis 360 eContent Import Profile\(s\)](#)

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

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

Settings for the TS3 MARC Profile List:

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

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

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

4. Remove all 856 tags

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

## Setting Up the eContent Item Templates for Axis 360

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

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

To set up the item templates for Axis 360:

1. Select **File > New** from the Polaris Shortcut Bar.
2. Select **Item Template** and click **OK**.

The Item Template workform opens.

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

The template is saved.

## Creating an Axis 360 Integrated Vendor Account

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

To create an Axis 360 vendor account:

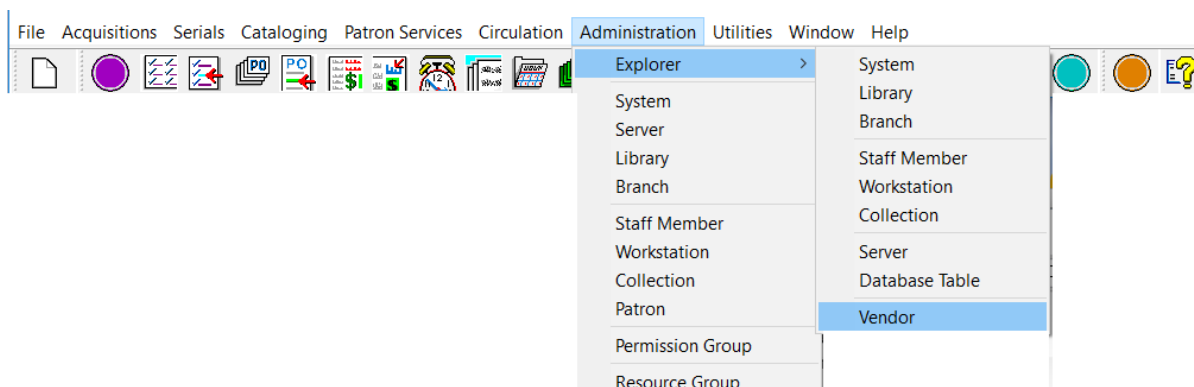
### Note:

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

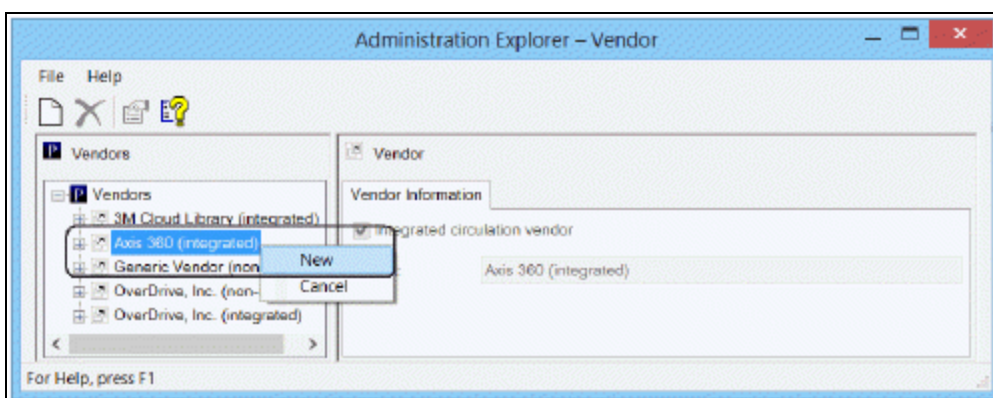
### Tip:

You cannot create a new Vendor Account by selecting **File > New** from the Polaris shortcut bar.

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



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



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



New vendor account - Polaris

File Edit Help

Vendor Account

Vendor name: Axis 360 (integrated) ☒ Integrated circulation vendor

Vendor account name:  ☐ Active

Vendor account description:

Resource group: (None) ▼

Icon URL:

Vendor contract ID:

Vendor account settings: Test Connection

Attribute	Value
▶ Vendor account access ID	
Vendor account access key	
Vendor account base path	
Vendor account server name	
Vendor account use SSL	No ▼
Vendor account item template ID	(None) ▼
Content cafe cover image user name	
Content cafe cover image password	
Library OAuth URL	
Default URL link text	

4. View the system-supplied fields and enter information in the editable fields:
- **Vendor name** - System-supplied; read-only
  - **Integrated circulation vendor** - This checkbox is automatically checked if the vendor's eContent is integrated with Polaris.
  - **Active** - This checkbox is initially unchecked when you are creating a vendor account for an integrated eContent vendor. Leave the checkbox unchecked, and enter the account information. Innovative Interfaces activates the vendor account.
  - **Vendor account name** - (required) The library supplies a unique name to identify the account.
  - **AccountID** - The account ID is supplied by Polaris when the account is saved, and it appears in the title bar of the Vendor Account workflow.

- **Vendor account description** (optional) - The library can add a description for the vendor account.
- **Resource group** (optional) - The library can select a resource group to limit access to the eContent by branch. For more information on resource groups, see Polaris staff client online Help.
- **Icon URL** (optional) - The library can specify a URL location for the icon that represents the eContent vendor.
- **Vendor contract ID** - The vendor's contract ID is required for integrated eContent vendors. The contract ID must be unique, and it can contain up to 255 characters.
- **Vendor account access ID** - The library's access ID for the eContent vendor account.
- **Vendor account access key** - The library's access key for the eContent vendor account.
- **Vendor account base path** - The URL path to the library's resources at eContent vendor.
- **Vendor account server name** - The vendor account server name.
- **Vendor account use SSL** - The library selects **Yes** or **No** to indicate whether Secure Socket Layer is used.
- **Vendor account item template ID** - The library creates the item template used during the API-driven processes. For Axis 360, this template is used for added copies only. The item template name must begin with **Ebook automatic import** or **E-book automatic import**.
- **Content cafe cover image user name**
- **Content cafe cover image password**

**Tips:**

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

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

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

If the test is successful, a message confirms that the connection was made. If a connection problem is encountered, one of the following messages may appear:

**Library account does not exist; Incorrect URL; There was a problem communicating with the Baker & Taylor Axis 360 API service;** or other error messages as they become implemented by the Baker & Taylor API service.

7. Ask your Polaris representative to activate the vendor account.

This starts the API consumer service. To check the status of the service, see [Polaris API Consumer Services](#).

**Important:**

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

## Creating the Axis 360 eContent Import Profile(s)

**Note:**

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

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

- Enable integration for existing Axis 360 non-integrated eContent bibs - Export and then re-import the non-integrated Axis 360 eContent titles. See [Integrating Existing Axis 360 EContent](#).
- **Enable integration for eContent titles downloaded from TS3** - Import bibliographic records and enable integration for titles that have not yet been

ordered. Then, bulk add the bibs to create the purchase order. See [Integrating New Axis 360 Bibs \(Pre-Order\)](#).

- **Overlay Axis 360 integrated eContent bibs and retain resource entities** - Fully cataloged eContent bibs can be imported to overlay existing integrated eContent bibs while retaining the resource entities that enable the integration. See [Overlaying Axis 360 EContent Bibs](#).

### Integrating Existing Axis 360 EContent

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

See also:

- [Putting Existing Non-Integrated Axis 360 eContent Records in a Record Set](#)
- [Exporting the Record Set of Non-Integrated Axis 360 eContent Records](#)
- [\(Optional\) Deleting the Existing Non-Integrated Axis 360 Records](#)
- [Importing Existing Axis 360 Records to Enable the Integration](#)

### Putting Existing Non-Integrated Axis 360 eContent Records in a Record Set

To locate the existing Axis 360 eContent records and put them in a record set:

**Note:**

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

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

### Exporting the Record Set of Non-Integrated Axis 360 eContent Records

**Note:**

If your library has SimplyReports and Export Express, you can select the record set to export. If your library does not have Export Express, your

Polaris Site Manager can assist you with exporting the record set from the staff client.

To export the Axis 360 eContent records using Export Express:

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

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

The screenshot shows the Polaris SimplyReports interface. The top navigation bar includes tabs for Patrons, Patron Account, Holds, Items, Bibs, Authorities, Serials, Funds, Invoices, Orders, My Reports, Admin, and Help. The 'Bib list reports' tab is selected. Below the navigation bar, there are links for Bib list reports, Bib count reports, Bib statistical reports, and Export profiles. The main content area is divided into three sections: Report output columns, Columns selected for output, and Columns selected for sort. The Report output columns section lists various fields like Bib creation date, Bib creator name, Bib first available date, Bib imported date, Bib lifetime circ count, Bib lifetime in house use count, and Bib modification date. The Columns selected for output and Columns selected for sort sections are empty. Below these sections, there are checkboxes for 'Include header rows', 'Text file', and 'Excel file'. The 'Export Express' section is highlighted, showing 'MARC file' selected. Other options include 'MARC file - custom' and 'Other formats'. The 'Holdings type' is set to 'No holdings', 'Profile' is 'COLLECTIONHQ - DO NOT EDIT', and 'Format' is 'Dublin core (XML)'. The 'Character encoding' is set to 'MARC-8'. At the bottom, there is a section for 'Bibliographic record general filters' with 'Bib record set' selected and 'Axis360 Titles' chosen from a dropdown menu. A 'Submit' button and a 'Help' button are also visible.

### (Optional) Deleting the Existing Non-Integrated Axis 360 Records

#### Note:

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

After exporting the records to a file on the desktop or another location, delete the records from the database.

To delete the non-integrated records from the Polaris database:

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

## Importing Existing Axis 360 Records to Enable the Integration

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

1. Create an import profile specifically for importing existing non-integrated Axis 360 eContent as follows:
  - a. Select the **Integrated ebook Bibs** PolarisExec import profile in the Profile Manager, right-click, and select **Copy**.
  - b. On the Profile Setup tab, type a new name for the import profile, and select the Axis 360 vendor account.

The screenshot shows a software window titled "Modify Import Profile - Integrating existing Axis 360 eContent". It has several tabs: "Profile Setup", "Bibliographic Records", "Item Records", "Authority Records", and "Record Sets". The "Profile Setup" tab is selected. Inside this tab, there are several input fields: "Name" (containing "Integrating existing Axis 360 eContent"), "Creator" (containing "peer"), "Description" (an empty text area), "Source file name" (an empty text box with a "Browse..." button), and "Vendor account" (a dropdown menu currently showing "Axis 360").

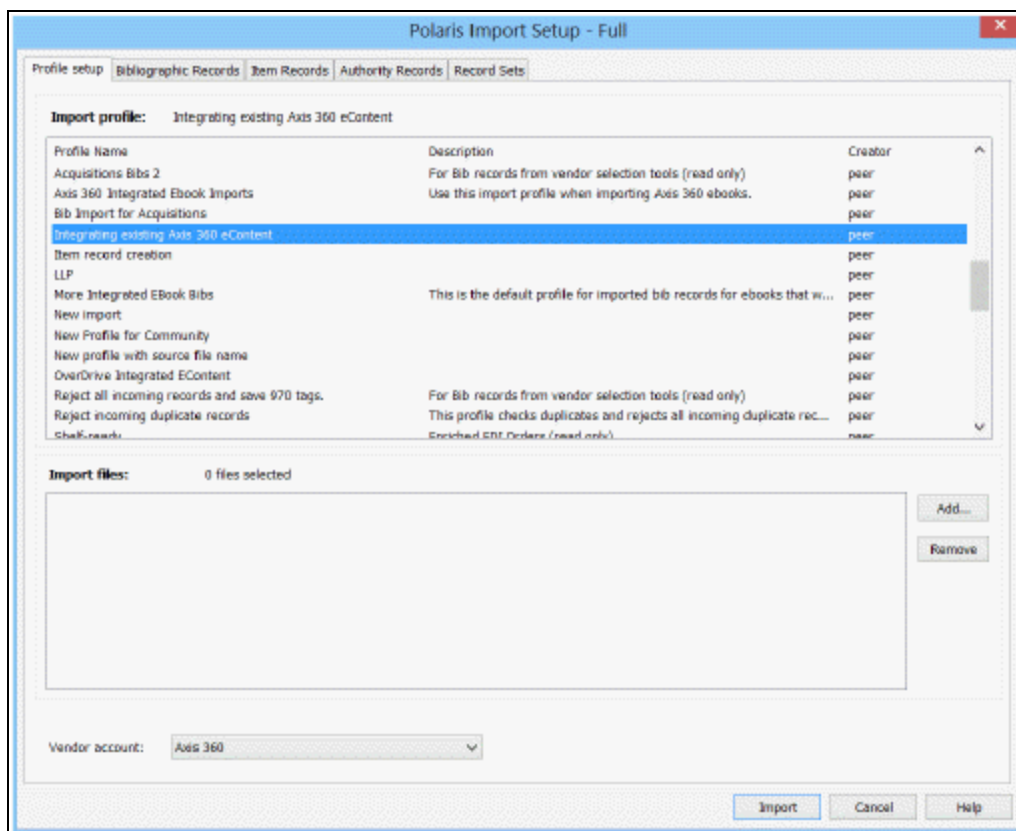
- c. Select the Bibliographic Records tab and set the duplicate detection options that are appropriate for your library. Work with your Polaris site manager to determine which settings to modify.
  - d. Select the Item Records tab and select the item template created for Axis 360 eContent

### Note:

You can select any item template, but if your library uses resource groups, ensure that the item template's assigned branch is in the resource group with access to the Axis 360

vendor account.

- e. (Optional) Select the Authority Records tab, and modify the settings.
  - f. (Optional) Select the Record Set tab, and modify the settings.
  - g. Save the import profile.
2. Select **Utilities > Importing > Express Import or Full Import**.
  3. Select the import profile created for integrating existing non-integrated Axis 360 eContent.



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

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

**Note:**

If you want to add call numbers from the 099 tag to the newly-created

eContent item records, you can select the **Use call number fields from bib record** setting on the Item Bulk Change dialog box.

### Integrating New Axis 360 Bibs (Pre-Order)

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

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

**Note:**

See [Set up the Baker & Taylor TS3 MARC Profile List](#).

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

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

**856 40 Ꞥu{contractID}.baker-taylor.com/Title?itemID={string from 037 a subfield}Ꞥ3 {Default URL link text string from vendor account}Ꞥx{contractID}**

During the import process, these constructed 856 tags are used to create the resource entities in the bibliographic records. See [Resource Entities](#). No item records are created because the titles have not yet been ordered.



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

See also:

[Import Axis 360 eContent Bibs Downloaded from TS3](#)

## Import Axis 360 eContent Bibs Downloaded from TS3

To set up the import profile for importing the Axis 360 eContent bibs downloaded from TS3 and enable integration with Polaris:

**Note:**

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

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

**Note:**

For general information about creating, copying, and modifying import profiles, see [Setting Up Import Profiles and Importing Records](#).

- a. Create a new, blank import profile or start with a PolarisExec import profile and copy it.
- b. On the Profile Setup tab, type a name for the import profile, select the Axis 360 vendor account in the **Vendor account** drop-down list box, and click **Save** to save the import profile.

Modify Import Profile - Axis 360 records downloaded from TS3 - Pre-Order import

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

Name: Axis 360 records downloaded from TS3 - Pre-Order import Creator: j0007

Description: Use this profile for importing records downloaded from TS3.

Source file name: Browse...

Vendor account: Axis 360

Save Close Help

- c. Select the Bibliographic Records tab and select or modify the options. Work with your Polaris site manager to determine the settings appropriate for your library. See [Examples of Settings for TS3 Imports](#).
- d. Select the Item Records tab and clear the **Build item records** checkbox.  
(EContent item records will be built by the overnight sync process once the titles have been ordered.)

- e. (Optional) Select the Authority Records tab, and modify the settings.
- f. (Optional) Select the Record Set tab, and modify the settings.
- g. Save the import profile.

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

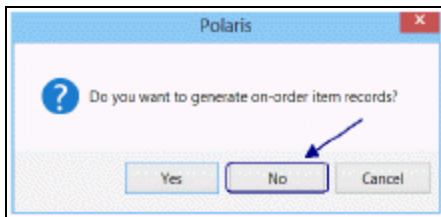
2. Select **Utilities > Importing > Express Import** or **Full Import**.
3. Select the import profile created for importing Axis 360 records from TS3.
4. Click **Add** and select the file of Axis 360 eContent bibliographic records downloaded from TS3.
5. Click **Import**.

The import job is added to the import queue. See [Axis 360 Import Jobs](#). Once the import processing is complete, the Axis 360 eContent records are integrated with Polaris.

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

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

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



Later, the library can import the full MARC records to overlay these “placeholder” bibs, while retaining the resource entities that enable the integration with Polaris. See [Overlaying Axis 360 EContent Bibs](#).

#### Examples of Settings for TS3 Imports

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

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

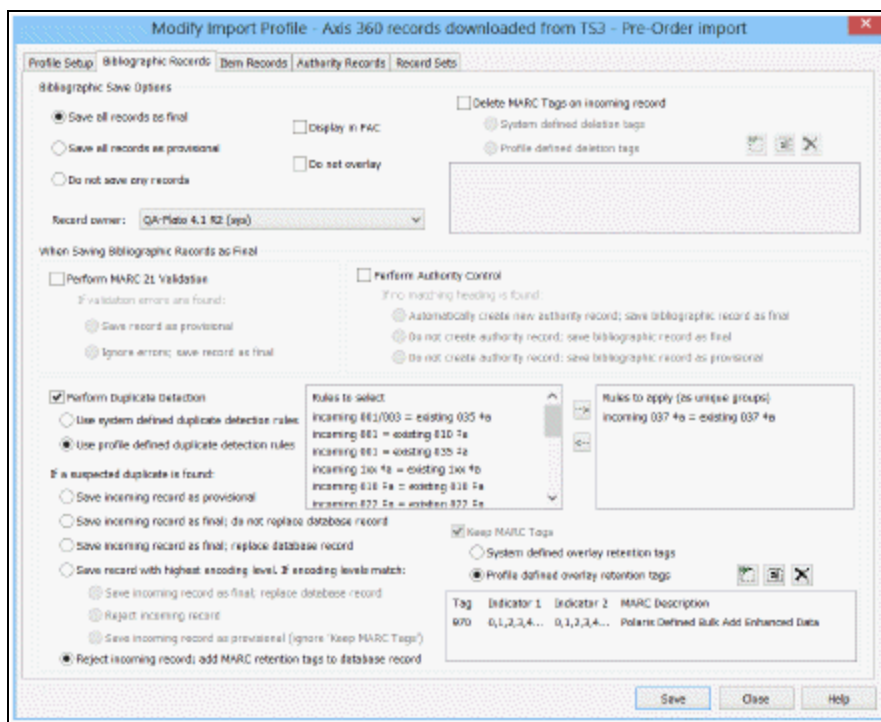
**Perform MARC Validation** and **Perform Authority Control** boxes are unchecked because the records are not yet fully cataloged.

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

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

**Profile defined overlay retention tags** is selected, and the 970 tag and indicators are the

tags to retain. This allows the ordering data for added copies to be retained in the database record.



## Overlaying Axis 360 EContent Bibs

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

### Important:

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

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

## Importing Fully-Cataloged Bibs to Overlay Axis 360 Bibs

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

### Note:

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

1. Create an import profile specifically for importing fully-cataloged Axis 360 from Baker & Taylor or another vendor by copying the PolarisExec **Integrated ebook Bibs** import profile, or create a new import profile.

### Note:

For general information about creating, copying, and modifying import profiles, see [Setting Up Import Profiles](#).

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

3. Select the Bibliographic Records tab and verify that the following options are set:

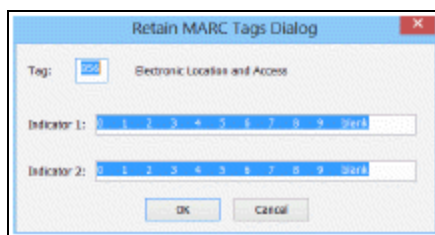
### Important:

The Bibliographic Records tab must be set up to:

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

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

- **Perform duplicate detection** - The checkbox must be selected.
- **Use profile defined duplicate detection rules** - The checkbox must be selected. **Rules to apply (as unique groups)** - The profile-defined rules must include **incoming 037\$a = existing 037\$a**
- **Save incoming record as final; replace database record** - This option must be selected under **If a duplicate is found**.
- **Keep MARC tags** - The checkbox must be selected.
- **Profile defined overlay retention tags** - This option must be selected, and the following tags must be listed as profile-defined overlay retention tags:
  - **856** - any indicator 1 or 2 value.



4. Click **Save** to save the settings for the Bibliographic Records tab.
5. Select the Item Records tab and verify that the options for building item records are set correctly.

**Note:**

Item records are created by the overnight synch process after the Axis 360 titles are ordered. If you select the option to build item records when

importing full Axis 360 bibs, item records are created only under certain circumstances. Work with your Polaris site manager to determine which item record options to select.

6. (Optional) Select the Authority Records tab, and modify the settings.
7. (Optional) Select the Record Set tab, and name the record sets to identify the type of records being imported.
8. Save the import profile.

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

9. Select **Utilities > Importing > Express Import or Full Import**.
10. Select the import profile created for importing fully-cataloged Axis 360 records.
11. Click **Add** and select the file of Axis 360 eContent bibliographic records downloaded from TS3.
12. Click **Import**.

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

### Axis 360 Added/Expired Copies

The API consumer service queries Axis 360 on a daily basis and synchs the number of eContent item records for each resource entity, either adding or removing eContent item records as necessary. For details on the synch process, see [Integration with Polaris and eContent Vendors](#).

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

**E-added copies\_VendorAccountName\_ID=nnn**

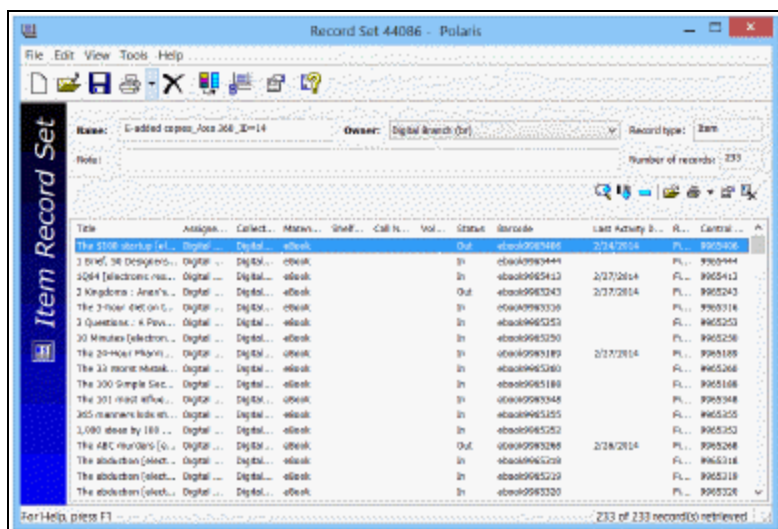


If necessary, the vendor account name is truncated to fit the 50-character record set name limit, and the vendor account ID follows the name.

**Example: E-added copies\_Axis 360\_ID=14**

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

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



## Axis 360 Import Jobs

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

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

See: [View the Jobs or Print Reports for Axis 360 Imports](#)

## View the Jobs or Print Reports for Axis 360 Imports

To view import jobs in the Import Jobs Queue:

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

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

**Tip:**

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

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

The Import Report pdf appears in the preview window.

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

## Axis 360 MARC Tags - Reference

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

**Note:**

For more information, see [Resource Entities](#).

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

**Example:**

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

- 852 - During import initialization, if the incoming Axis 360 records have 852 tags, they are removed from the records. New 852 tags are added for the correct number of copies.
- 856 40 - During import initialization, the 856 tags with a first indicator (access method) of 4 (HTTP) and a second indicator of 2 (related resource) are updated

with a second indicator of 0 (resource). The tag is then converted to a resource entity and moved to the Resources view of the Bibliographic Record workform. It does not display in the MARC view.

**Example:**

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

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

**Example:**

856 42 ‡uhttp://images.btol.com/ContentCafe/Jacket.aspx?UserID=polaris-test&Password=polaris-test&Return=1&Value=9781458123299&Type=S

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

## Patron Access to Axis 360 EContent

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

When the Axis 360 eContent is accessible to the logged-in patron, a **Check Out** button is displayed in the PAC search results if the title is available. If the patron has access, but the title is not available because it is checked out, a **Place Hold** button is displayed. If the patron does not have access to the eContent title, a **Restricted** button is displayed with the hover text **Sorry this title is currently not available at your registered branch**. You can modify this text string in WebAdmin using the mnemonic: **PACML\_EBREstricted\_TIP**.

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

- **PACML\_AXISCHECKOUT**
- **PACML\_AXISPLACEHOLD**

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

See also:

- [Check Out and Download Axis360 eContent from PowerPAC](#)
- [Check Out and Download Axis360 eContent from Mobile PAC](#)

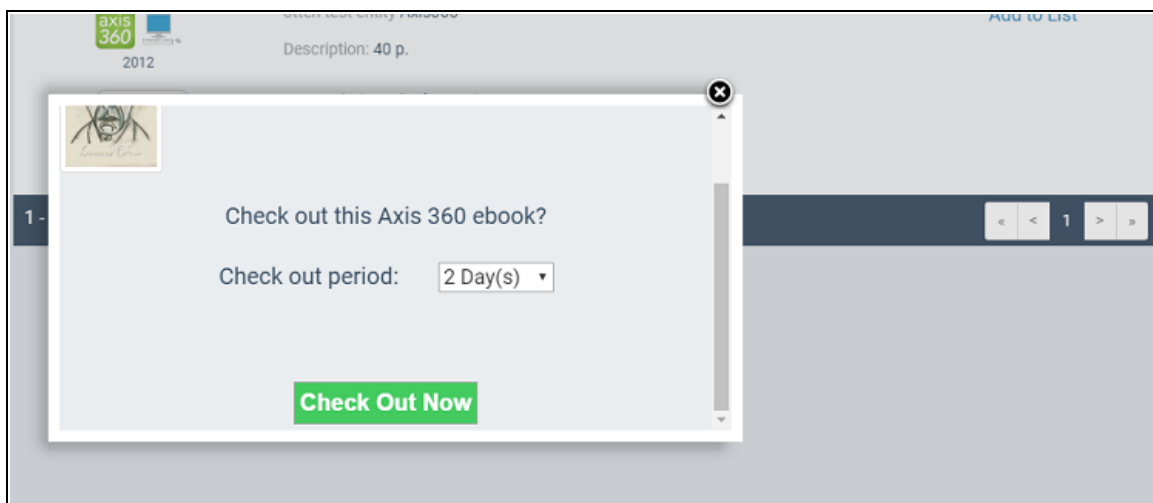
## Check Out and Download Axis360 eContent from PowerPAC

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

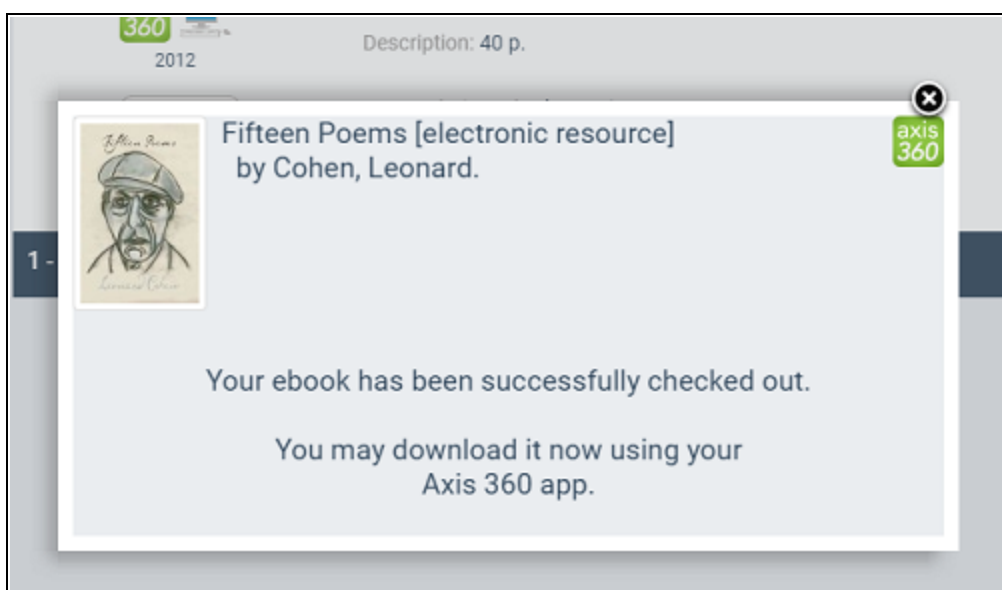
To check out the eContent in the PAC, the patron logs in to their account, and clicks or taps the **Check Out** button, which opens a light box.



The patron clicks or taps **Check Out Now**.



A confirmation message box informs the user that the eContent title is checked out and ready to download.



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

### Check Out and Download Axis360 eContent from Mobile PAC

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

When checking out Axis 30 integrated eContent from Mobile PAC, the user selects the title in the Mobile PAC search results and selects **Check Out** on the Title page to go to the Check Out page.



On the Check Out page, the user selects the **Check Out** button.



A confirmation message informs the user that the eContent has been checked out and is ready to download.

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## OverDrive EContent Integration

Libraries using the Polaris ILS can catalog, display in PAC, manage access, and circulate eContent from OverDrive. Innovative Interfaces requires a license for each integrated eContent vendor. Once the library has a subscription with OverDrive and the required Polaris license, the library creates an item template, an integrated vendor account, and an import profile in Polaris. The Vendor Account is in Polaris Administration, not in Acquisitions, and it is used during automatic importing to create resource entities for the bibliographic records.

As a result of this integration, patrons can search for, place holds on, and check out OverDrive eContent directly from the PAC. All associated circulation processing and tracking for these integrated eContent occurs in Polaris. Holds placed in the PAC for OverDrive eContent are recorded, but since holds activity is managed exclusively in the vendor's database, it is not reflected in the Polaris staff client.

OverDrive eContent may be in one of the following formats:

**Note:**

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

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

### OverDrive Advantage Accounts

Libraries participating in OverDrive Advantage accounts share eContent collections under a state, county, or consortium contract. The group of libraries sharing the collection may include libraries running an ILS other than Polaris. Patrons from these non-Polaris libraries can still check out shared titles from the OverDrive application. However, unlike the synchronization process that runs every 5-15 minutes when patrons from a Polaris library check out eContent from the OverDrive application, the process to synchronize remote patron checkouts from the app runs every 24 hours—updating the Polaris item status to **unavailable** (rather than checked out) and then to **in** when they are available.

If your library uses OverDrive Advantage, you can set up the OverDrive Vendor Account so that PAC users who are connected at the system level and not logged in do not see the Advantage titles. See: [Create an OverDrive integrated vendor account](#).

### **OverDrive and Polaris Synchronization**

Availability and hold counts (total number of copies, number of available copies, and number of holds) for OverDrive eContent titles appear in the PAC based on the status of the items in the OverDrive repository, not on the status of the items in the Polaris database. Patrons can see the availability information whether they are logged into their library account or not.

The Polaris API consumer service queries the OverDrive database daily to find and fetch the metadata for titles identified as those the library has purchased. After fetching the OverDrive metadata, the API consumer service identifies duplicates by matching on the object identifier or title ID. If the title is new to the catalog, the OverDrive XML metadata is converted to MARC XML, and the file is automatically added to the Polaris import queue to be imported. OverDrive imports are done once daily, around midnight.

When a patron checks out or places a hold on a OverDrive title in Polaris, the data is immediately updated in the Polaris database and in the vendor's repository. However, when a patron uses the OverDrive app to initiate circulation, the synchronization process takes longer because the app uses the Polaris API to push the data to Polaris, and then the API consumer service completes the process. The API consumer service also performs a periodic "pull" query of the OverDrive database and then synchronizes the data if any circulation activity was detected.

The Polaris database and OverDrive are synchronized as follows:

- Holds - Real time
- Check-out or Check-in from the PAC - Real time
- Check-out or Check-in from the OverDrive or Libby app - Every 5-15 minutes
- Added copy for an existing title - Once daily (overnight)
- Expired copy for an existing title - Once daily (overnight)
- Added title - new MARC record - Once daily (overnight)
- Added title - prepublication - Once daily (overnight)

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



See also:

- [Setting Up Polaris for OverDrive Integration](#)
- [Integrating New OverDrive EContent](#)
- [OverDrive Added/Expired Copies](#)
- [Overlaying OverDrive EContent Bibs](#)
- [OverDrive Import Jobs](#)
- [Patron Access to OverDrive EContent](#)

### Setting Up Polaris for OverDrive Integration

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

See also:

- [Set up the eContent item templates for OverDrive](#)
- [Create an OverDrive integrated vendor account](#)
- [Create OverDrive eContent import profile\(s\)](#)

### Setting Up the eContent Item Templates for OverDrive

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

**Note:**

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

You can also create multiple other item templates, named however your library wishes, to use when re-importing existing non-integrated OverDrive records. For example, if your library has existing non-integrated OverDrive ebooks and audio ebooks, you can set up

one item template for ebooks and one item template for audio ebooks. Then, you can select the appropriate item template in the import profile when you are re-importing these existing records.

To set up the item templates for OverDrive:

1. Select **File > New** from the Polaris Shortcut Bar.
2. Select **Item Template** and click **OK**.

The Item Template workform opens.

The screenshot shows the 'New Item Template 1 - Cataloging - Polaris' window. The interface includes a menu bar (File, Edit, View, Links, Tools, Help) and a toolbar with icons for file operations. A vertical sidebar on the left is labeled 'Item Template'. The main area contains various input fields and dropdown menus. Fields include: Template Name, Template owner (Community Library (br)), Title, Author, Call number, Bib control number, Parent item, Price, Owner (Community Library (br)), Shelf location ((None)), Assigned (Community Library (COB)), Temporary location, Collection ((None)), Circulation status (In-Process), Circulation parameters (Material type, Loan period, Fine code, Renewal limit, Stat code, Name of piece, Home branch), Call number (Scheme, Prefix, Class, Cutter, Suffix, Volume, Copy, Do not float), and Request (Loanable outside system, Holdable, Limit to, Pickup at, Patrons from this library and branches, Patrons from this branch only, Preferred borrowers).

3. Type a name for the OverDrive eContent item template.
  - If you are creating the item template that will be selected in the OverDrive Vendor Account workform, it must be named **Ebook automatic import** or **E-book automatic import**. Case does not matter, and other words can follow this string, but the name must begin with **Ebook automatic import**. For information about the items created from the automatic import item template, see

- If you are creating an item template to create eContent item records during a non-automatic import, you can type any name in the **Name** box. You can create as many of these templates as are appropriate for your library. For example, your library may already have non-integrated OverDrive records in various electronic formats (ebook, audio ebook, etc.) in its database. When importing these records to enable their integration with Polaris Circulation, the user can select one of these eContent templates.
4. Select the branch that owns the template in the **Template owner** box.
  5. In the **Assigned** box, select the branch for the eContent items that will be created using this template.

**Note:**

If a resource group is selected in the Vendor Account, the **Assigned** branch selected in the item template must belong to the resource group.

6. In the **Circulation status** box, select **In**.
7. Select the **Fine code** and **Renewal limit**. These fields are required to save the item template, but they are ignored in eContent items circulation processing.
8. Select **File > Save**, select the save button, or press **Ctrl+S** to save the template.

See also: [EContent Item Records](#).

## Creating an OverDrive Integrated Vendor Account

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

To create an integrated vendor account for OverDrive.

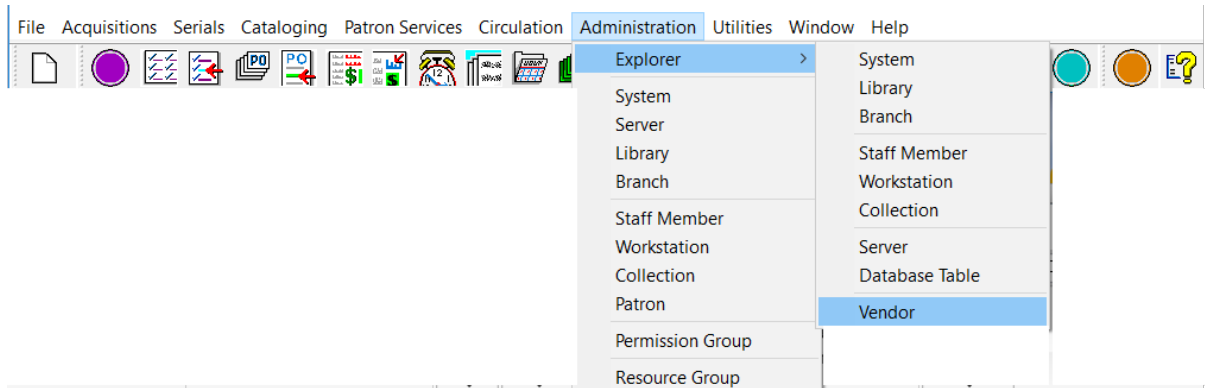
**Note:**

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

**Tip:**

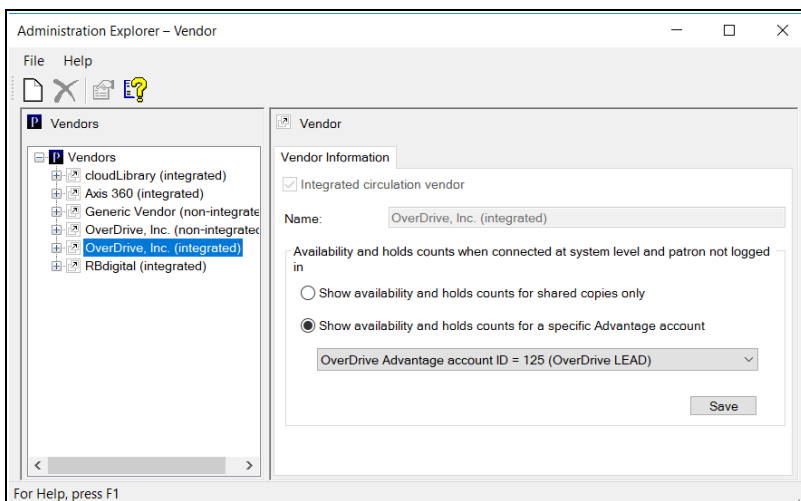
You cannot create a new Vendor Account by selecting **File > New** from the Polaris shortcut bar.

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



2. Expand the Vendors list, and select the integrated OverDrive vendor.

The Vendor information appears in the right tab.



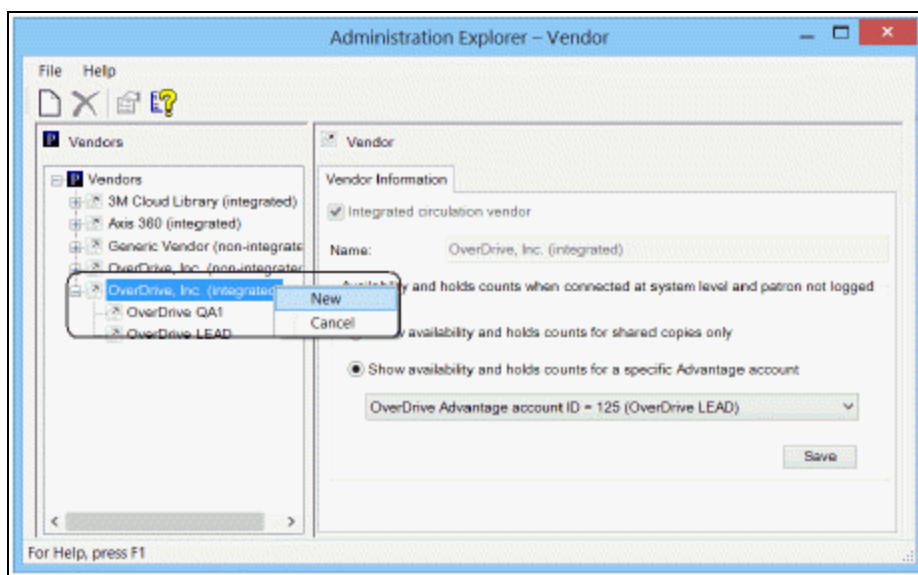
The **Integrated circulation vendor** read-only box is checked.

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

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

participates in the Advantage account.

- **Show availability and holds counts for a specific Advantage account** - When you select this option and select the specific Advantage account from the drop-down list, both the shared eContent titles and the titles from the selected Advantage account display when users are connected at the system level and not logged in.
3. Right-click the **Overdrive, Inc. (integrated)** Vendor node, and select **New**.



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

**Vendor Account**

Vendor name: OverDrive, Inc. (integrated) ☒ Integrated circulation vendor

Vendor account name:  ☐ Active

Vendor account description:

Resource group: (None) v

Icon URL:

OverDrive library ID:

Vendor account settings: Test Connection

Attribute	Value
Vendor account access ID	
Vendor account access key	
Vendor account base path	
Vendor account server name	
Vendor account use SSL	No v
Vendor account import profile ID	Integrated ebook Bibs v
Vendor account item template ID	(None) v
Library OAuth URL	
Patron OAuth URL	
Patron API URL	
Library web-site ID	
Default URL link text	
ILS name	
OverDrive Advantage account ID	

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

**Note:**

Required fields have bold labels.

- **Vendor name** - OverDrive Inc. (integrated) System-supplied; read-only
- **Integrated circulation vendor** - This checkbox is automatically checked.
- **Vendor account name** - (required) The library supplies a unique name to identify the account.
- **Active** - This checkbox is initially unchecked when you are creating a vendor account for an integrated eContent vendor. Leave the checkbox unchecked, and enter the account information. Innovative Interfaces activates the vendor account.
- **Vendor account description** (optional) - The library can add a description for the vendor account.
- **Resource group** (optional) - The library can select a resource group to limit access to the eContent by branch. Search the Polaris help for "Manage patron access to eContent using resource groups."

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

#### Tips

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

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

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

If the test is successful, a message confirms that the connection was made. If a connection problem is encountered, a message appears.

7. Ask your Polaris representative to activate the vendor account.

This starts the API consumer service. To check the status of the service, see [Check the status of the Polaris API consumer service](#).

**Important:**

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

## Create OverDrive eContent import profile(s)

**Note:**

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

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

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

- Enable integration for existing OverDrive non-integrated eContent bibs - Export and then re-import the non-integrated OverDrive eContent titles. See [Integrating Existing OverDrive EContent](#).



- Overlay OverDrive integrated eContent bibs with fully-cataloged bibs while retaining the resource entities - Fully cataloged eContent bibs can be imported to overlay existing integrated eContent bibs, while retaining the resource entities that enable the integration with Polaris circulation. See [Overlaying OverDrive EContent Bibs](#).

## Integrating Existing OverDrive EContent

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

See also:

- [Putting Existing Non-Integrated OverDrive Bibs in Record Sets](#)
- [Exporting OverDrive Non-Integrated eContent Bibs](#)
- [Deleting the Exported OverDrive Non-Integrated Bibs](#)
- [Re-Importing Existing Non-Integrated OverDrive Records](#)

## Putting Existing Non-Integrated OverDrive Bibs in Record Sets

To locate the existing OverDrive eContent records and put them in record sets

### Note:

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

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

### Note:

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

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

## Exporting OverDrive Non-Integrated eContent Bibs

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

### Note:

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

To export the OverDrive eContent records using Export Express:

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

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

The screenshot shows the Polaris SimplyReports interface. The top navigation bar includes tabs for Patrons, Patron Account, Holds, Items, Bibs, Authorities, Serials, Funds, Invoices, Orders, My Reports, Admin, and Help. The 'Bib list reports' tab is selected. Below the navigation bar, there are links for Bib list reports, Bib count reports, Bib statistical reports, and Export profiles. The main content area is divided into three sections: Report output columns, Columns selected for output, and Columns selected for sort. The Report output columns section lists various fields like Bib creation date, Bib creator name, Bib first available date, Bib imported date, Bib lifetime circ count, Bib lifetime in house use count, and Bib modification date. The Columns selected for output and Columns selected for sort sections are empty. Below these sections, there are checkboxes for 'Include header rows', 'Text file', and 'Excel file'. The 'Export Express' section is expanded, showing options for 'MARC file', 'MARC file - custom', and 'Other formats'. The 'MARC file' option is selected. The 'Holdings type' is set to 'No holdings', the 'Profile' is 'COLLECTIONHQ - DO NOT EDIT', and the 'Format' is 'Dublin core (XML)'. The 'Character encoding' is set to 'MARC-8'. The 'Maximum rows to return' is set to '999999'. At the bottom, there is a section for 'Bibliographic record general filters' with a dropdown menu showing 'Bib record set' and 'Axis360 Titles'.

## Deleting the Exported OverDrive Non-Integrated Bibs

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

To delete the non-integrated records from the Polaris database.

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

## Re-Importing Existing Non-Integrated OverDrive Records

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

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

### Note:

Newly-purchased OverDrive eContent records will be imported automatically using the default **Integrated ebook bibs** import profile (or a renamed copy of this profile) selected in the OverDrive Vendor Account workform. See [Automatic Import Profile Selected in the OverDrive Vendor Account](#).

To set up the import profile and then import the existing non-integrated OverDrive bibs.

### Note:

If this profile is already set up, skip step 1.

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

You can start with a new import profile, or select an existing profile, rename it, and modify the settings. For general information about copying and renaming import profiles, see [Copy a Polaris read-only import profile](#).

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

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

Name:  Creator:

Description:

Source file name:

Vendor account:

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

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

- c. Select the Item Records tab, and ensure that the following options are set:
- **Build item records** checkbox is checked
  - **Using all available holdings/item fields** is selected.
  - **Item template (for fields that are missing)**: The correct eContent item template is selected.

**Note:**

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

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

When Saving Bibliographic Records as Final:

☒ Build item records

☐ Using embedded holdings fields only

☐ Using template/system default values only

☒ Using all available holdings/item fields

If a duplicate item record (barcode) is found:

☒ Save duplicate item record as provisional

☐ Do not save duplicate item record

If no item record (barcode) is found:

☒ Save item record as final

☐ Save item record as provisional

☐ Do not save item record

☒ Display in PAC (when not explicitly found)

Item template (for fields that are missing):

Ebook (Community Library)

☐ Update items (enriched EDC)

If an update error is encountered:

☐ Save item record as provisional

☐ Do not save item record

Embedded holdings field/MARC subfield mapping

Holdings tag number: 852

Assigned Branch:	B	Loanable Outside System:	7
Assigned Collection:	b	Material Type:	w
Barcode:	p	Name Of Place:	
Call Number Prefix:	k	Non Circulating:	
Call Number Suffix:	ra	Non Public Item:	x
Circulation Status:		Owning Branch:	a
Classification Number:	h	Physical Condition:	q
Copy Number:	t	POL-Segment ID:	
Outer Number:	i	Price:	8
Display In PAC:	4	Public Note:	z
File Code:	r	Renewal Unit:	y
Free Text Block:		Shelf Location:	c
Funding Source:	1	Shelving Scheme:	j
Holdable:	5	Statistical Code:	d
Library Assigned Block:		Temporary Shelf Location:	i
Loan Period Code:	U	Volume Number:	v

- d. (Optional) Select the Authority Records tab, and modify the settings.
- e. Select the Record Set tab, and ensure that the record sets are named appropriately to identify the types of records in them.
- f. Save the import profile.

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

2. After the import profile is set up, to re-import the OverDrive bibs, select **Utilities > Importing > Full Import**.
3. Select the import profile created in step 1.
4. On the Profile Setup tab, click **Add** and select the file of exported non-integrated OverDrive bibs to import.
5. Click the **Import** button.

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

**Note:**

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

## Integrating New OverDrive EContent

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

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

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

## Automatic Import Profile Selected in the OverDrive Vendor Account

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

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

- Profile Setup tab - You can type a different name and description, but do not select a source file or a vendor account.
- Bibliographic Records tab - Work with your site manager to determine the duplicate detection options to set.
- Item Records tab - The **Build item records, Using all available holdings/item fields** must be selected, and the **Embedded holdings field/MARC subfield mapping** options should not be changed. Do not select a template because the item

template used in automatic import processing is selected in the Vendor Account workflow, not in the import profile.

- Authority Records tab - Leave the **Do not save any records** option selected.
- Record Sets tab - You can rename the record sets without affecting the automatic import.

### OverDrive Added/Expired Copies

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

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

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

#### **E-added copies\_VendorAccountName\_ID=nnn**

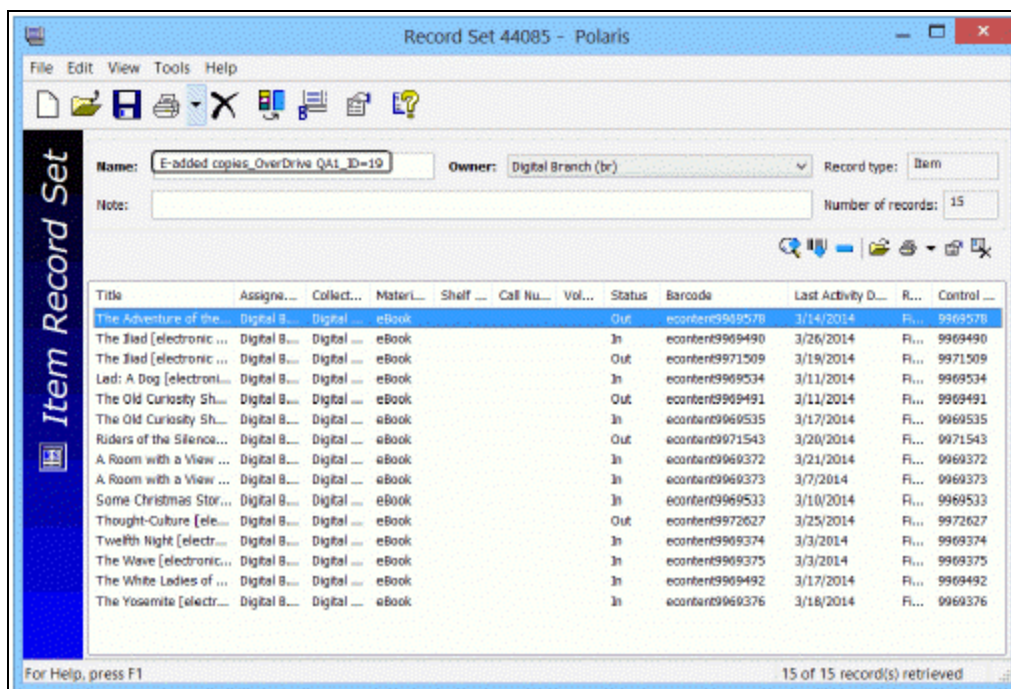
If necessary, the vendor account name is truncated to fit the 50-character record set name limit, and the vendor account ID follows the name.

#### **Example:**

**E-added copies\_OverDrive\_ID=10**

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

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



## Overlaying OverDrive EContent Bibs

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

### Important:

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

The records must be MARC or MARCXML bibliographic records.

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

See also: [Importing Fully-Cataloged Bibs to Overlay Axis 360 Bibs](#)



## Import fully-Cataloged Bibs to Overlay OverDrive Bibs

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

**Note:**

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

1. Create an import profile specifically for importing fully-cataloged bibs to overlay OverDrive records.
  - a. Copy the PolarisExec **Integrated ebook Bibs** import profile, or create a new import profile.

**Note:**

For general information about creating, copying, and modifying import profiles, see [Setting Up Import Profiles](#).

- b. On the Profile Setup tab, type a name for the import profile, select the OverDrive vendor account in the **Vendor account** drop-down list box, and click **Save** to save the profile.
- c. Select the Bibliographic Records tab and verify that the following options are set:
  - **Perform duplicate detection** - The checkbox must be selected.
  - **Use profile defined duplicate detection rules** - The checkbox must be selected.
  - **Rules to apply (as unique groups)** - The profile-defined rules must include **incoming 037\$a = existing 037\$a**
  - **Save incoming record as final; replace database record** - This option must be selected under **If a duplicate is found**.
  - **Keep MARC tags** - The checkbox must be selected.
  - **Profile defined overlay retention tags** - This option must be selected, and the following tags must be listed as profile-defined overlay retention tags: **856** - any indicator 1 or 2 value.



- d. Click **Save** to save the settings for the Bibliographic Records tab.
- e. Select the Item Records tab and verify that the **Build item records** checkbox is not checked.

**Note:**

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

- f. (Optional) Select the Authority Records tab, and modify the settings.
- g. (Optional) Select the Record Set tab, and name the record sets to identify the type of records being imported.
- h. Save the import profile.

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

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

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

### OverDrive Import Jobs

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

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

## Viewing the Jobs or Print Reports for OverDrive Imports

To view import jobs in the Import Jobs Queue:

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

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

### Tip:

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

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

The Import Report pdf appears in the preview window.

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

## Patron Access to OverDrive EContent

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

For more information about options for displaying, managing, and circulating eContent, search Polaris help for "Managing EContent in the PAC."

When the OverDrive eContent is accessible to the logged in patron, a **Check Out** button is displayed in the PAC search results if the title is available. If the patron has access,

but the title is not available, a **Place Hold** button is displayed. If the patron does not have access to the eContent title, a **Restricted** button is displayed with the hover text **Sorry this title is currently not available at your registered branch**. You can modify this text string in WebAdmin using the mnemonic: **PACML\_EBREstricted\_TIP**.

You can prevent or allow downloads of OverDrive integrated eContent on library computers designated as in-house workstations. See the Public Access Administration Guide, Prevent or allow downloads of OverDrive eContent on in-house workstations.

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

- **PACML\_OVERDRIVECHECKOUT**
- **PACML\_OVERDRIVEPLACEHOLD**

Patrons who are logged into their accounts in PowerPAC or Mobile PAC can check out OverDrive integrated eContent titles and access the file from the final checkout acknowledgment or from their patron accounts. If the title is available in a single format, the PAC user selects the single format shown. If the title is available in multiple formats, the user selects the **Get It** button, and a drop-down menu displays the available formats.

The patron experience may vary according to the device used to access the eContent; the operating system and the apps installed; and the browser settings. To access the eContent, the patron may need to allow one-time pop-ups or turn off the pop-up blocker on some devices, such as on the iPad.

The following variables are outside of the control of the Polaris software:

- DRM-protected Adobe PDF and EPUB files (.acsm files) may open in the OverDrive reading application, Adobe Digital Editions, or another reading application.
- OverDrive Read, OverDrive Listen, MediaDo, and streaming video titles open and play in a new browser tab or a new browser window.
- Kindle titles open in a new browser tab or window with an Amazon login page. The title is sent to the user's Kindle account; the Kindle app does not open automatically.
- Nook titles are sent to the user's Nook account; the Nook app does not open automatically. Depending on the user's device and the Barnes & Noble account, a new browser tab or window may open with a Barnes & Noble login page.

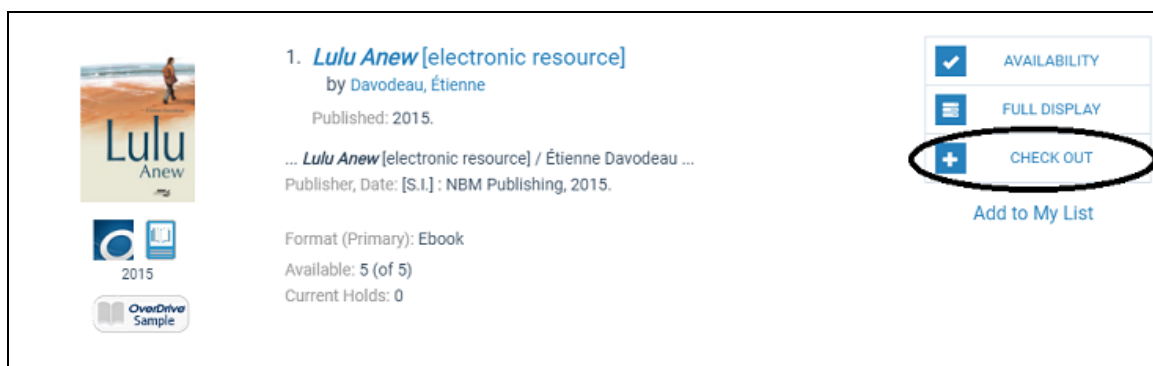
See also:

- [Checking Out and Downloading OverDrive eContent from PowerPAC](#)
- [Check out and download OverDrive eContent from Mobile PAC](#)

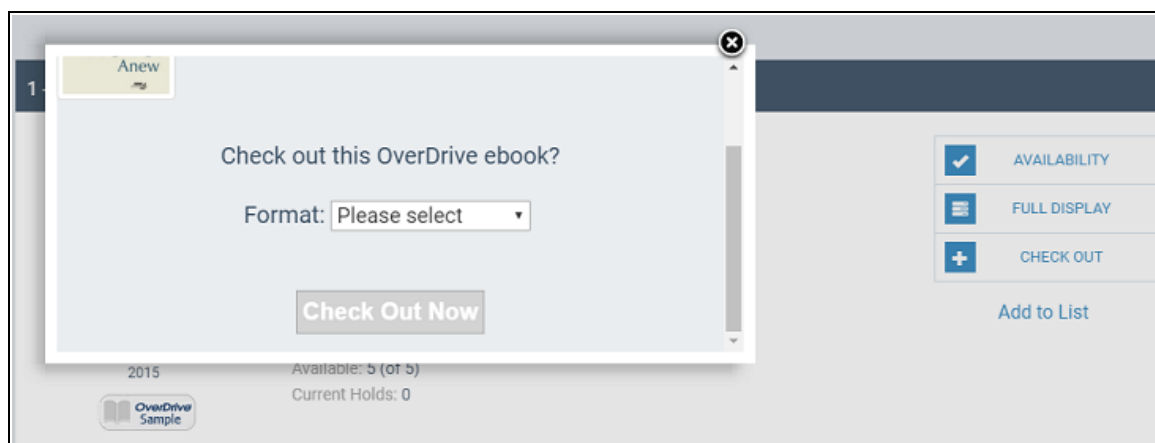
## Checking Out and Downloading OverDrive eContent from PowerPAC

A patron who is logged into PowerPAC can check out and immediately download or access OverDrive integrated eContent without going to the OverDrive app.

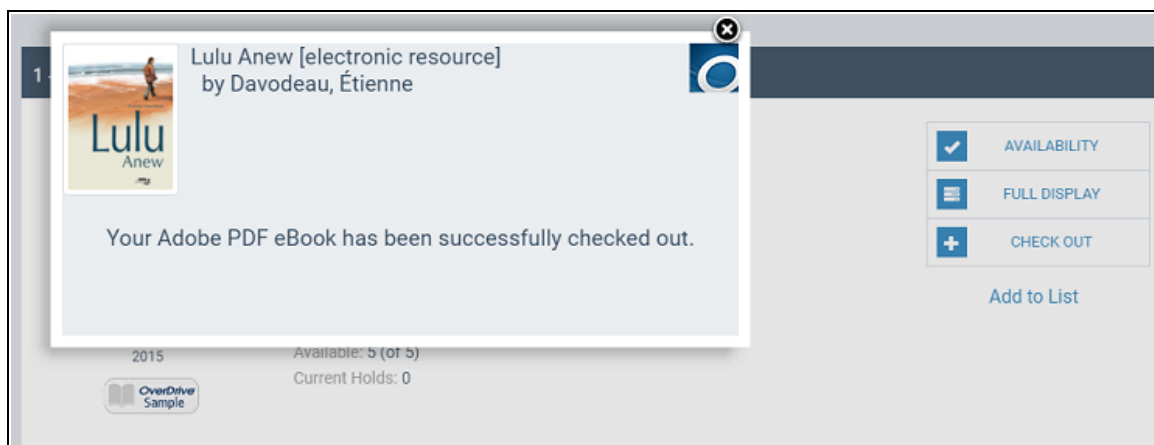
The patron selects the **Check Out** button for the title.



The patron selects the format for the eContent check out and clicks or taps **Check Out Now**.



Another light box confirms that the eContent was checked out.



The patron can download or access the title immediately by selecting an option in the **Get It** drop-down list box. See [Patron Access to OverDrive EContent](#).

**Note:**

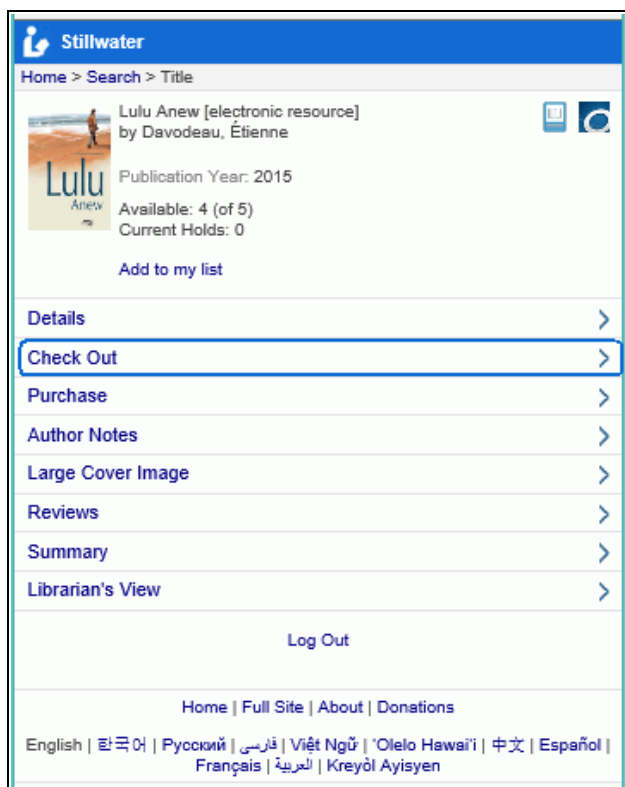
Safari browsers - If Safari is set to block pop-ups, nothing happens when the patron selects **Get It**. The patron should change the browser setting to allow pop-ups. Selecting **Get It** then displays the correct prompt to allow the pop-up and the patron can proceed.

Or the patron can close the light box and download or access the eContent from the Items Out page in the PowerPAC patron account or from the app.

### Check out and download OverDrive eContent from Mobile PAC

A patron who is logged into Mobile PAC can check out and immediately download or access OverDrive integrated eContent without going to the OverDrive app.

The patron selects **Check Out** from the title display in Mobile PAC.

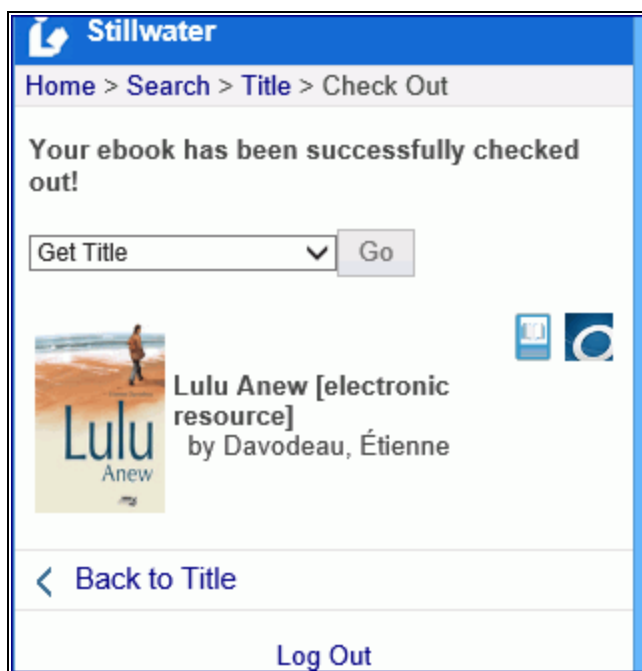


The Check Out view opens.



The patron selects the format in the **Format** drop-down list box and selects the **Check Out** button.

A message confirms that the check-out occurred, and the **Get Title** drop-down list contains the download formats for the eContent.

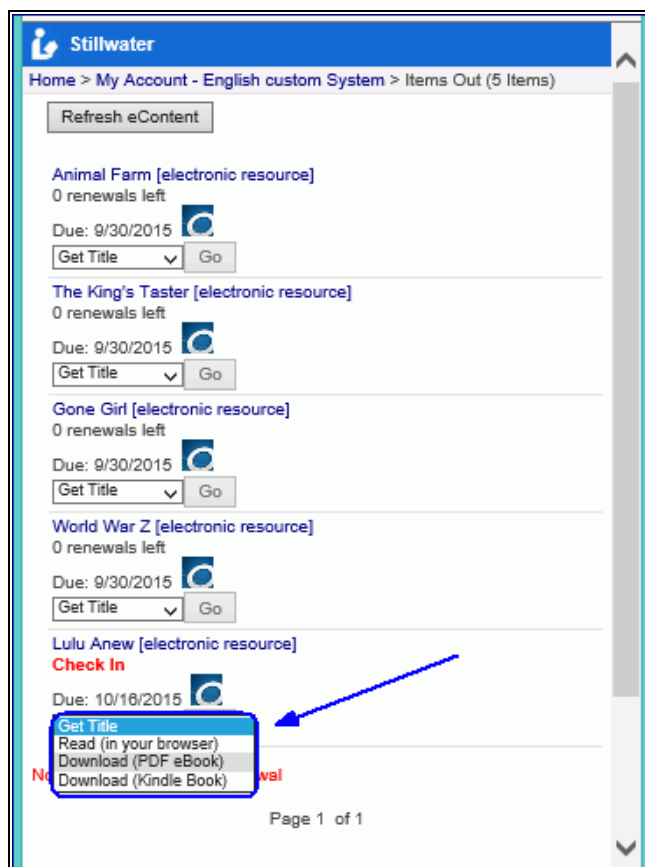


The patron selects the format for download in the **Get Title** drop-down list box. The OverDrive eContent is downloaded in the format the patron selected without the patron having to go to the OverDrive app.





Or, the patron can navigate away from the page without getting the title, and then download or access the eContent later from the Items Out list or from the OverDrive app.



The patron selects an option in the **Get title** list, and the eContent is downloaded to the patron's phone or device.

## OverDrive and Changed Patron Barcodes

In Polaris 5.1 and later, a patron whose barcode has been replaced (for example, due to a lost library card) can now access integrated and non-integrated OverDrive content associated with the previous barcode. To support this feature, a **PC** field containing the PatronID is included in the 24 Patron Status and 64 Patron Information response messages consumed by OverDrive.

To implement this feature, follow these steps:

1. Upgrade to Polaris 5.1 or later, if necessary.
2. Submit a support request to Innovative Interfaces via OverDrive Marketplace.

OverDrive receives the request and asks for a list of current IDs/barcodes and corresponding Patron IDs, so they can be linked together. This will

ensure that all users can continue to access their existing checkouts and holds.

3. Generate the list and send it to OverDrive.

Upon receiving the list, OverDrive will link each user's barcode or ID to their new Patron ID. OverDrive updates the authentication configuration to capture the Patron ID from the SIP response as the user's identification.

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## cloudLibrary eContent Integration

When the library purchases eContent from Bibliotheca, the following automatic processes enable the integration with Bibliotheca's cloudLibrary eContent and Polaris:

- Bibliotheca's API makes a call to the Polaris API (PAPI).
- The Polaris API consumer service is notified. This service allows the Polaris ILS to consume data from third-party APIs.
- The Polaris API consumer service calls Bibliotheca's API and gets the MARCXML records and a count of the number copies for each eContent title the library purchased.
- The Polaris API consumer service parses the MARCXML records and creates the appropriate number of holdings tags based on the holdings count.
- The Polaris API consumer service then submits an automatic import job for processing.
- The bibliographic records are imported automatically using the import profile selected in the Vendor Account workform. The **Integrated ebook Bibs** import profile is selected by default, but your library can select another import profile, provided it has the settings required for the integration.
- Automatic import jobs appear in the Import Jobs Queue. The automatic import jobs are listed in the Import Jobs Queue in the same way as staff-initiated import jobs, and the import report provides details regarding the automatic import.
- New bibliographic records for the integrated cloudLibrary eContent are saved in the Polaris database.
- A Resource Entity is created for each 856 tag that contains cloudLibrary vendor account data and links to the eContent in the cloudLibrary repository. The vendor contract ID is in subfield x of the 856 tag. The Resources view of the Bibliographic Record workform displays the Resource Entity. See [Resource Entities](#).

- Integrated eContent item records are created when the eContent bibs are automatically imported. During import initialization, the API determines how many item records need to be built, and 852 tags are inserted into the bibliographic records. When the bibliographic records are automatically imported, the appropriate number of item records are created using information in these tags as well as information in the **Ebook automatic import** item template selected in the 3M Vendor Account workflow.
- Auto-suggest and facets are updated the following day - PAC auto-suggest and search results facets for these newly imported eContent records are updated after the overnight jobs for these processes are run.

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

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

**Note:**

Integrated eContent checkins through the PAC are handled the same way.

If the patron checks out the eContent directly from cloudLibrary, the following events occur:

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

**Note:**

Integrated eContent checkins through the vendor's service (cloudLibrary) are handled the same way.

- If your library also uses Bibliotheca's cloudLink feature to share digital collections among libraries in a cloudLink group, "external" patrons from other non-Polaris libraries in the cloudLink group can check out cloudLink titles held by Polaris libraries. For these checkouts from external patrons, Polaris assigns an item status

of Econtent External Loan to the checked out item because the transaction cannot be associated with the patron. Polaris also returns those item records to In status when the external patron checks in the title in the cloudLibrary app, or when the loan period expires. See also: [Implementing the cloudLink Feature](#).

### **cloudLibrary and Polaris Synchronization**

Availability and hold counts (total number of copies, number of available copies, and number of holds) for cloudLibrary eContent titles appear in the PAC based on the status of the items in the cloudLibrary repository, not on the status of the items in the Polaris database. Patrons can see the availability information whether they are logged into their library account or not.

When a library purchases a new title, cloudLibrary sends a push notification that the title is available, the import process automatically imports the new titles, and the title appears in the PAC within minutes. The availability counts for existing cloudLibrary titles are automatically updated when the library purchases additional copies or when copies expire because of publisher limits.

When a patron checks out or places a hold on a cloudLibrary title in Polaris, the data is immediately updated in the Polaris database and in the vendor's repository. However, when a patron uses the cloudLibrary app to initiate circulation, the synchronization process takes longer because the app uses the Polaris API to push the data to Polaris, and then the API consumer service completes the process. The API consumer service also performs a periodic "pull" query of the cloudLibrary database and then synchronizes the data if any circulation activity was detected.

The Polaris database and cloudLibrary are synchronized according to circulation activity as follows:

- Holds - Real time
- Check-out or Check-in from the PAC - Real time
- Check-out or Check-in from the cloudLibrary app - Every 5-15 minutes
- Added copy for an existing title - Every 5-15 minutes
- Expired copy for an existing title - Every 5-15 minutes
- Added title - new MARC record - Every 5-15 minutes

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

See also:

- [Setting Up Polaris for cloudLibrary Integration](#)
- [Integrating Existing cloudLibrary EContent](#)
- [Integrating New cloudLibrary EContent](#)
- [cloudLibrary Added/Expired Copies](#)
- [Overlaying cloudLibrary eContent Bibs](#)
- [cloudLibrary Import Jobs](#)
- [MARC Tags in cloudLibrary Bibs - Reference](#)
- [Patron Access to cloudLibrary EContent](#)
- [Implementing the cloudLink Feature](#)

### Setting Up Polaris for cloudLibrary Integration

To enable the import processing that integrates cloudLibrary eContent with Polaris, the item templates, vendor account, and import profiles must be set up correctly in Polaris. In addition, if your library uses the cloudLink feature whereby libraries in a cloudLink group can share digital collections across multiple cloudLibrary accounts, you can implement the Preferred Vendor Account policy table to prevent cloudLink titles from appearing under multiple branches. See [Implementing the cloudLink Feature](#). Your Polaris site manager can assist your library with this setup.

See also:

- [Setting Up the eContent Item Templates for cloudLibrary](#)
- [Creating a cloudLibrary Integrated Vendor Account](#)
- [Creating CloudLibrary eContent Import Profile\(s\)](#)

### Setting Up the eContent Item Templates for cloudLibrary

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

To set up the item template to associate with the vendor account:

1. Select **File > New** from the Polaris Shortcut Bar.
2. Select **Item Template** and click **OK**.

The Item Template workform opens.

3. Type **Ebook automatic import** or **E-book automatic import** in the **Name** box. Case does not matter, and other words can follow this string, but the name must begin with **Ebook automatic import**.
4. Select the branch that owns the template in the **Template owner** box.
5. In the **Assigned** box, select the branch for the eContent items that will be created using this template. If a resource group is selected in the Vendor Account, the **Assigned** branch selected in the item template must belong to the resource group.
6. In the **Circulation status** box, select **In**.

**Note:**

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

7. Select the **Fine code** and **Renewal limit**.
8. Select **File > Save** to save the template.

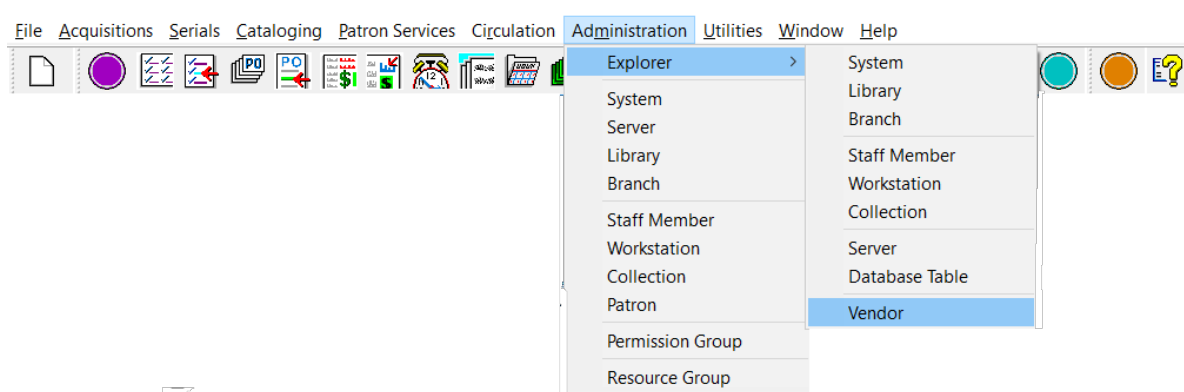
## Creating a cloudLibrary Integrated Vendor Account

To create a vendor account for a cloudLibrary (formerly 3M Cloud Library) integrated eContent vendor:

**Tip:**

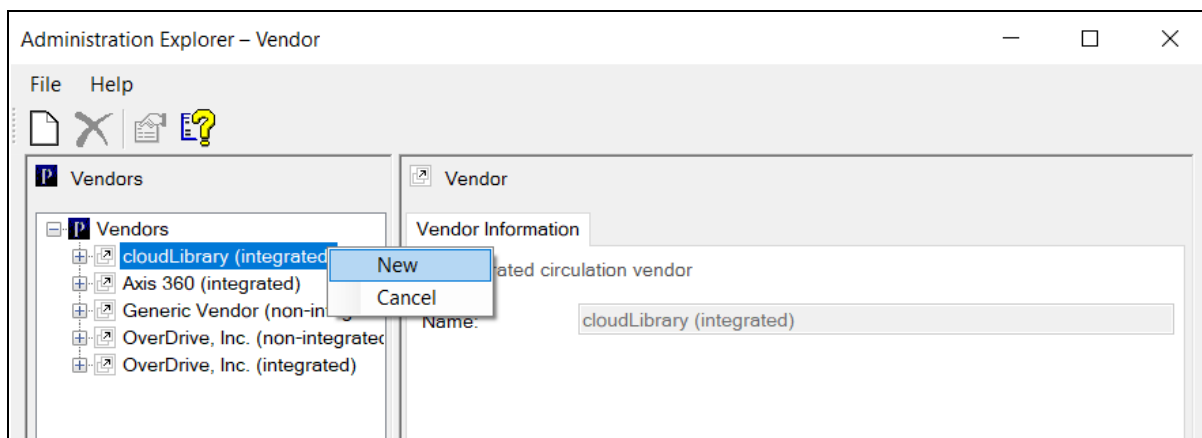
You cannot create a new Vendor Account by selecting **File > New** from the Polaris shortcut bar.

1. Select the **Administration > Explorer > Vendor**.



The Administration Explorer - Vendor window appears.

2. Select the cloudLibrary vendor, right-click, and select **New**.



The Vendor Account workform opens.

**Vendor Account**

**Vendor name:** cloudLibrary (integrated) ☒ Integrated circulation vendor

**Vendor account name:**  ☐ Active

Vendor account description:

Resource group: (None) ▼

Icon URL:

Vendor contract ID:

**Vendor account settings:**

Attribute	Value
<b>Vendor account access ID</b>	
<b>Vendor account access key</b>	
<b>Vendor account base path</b>	
<b>Vendor account server name</b>	
<b>Vendor account use SSL</b>	Yes ▼
<b>Vendor account import profile ID</b>	Integrated ebook Bibs ▼
<b>Vendor account item template ID</b>	(None) ▼

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

**Note:**

Required fields are labeled in bold.



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

**Bibs** profile, or a renamed copy of this profile. See [Create cloudLibrary eContent import profile\(s\)](#).

- **Vendor account item template ID** - The library creates the item template used during the automatic API-driven import process. The item template name must begin with **eContent automatic import** or **eContent automatic import**. See [Set up the eContent item templates for cloudLibrary](#).

**Tips:**

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

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

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

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

**Important:**

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

## Creating CloudLibrary eContent Import Profile(s)

**Note:**

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

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

Depending on your library's processing workflow for cloudLibrary eContent, you may need to create an import profile to overlay cloudLibrary integrated eContent bibs with fully-cataloged bibs while retaining resource entities. See [Overlaying cloudLibrary eContent Bibs](#).

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

### Integrating Existing cloudLibrary EContent

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

To preserve cataloging work that was done for these non-integrated eContent bibs, you can export the records and then re-import them after the synch process has run. See [Overlaying cloudLibrary eContent Bibs](#).

## Putting Existing Non-Integrated cloudLibrary Bibs in a Record Set

To locate the existing cloudLibrary (formerly 3M Cloud Library) eContent records and put them in a record set:

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

**Note:**

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

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

## (Optional) Exporting cloudLibrary Non-Integrated eContent Bibs

This process is necessary only if you want to preserve cataloging work. If you opt to export the cloudLibrary (formerly 3M Cloud Library) bibs, you will need to wait until after the synch process has created the integrated bibs for these titles and then re-import them. See [Overlaying cloudLibrary eContent Bibs](#).

**Note:**

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

To export the cloudLibrary eContent records using Export Express:

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

## Deleting the cloudLibrary Non-Integrated Bibs

To delete the non-integrated bibs:

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

### Integrating New cloudLibrary EContent

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

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

#### Automatic Import Profile Selected in the cloudLibrary Vendor Account

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

#### Important:

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

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

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

**Create Import Profile - (copied from Integrated ebook Bibs profile)**

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

Name:  Creator:

Description: This is the default profile for imported bib records for ebooks that will receive "integrated" circulation processing in Polaris, for example, bib records for 3H ebooks. (read only)

Source file name:  Browse...

Vendor account:

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

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

**Bibliographic Save Options:**

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

☒ Display in PAC  
☐ Do not overlay

☐ Delete MARC Tags on incoming record  
☐ System defined deletion tags  
☐ Profile defined deletion tags

Record owner:

**When Saving Bibliographic Records as Final:**

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

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

☒ Perform Duplicate Detection  
☐ Use system defined duplicate detection rules  
☒ Use profile defined duplicate detection rules

If a suspected duplicate is found:  
☐ Save incoming record as provisional  
☐ Save incoming record as final; do not replace database record  
☐ Save incoming record as final; replace database record  
☐ Save record with highest encoding level; if encoding levels match:  
☐ Save incoming record as final; replace database record  
☐ Reject incoming record  
☐ Save incoming record as provisional (ignore "Keep MARC Tags")  
☒ Reject incoming record; add MARC retention tags to database record

Rules to select:  
 incoming 001/000 = existing 005 %a  
 incoming 001 = existing 010 %a  
 incoming 001 = existing 035 %a  
 incoming 100 %a = existing 100 %a  
 incoming 010 %a = existing 010 %a  
 incoming 032 %a = existing 032 %a

Rules to apply (as unique groups):  
 incoming 007 %a = existing 007 %a

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

Tag	Indicator 1	Indicator 2	MARC Description
056	0,1,2,3,4...	0,1,2,3,4...	Electronic Location and Access
052	0,1,2,3,4...	0,1,2,3,4...	LOC800s
956	4	2	Integrated Ebook Product Information

Save Close Help

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

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

When Saving Bibliographic Records as Final

☒ Build item records

☐ Using embedded holdings fields only

☐ Using template/system default values only

☒ Using all available holdings/item fields

If a duplicate item record (barcode) is found:

☐ Save duplicate item record as provisional

☒ Do not save duplicate item record

If no item record (barcode) is found:

☒ Save item record as final

☐ Save item record as provisional

☐ Do not save item record

☒ Display in PAC (when not explicitly found)

Item template (for fields that are missing):

(None)

☐ Update items (enriched ED)

If an update error is encountered:

☐ Save item record as provisional

☒ Do not save item record

Embedded holdings field/MARC subfield mapping

Holdings tag number: 852

Assigned Branch:	0	Loanable Outside System:	7
Assigned Collection:	b	Material Type:	w
Barcode:	p	Issue Of Piece:	
Call Number Prefix:	k	Non Circulating:	
Call number suffix:	m	Non Public Note:	x
Circulation Status:		Owning Branch:	o
Classification Number:	h	Physical Condition:	q
Copy Number:	t	POL2 Segment ID:	
Cutter Number:	i	Price:	0
Display In PAC:	4	Public Note:	z
File Code:	r	Renewal Limit:	y
Price Text Block:		Shelf Location:	c
Funding Source:	1	Shelving Scheme:	j
Holdable:	3	Statistical Code:	d
Library Assigned Block:		Temporary Shelf Location:	l
Loan Period Code:	u	Volume Number:	v

Save Close Help

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

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

**Bibliographic Record Set**

**Final**

☒ Save to new record set ☐ Save to existing record set

Name: Ebook Import, final Find Append Replace

Owner: QA-Plato 4.1 R2 (sys)

**Provisional**

☒ Save to new record set ☐ Save to existing record set

Name: Ebook Import, provisional Find Append Replace

Owner: QA-Plato 4.1 R2 (sys)

**Deleted**

☒ Save to new record set ☐ Save to existing record set

Name: Ebook Import, deleted Find Append Replace

Owner: QA-Plato 4.1 R2 (sys)

**Authority Record Set**

**Final**

☐ Save to new record set ☐ Save to existing record set

Name: Find Append Replace

Owner:

**Provisional**

☐ Save to new record set ☐ Save to existing record set

Name: Find Append Replace

Owner:

**Deleted**

☐ Save to new record set ☐ Save to existing record set

Name: Find Append Replace

Owner:

**Item Record Set**

**Final**

☒ Save to new record set ☐ Save to existing record set

Name: Ebook Import, final Find Append Replace

Owner: QA-Plato 4.1 R2 (sys)

**Provisional**

☒ Save to new record set ☐ Save to existing record set

Name: Ebook Import, provisional Find Append Replace

Owner: QA-Plato 4.1 R2 (sys)

## Creating CloudLibrary eContent Import Profile(s)

**Note:**

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

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

Depending on your library's processing workflow for cloudLibrary eContent, you may need to create an import profile to overlay cloudLibrary integrated eContent bibs with fully-cataloged bibs while retaining resource entities. See [Overlaying cloudLibrary eContent Bibs](#).

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

### cloudLibrary™ Added/Expired Copies

The API consumer service queries cloudLibrary (formerly 3M Cloud Library) daily and synchronizes the number of eContent item records for each resource entity, either adding or removing eContent item records as necessary. For details on the synch process, see EContent Vendor and Polaris Synchronization.

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



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

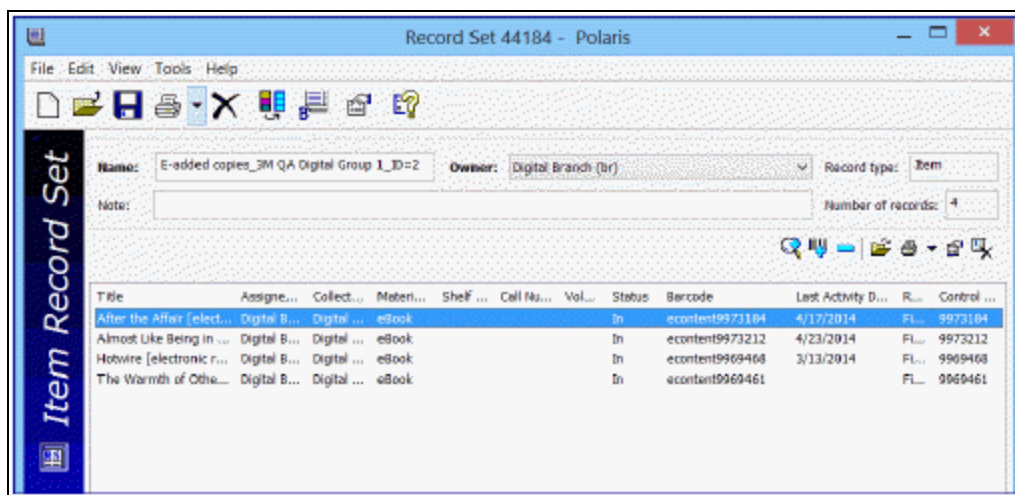
### **E-added copies\_VendorAccountName\_ID=nnn**

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

#### **Example:**

**E-added copies\_3M\_ID=10**

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



### **Overlaying cloudLibrary eContent Bibs**

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

**Important:**

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

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

## Importing Fully-Cataloged Bibs to Overlay cloudLibrary Bibs

To set up an import profile designed for importing fully-cataloged eContent bibliographic records to overlay existing cloudLibrary (formerly 3M Cloud Library) records, and then import the records using the profile:

**Note:**

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

1. Create an import profile specifically for importing fully-cataloged bibs to overlay cloudLibrary records. You can copy the PolarisExec **Integrated ebook Bibs** import profile, or create a new import profile.

**Note:**

For general information about creating, copying, and modifying import profiles, see: [Setting Up Import Profiles and Importing Records](#).

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

Modify Import Profile - 3M - Fully-Cataloged Bibs to Overlay 3M

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

Name: 3M - Fully-Cataloged Bibs to Overlay 3M Creator: peer

Description: Use this profile when importing fully-cataloged bibs to overlay 3M bibs.

Source file name: Browse...

Vendor account: 3M QA Digital Group 1

Save Close Help

3. Select the Bibliographic Records tab and verify that the following options are set:

**Important:**

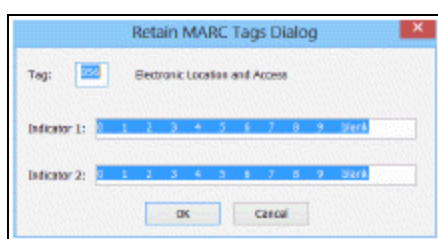
The Bibliographic Records tab must be set up to:

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

Other settings may be defined according to your library's workflow. Work with your Polaris site manager to set up this import profile specifically for overlaying 3M bibs.

- **Perform duplicate detection** - The checkbox must be selected.
- **Use profile defined duplicate detection rules** - The checkbox must be selected.

- **Rules to apply (as unique groups)** - The profile-defined rules must include **incoming 037\$a = existing 037\$a**
- **Save incoming record as final; replace database record** - This option must be selected under **If a duplicate is found**.
- **Keep MARC tags** - The checkbox must be selected.
- **Profile defined overlay retention tags** - This option must be selected, and the following tags must be listed as profile-defined overlay retention tags: **856** - any indicator 1 or 2 value.



4. Click **Save** to save the settings for the Bibliographic Records tab.
5. Select the Item Records tab and verify that the **Build item records** checkbox is not checked.

**Note:**

cloudLibrary item records are created automatically via the automatic import process.

6. (Optional) Select the Authority Records tab, and modify the settings.
7. (Optional) Select the Record Set tab, and name the record sets to identify the type of records being imported.
8. Save the import profile.

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

9. Select **Utilities, Importing, Express Import** or **Full Import**.
10. Select the import profile created for importing fully-cataloged records to overlay cloudLibrary bibs.
11. Click **Add** and select the file of fully-cataloged eContent bibliographic records to replace the existing cloudLibrary records, while retaining the tags required for

integration with Polaris Circulation.

12. Click **Import**.

The import job is added to the import queue. Once the import processing is complete, the cloudLibrary bibs are overlaid with the fully-cataloged records, and they retain the resource entities that enable the integration. See [cloudLibrary Import Jobs](#).

### cloudLibrary Import Jobs

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

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

### Viewing the Jobs or Printing Reports for cloudLibrary Imports

To view import jobs in the Import Jobs Queue:

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

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

**Tip:**

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

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

The Import Report pdf appears in the preview window.

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

## MARC Tags in cloudLibrary Bibs - Reference

cloudLibrary (formerly 3M Cloud Library) supplies the following tags that are used for integrated eContent processing in Polaris:

### Tip:

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

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

### Example:

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

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

### Example:

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

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

### Example:

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

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

**Example:**

**856 42 ‡3M Cloud  
Icon†uhttp://eContentdownload.3m.com/sites/prototypes/web/media/t  
hemes/mmm\_patron/img/landing\_page/step1.png**

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

**Example:**

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

**Patron Access to cloudLibrary EContent**

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

When the cloudLibrary eContent is accessible to the logged-in patron, a **Check Out** button is displayed in the PAC search results if the title is available. If the patron has access, but the title is not available because it is checked out, a **Place Hold** button is displayed. If the hold request is satisfied by the patron's library, the patron can check out held titles from the PAC patron account once they become available for checkout. If the patron does not have access to the eContent title, a **Restricted** button is displayed with the hover text **Sorry this title is currently not available at your registered branch**. You can modify this text string in WebAdmin using the mnemonic: **PACML\_EBREstricted\_TIP**. You can use resource groups to prevent titles from displaying at all if they are restricted, instead of displaying with a **Restricted** button.

**Note:**

Patrons can search for cloudLibrary titles, add them to lists, and view

check-outs or requests under **My Account** in Mobile PAC, but they cannot perform any circulation actions for cloudLibrary titles using Mobile PAC.

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

- **PACML\_MMMCHECKOUT**
- **PACML\_MMMPLACEHOLD**



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

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

#### Important:

Patrons can also create accounts in the cloudLibrary application by choosing their library and entering the patron barcode. The patron must sign up with the library account barcode, not the library account user name; otherwise, the patron's transactions in the cloudLibrary application and in the PAC patron account will not be synchronized.

#### Tip:

Charges for check-out do not apply to eContent.

The patron goes to the cloudLibrary app on their device, and downloads the eContent. First-time users must go to the cloudLibrary web page and download the cloudLibrary



app on their device. For information on downloading the cloudLibrary apps, and the devices and formats that cloudLibrary supports, go to:

<http://www.yourcloudlibrary.com/index.php/en-us/>

Libraries using the cloudLibrary eContent service can implement Bibliotheca's cloudLink feature to share digital collections across cloudLibrary accounts. See [Implementing the cloudLink Feature](#).

### Implementing the cloudLink Feature

Libraries using the cloudLibrary eContent service can implement Bibliotheca's cloudLink feature whereby libraries in a cloudLink group can share digital collections across multiple cloudLibrary accounts. Bibliotheca's cloudLink groups are ILS-independent and can be used to connect existing cloudLibrary customers on different systems, usually based on geographic location. The Polaris integration can also support a "self-contained" cloud, where all libraries in the cloudLink group are on the same Polaris server.

To ensure that patron check-outs and requests appear under a single library when resources are being shared via cloudLink, use the Preferred Vendor Accounts policy table.

**Note:**

Existing cloudLibrary customers who are not using the cloudLink feature do not need to use the Preferred Vendor Accounts policy table. However, all cloudLink customers should use the policy table to provide the best patron experience.

### Circulation Transactions for cloudLink Titles

When cloudLibrary titles are checked out through the PAC, Polaris uses the Item Library ID returned in the cloudLibrary API to associate the correct item record with the patron. For cloudLink libraries, one of two transaction types can be logged:

- If the item belongs to a library that exists in the Polaris database, a normal check-out transaction is logged.
- If the item does not belong to a library within the Polaris database, a new eContent check-out (6103) transaction is logged. This is different from a normal check-out transaction because there is no item record associated with the transaction. In addition, the following message appears: **Your ebook has been successfully**

**checked out. To provide faster access, this ebook was borrowed from a partner library. Please use your cloudLibrary reader to download or view this title.**

See also:

- [Setting Up the Preferred Vendor Accounts Policy Table](#)
- [Shared cloudLink Titles Display in the PAC](#)

## Setting Up the Preferred Vendor Accounts Policy Table

If your library uses the cloudLink feature for sharing cloudLibrary titles among multiple libraries, use the Preferred Vendor Accounts policy table to ensure that patron check-outs and requests appear under a single library for resources that are being shared via cloudLink. Polaris libraries that use cloudLibrary without implementing the cloudLink feature do not need to use this table.

### Note:

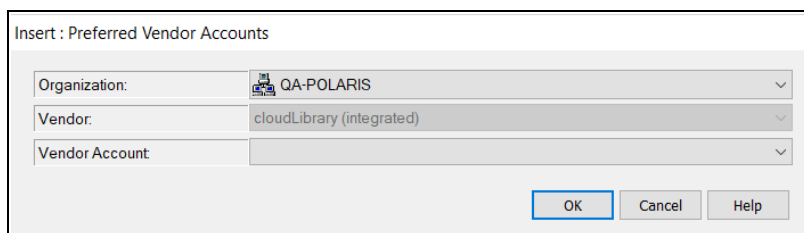
To add or delete entries in the table, you must have the new permission **Modify preferred vendor accounts table: Allow**. This permission is added by default to the Administrator permission group.

To add a Preferred Vendor Account to the table:

1. Expand the System, Library, or Branch-level node in the Polaris Administration Explorer.
2. Select **Policy Tables > Preferred Vendor Accounts**.

The Preferred Vendor Accounts policy table appears. The table contains an organization name, vendor description, and vendor account name. Only one preferred vendor account can be set for each branch. If a duplicate is found, the following message appears: **An organization can only have one preferred vendor account per vendor.**

3. Click  to open the Insert: Vendor Accounts dialog box.



Insert : Preferred Vendor Accounts

Organization: QA-POLARIS

Vendor: cloudLibrary (integrated)

Vendor Account:

OK Cancel Help

4. Select the cloudLink account from the **Vendor Account** drop-down list, and click **OK**.

The Preferred Vendor Account is set for the organization.

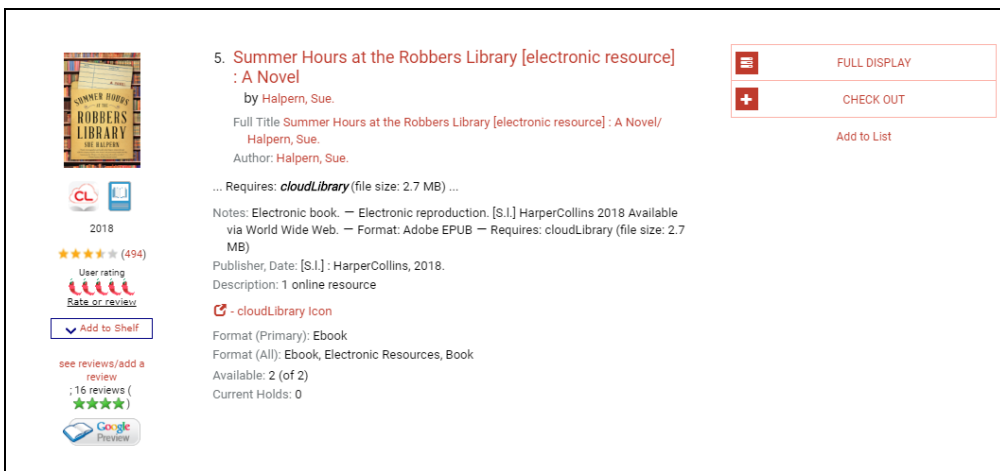
**Note:**

If you delete a cloudLibrary vendor account, the corresponding entry in the Preferred Vendor Accounts policy table is automatically deleted.

## Shared cloudLink Titles Display in the PAC

The cloudLibrary integration creates bibliographic records for titles owned by libraries within the Polaris database. These titles will display in the PAC and use the cloudLibrary API to display availability and holds. For cloudLink libraries, the availability and hold information is based on the entire cloudLink group. If the title within the cloudLink group is not owned by a library in the Polaris database, it will only be available to patrons from the cloudLibrary app.

Resource groups can be used with cloudLibrary integration to suppress eContent titles for different vendor accounts. However, cloudLink customers may want to disable the **Honor Resource Groups in PAC search results** setting because the real-time availability of items in a shared collection may change.



5. Summer Hours at the Robbers Library [electronic resource]  
: A Novel  
by Halpern, Sue.  
Full Title Summer Hours at the Robbers Library [electronic resource] : A Novel/  
Halpern, Sue.  
Author: Halpern, Sue.  
... Requires: **cloudLibrary** (file size: 2.7 MB) ...  
Notes: Electronic book. — Electronic reproduction. [S.l.] HarperCollins 2018 Available via World Wide Web. — Format: Adobe EPUB — Requires: cloudLibrary (file size: 2.7 MB)  
Publisher, Date: [S.l.] : HarperCollins, 2018.  
Description: 1 online resource  
cloudLibrary Icon  
Format (Primary): Ebook  
Format (All): Ebook, Electronic Resources, Book  
Available: 2 (of 2)  
Current Holds: 0

2018  
User rating  
Rate or review  
Add to Shelf  
see reviews/add a review  
16 reviews (★★★★★)  
Google Preview

FULL DISPLAY  
CHECK OUT  
Add to List

### Hold Requests for cloudLibrary Titles Displayed in the PAC

The real-time holds count displayed for cloudLibrary titles has been updated to consider cloudLink libraries. The previous holds count displayed the total of all requests in the

holds queue. With a cloudLink system, this can give patrons an incorrect impression regarding the wait time for a title.

If the vendor account ID (connection branch or patron's branch) being used to view the holds count owns a copy of the title, the count will display only the holds for that library because that is the real wait time for that branch/patron.

If the vendor account ID (connection branch or patron's branch) being used to view the holds count does not own a copy of the title, the count will display the total holds for the cloudLink group.

For all cloudLibrary customers, the holds queue position will no longer display for cloudLibrary titles in PowerPAC or Mobile PAC.

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## RBdigital EContent Integration

You can integrate eContent from the Recorded Books service, RBdigital, into Polaris so that patrons can search for, check out, and download these titles from the PAC.

### **Note:**

The RBdigital integration does not create item records within Polaris because the RBdigital API provides availability as either True or False instead of providing copy counts.

The following are required for RBdigital eContent integration:

- RBdigital license key - System-only license key with the number of seats corresponding to the number of vendor accounts Innovative needs to create.
- Access to the RBdigital API - The library's firewall must allow access to api.rbdigital.com over port 443.

If your library is interested in implementing integrated eContent with Recorded Books, contact your library's Innovative Interfaces Site Manager.

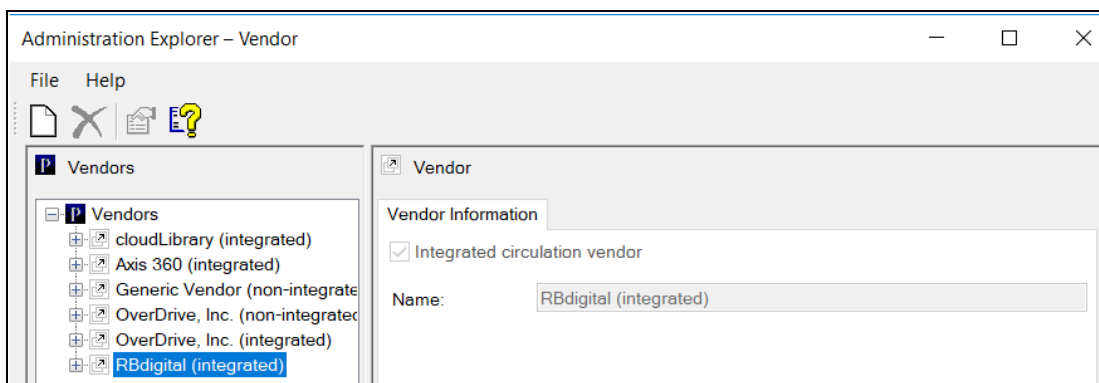
The Recorded Books API provides nightly deltas of newly added or recently expired titles. The Polaris API Consumer Service uses these deltas to import new titles or identify expired titles during the overnight process. Library staff can periodically check for Recorded Books titles removed from the library's collection. The expired bibliographic records are gathered in a record set entitled **RBExpiredTitles\_[Date/time]**. Your library can purge or retain the records.

See also:

- [Creating an RBdigital Integrated Vendor Account](#)
- [Importing RBdigital Bibliographic Records](#)
- [Integrating Existing RBdigital EContent](#)
- [Integrating New RBdigital eContent](#)
- [Patron Access to RBdigital EContent](#)
- [Manually Import the RBdigital Collection](#)

### Creating an RBdigital Integrated Vendor Account

The **RBdigital (integrated)** Vendor node appears in the Polaris Administration Explorer only when your library has a license for RBdigital. RBdigital supports multiple accounts, such as a parent (shared) account and individual child accounts with titles and copies exclusively for patrons registered at specific branches.

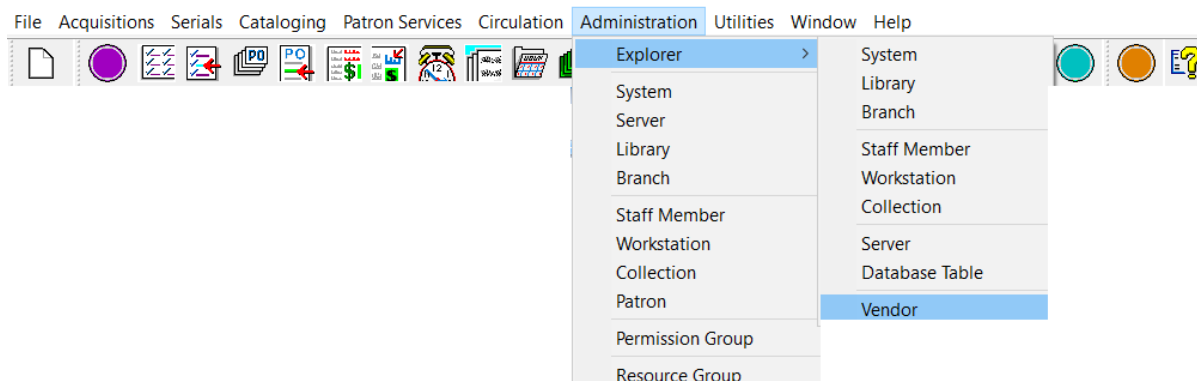


#### Note:

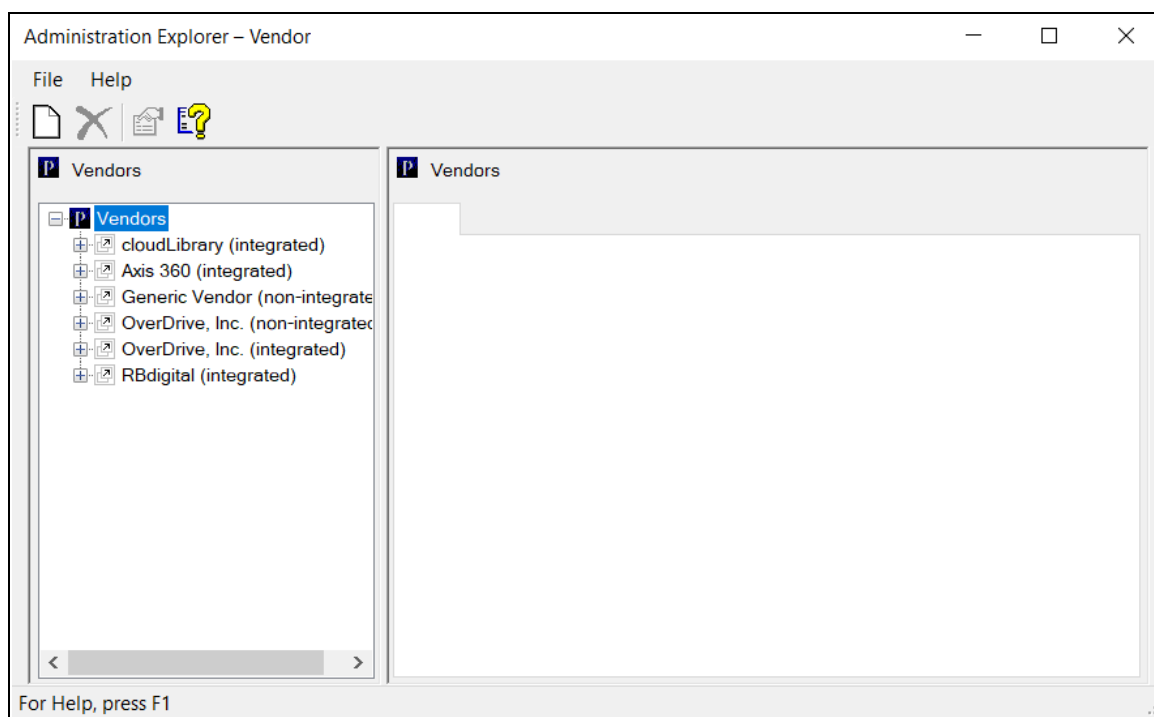
Your Site Manager will assist you in creating a RBdigital vendor account.

To create an RBdigital vendor account:

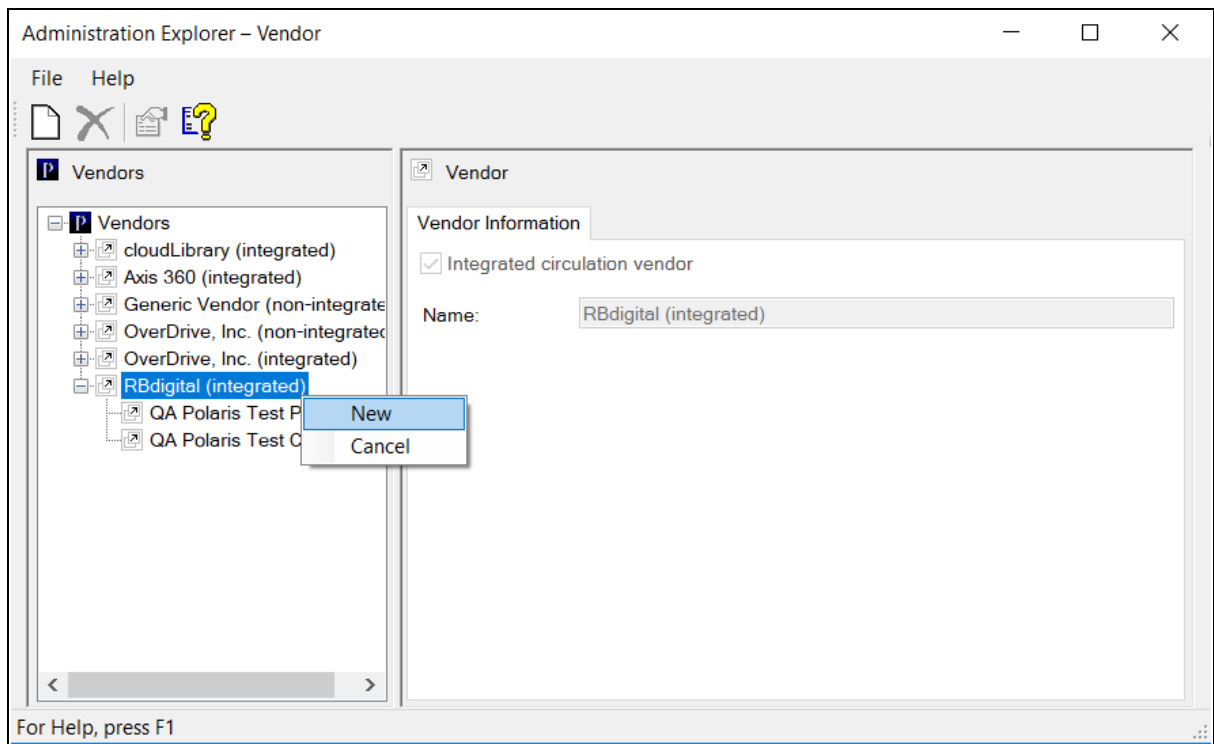
1. Select **Administration > Explorer > Vendor**.



2. Expand the **Vendors** node to display all the eContent vendors.



3. Right-click **RBdigital (integrated)**, and select **New**.



The Vendor Account workform appears.

New vendor account - Polaris

File Edit Tools Help

**Vendor Account**

Vendor name: RBdigital (integrated) ☒ Integrated circulation vendor

Vendor account name:  ☐ Active

Vendor account description:

Resource group: (None) ▼

Icon URL:

Vendor contract ID:

Vendor account settings:

Attribute	Value
Vendor account server name	<input type="text"/>
Vendor account use SSL	Yes ▼
Vendor account import profile ID	Integrated eContent bibs (without items) ▼
Library RBdigital URL	<input type="text"/>

4. Type the name for the RBdigital account in the **Vendor account name** box.
5. Type the description for the account in the **Vendor account description** box.
6. If your library is using a resource group for this vendor account, select it in the **Resource group** box.
7. Type the URL for the RBdigital icon in the **Icon URL** box.
8. Type the contract ID in the **Vendor contract ID** box.
9. Type **api.rbdigital.com** in the **Vendor account server name** box.

**Note:**

The firewall must allow access to api.rbdigital.com over port 443.

10. Select **Yes** in the **Vendor account use SSL** box.
11. Select **Integrated eContent bibs (without items)** in the Vendor account import profile ID box.
12. Type the library-specific URL in the **Library RBdigital URL** box.



Vendor account 46 - Polaris

File Edit Tools Help

Vendor name: RBdigital (integrated) ☒ Integrated circulation vendor

Vendor account name: QA Polaris Test Parent ☒ Active

Vendor account description: QA Polaris Test Parent account

Resource group: RBdigital Parent

Icon URL:

Vendor contract ID: 4039

Vendor account settings: Test Connection

Attribute	Value
Vendor account server name	api.rbdigital.com
Vendor account use SSL	Yes
Vendor account import profile ID	RBdigital test
Library RBdigital URL	http://qapolaristestp.rbdigital.com

13. Save the Vendor Account workform.

## Importing RBdigital Bibliographic Records

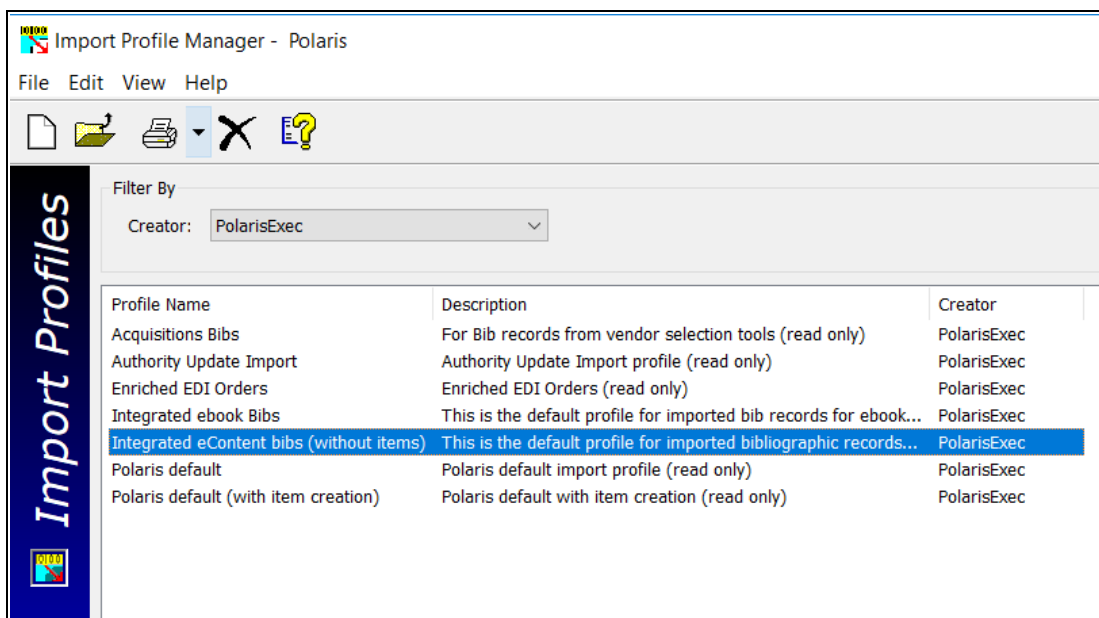
To enable the import processing that integrates RBdigital eContent with Polaris, the vendor account, and import profile(s) must be set up correctly in Polaris. Your Polaris Site Manager can assist your library with this setup.

### Note:

The RBdigital integration does not create item records within Polaris; therefore no item template is necessary.

## RBdigital Import Profile

The **Integrated eContent bibs (without items)** import profile is used to import RBdigital titles. It is listed when you filter the import profiles by **Creator > PolarisExec**.



All options set on the Bibliographic Records and Authority Records tabs are the same as those set in the Integrated ebook Bibs import profile, except the Item Records tab, which has no item-creation options selected because no item records will be built. In addition, the record set names defined on the Record Sets tab of the Integrated eContent bibs (without items) import profile begin with eContent instead of EBook.

Modify Import Profile - Integrated eContent bibs (without items)

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

**Bibliographic Record Set**

**Final**

☒ Save to new record set ☐ Save to existing record set

Name: eContent Import, final Find ☐ Append ☐ Replace

Owner: QA-POLARIS 6.1 (sys)

**Provisional**

☒ Save to new record set ☐ Save to existing record set

Name: eContent Import, provisional Find ☐ Append ☐ Replace

Owner: QA-POLARIS 6.1 (sys)

**Deleted**

☒ Save to new record set ☐ Save to existing record set

Name: eContent Import, deleted Find ☐ Append ☐ Replace

Owner: QA-POLARIS 6.1 (sys)

**Authority Record Set**

**Final**

☐ Save to new record set ☐ Save to existing record set

Name: Find ☐ Append ☐ Replace

Owner:

**Provisional**

☐ Save to new record set ☐ Save to existing record set

Name: Find ☐ Append ☐ Replace

Owner:

**Deleted**

☐ Save to new record set ☐ Save to existing record set

Name: Find ☐ Append ☐ Replace

Owner:

**Item Record Set**

**Final**

☐ Save to new record set ☐ Save to existing record set

Name: Find ☐ Append ☐ Replace

Owner:

**Provisional**

☐ Save to new record set ☐ Save to existing record set

Name: Find ☐ Append ☐ Replace

Owner:

Save Close Help

## RBdigital Import Process

When your library has implemented integrated eContent with RBdigital, the following processes occur:

- The Polaris API consumer service overnight process runs and retrieves the data from RBdigital since it last ran.
- The Polaris API consumer service then submits an automatic import job for processing.
- The bibliographic records are imported automatically using the import profile selected in the Vendor Account workform. The Integrated eContent bibs (without items) import profile is selected by default.
- The automatic import job appears in the Import Jobs Queue, and the import report provides details regarding the automatic import.
- New bibliographic records are saved in the Polaris database.
- A Resource Entity is created for each 856 tag that contains RBdigital vendor account data. The vendor contract ID is in subfield x of the 856 tag. The Resource Entity appears on the Resources view of the Bibliographic Record workform.
- The import synchronization occurs once daily during an overnight process.

- Auto-suggest and facets are updated the following day - PAC auto-suggest and search results facets for these newly imported eContent records are updated after the overnight jobs.

### **Integrating Existing RBdigital EContent**

When the RBdigital vendor account is activated for the first time, a call goes out to the RBdigital API, which returns all the titles the library currently owns. If the library has multiple vendor accounts, data is returned for each vendor account.

The returned data from RBdigital is transformed into a format that can be consumed by the import process. Then, the bibliographic data is imported into Polaris using the predefined import profile, **Integrated eContent bibs (without items)**, which is specified in the Vendor Account workform.

### **Integrating New RBdigital eContent**

When your library purchases new eContent from Recorded Books, the bibliographic records are imported automatically using the import profile selected in the Vendor Account workform. See [Importing RBdigital Bibliographic Records](#).

### **Patron Access to RBdigital EContent**

Your patrons can log into the Polaris PowerPAC to search for and access RBdigital eContent titles. Recorded Books requires that all borrowers of its eContent be registered with RBdigital. The Polaris PowerPAC provides a link to the RBdigital registration form.

See also:

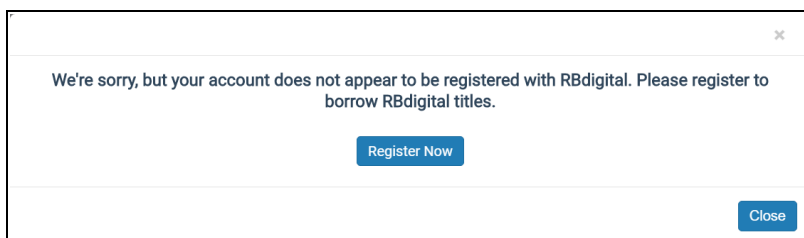
- [RBdigital Registration](#)
- [RBdigital Titles Displayed in the Polaris PowerPAC](#)
- [Checking Out RBdigital Titles](#)
- [Requesting RBdigital Titles](#)
- [Checking in RBdigital Titles Before They Expire](#)

### **RBdigital Registration**

To comply with the RBdigital requirement that all borrowers of its eContent be registered, a message in Polaris PowerPAC notifies patrons who have not yet registered that they need to register. When a patron clicks a button to check out or place a request for an RBdigital title, a message appears if the patron is not yet registered with RBdigital.

**Note:**

To determine whether the patron is registered, the RBdigital API checks the barcode entered when the patron logged into PowerPAC. The registration message appears only when a patron has not registered with RBdigital.



The patron clicks **Register Now** to go to the library's RBdigital site to access the registration form.

LOGIN INFORMATION	YOUR INFORMATION
USERNAME*	FIRST NAME*
<input type="text"/>	<input type="text"/>
PASSWORD*	LAST NAME*
<input type="text"/>	<input type="text"/>
CONFIRM PASSWORD*	EMAIL*
<input type="text"/>	<input type="text"/>
LIBRARY INFORMATION	
LIBRARY CARD*	CONFIRM EMAIL*
<input type="text"/>	<input type="text"/>
PIN*	POSTAL CODE*
<input type="text"/>	<input type="text"/>
<input type="checkbox"/> I accept the <a href="#">Terms of Service</a> and <a href="#">Privacy Policy</a> . *	
*Required fields	
<div>CANCEL</div> <div>REGISTER →</div>	

The patron fills out the form and clicks **REGISTER** to register with RBdigital. The patron is then able to check out or request RBdigital from the Polaris PAC.

You can change the text for the Recorded Book messages displayed in the PAC.

## RBdigital Titles Displayed in the Polaris PowerPAC

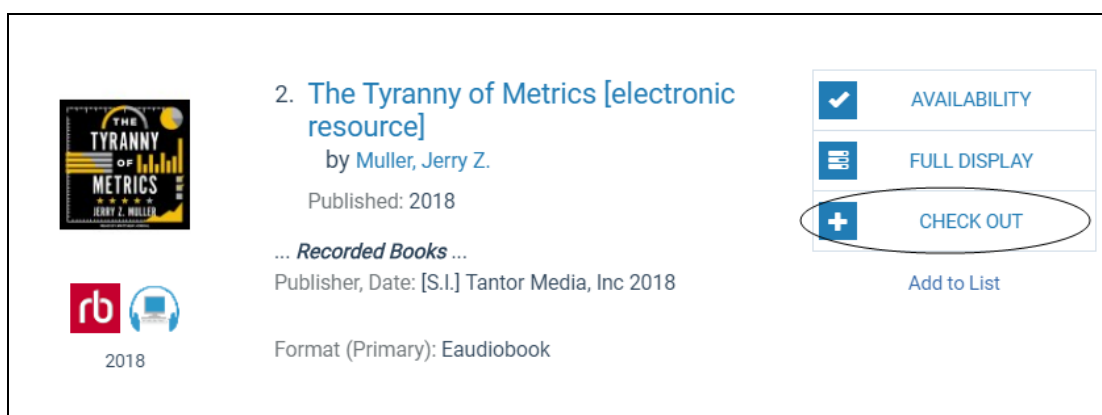
**Note:**

RBdigital titles display in the patron's account in the Polaris Mobile PAC,

but the patron cannot take any action on Recorded Books titles from Mobile PAC.

RBdigital titles appear in Polaris PowerPAC with the following buttons and banners next to the title:

- **CHECK OUT** button - This button appears if the title is owned by the library and is available. When a patron clicks this button, the check out process begins if the patron is registered with RBdigital and has not reached the checkout limit defined by RBdigital for the type of eContent. When a checkout is successful, a new transaction 6103 is logged, indicating the eContent was checked out without an associated item record. In the patron's account, details regarding the checked out eContent for Recorded Books do not include item record fields, and **Online** appears as the Assigned Branch. See [Checking Out RBdigital Titles](#).



- **PLACE HOLD** button - This button appears if the title is owned by the library, but it is not available. When the patron clicks this button, the request process begins if the patron is registered with RB digital and has not reached the hold request limit defined in RBdigital for the type of eContent. See [Requesting RBdigital Titles](#).

1. **The Disappeared** [electronic resource]  
by Box, C.J.  
Published: 2018  
... [S.I.] *Recorded Books*, Inc. 2018 ...  
Publisher, Date: [S.I.] *Recorded Books*, Inc. 2018  
Format (Primary): Eaudiobook

2018

☒ AVAILABILITY  
☒ FULL DISPLAY  
☒ **PLACE HOLD**  
[Add to My List](#)

- **RESTRICTED** - If a resource group has been used to restrict access to the title, but does not have **Honor resource groups** enabled in Polaris Administration, patrons will see **RESTRICTED** for titles they do not have access to.

7. **A Court of Frost and Starlight** [electronic resource]  
by Maas, Sarah J.  
Published: 2018  
... [S.I.] *Recorded Books*, Inc. 2018 ...  
Publisher, Date: [S.I.] *Recorded Books*, Inc. 2018  
Format (Primary): Eaudiobook

2018

☒ AVAILABILITY  
☒ FULL DISPLAY  
☒ **RESTRICTED**  
[Add to List](#)

- **ALL COPIES EXPIRED** - This appears when all copies owned by the library have expired, but the title has not yet been removed from the catalog. If the library orders new copies, the button is updated once those copies become available.



2. **Beyond Danger [electronic resource]**  
by Martin, Kat  
Published: 2018  
... [S.I.] *Recorded Books*, Inc. 2018 ...  
Publisher, Date: [S.I.] *Recorded Books*, Inc. 2018  
Format (Primary): Eaudiobook

2018

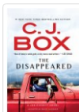
☒ AVAILABILITY  
☒ FULL DISPLAY  

ALL COPIES EXPIRED

  
[Add to My List](#)

## Checking Out RBdigital Titles

If the RBdigital title is available to the patron who is logged into the Polaris PowerPAC, the **CHECK OUT** button appears. When the patron clicks the **CHECK OUT** button, a confirmation message box appears.



The Disappeared [electronic resource]  
by Box, C.J.

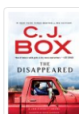
Check out this RBdigital Eaudiobook?

[Check Out Now](#)

[Close](#)

The patron clicks the **Check Out Now** button.

A message appears indicating the check-out was successful.



The Disappeared [electronic resource]  
by Box, C.J.

Your Eaudiobook has been successfully checked out.

[Close](#)

The RBdigital title appears in the patron's Items Out list.



Library Info ▾

Search ▾

My Account ▾

Help ▾

My Account

Banach, Jane A

My Record

Items Out (4)

Requests (3)

Fines & Fees

Claimed and Lost

Reading History (228)

Saved Searches (10)

My shopping cart

Refresh eContent

Banach, Jane A


Items Out

more information

#	Format	Due Date	Title	Renewals Left	Call Number	Assigned Branch
1	rb	9/13/2018	The Disappeared	Check In		Online
2	rb	8/24/2018	Winter Storms	Check In		Online
3	rb	8/24/2018	Secret Montana	Check In		Online
4	rb	8/24/2018	101 Dressage Exercises for Horse & Rider	Check In		Online

## Requesting RBdigital Titles

If the RBdigital title is not available for check-out but the logged-in patron can place a hold request on the title, the **PLACE HOLD** button appears. The patron clicks the **PLACE HOLD** button, and a confirmation message box appears.




Red Rising [electronic resource]  
by Brown, Pierce

Place a hold on this RBdigital Eaudiobook?

[Place Hold Now](#)

[Close](#)

The patron clicks the **Place Hold Now** button, and a message indicates the hold request was placed.

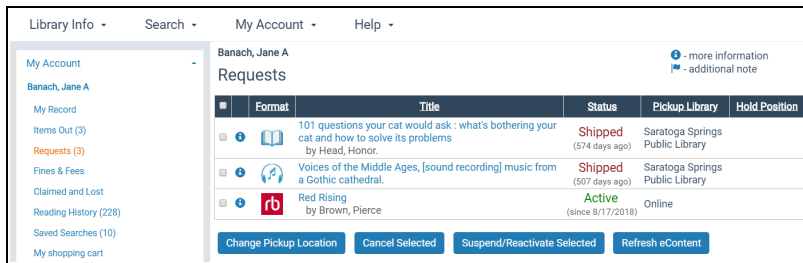


Red Rising [electronic resource]  
by Brown, Pierce

Your request has been placed

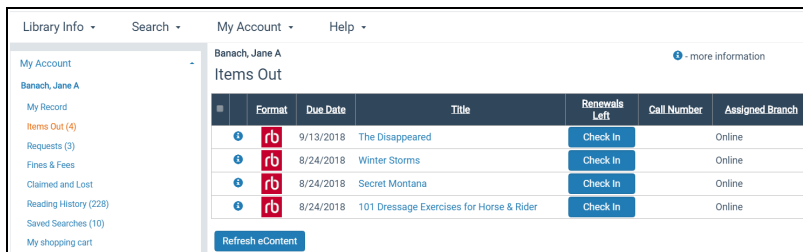
[Close](#)

The hold request appears in the patron's Requests list.

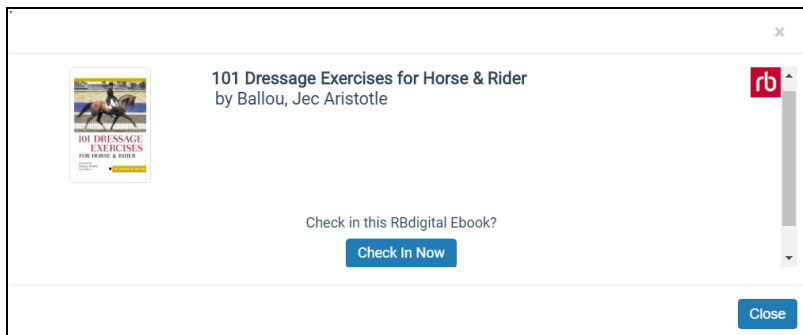


## Checking in RBdigital Titles Before They Expire

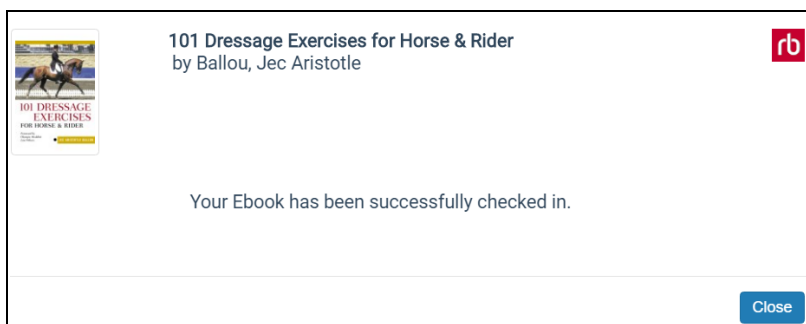
From the patron account Items Out list, the patron clicks **Check In** to check in a Recorded Books title before it expires.



A confirmation message box appears, and the patron clicks **Check in Now**.



A success message appears.



## Manually Import the RBDigital Collection

You can manually set the import to run during the next overnight process and import any missing records. This process does not affect expired titles.

To manually import your RBDigital collection:

1. Open the Vendor Account workform for Recorded Books.
2. Select **Tools > Import Titles** or press **CTRL+ALT+T**.

### Note:

The **Tools** option appears only for RBDigital vendor accounts.

Vendor account 47 - Polaris

File Edit Tools Help

Import Titles Ctrl+Alt+T

**Vendor Account**

Vendor name: RBDigital (integrated) ☒ Integrated circulation vendor

Vendor account name: QA Polaris Test Child ☒ Active

Vendor account description: QA Polaris Test Child Account

Resource group: RBDigital Child

Icon URL:

Vendor contract ID: 4040

Vendor account settings:

Attribute	Value
Vendor account server name	api.rbdigital.com
Vendor account use SSL	No
Vendor account import profile ID	RBDigital test
Library RBDigital URL	https://qapolaristestc.rbdigital.com

The following message appears: **Warning: This process will review your entire RBdigital collection during overnight processing and import any missing records. Do you want to continue? Ok / Cancel.**

3. Click **Ok**.

When you manually request an import, the system calls out to RBdigital for the most recent snapshot of the library's titles. The system identifies the records that are in the snapshot but not in the Polaris database, and it creates an import job for those missing records.

Then, the job is added to the import jobs queue. When the import runs, the records are imported according to the settings in the new import profile. The vendor account linked to the resource entity must match the vendor account importing titles to be considered a match. Duplicate detection is performed by matching the ISBN in the RB digital record to the ISBN in the Resource Entity in Polaris, and only those records not currently in the Polaris database are imported.

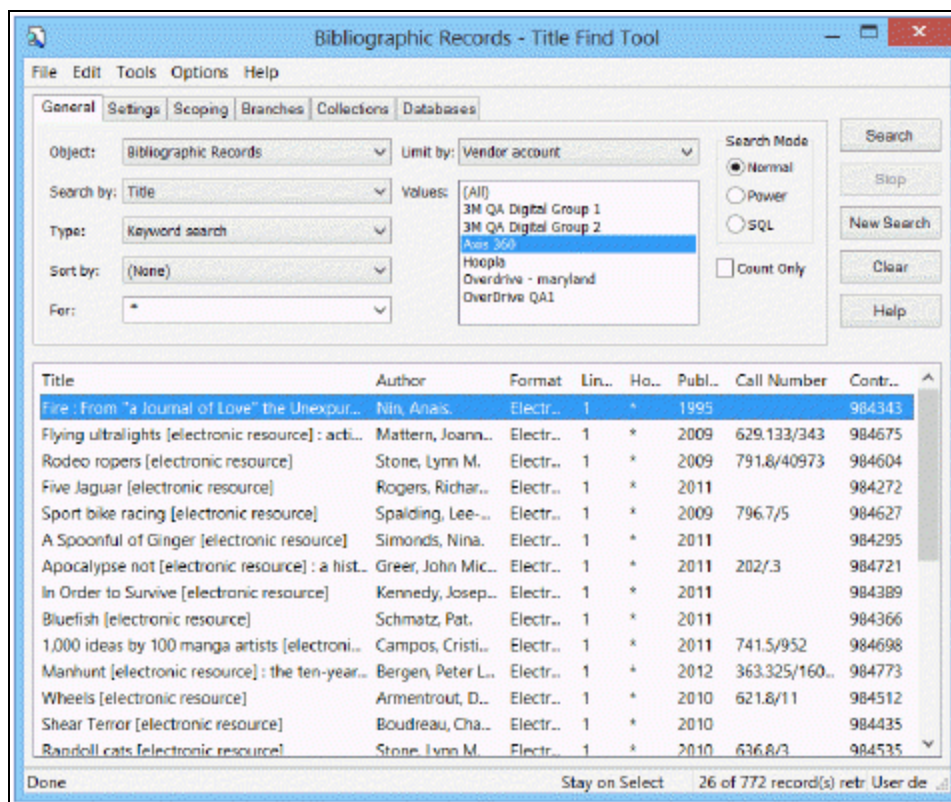
A RBdigital Import Requested transaction is logged. This includes a 300 transaction subtype for the vendor account ID.

---

## EContent in the Polaris Staff Client

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

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



For more information on eContent bibliographic records and their resource entities, which enable the integration between Polaris and the vendor, see [Resource Entities](#).

For more information on integrated eContent item records, see [EContent Item Records](#).

## EContent Item Records

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

Item Records - Author Find Tool

File Edit Tools Options Help

General Settings Scoping Branches Collections Databases

Object: Item Records Limit by: Econtent (Integrated) Search Mode: ☒ Normal ☐ Power ☐ SQL Search

Search by: Author Values: All Yes No Stop

Type: Exact match (implicitly truncated) Sort by: (None) For: munro Count Only New Search

Clear Help

Title	Assign...	Colle...	Mate...	Shelf ...	Call ...	Status	Barcode	Last Activi...	R...	Con...
Lives of Girls and ...	Digit...	Digit...	eBook			In	econtent9905...	1/19/2014	Fi...	990...
Dance of the Hap...	Digit...	Digit...	eBook			In	econtent9907...		Fi...	990...
Dear Life [electron...	Digit...	Adult...	eBook			In	econtent9910...		Fi...	991...
Dear Life [electron...	Digit...	Digit...	eBook			In	econtent9955...		Fi...	995...

Done Stay on Select 4 of 4 record(s) retrieve User de

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

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

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

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

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

#### Read-Only Fields in Integrated EContent Items

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

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



- **EContent Item Record workform History view**
- **Do not float** (checkbox always unchecked)
- EContent Item Record workform Reserves view - The fields are always blank on the Reserves view.

### EContent Item Records and Item Bulk Change

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

### EContent Circ/Holds Transactions

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

The following Polaris circulation activities apply to eContent:

#### **Note:**

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

- Check-out and check-in transactions -
  - Two subtype codes identify eContent: one for an electronic item; one for the vendor account. EContent circulation transactions are included in existing standard Polaris reports, and can be identified in Polaris SimplyReports.
  - Check-outs and check-ins done from the eContent vendor's application are logged in Polaris after synchronization. The check-out subtype is 44 (Third party Checkout). The check-in subtype is 47 (Third party Checkin).
  - Checked out eContent titles are displayed in the Patron Status workform - Items Out view, and in the patron's reading history. They can be removed

from the reading history.

- The due date is set at the point that the checkout occurs in Polaris, according to the rules established by the library's account with the vendor. The due date includes the time due.

**Note:**

Due dates (automatic expiration dates) for eContent are calculated from the check-out transaction date and time, not the download date and time.

- When an eContent item is checked in from PAC, the action is recorded in the Polaris item record. The due date, check-out date, original due date, current borrower and loaning branch fields are cleared, and the **Last Borrower** fields are populated. The check-in transaction is recorded in the item record history.
- Hold request transactions -
  - Econtent hold request created (6100)
  - Econtent hold requests satisfied (6101)
  - Econtent hold request canceled (6102)
- These transactions include the following details:
  - Date/time
  - Vendor ID
  - Title
  - Bib ID
  - Patron ID and patron branch, if available
- Transaction subtypes identify the eContent type: eContent, Audio eContent, or Digital video recording.
- EContent hold transaction types are not included in existing standard Polaris reports, but are available for reporting in Polaris SimplyReports, Patron History reports.
- EContent requests placed from the PAC are not displayed in the Patron Status, Holds view or in other areas where holds display for physical items.
- Item-level requests are not allowed, and eContent item records are automatically set to non-holdable.

The following circulation actions do not apply to eContent items:

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

### Expired EContent

EContent publishers may restrict eContent circulations using one of the following methods:

- Number of copies
- Expiration date
- Hybrid (expiration date or number of copies, whichever comes first)

Polaris processes expired titles differently depending on the eContent vendor.

#### cloudLibrary Expired EContent

cloudLibrary (formerly 3M Cloud Library) sends a “remove” event when a library’s access to an eContent title ends because a checked out copy has reached the maximum circulation limit, or a copy with any circ status expires because it has reached the time limit specified by the publisher.

The Polaris API consumer services detects the remove event, and Polaris reduces the number of available copies by one - either by suppressing the record from display in PAC or by changing its status to Withdrawn. If cloudLibrary sends a single remove event for a title with multiple copies, Polaris removes the oldest item with the earliest creation date. If two items have the same creation date, the item with the lower item record ID is selected.

If the expired item’s status is Checked Out, the **Display in PAC** setting is changed so that the item does not display. When it is checked back in, its **Display in PAC** setting is turned back on, and its circ status changes to Withdrawn. If the expired item’s status is

In, no changes are made to the Display in PAC setting, and the status is set to Withdrawn.

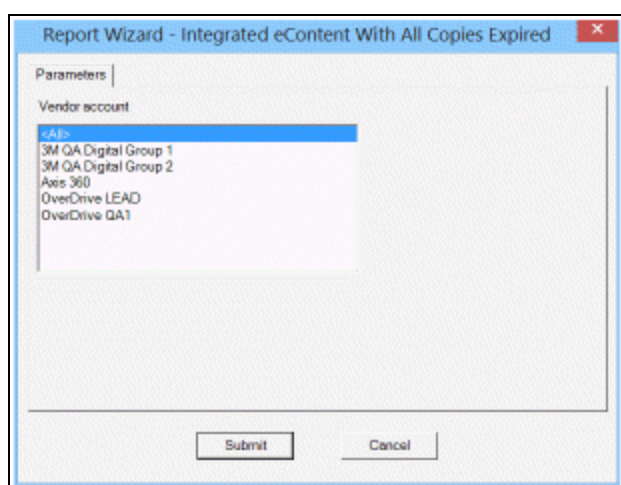
When an eContent item has expired, the item record stays in the database and remains linked to the bibliographic record and the resource entity. The History view of the Item Record workform includes information about the **Modified by API consumer service** status changes from **In** to **Withdrawn** and **Withdrawn** to **In**, and the **Modified by API consumer service** changes to the **Display in PAC** setting.

**Important:**

If your library does not prevent withdrawn items from displaying in PAC, these expired items will still display in PAC availability information.

If the library orders another copy of the cloudLibrary title to replace the expired copy, the eContent item with a *Withdrawn* status is set to a status of Checked In, and it is set to display in PAC.

You can use the standard Cataloging Bibliographic report, Integrated eContent With All Copies Expired, to see the eContent bibliographic records where all the linked item records have a status of *Withdrawn*. In the Report Wizard window, select the vendor account from a drop-down list of all integrated eContent vendors. The report columns display the bib ID, title, author, the number of resource entities, and the vendor account with all copies expired.



### OverDrive and Axis 360 Expired EContent

An overnight synchronization process identifies discrepancies between the number of eContent item records in Polaris, for a given title, and the number of copies at the

eContent vendor. For a given title, if the provider reports fewer copies for the library than there are eContent item records in Polaris, then item records are deleted from Polaris. The following rules determine which item records are deleted from Polaris:

- The eContent item record with the lowest item record control number that has a circulation status of “in” is deleted. The system administration setting “Retain deleted item records” is followed.
- If no eContent item records have a circulation status of “in,” then the record with the lowest control number with a circulation status of “unavailable” is deleted. (EContent item records have a circulation status of “unavailable” when they are checked out via the vendor’s app to a consortium patron who is not in the local Polaris database.)
- If no eContent item records have a circulation status of either “in” or “unavailable,” then no item record is deleted. When one of the copies is subsequently checked in, then the next night’s synchronization process deletes the extra item record. In the interim period between the check in and the sync process, a “place hold” button appears in the PAC, unless there are no copies reported by the eContent vendor, in which case the button says “all copies expired.”

#### All Integrated EContent Vendors

If all eContent item records for an eContent title have been deleted, or have a status of *Withdrawn*, the resource entity still remains on the bibliographic record, and after the patron logs in, the PAC **Check Out/Place Request** button is changed to **All Copies Expired** and disabled so it cannot be clicked. The button’s hover text is: **Your library’s license for this title has expired. Please contact a librarian for more information.** This text can be changed in WebAdmin.

To prevent the eContent title from displaying in the PAC if all copies are withdrawn, the library can set the title to not display in PAC. Other options are to revert or delete the resource entity, or delete the bibliographic record. If you delete the resource entity from the bibliographic record and the library purchases more copies, the API consumer service will create a new resource entity and the associated eContent item records.

#### Note:

When the library replaces the expired copies, the API consumer service does not check or reset the **Display in PAC** setting on the bibliographic record. If the library sets the record to not display in PAC and then purchases added copies, a staff member must manually check the **Display in PAC** box on the Bibliographic Record workflow.

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## Polaris API Consumer Services

An overnight process, PolAPIConsumerServiceOvernightProc.exe, checks for new titles (OverDrive only) and changes in item availability, such as added copies (OverDrive and Axis 360). It runs in addition to the PolAPIConsumerService.exe, which synchronizes patron circulation activity.

For OverDrive, the PolAPIConsumerServiceOvernightProc.exe runs in either full synch or delta modes, based on an appSettings.key named LastProcessTime. The first time the process runs after the service has been started, the LastProcess time is set to nothing by default, and a full synch occurs. New titles are brought in and availability is synchronized for all OverDrive eContent titles owned by the library.

After the initial run, the LastProcessTime is determined by the previous successful run, and a delta synch occurs. During a delta synch, only titles that are new or have availability changes since the LastProcessTime are synchronized.

The service should be stopped, restarted, and run in full synch mode when:

- A vendor account is enabled
- It is necessary to bring in the full set of OverDrive titles again (occasionally necessary because of changes to import settings and related processing).

If it is necessary to stop and restart the service, but a full synch is not desirable for some reason, you can force a delta synch by entering a valid datetime string into the LastProcessTime appSettings.key.

See [Checking the Status of the Polaris API Consumer Service](#).

### Checking the Status of the Polaris API Consumer Service

To check the status of the Polaris API consumer service for an integrated eContent vendor:

1. Go to the server where the service is running.
2. Select **Start > Administrative Tools > Services**.

The Services window opens.

3. Select **Polaris API Consumer Service** and scroll right to see the status of the service. The service status should be restarted.

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## Suspending and Reactivating an Integrated Vendor Account

In the event of a system disruption, you can temporarily suspend an integrated eContent vendor account. Suspending an account applies only to integrated eContent vendor accounts because it allows the library to temporarily suspend API calls. When a vendor account is suspended, most API processes stop, which temporarily disallows eContent check outs and hold requests, and stops the automatic creation of eContent item records from these API calls. Synchronization of circulation transactions continues to take place for records currently checked out; for example, automatic check in occurs when an item is due. After resolving the system problem, you can reactivate the suspended vendor account. All API calls resume.

**Important:**

After activating a vendor account, or reactivating a suspended vendor account, an IIS reset is required so that the PAC shows the correct information for the vendor's resources. For example, the IIS reset enables the Check Out or Place Hold button to be displayed instead of the **Temporarily Unavailable** button. Polaris Hosted customers should contact Polaris Customer Support to perform an IIS reset.

### Suspending an Integrated eContent Vendor Account

To suspend an integrated eContent vendor account:

1. Open the integrated eContent vendor account in the Vendor Account workform.
2. Clear the **Active** checkbox.
3. Save the workform.
4. Do an IIS reset.

**Note:**

Polaris Hosted customers should contact Polaris Customer Support to perform an IIS reset.

### Results of Suspending a Vendor Account

Changes will take effect after the IIS reset. When an integrated eContent vendor account is suspended, the following changes occur in the PAC and the Polaris staff client:

- PAC - The **Check out** or **Place request** button changes to **Temporarily Unavailable** (the button text can be changed in WebAdmin).
- **Polaris Staff Client**
  - Bibliographic Record - The Resource view of the Bibliographic Record workform indicates that the vendor account is suspended.
  - Import Profile - In the import profile associated with the vendor account, the vendor account's name is listed with **suspended** after it. If you select a suspended vendor account and import records using the Polaris Import Setup window, resource entities are built during the import, but the entities are not accessible for circulation functions. In addition, in the absence of the API call, the import cannot determine how many items to build, so no item records are built. When the vendor account is reactivated and the synchronization process restarts, any necessary item records are generated.
  - Import Report - The import report indicates the vendor account was suspended at the time of import, so only one item record was built for each imported bibliographic record.

## Reactivating a Suspended Integrated eContent Vendor Account

### Important:

After activating a vendor account, or reactivating a suspended vendor account, an IIS reset is required so that the PAC shows the correct information for the vendor's resources. For example, the IIS reset enables the Check Out or Place Hold button to be displayed instead of the **Temporarily Unavailable** button. Polaris Hosted customers should contact Polaris Customer Support to perform an IIS reset.

To reactive a suspended integrated eContent vendor account:

1. Open the integrated eContent vendor account in the Vendor Account workform.
2. Check the **Active** checkbox.
3. Save the workform.
4. Perform an IIS reset.

## Results of Reactivating an Integrated eContent Vendor Account

When an integrated eContent vendor account is reactivated, the **Active** box is checked in the Vendor Account workform, all API processes resume, and the following changes occur in the PAC and Polaris staff client:



- PAC - The **Temporarily Unavailable** changes back to the **Check out** or **Place request** button (whichever is appropriate).
- Polaris Staff Client - The message **Vendor Account Suspended** no longer appears on the Resource view of the Bibliographic Record workform; automatic imports resume using the import profile specified in the vendor account; resource entities are built and used in circulation functions; and the item records are created during the import.

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## Non-Integrated EContent in Polaris

When the library offers eContent from non-integrated vendors, the records are displayed in PAC search results, but patrons must click a link to check them out on the vendor's site. These circulation transactions are not recorded in Polaris.

You can create vendor accounts for non-integrated eContent vendors if you want to limit patron access to the eContent based on the contract the library has with the vendor. If you do not want to limit access, you do not need a vendor account in Polaris. No license is required for setting up non-integrated vendor accounts.

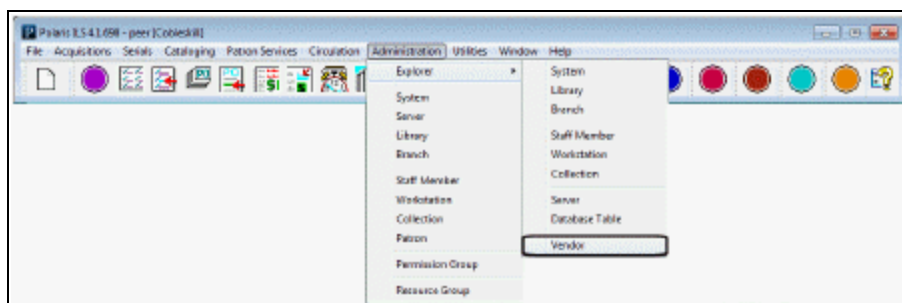
A non-integrated vendor account associates a specific eContent vendor account with a resource group in order to limit patron access to eContent according to the branch or branches that use the account. You can also create a non-integrated vendor account without a resource group if you want a vendor-specific icon to appear with the 856 tags in the PAC.

The fields in the Vendor Account workform contain the following information for a non-integrated vendor:

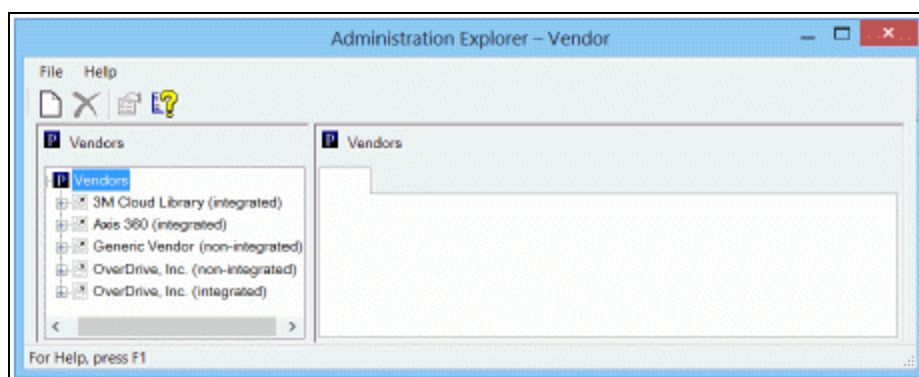
- The vendor account ID, and the MARC tag/subfield where the account ID is found.
- The MARC tag/subfield where the object identifier is found, and where the object identifier starts and ends. This is where Polaris looks for the data that identifies the eContent or electronic resource in the vendor's repository.
- The tag where the URL and link text are found, and the subfields for the URL and the text.
- The subfields where the vendor's public note and non-public note are found.

To implement eContent processing for a non-integrated eContent vendor, the library and Innovative Interfaces do the following:

- Polaris provides the non-integrated eContent vendor records. The Vendor option is available under **Administration > Explorer > Vendor**.



The available Vendor records are displayed under the expanded **Vendors** node.



- The library sets up resource groups in Polaris Administration for the library organizations that allow their patrons to access the eContent from the non-integrated vendor. To set up a resource group, select **File > New > Resource Group** from the Polaris Shortcut Bar. Select the branches that belong to this resource group. For more information, search the Polaris help for "Manage patron access to eContent using resource groups."
- The library sets up a non-integrated vendor account under the **OverDrive (non-integrated)** or **Generic (non-integrated)** vendor record. Non-integrated vendor accounts are used to limit access to eContent for a vendor that does not integrate with Polaris Circulation. See [Create a non-integrated eContent vendor account](#).
- The library imports the eContent from the non-integrated eContent vendor using an import profile with the non-integrated vendor's account selected.
- For existing eContent titles for a non-integrated vendor, the library gathers the bibliographic records in a record set and uses the Bib Bulk Change process to create resource entities that are used to limit access in the PAC. See [Bulk-Creating](#)

[Resource Entities](#). Resource entities can also be created for single records from the Bibliographic Record workform. See [Creating a Resource Entity from the Bibliographic Record Workform](#).

## Creating a Non-Integrated eContent Vendor Account

To create a non-integrated eContent vendor account:

1. Select the **Vendor** node in the Administration Explorer.
2. Select the **Overdrive (non-integrated)** or **Generic (non-integrated)** vendor, right-click, and select **New**.

The Vendor Account workform for the non-integrated eContent vendor opens.

Attribute	Value
Vendor account identifier value	
Vendor account identifier tag number	
Vendor account identifier subfield	
Vendor object identifier tag number	
Vendor object identifier subfield	
Vendor object identifier start value	
Vendor object identifier end value	
Vendor account URL and link text tag number	
Vendor account URL and link text indicator two	
Vendor account URL subfield	
Vendor account link text subfield	
Vendor account public note subfield	
Vendor account nonpublic note subfield	

### Note:

The Vendor name field is filled in automatically with OverDrive, Inc. if you

are creating a vendor account for OverDrive, or Generic Vendor if you are creating an account for another vendor.

3. Type a name for the vendor account in the **Vendor account name** box and an optional description in the **Vendor account description** box.

**Note:**

The following fields are required for non-integrated eContent vendor accounts: **Vendor account name**, **Vendor account identifier value**, **Vendor account identifier tag number**, **Vendor account identifier subfield**, **Vendor account URL and link text tag number**, **Vendor account URL and link text indicator two**, **Vendor account URL subfield**, and **Vendor account link text subfield**.

4. To limit patron access, select the resource group from the **Resource group** drop-down list box.

**Note:**

The resource group must be set up in Polaris Administration before it appears in the list. For information on setting up resource groups in Polaris, see Polaris staff client online Help.

5. To display the vendor's icon next to the URL link in the PAC, enter the URL for the vendor's icon in the **Icon URL** box.
6. Type the contract ID in the **Vendor contract ID** box. The contract ID is optional for non-integrated vendors.
7. In the Vendor account settings, enter the following information:

**Note:**

If you are creating a vendor account for OverDrive, some recommended account settings are pre-filled.

- **Vendor account identifier value** - (required) Identifies the vendor's account.
- **Vendor account identifier tag number** - (required) Identifies the bib tag where the vendor account ID is located.
- **Vendor account identifier subfield** - (required) Identifies the bib tag subfield where the vendor account identifier is found.

- **Vendor object identifier tag number** - (required) Identifies the tag where the eContent object identifier is found.
- **Vendor object identifier subfield** - (required) Identifies the tag subfield where the eContent object identifier is found.
- **Vendor object identifier start value** - Specifies where the string that identifies the eContent object starts.
- **Vendor object identifier end value** - Specifies where the string that identifies the eContent object ends. If the object identifier appears at the end of the subfield, this field can be left blank.

**Note:**

If both the object identifier start and end values are left blank, the entire subfield is included.

- **Vendor account URL and link text tag number** (required) - Identifies the tag where the URL for the eContent and link text are found. These need to be in the same tag. This is the tag that becomes the resource entity for the non-integrated eContent bibliographic record.
- **Vendor account URL and link text indicator two** (required) - Identifies the MARC second indicator value for the tag containing the URL and link text.
- **Vendor account URL subfield** (required) - Identifies the subfield where the URL is located.
- **Vendor account link text subfield** (required) - Identifies the subfield where the link text is located.
- **Vendor account public note subfield** - Identifies the subfield for the public note.
- **Vendor account nonpublic note subfield** - Identifies the non-public note subfield.

8. Save the Vendor Account workflow for the non-integrated vendor account.

## Resources Entities for Non-Integrated EContent Vendors

Resource entities are used for non-integrated eContent vendors when the library wants to restrict access to eContent by the branch or branches that have a certain contract with the non-integrated eContent vendor. They must be unique for the vendor account ID/URL within one bibliographic record.

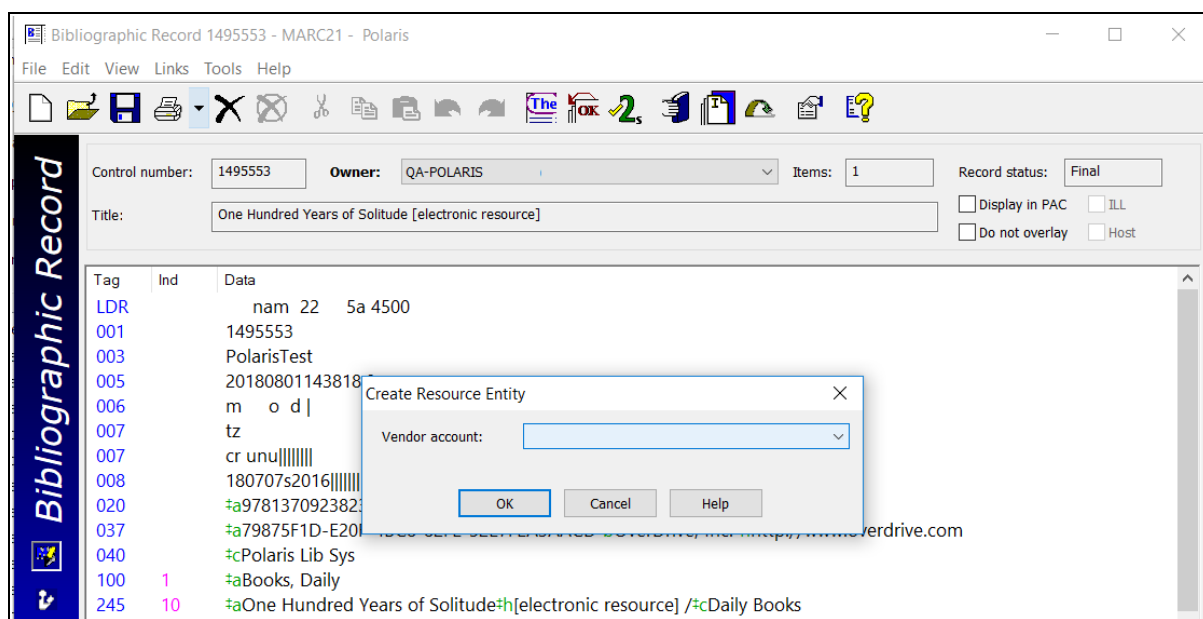
## Creating a Resource Entity from the Bibliographic Record Workform

To create a resource entity from the Bibliographic Record workform:

1. Search for and select a bibliographic record for the eContent.
2. Select **Tools > Create Resource Entities** from the Bibliographic Record workform menu.

The Create Resource Entity dialog box appears.

3. Select the vendor account in the drop-down list box, and click **OK** to close the dialog box.



4. Save the bibliographic record to create the resource entity.

## Bulk-Creating Resource Entities

If a vendor account is set up in Polaris, and you have the **Access bibliographic bulk change permission**, you can bulk-create resource entities for bibliographic records that contain data matching to the vendor account. For example, you could bulk-create resource entities for a non-integrated eContent vendor to restrict access by resource group. You cannot bulk-change existing resource entities.

To use the Bibliographic Bulk Change dialog box to bulk-create resource entities from existing 856 (or other) tags:

1. Open the bibliographic record set containing the records for which you want to create resource entities.

**Tip:**Click to open the Bulk Change dialog box, or press **CTRL+B**.

2. Select **Tools, Bulk Change**.

The Bibliographic Bulk Change dialog box appears with the non-MARC tabbed page displayed.

3. Select the **Create resource entities** checkbox, and select the vendor account in the **Vendor account** box.

Bibliographic Record Bulk Change

Non-MARC | Data Fields | Leader | 006 Tag | 007 Tag (1) | 007 Tag (2) | 008 Tag

☐ Display in PAC      ☐ Do not overlay

☐ On    ☐ Off      ☐ On    ☐ Off

☐ Record owner

    From:

    To:

☐ Save provisional records as final

☒ Create resource entities

    Vendor account:

OK Cancel Help

4. Click **OK**.

A resource entity is created for each bibliographic record that contains data required to create the resource entity. First, the system checks for data matching the vendor account. If the data in the bibliographic record matches the vendor account data, the system then checks for the data required to create the resource entity.

## Bibliographic Bulk Change Report

The report displays the number of resource entities that were created. If a resource entity could not be created, an error message displays the reason the resource entity could not be created:

- No resource entities were created. The data in the record does not match the vendor account you selected. - This message appears if the bibliographic record does not have data that matches to the vendor account.
- No resource entities were created. Required data is missing from the record. - This message appears if the bibliographic record contains data matching to the vendor account, but not the data required to create the resource entity.



## Managing Promotions

With Feature It, a separately-licensed product, the library can display featured resources in a dashboard on the PowerPAC search results screen when specific search queries are entered. These featured resources may be library materials, web sites, or community organizations/events. Your library must also have a license for Community Profiles to feature community organizations or events. Promotion records are linked to the featured community or bibliographic record.

To feature these resources in the PAC, you create Promotion records in the Polaris staff client that specify the resources to feature and the conditions under which the resources will display. If your library has Community Profiles and a Campaigns license, promotion records can be generated automatically for community organizations and events.

Polaris Administration settings determine the location and display of these featured resources in PowerPAC. See the Public Access Administration PDF Guide, Managing Feature It Promotions .

**Note:**

Feature It is not available in Polaris Mobile PAC or Polaris PowerPAC Children's Edition.

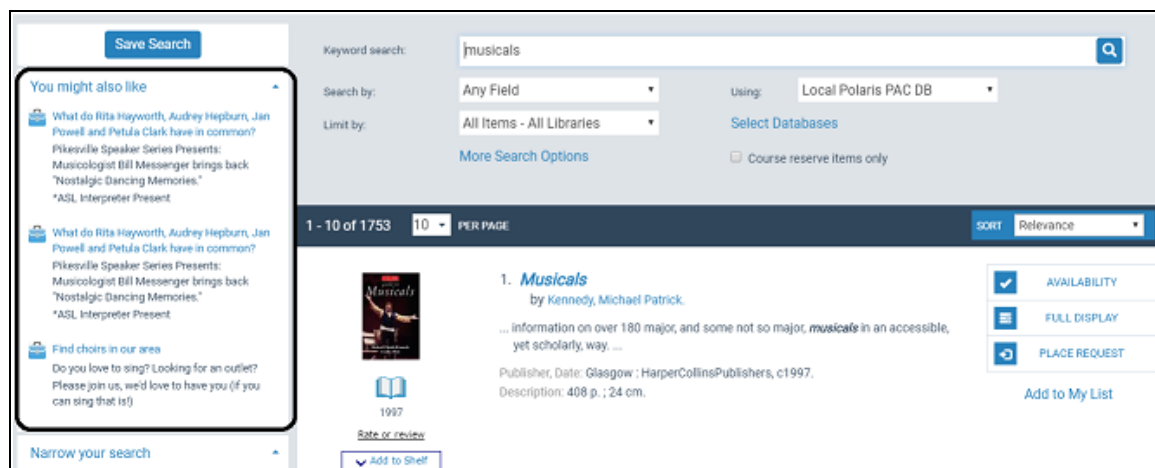
See also:

[Creating and Editing Promotion Records](#)

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### Creating and Editing Promotion Records

Promotion records in Polaris Cataloging are used to feature bibliographic materials, web sites, or community resources and events (if your library has a license for Community Profiles in addition to Feature It). Multiple resources can be featured in the same promotion record, but they must be of the same type. For example, if the promotion record features a title in your library's catalog, you can add other bibliographic records to feature, but not URLs or community organizations/events. The following Cataloging permissions, set at the system, library or branch level, control who can work with these records: **Promotion records: Access, Create, Modify, and Delete**. The following example shows community resources returned with a bibliographic keyword search.



To feature multiple resources of different types, you can create several promotion records linked to different types of resources, then enter the same set of search terms that will trigger the featured resources. For example, you could feature bibliographic records and a community organization/event by creating two promotion records, each with the same search triggers.

See also:

- [Find an existing promotion record](#)
- [Create a new promotion record from the Shortcut Bar](#)
- [Enter or edit general promotion information](#)
- [Enter the resource\(s\) to feature](#)
- [Enter search terms to trigger the featured resources](#)
- [Enter demographic targeting for promotions](#)

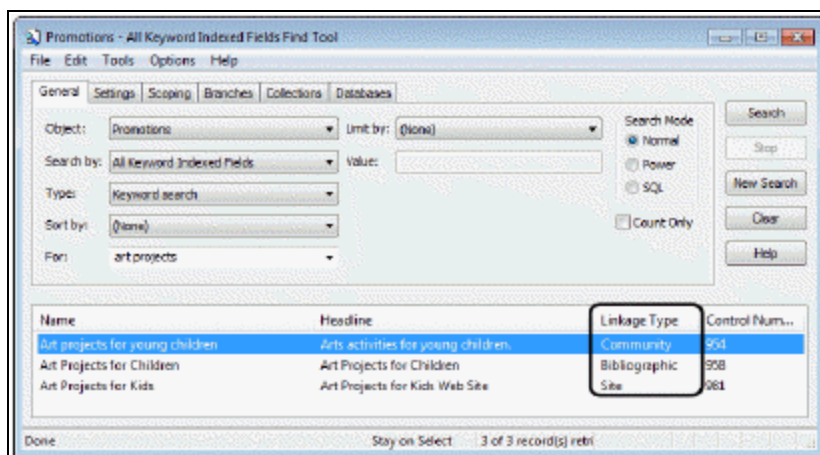
## Find an Existing Promotion Record

To search for an existing promotion record:

1. Select **Cataloging, Promotions** from the Polaris Shortcut Bar.  
The Find Tool opens with **Promotions** selected in the **Object** box.
2. Select the search criteria, and enter the search term in the **For** box.
3. Click the **Search** button.

The promotion records meeting your search criteria appear in the list.

The **Linkage Type** column displays the type of featured resource.



- Double-click the promotion record, or select the record, right-click and select **Open**.  
The selected record opens in the Promotion workform.

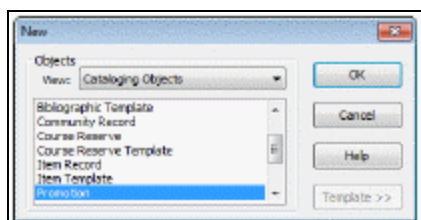
### Create a New Promotion Record from the Shortcut Bar

To create a new promotion record from the Polaris shortcut bar:

#### Tip:

Press **CTRL+N** to display the New dialog box. Type the first letter of the record type to go to all records that begin with that letter. For example, type **p** to go to **Promotion**. To limit the record types in the **Objects** list, select Cataloging in the **View** box.

- Select **File > New** from the shortcut bar.  
The New dialog box appears.
- Select **Promotion** in the **Objects** list.



- Click **OK**.  
The Promotion workform opens.
- Enter information in the workform. See also:

- [Enter or edit general promotion information](#)
- [Enter the resource\(s\) to feature](#)
- [Enter search terms to trigger the featured resources](#)
- [Enter demographic targeting for promotions](#)

5. Select **File > Save** to save the record.

A message in the status bar indicates the record was saved.

### Create a Record from the Promotion Workform

To create a new promotion record from the Promotion workform:

1. Use the Polaris Find Tool to locate and display an existing promotion record.
2. Select **File > New**, or press **CTRL+N** from the workform menu bar.

The New Promotion dialog box appears.

3. Select one of the following options:
  - **Clear Work Form** - The data is cleared from the workform, and a new, blank workform appears.
  - **Copy Existing Work Form** - The original workform closes, and a copy of the workform appears.
4. Click **OK**.

The new record appears in the Promotion workform.

5. Enter or modify the information in the Promotion workform.
  - [Enter or edit general promotion information](#)
  - [Enter the resource\(s\) to feature](#)
  - [Enter search terms to trigger the featured resources](#)
  - [Enter demographic targeting for promotions](#)

6. Select **File > Save** or press **CTRL+S** to save the record.

A message in the status bar indicates the record was saved.

### Enter or Edit General Promotion Information

#### To add general promotion information

1. Open the Promotion workform, and go to the General view.

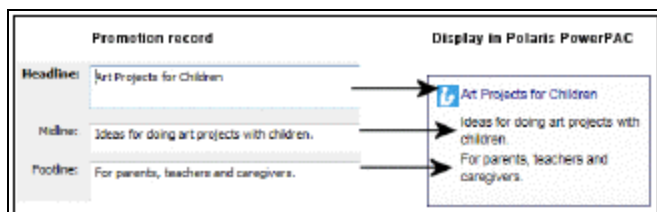
2. Enter the promotion record's name (required).
3. Select the promotion record's owner (required).
4. Select the promotion's activation date and expiration date (required).

**Note:**

When the expiration date passes in the promotion record, the promotion record remains in the database, but it is deactivated and the featured resources do not display in PowerPAC. If you want the featured resources to display in PowerPAC for an indefinite amount of time, you can set the expiration date many years into the future.

5. Type the promotion record's headline, midline, and footline. The headline is required; the midline and footline are not required. The maximum length for each is 255 characters.

The headline, midline, and footline text describe the featured resource in PowerPAC. For example:



6. Select **File > Save**.

### Enter the Resource(s) to Feature

To feature bibliographic records, community organizations and/or events, or URLs:

#### Note:

The same promotion record can contain multiple bibliographic, community, or web resources to feature, but it cannot contain resources of different types. For example, you cannot add both community and bibliographic records to the same promotion workform. Promotion records are linked to the bibliographic or community records they feature.

1. Open the Promotions workform, and select the Featured Resources view.
2. To feature bibliographic or community records, do the following steps:
  - a. Select **Feature these local object(s)** and select **Bibliographic** or **Community** in the **Objects** box.
  - b. Click the **Add** button, and search for the bibliographic or community resource in the Find Tool. The option to select other databases is disabled on the Remote databases tab of the Find Tool.
  - c. Select the bibliographic or community record to add. You can add more than one community or bibliographic record, but not a mixture of record types.
  - d. To feature a web site or a library resource (bibliographic record or record set) via a URL, select **Open this page**, and type the URL in the box.
3. Select **File > Save**.

### Enter Search Terms to Trigger the Featured Resources

The featured resources appear only if the keywords contained in the PAC user's search term match those defined as a positive trigger for the featured resource. You can also specify words or phrases as negative triggers that will prevent the display of the featured resource. For more information, see [Promotion Triggers and PAC Searches](#).

To enter promotion triggers:

1. Open the Promotions workform, and go to the Triggers view.

#### Tips:

Wild card characters, such as an asterisk, are not supported for triggers.

The trigger words should not match words already in the record being

featured so that the same record does not appear in search results and as a featured resource.

It may be useful to think of a Boolean OR between triggers, a Boolean AND for multiple words within a single unquoted trigger, and a Boolean AND with a proximity value of '1' (ordered) for multiple words within a quoted trigger.

2. In the **Freetext** column, type the text that triggers the display of the featured resource as follows:
  - Enter a single keyword per line. The PAC user must enter any or all of the keywords for the resource to be featured.
  - Enter a phrase on a line. The PAC user must enter the entire phrase for the resource to be featured. If the phrase has double quotes around it, the PAC user must enter the entire phrase in the same order without any other words. If the phrase is not in quotes, the PAC user must enter all the words, but they can be in any order.
3. In the **Type** column, select the box to open the list of search types.

If your library has a license for Community Profiles, the following types appear in the list:

- Author or Organization
- General Notes
- Genre
- Publisher
- Series
- Subject or Services
- Title or Event Name

If your library does not have a license for Community Profiles, the following types appear in the list:

- Author
- General Notes
- Genre
- Publisher

- Series
  - Subject
  - Title
4. Select the type(s) of searches to which the search terms apply.
  5. If the search terms entered should prevent the resource from being featured, select the **Negative** box.


**Note:**

The promotion record must have at least one positive trigger in order for a negative trigger to operate. For more information, see [Promotion Triggers and PAC Searches](#).

6. Type in the next available line to enter more search terms.
7. To move a trigger up or down in the list, select it and click the up or down arrow.

**Note:**

The order of the triggers on the workform does not affect processing or relevancy ranking.

8. To normalize (remove un-indexable characters) from a search term, select it and click . When search terms are normalized, you can see the actual keywords.
9. Select **File > Save**.

Promotion Triggers and PAC Searches

**How Polaris matches promotion triggers to PAC searches:**

- When a PAC user enters a search query, all search terms are extracted and normalized. Keyword, phrase and exact match search queries are all treated the same way.
- An ordered keyword list is created that contains up to 16 normalized keywords.
- If the ordered keyword list matches one or more positive promotion triggers (and zero negative triggers), the search query matches the promotion.

**Positive and Negative Triggers**

When looking for matching promotions, Polaris first looks for a matching trigger (keyword, quoted phrase, unquoted phrase) and then considers whether the trigger is positive or negative. At least one positive trigger must be entered for a negative trigger to operate.



If a trigger type is checked and the library patron searches by that access point or by the “any field” access point (KW) for either bibliographic or community records, then Polaris attempts to find matching promotions.

**Example:**

Promotion has 6 positive triggers and 1 negative trigger. The triggers are:

Quilting - (all) - positive

Knitting - (all) - positive

Crochet - (all) - positive

Sewing - Title/Event Name - negative

Crocheting - (all) - positive

Quilters - (all) - positive

Needlework - (all) - positive

The PAC user does a keyword Subject search for Knitting Sewing. The promotion should be returned because of the positive filter Knitting (all). Sewing is a negative filter but just for Title/Event Name and since the search was a subject search, Sewing was not a matching trigger.

If a trigger is restricted to a subset of trigger types, then it applies when the access point is KW (regardless of whether the trigger is positive or negative). In other words, if SEWING is a negative trigger restricted to the Title/Event Name, then it applies when the access point is TI or KW.

### Normalizing Triggers

When you click the Normalize icon un-indexable characters are removed from the display of the trigger so the user can see how the string will be indexed in the database.

**Example:**

"\*\*\*race\*\*\* [Car] Driver" would normalize to "race car driver".

"\*\*\$%#" would normalize to "". In this case the trigger would be ignored and/or removed automatically.

The normalization rules used here are the same as those used for keyword normalization in bibliographic records.

These are some of the characters that are retained:

- Double quotes
- Diacritics and most Unicode characters
- Apostrophes
- Hyphens

These are some of the characters that are removed and replaced with a space:

- Asterisk
- Dollar sign
- Percent sign
- Pound sign
- Opening and closing square brackets

Additional indexing rules may apply to some forms of punctuation:

**Example:**

The normalized form of *dog's bone* retains the apostrophe, but the user can search on either *dog's bone* or *dogs bone* and get a match.

For words that contain characters that are stripped out by the normalization rules, enter two triggers: one with the original spelling, and one with the equivalent characters:

**Example:**

For the search term *Kei\$ha*, enter two triggers: *keisha* and *kei\$ha*. This way, a match will occur when the user searches for either version of the name.

## Enter Demographic Targeting for Promotions

To enter languages or branches to target for promotions:

1. Open the Promotion workform, and go to the Demographic Targeting view.
2. Select one or both of the following options to display the lists.
  - **Target only these languages**
  - **Target only these branches**
3. Select the checkboxes next to the language(s) or branch(es) you want to target.

**Note:**

The list of languages contains only those languages for which the library has a license from Polaris.

- If a language or languages are selected, the featured resources appear only when the PAC user has switched the PowerPAC interface to a targeted language (from the **Languages** tab at the top of the PowerPAC window).
  - If a branch or branches are selected, the featured resources appear only when the PAC user is connected to one of the targeted branches in PowerPAC.
4. Select **File > Save**.

## Cataloging Bound-With Materials

When cataloging pamphlets or other materials that have individual titles and individual bibliographic records, but are bound together in physical volumes, libraries can group bibliographic records together by creating special linking entry fields. Although these linking entry fields are not stored in MARC tags in the host and constituent bibliographic records, they are used to link the records, they are searchable and browsable, and they are exported as 773/774 tags.

The bound-with feature is designed and optimized for research materials where:

- the holding library owns a single copy of each title in the bound-with volume;
- each title in the bound-with volume has a separate bibliographic record;
- and the bound-with volume is unique within the collection and can be represented by one and only one item record.

Bound-with groups are not intended to be used for non-unique materials that are circulated together but are likely to require multiple item records (for example, circulating multiple ebook tablets, each with multiple non-unique titles loaded onto them) or for materials that are circulated together but do not have separate bibliographic records for each of the parts (for example, kits or book club sets).

The bound-with group functionality is available to all Polaris customers and does not require a Polaris license.

In Polaris, a “bound with” group is not a separate object like a record set; rather, it represents a conceptual relationship among groups of bibliographic records that are defined by their role in the group. In a bound-with group, a single bibliographic record acts as the “host” record representing the title of the bound volume, and one or more bibliographic records act as “constituent” records representing the titles bound together in the volume. A single bar-coded item record represents the physical bound volume; the constituent records do not have linked item records.

Users create bound-with groups with existing final bibliographic records, and the linking between these existing records establishes the role each linked record plays in the bound-with group: host or constituent. When the user starts with a bibliographic record and creates a constituent link, the starting record becomes the single host in the bound-with group.

Conversely, when the user starts with a bibliographic record and creates a host link, the starting record becomes one of the constituent records in the bound-with group.

Establishing the links also inserts the appropriate linking entries into the bibliographic records.

Any 773/774 or 787 tags already in the existing bibs are not used to establish the new linking entry fields.

See also

- [Host Bibliographic Records](#)
- [Constituent Bibliographic Records](#)
- [Preventing Multiple Host Item Records](#)
- [Displaying Constituent Call Numbers](#)
- [Modifying, Deleting, Importing, and Exporting Bound-With Bibs](#)
- [Indexing for Bound-With Groups](#)
- [Bibliographic Records With No Linked Items Report](#)
- [Multiple Copies of the Same Constituent Title](#)
- [Bibs That Cannot Be Members of a Bound-With Group](#)
- [Bound-With Workflow](#)
- [Create a Bound-With Group](#)

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## Host Bibliographic Records


Each bound-with group has a single host bibliographic record with the following characteristics:

- A MARC record for the overall title representing the bound volume. If a bibliographic record already exists for the bound volume, the user identifies it as the host record. If the bound volume does not have an existing bibliographic record, one must be created. Alternatively, the record for one of the constituent titles can be used; however, this record may be too specific for use as a host record.
- A host bibliographic record cannot be a constituent record of another host.
- After the bound-with group is created, the **Host record** checkbox is checked in the Bibliographic Record workform. This is a read-only field.
- In the PAC displays, the host title appears as a link in the display of the constituent records.

- The host bibliographic record is linked to a single item record that represents the physical bound volume and is displayed in the Item Record workform with a bar-code and call number.
- The circulation status of the host carries down to the constituent units.
- The **Bound With** view of the Bibliographic Record workform displays the links to the constituent records.

### Host Bibliographic Record's Bound-With View

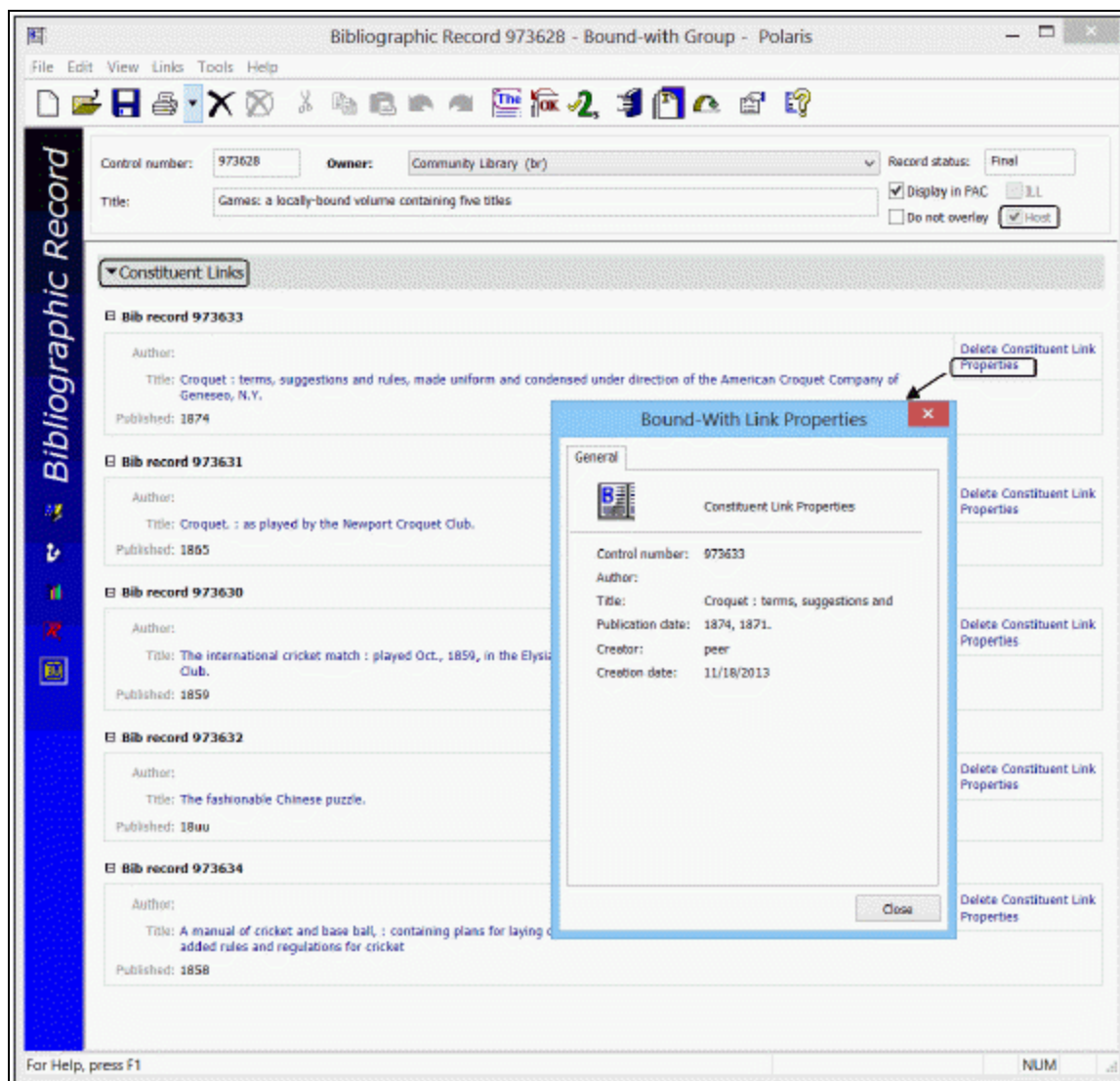
To go to the Bound-with Group view of the Bibliographic Record workform, select **View >**

**Bound-with** or select . The host bibliographic record displays links to the constituent records. The constituent links are displayed in the order in which the constituent links were added.

If you add constituent records from a record set, they are added in bibliographic record control number order. If you select the bibliographic records from a list, such as the Find Tool results, they are added in the order in which they appear in the list. You can select a sorting option in the Find Tool, or click on a column header to sort the list.

For each constituent link listed in the Bound-With view, the following fields are displayed:

- **Author** - The PrimaryDisplayAuthor with all tags and subfields that were selected for inclusion
- **Title** - The PrimaryDisplayTitle with all tags and subfields that were selected for inclusion
- **Published** - The publication date from the 008/07-10 positions



## Constituent Bibliographic Records

The constituent bibliographic records in a bound-with group have the following characteristics:

- A MARC record for the individual title representing the constituent part.
- No item record is linked to the individual title; the host item record is used. Constituent bibliographic records cannot be linked to final item records. However, constituent call numbers that appear in MARC tags can be searched and displayed in the PAC.

- A constituent bibliographic record cannot be a constituent of more than one host.
- After the bound-with group is created, the **Constituent record** checkbox is checked in the Bibliographic Record workform. This is a read-only field.
- In the PAC displays, the constituent title appears as a link in the display of the host record.
- The circulation status of the host carries down to the constituent units.
- The **Bound-With Group** view of the Bibliographic Record workform displays the link to the host record.

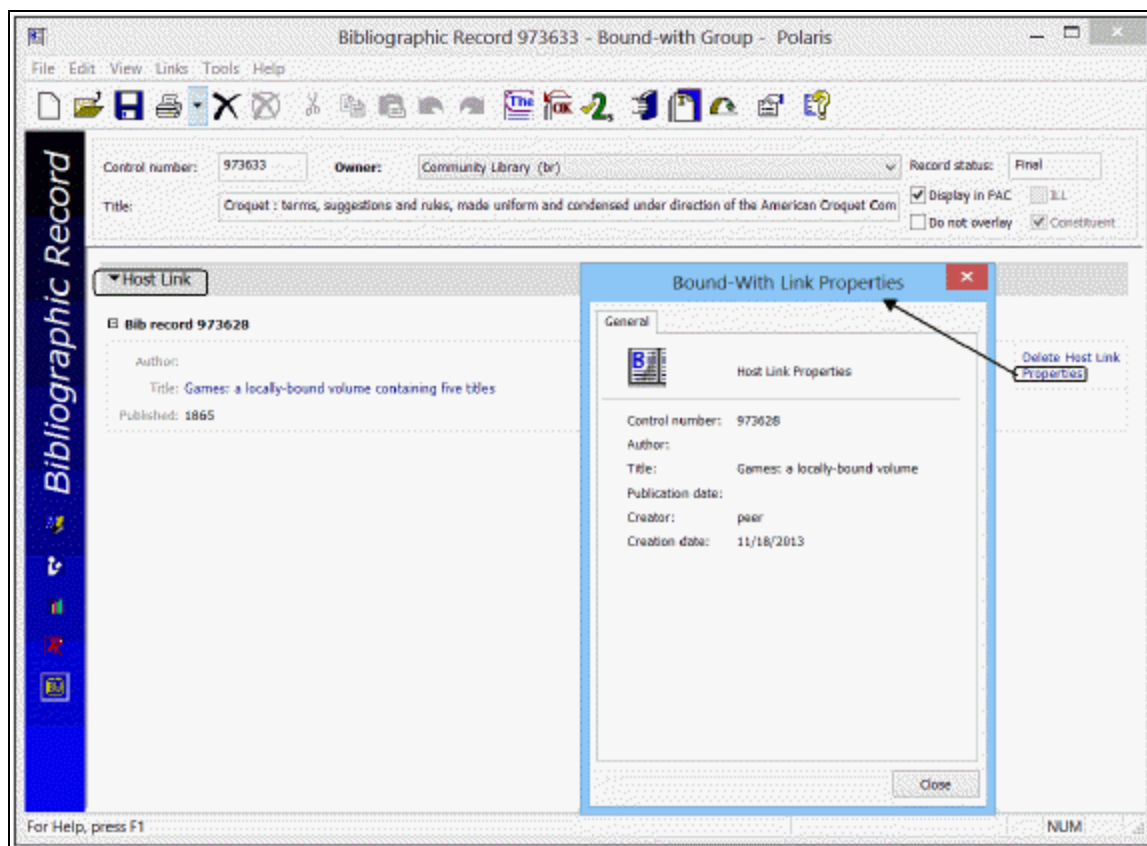
### Constituent Bibliographic Record's Bound-With View

A single host link is generated from the following fields in the linked host record:

- **Author** - The PrimaryDisplayAuthor with all tags and subfields that were selected for inclusion.
- **Title** - The PrimaryDisplayTitle with all tags and subfields that were selected for inclusion.
- **Published** - The publication date from the 008/07-10 positions.

Users can browse and search the host and constituent links according to the library's indexing rules for the 773/774 tags.





## Finding Bound-With Bibliographic Records in the Staff Client

Use the Limit by **Bound-with host/constituent** option in the Polaris Find Tool to find bibliographic records that are part of a bound-with group. When the **Bound-with host/constituent** option is selected, you can select **All** to find all bibliographic records that are part of a bound-with group; **Host** to find bibliographic records that act as the host record in a bound-with group; or **Constituent** to find bibliographic records that act as constituent records in a bound-with group.

From the right-click menu, select **Links > Host record** or **Links > Constituent records** to see the host record or the constituent records.

---

## Preventing Multiple Host Item Records

A host bibliographic record may have no more than one linked final item record, which contains the call number for the physical volume. For host bibliographic records, the following functions prevent multiple items from being created:

- The New Item Record Options dialog box does not allow a quantity greater than 1. If the user enters a quantity greater than 1, the following message appears: Host records can have no more than 1 linked item record with a record status of Final.
- The import process does not replace an existing host bibliographic record with an incoming record if the resulting record would have more than one item attached.
- The bibliographic control number field on an existing final item record cannot be changed to that of a host bib if that host already has a linked item.
- The Item Bulk Change process does not change the bib control number to that of a host bib if that host already has a linked item. If the host bib has no items attached to it, the first item in the bulk change list is changed, but the remainder of the items are not changed.

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## Displaying Constituent Call Numbers

Since constituent records represent titles that cannot be circulated outside of the volume in which they are bound, they cannot be linked to final item records. However, if call numbers for the constituent items already appear in MARC tags in the constituent bibliographic records, your library can work with your Polaris Site Manager to enable constituent call numbers to be displayed in PAC search results and availability displays. The Polaris Site Manager enters the tag and subfields containing the constituent call numbers and into two tables that are not visible in the Polaris staff client.

One table, BibIndexParams, associates the constituent call number tag with a new bib index key. Another table, BrowseSubfields, specifies the subfields to use in building the constituent call number display. If multiple tags have been designated to carry the constituent call numbers, the BibIndexParams table specifies the order of precedence in which the tags will be checked for the call number.

**Note:**

To avoid re-indexing, your library and site manager should work together to set up entries in these tables before you create any bound-with groups.

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## Modifying, Deleting, Importing, and Exporting Bound-With Bibs

**Note:**

Transactions are recorded when host and constituent records are created and deleted.

- **Modifying a constituent record** - If you change a constituent record while the host record is open, the changes are not displayed on the host record's bibliographic record workform until the host record is closed and reopened.
- **Changing the order of constituent links** - To change the order of constituent links displayed on the host record, you must delete the links and add them again in the order you want them to appear.
- **Copying a host or constituent record** - If you copy a bibliographic record that is part of a bound-with group, none of the bound-with links are copied.
- **Changing the author, title, and publication date fields** - Any changes to the linking entry bibliographic data in a host or constituent record are reflected in the records within the bound-with group. For example, a change to the 245\$a in a host record automatically updates the host entries for all constituent records.
- **Replacing a bibliographic record** - During online save and importing, any host or constituent links on the replaced record are copied to the replacing record. However, certain restrictions may prevent bibliographic records from replacing existing host or constituent bibliographic records. (For example, a record with linked items cannot replace a constituent record, because constituent records cannot have items attached.) When restrictions are encountered, the replacement does not occur. Instead, a message appears, or in the case of an import, the incoming record is saved provisionally and a message appears in the import report.
- **Deleting bound-with links** - When you delete a host link from a constituent bibliographic record, the link to the host record is deleted from the constituent record, and the reciprocal constituent link is deleted from the host record. If the constituent record from which you deleted the host link is the last constituent link on the host record, the Host checkbox is unchecked on the host bibliographic record.
- **Deleting a bibliographic record from a bound-with group** - When a bibliographic record is deleted, and it belongs to a bound-with group, the following occurs:
  - If the deleted bibliographic record is a host record, the bound-with group no longer exists; constituent links on the host record are removed and host links are removed from constituent records.

- If the deleted bibliographic record is a constituent record, it is removed from the bound-with group; the host link is removed from the deleted record, and the constituent link is removed from the host bibliographic record.
- Exporting records in a bound-with group - Bibliographic records that are part of a bound-with group are exported as follows:
  - The host and constituent links are converted to traditional MARC 773/774 tags (first indicator = 0, second indicator=blank).
  - All subfields specified in the library's PrimaryDisplayAuthor and PrimaryDisplayTitle tables are included.
  - Author subfields are concatenated into a single \$a subfield with the internal punctuation retained.
  - Title subfields are concatenated into a single \$t subfield with the internal punctuation retained. The non-filing indicators (if any) in the title tag of the reciprocal record are honored; the appropriate number of characters are stripped from the \$t subfield in the exported tag.
  - The publication information from the 260 or 264 tag is in subfield \$d in the exported tag.
  - The system control number of the related record is carried in the \$w of the exported tag, preceded by the MARC code (the system-level cataloging profile **Control number identifier string (003)**, enclosed in parentheses), for the agency to which the control number applies. If there is no value entered in the cataloging profile, the organization abbreviation for organizationID=1 is used. (The MARC code is not included in records exported via the API.)
  - In Export Express, if you are exporting host records and select the option to include embedded holdings tags (e.g. 852), embedded holdings tags are built from the host item records, according to the usual profile settings in Export Express. For constituent records, the call number is taken from the designated constituent call number tag and all other holdings fields are taken from the host record. If the constituent bibliographic record does not contain a constituent call number tag, the call number fields are taken from the host record.
  - In the Polaris Database Export Utility (**Utilities, Exporting**), if you are exporting host records and check **Include current item holdings information**, the embedded holdings tags are built from the host item records, according to the usual export utility settings. For constituent records, the call number is

taken from the designated constituent call number tag and all other holdings fields are taken from the host item record.

- When records are exported via the Polaris API (PAPI) or a Z39.50 remote search, the holding information is included for both host and constituent records.
- Changing the item record's call number - If you change the call number for the host item record, the following message appears: **Attention: This item record is linked to a host bibliographic record. You may also need to change the call numbers (if any) on linked constituent bib records.** The message also appears on the Bulk Change report if you change the call number for a host item during bib bulk change.  
If you attempt to create an item record from a constituent bibliographic record, or change an existing item record's bibliographic control number to that of a constituent bib, a message informs you that constituent bibliographic records cannot have final item records linked to them.
- Saving item templates with a bound-with record's control number - If you attempt to save an item template with a bibliographic record control number for a record that is either a host or constituent record in a bound-with group, the template will not be saved, and the following message appears: **Bibliographic record <control number> is in a bound-with group; it cannot be added to an item template.** If the item template already exists with a bibliographic control number, and you subsequently designate the bib as a member of a bound-with group, the bib ID is removed from the item template, and a warning message informs you of the bib ID removal.

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## Indexing for Bound-With Groups

Linking entries are indexed according to the rules for 773/774 tags. If the library chooses not to index traditional 773/774 MARC tags, the bound-with host and constituent links are not indexed. If the linking entries are indexed, the link to the reciprocal record is followed and the primary author/title tags in the reciprocal record are indexed, following the indexing rules for these tags.

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## Bibliographic Records With No Linked Items Report

The Bibliographic Records With No Linked Items report indicates if the bibliographic record has no linked items because it is a constituent of a bound-with group. If a title listed on the Bibliographic Records With No Linked Items report is a constituent record, the following note appears next to the Bibliographic Record ID: **This record is a constituent in a Bound-With Group.**

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## Multiple Copies of the Same Constituent Title

If the library has multiple copies of a title with some copies bound in volumes with other titles and others bound separately, Innovative Interfaces recommends that the library create separate bibliographic records for each instance.

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## Bibs That Cannot Be Members of a Bound-With Group

The following types of bibliographic records cannot be part of a bound-with group:

- Provisional
  - Deleted
  - Linked to an Acquisitions record (selection list, purchase order, or invoice line item)
  - Linked to a Serials record (serial holdings record, subscription record, or standing order part)
  - Interlibrary Loan (ILL) bib
  - Contains Resource Entities for an integrated ebook vendor
- 

## Bound-With Workflow

Follow this general workflow to implement bound-with cataloging in Polaris:

See also: [Create a bound-with group](#).

- Identify the bibliographic records for the bound-with volume. Bibliographic records cannot be host or constituent records if they are provisional, deleted, an ILL bib,

are linked to a Polaris Acquisitions or Serials, or contain resource entities for an integrated ebook vendor.

- Identify the bibliographic record that will serve as the host record.
  - If a bibliographic record already represents the physical volume, that record should be the host record.
  - If no bibliographic record represents the physical volume, create the bibliographic record for the volume.
  - If a bibliographic record already represents a title within the physical volume, such as the first title in the bound volume, you can designate this record as the host record. However, since this title is within the bound volume, it may be too specific for a host record.
- Add a single item record to the record that will be the host record. If a single item record is already linked to the bibliographic record, no action is necessary. If multiple item records are linked, all but one must be deleted because a host record can only have one linked item record representing the physical bound volume.
- Identify the bibliographic records that will become the constituent records, and (optionally) place them in a record set.
  - Delete any linked items from bibliographic records that will become the constituent records because constituent bibliographic records cannot have item records linked to them. However, if call numbers for the constituent items already appear in MARC tags in the constituent bibliographic records, your Polaris Site Manager can enable the display of these call numbers in availability displays and call number browsing.
- Open the bibliographic record identified as the host record, select **Tools, Create Constituent Links** and select the constituent records.

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## Create a Bound-With Group

To create a bound-with group:

1. Open the Bibliographic Record workform for a bibliographic record that will be identified as the host or constituent record.
2. Select **Tools** and select one of the following options:
  - If the open record represents the bound volume, select **Create constituent link**.

- If the open record represents a constituent title in the bound volume, select **Create host link**.

The Find Tool opens with Bibliographic Records selected in the **Object** box. If you are creating constituent links, you can also select Record sets in the **Object** box.

3. Search for and select the bibliographic record that will be the host or constituent record.

**Note:**

If you selected **Create constituent link**, you can select multiple bibliographic records or a record set. If you select a record set, constituent links are created for all the records in the record set. If you selected **Create host link**, you can select only a single bibliographic record.

**Note:**

A bound-with group can have a maximum of 100 constituent records. If you select more constituent records than can be added to the group, a message informs you that the limit will be exceeded.

If you select a record that cannot be linked, a message informs you why it cannot be part of the bound-with group.

**Example:**

***Bibliographic record <control number> cannot be selected as a constituent record because it has an <item record/acquisitions record> linked to it.***

When the linking is successful, the following occurs:

- A confirmation message displays: **Links created. Click the Bound-with view of the bibliographic record to see the linking entries.**
- If you selected **Create constituent link** in the open bibliographic record, the open record is designated as the host of the bound-with group, the linked record is designated as a constituent of the bound-with group, and the appropriate linking entries are inserted into the host bibliographic record.
- If you selected **Create host link** in the open bibliographic record, the open bibliographic record is designated as a constituent record of the bound-with group, the linked record is designated as the host of the bound-with group, and the appropriate linking entries are inserted into the host bibliographic record.




You can go to the linked records by selecting **Links > Host record** or **Constituent records** on the Bibliographic Record workform.

## Type of Material Codes (TOMs)

When you import, copy, or manually create new bibliographic records, Polaris checks the LDR/06, LDR/07, the 006 tag, the 007 tag, and other combinations of codes to determine the record's primary Type of Material code or TOM. This generates the material type icon in Polaris PowerPAC and enables searching for bibliographic records using the TOM in the staff client, Leap, PowerPAC, and Mobile PAC.

### Tip:

From the Bibliographic Record workflow, select **View > PAC** or click  to see the icon that displays in the PAC.

If a single bibliographic record contains values indicating more than one material type, only one TOM icon is displayed in Polaris PowerPAC. For example, a single record could contain codes indicating it is both a video recording and a DVD. The primary type of material code (and icon) for that record would be DVD. However, the record could be retrieved in the staff client and Polaris PowerPAC by searching for either of its TOM codes. See [Multiple TOMs - Order of Precedence](#).

### Note:

If the bibliographic record's primary TOM is **elr** (electronic resource), and it has at least one 856 tag, and there are no item records linked to it, hold requests cannot be placed for that title in the PAC.

You can opt to suppress request and availability options for all records with a specific primary TOM, or only those with specific primary TOMs that have at least one 856 in the bib record. By default, Electronic resources (**elr**) and Digital collection (**dmc**) are selected for suppressing request and availability options. The option **Records with an 856** is selected by default except **dmc**, where **All records** is selected. You can run the Bibliographic Records With No Format report to identify any bibliographic records in your catalog that do not have a TOM code assigned.




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## TOMs and MARC Coding



### Note:


The (Polaris) note under the format indicates it is a Polaris TOM. Between




the columns, **Or** is implied, except in the case where **AND** appears. For example, a music CD can be coded with **j** in LDR/06 OR **j** in 006/00.


Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
Abstract (Polaris)		abs	a	AND i			AND /21=d AND /24=a AND /25=a
Archival/Mixed Materials		mix	p		/00=p		
Atlas - 3 ways to determine (Polaris)		atl	e OR f		in the same 006 tag: /00=e OR f		AND /25=e

Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap  Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
					/08=e		
						in the same 007 tag: /00=a AND /01=d	
Audio Book (Polaris)		abk	i			AND /00=s	
Audio Book on Cassette (Polaris)		abt	i			in the same 007 tag: AND /00=s AND /01=s	



Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap  Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
Audio Book on CD (Polaris)		abc	i			in the same 007 tag: AND /00=s AND /01=d AND /03=f	
Blu-ray Disc (Polaris)		brd	g			AND /00=v AND /01=d AND /04=s AND /05=a AND /06=i AND /07=z	AND /33=v




Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap  Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
Blu-ray+DVD (Polaris)		bdv	g			<p>Two 007s needed.</p> <p>One 007 for Blu-ray:</p> <p>AND /00=v</p> <p>AND /01=d</p> <p>AND /04=s</p> <p>-----</p> <p>-----</p> <p>One for DVD:</p> <p>AND /00=v</p> <p>AND</p>	AND /33=v




Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap  Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
						/01=d AND /04=v	
Book		bks	a OR t	AND NOT b OR s OR i	/00= a OR t	/00=t	
Book+Cassette (Polaris)		bcs	i OR a		AND /00=a	AND /00=s AND /01=s AND /13=e	
Book+CD (Polaris) 2 ways to determine		bcd	i OR j		AND /00=a	AND in the same 007 tag: /00=s AND /01=d	





Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
						AND /03=f	
Book+DVD 2 ways to determine		bkv	a		AND /00=i OR j	AND in the same 007 tag: /00=s AND /01=d AND /03=f	
			g		AND /00=g	in the same 007 tag: AND /00=v AND /01=d AND /04 = v	
					AND /00=a	in the same 007	









Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap  Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
						tag: AND /00=v  AND /01=d  AND /04 =v	
Braille - 3 ways to determine		brl	a, c, d, p OR t		/00=a, c, d, p OR t		AND /23=f
				b OR s	/00=s		AND /23=f
			e, f, g, k, OR r		/00=e, f, g, k, OR r		AND /29=f
Cartographic Material		cmt	e OR f		/00=e OR f		






Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap  Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
Digital Collection (Polaris)		dmc	m	AND c			
DVD (Polaris)		dvd	g			AND in the same 007 tag: /00=v AND /01=d AND /04=v	AND /33=v
EAudioBook (Polaris)		aeb	i		AND /00=m /09=h	AND Two 007s needed 1st 007: /00=s AND /12=e	AND /23=s Or o







Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
						AND /13=d <hr/> — 2nd 007: /00=c AND /01=r AND /05=a	
Ebooks		ebk	a		/00=m	/00=c AND /01=r	AND /23=o
Electronic Resources		elr	m	a, d, OR m	/00=m	/00=c	
Emagazine		emg		s			AND /21=p AND

Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap  Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
							/23=o
Globe		glb				/00=d	
Kit		kit	o		/00=o	/00=o	
Large Print - 3 ways to determine		lpt	a, c, d, p, OR t		/00=a, c, d, p, OR t		AND /23=d
		lpt	e, f, g, k OR r		/00=e, f, g, k OR r		AND /29=d
		lpt		b OR s	/00=s		AND /23=d
Manuscript Cartographic Material		mcm	f		/00=f		





Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap  Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
Map		map				/00=a	
Manuscript Material		mss	d, f, OR t		/00=d, f, OR t		
Manuscript Music		mmu	d		/00=d		





Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap  Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
Microform - 4 ways to determine		mic				/00=h	
				b OR s	/00=s		AND /23=a, b, or c
			a, c, d, p OR t		/00=a, c, d, p OR t		AND /23=a, b, OR c
			e, f, g, k OR r		/00=e, f, g, k OR r		AND /29=a, b, OR c
Motion Picture		mot				/00=m	
Music CD (Polaris)		mcd	j		OR /00=j	AND in the same 007 tag: /00=s AND /01=	

Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
						d AND /03=f	
Musical Sound Recording		msr	j		/00=j		
Nonmusical Sound Recording		nsr	i		/00=i		
Newspaper		new	a	b OR s	and /00=s		AND /21=n
Periodical		per	a	b OR s	and /00=s		AND /21=p
Printed or Manuscript Music		mus	c OR d		/00=c OR d	/00=q	
Printed Music	Music CD	pmu	c		/00=c		

Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap  Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
	(Polaris) 						
Printed Cartographic Material		pcm	e		/00=e		
Projected Medium		pgr	g		/00=g	/00=g	
Sound Recording		rec	i OR j		/00=i OR j	/00=s	
Serial		ser		b OR s	/00=s		
Streaming Music		stm	j				/23=o OR /23=s



Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap  Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
Streaming Video		stv	g				/29=o OR /29=s
Two Dimensional Non-projected Graphic		ngr	k		/00=k	/00=k	
Three Dimensional Object (Artifact)		art	r		/00=r		
Video Game - Two ways to determine		vgm	m	in the same 006 tag: /00=m AND /09=g			AND/26=g

Type of Material TOM	Icon Displayed in PAC / PAC Preview and Leap  Note: In the Leap UI, TOM icons appear in gray.	TOM Code	LDR/06	LDR/07	006	007	008
Videorecording		vid				/00=v	
Videotape (Polaris)		vcr				/00=v AND /01=c OR f	
Vinyl (Polaris)		vyl	i OR j			AND in the same 007 tag: /00=s AND /01=d AND /03= a, b, c, d, OR e	
Visual Material		vis	g, k OR r		/00=g, k OR r	/00=f OR g, OR k, OR m	

### Multiple TOMs - Order of Precedence

For records with more than one TOM, the following order of precedence determines which TOM and icon are displayed. To see which icon will appear in Polaris PowerPAC, select **View > PAC** from the Bibliographic Record workform.

Order of Precedence	Format/Type of Material	Code
1	Blu-Ray+DVD	bdv
2	Blu-ray Disc	brd
3	Eaudiobook	aeb
4	Book+CD	bcd
5	Book+Cassette	bcs
6	Abstract	abs
7	Digital Collection	dmc
8	Video Game	vgm
9	Book+DVD	bkv
10	DVD	dvd
11	Videotape	vcr
12	Streaming Video	stv
13	Videorecording	vid
14	Motion Picture	mot
15	Projected Medium	pgr
16	Two Dimensional Nonprojected Graphic	ngr
17	Three Dimensional Object (Artifact)	art

Order of Precedence	Format/Type of Material	Code
18	Visual Materials	vis
19	Music CD	mcd
20	Streaming Music	stm
21	Audio Book on CD	abc
22	Vinyl	vyl
23	Audio Book on Cassette	abt
24	Audio Books	abk
25	Musical Sound Recording	msr
26	Nonmusical Sound Recording	nsr
27	Sound Recording	rec
28	Printed Music	pmu
29	Manuscript Music	mmu
30	Atlas	atl
31	Printed or Manuscript Music	mus
32	Map	map
33	Globe	glb
34	Printed Cartographic Material	pcm

Order of Precedence	Format/Type of Material	Code
35	Manuscript Cartographic Material	mcm
36	Cartographic Material	cmt
37	Emagazine	emg
38	Ebook	ebk
39	Kit	kit
40	Archival/Mixed Materials	mix
41	Newspaper	new
42	Periodical	per
43	Serial	ser
44	Electronic Resources	elr
45	Large Print	lpt
46	Braille	brl
47	Manuscript Material	mss
48	Microform	mic
49	Book	bks

## Setting Up Labels

You set label profiles for Cataloging and Serials labels on the Staff Client tab in Polaris Administration, and you configure, customize, and edit labels using the Label Manager. The Label Manager is available from the Polaris Shortcut Bar under **Utilities** and from Polaris Administration.

**Note:**

The permissions **Label Manager Configuration: Create, Modify, and Delete** apply to label type and label content. For example, if you have the **Create** permission, you can create both label types and label content.

---

### Recommendations for Label Types and Content

The available label types are associated with the branch where you are logged on. Make sure the content types and label types are available at the workstation from which you are printing the labels. If your library system does centralized processing, set the label types and content at the system level, and make sure all your branches are using the same label types and content. If your branch does its own processing, make sure the content type and the label type you need are both available at the workstation from which you print the labels.

When you set up custom labels, use the default label types for guidelines on the label and page sizes. Although you can change the page and label size to any value greater than 0, deviating too far from the standard sizes may produce labels with incomplete text. Use **Print Preview** to check your custom labels.

See also:

- [Setting Label Profiles](#)
- [Configuring Existing Label Types](#)
- [Creating Custom Labels](#)
- [Setting the Default Label Printers](#)

---

## Set Label Profiles

Polaris Administration profiles on the Staff Client tab control various default settings for labels, such as whether labels are printed automatically when item records are created. Use the **Labels: Options** profile to configure existing label types and specify the label content.

To set profiles for spine, pocket, and serial labels:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Staff Client** tab.
3. Double-click **Label Manager open using** and select **Cataloging Options** or **Serial Options** to specify which type of label appears when you open Label Manager from the **Utilities** menu on the Polaris Shortcut Bar.
  - If you select **Cataloging Options**, the cataloging label displays according to the setting in the **Labels: Cataloging label type** profile.
  - If you select **Serial Options**, the serial label is displayed according to the setting in the **Labels: Serial label type** profile.
1. Double-click **Labels: Automatically generate labels for each item record created**. Select **Yes** to generate labels automatically when items are created, or **No** if you do not want labels to be generated automatically.
2. Double-click **Labels: Automatically generate labels for each SO and SUBS check-in**. Select **Yes** to set labels to be generated automatically when issues or parts are checked in, or **No** if you do not want labels to be generated automatically.
3. Double-click **Labels: Cataloging label type**, and select the default label type to be generated when cataloging items.

**Note:**

The label types must be enabled for them to appear in this list. See [Set up existing label types](#).

4. Double-click **Labels: Cataloging print method**, and select **On Demand > Batch**, or **Quick Print** as the default printing method for cataloging labels.
  - If **On Demand** is selected, the Label Manager appears when the user requests a label and the user can view the label before printing it.

- If **Batch** is selected, the label is generated when the user requests a label, but it is not printed until the user opens Label Manager and selects **Print**. The Batch option works well for creating sheets of labels for multiple items.

**Note:**

Batch printing is limited to 500 labels at a time.

- If **Quick Print** is selected, the label is printed at the designated printer without opening the Label Manager.

**Tip:**

You can also select **Utilities** from the Polaris Shortcut Bar and select **Label Manager > Tools > Label Settings and Content** to open the Label Configuration dialog box.

5. Double-click **Setup** in the **Labels: Options** profile to modify existing labels, specify the label content, and create custom labels. The Label Configuration dialog box appears. See [Set up existing label types](#).

**Note:**

This profile is available at the workstation level, but only the Settings tab appears. Both the Settings and Content tabs are available at the system, library, and branch levels.

6. Double-click **Labels: Serial label type**, and select the default label type for serials issues.
7. Double-click **Labels: Serial print method**, and select **On Demand > Batch**, or **Quick Print** to specify how you want serial labels to print.
  - If **On Demand** is selected, the Label Manager appears when the user requests a label and the user can view the label before printing it.
  - If **Batch** is selected, the label is generated when the user requests a label, but it is not printed until the user opens Label Manager and selects **Print**. The Batch option works well for creating sheets of labels for multiple issues or parts.

**Note:**

Batch printing is limited to 500 labels at a time.



- If **Quick Print** is selected, the label is printed at the designated printer without opening the Label Manager.
8. To specify a carriage return in the classification number, do the following:

**For Dewey shelving scheme -**

- To force a new line after a decimal in the classification number on spine labels, double-click **Spine Labels (Dewey): Carriage return after decimal**, and select **Yes**.

**Tip:**

The prime marks must be inserted with the contents in the **Class** box on the Item Record workform.

- To specify a character that forces a new line in the classification number, double-click **Spine Labels (Dewey): Prime mark to generate carriage return**, and select one of the following options from the list:
  - Select **None** to ignore any prime marks.
  - Select **Forward Slash /** to start a new line wherever this prime mark is placed in the classification number.
  - Select **Apostrophe '** to start a new line wherever this prime mark is placed in the classification number.

**For Library of Congress or other non-Dewey shelving scheme-**

- To force a new line after a space in the classification number, set the **Spine Labels (non-Dewey): Carriage return after space** profile to **Yes**.

---

## Configuring Existing Label Types

Use the Label Manager to configure existing label types for spine, pocket, and serial labels, and to specify the content that you want to appear on them. You can also set up your own custom labels in Label Manager. See [Creating Custom Labels](#). After labels are set up and enabled in the Label Manager, they are available to be printed from the following areas in Polaris:

- Item Record
- New Item Record Options

- Serial Issue
- Standing Order Part
- Subscription Check In
- Standing Order Part Check In

Labels can be printed as you catalog each item, or you can catalog multiple items and print labels in batch. If the profile **Labels: Automatically generate label for each item created** is set to **Yes** in Polaris Administration, a label is generated automatically when you create and save a new item record.

To print labels, set up your printing preferences on the computer where you are doing the cataloging or serials processing. The label printer must be set up in Microsoft Windows, and it must be connected to the workstation or the same local area network as the workstation.

By default, Polaris uses the Andale Mono font, which is available at no cost from the Microsoft Web site. The default size is 12 points. On an SL4 label sheet, this font allows eight characters and spaces per line (total of eight lines) on the spine label and 28 characters per line on the pocket labels (total of four lines). The label stock size and label size can be changed but you cannot change the number of labels per page or per label group for the system-defined label types (Spine, SL4, SL6, SLB and Serials). See [Standard Label Types](#).

After you generate your labels, you can preview them in the Label Manager and use the right-click context menu to edit this particular page of labels. You can copy, paste, delete, insert text, change the font, or select diacritics to insert into the labels.

See also:

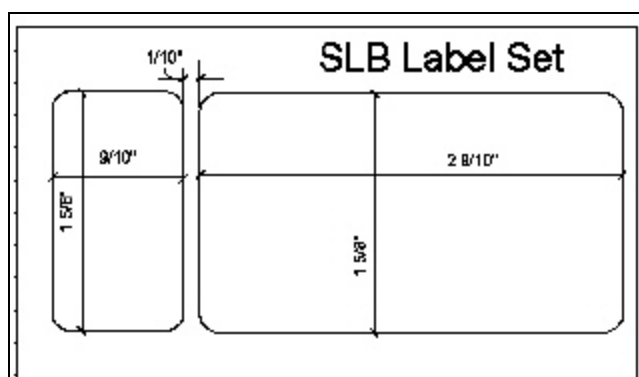
- [Standard Label Types](#)
- [Computype Spine Labels](#)
- [Label Content](#)
- [Set up existing label types](#)
- [Define the label content](#)

## Standard Label Types

All the standard label types have three sections of content. Label sets contain different label styles. You can configure existing label types, see [Set up existing label types](#).

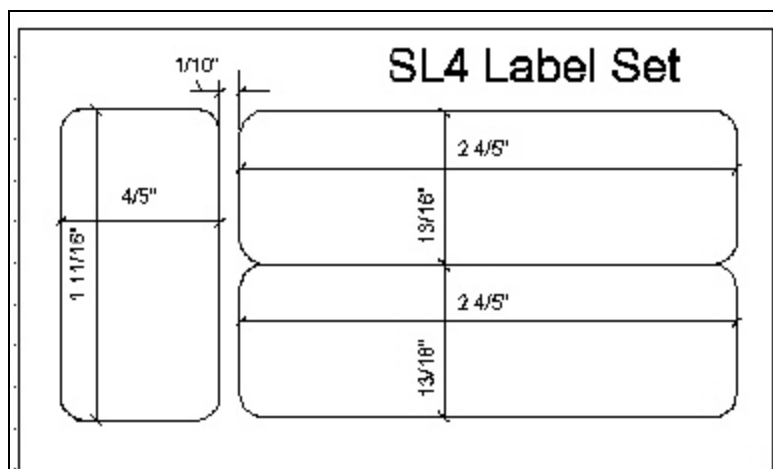
Spine sheets - Spine label sheets contain 50 labels per sheet. Each label is 1.5 inches (3.81 cm) wide and 1 inch (2.54 cm) high. They can have five text lines of 11 characters each.

SLB sheets - SLB label sheets contain 12 label sets per sheet. Each label set has a spine label and a pocket label. Polaris SLB spine labels have nine text lines of eight characters each. Polaris SLB pocket labels have nine text lines of 28 characters each.

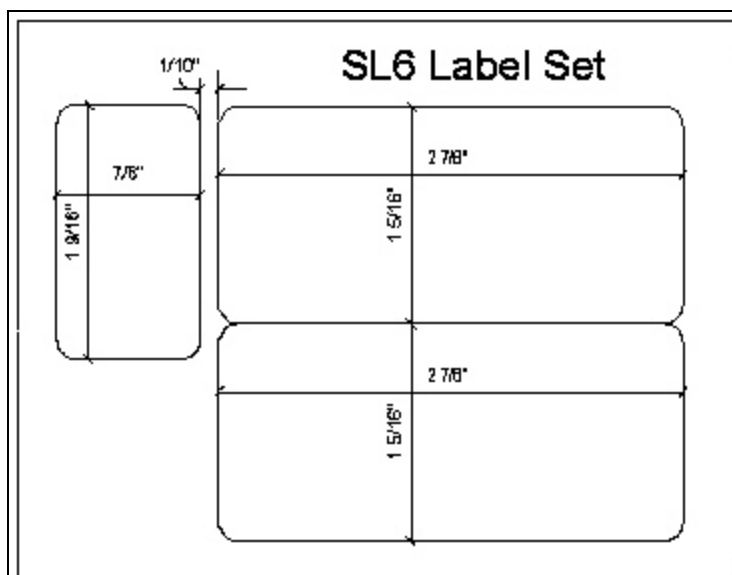


Serial sheets - Serial label sheets contain 20 labels per sheet. Serial labels are 4 inches (10 cm) wide and 1 inch (2.54 cm) high. They have five text lines of 34 characters each.

SL4 sheets - SL4 label sheets contain 12 label sets per sheet. Polaris creates SL4 spine labels with nine text lines of eight characters each. The pocket labels have four text lines of 28 characters each.



SL6 sheets - SL6 label sheets contain eight label sets per sheet. Polaris SL6 spine labels have nine text lines of seven characters each. The other labels in the set have six text lines of 28 characters each.



### Computype Spine Labels

The following types of labels are offered by Computype and supported by the Polaris Label Manager. You cannot change Computype labels in Label Manager.

- Single Label - 1 inch wide and 1.5 inches high
- Single Label - 1.125 inches wide and 1.25 inches high
- 2 Label Set
- Label 1 - 0.875 inches wide and 1.375 inches high
- Label 2 - 2.875 inches wide and 1.375 inches high
- 3 Label Set
- Label 1 - 0.9 inches wide and 1.5625 inches high
- Label 2 - 2.9 inches wide and .8125 inches high
- Label 3 - 2.9 inches wide and .8125 inches high

### Label Content

The label may include information from the item record, the serial issue/part record, or the linked bibliographic record. See [Define the label content](#).

- Call Number - If **Library of Congress** is selected in the shelving scheme on the Item Record workform, each part of the call number will be printed on a separate line on the label. If **Dewey Decimal** is the shelving scheme, all parts of the call

number are printed on different lines based on the **Carriage return after Dewey decimal** and **Prime mark to generate carriage return**. For all other shelving schemes, a new line is printed for each part of the call number.

- **Author** - The author information comes from the 1xx tag and subfields in the bibliographic record linked to the item record. If there is no 1xx field, the space remains blank on the label. The information is printed in the same order as the subfields in the MARC 21 record. The text wraps within this section, but there is a break before the bottom section.
- **Title** - The title information comes from the 245 tag and subfields in the bibliographic record linked to the item record. The information is printed in the same order as the subfields in the MARC21 record.
- **Collection** - The label content can include the collection or the collection abbreviation from the item record.

### Set up Existing Label Types

You can set up label types in Polaris Administration or from the Polaris Shortcut Bar. To configure spine, pocket, serial, or custom label types:

#### **Important:**

If your library uses Computype® printers, you can use only the Computype label types listed in Settings & Content, and none of the settings can be changed for Computype labels. These label types are not enabled at Polaris installation, so your library will need to enable them. Also, be sure to indicate a Computype label type as the default Cataloging label. For the measurements of Computype labels, see [Computype Spine Labels](#).

1. In the Administration Explorer tree view, expand the folder for the organization or workstation.
2. Select **Profiles** and select the **Staff Client** tab.
3. Select **Labels: Options**.

The Label Configuration window appears with the Settings tabbed page displayed.

#### **Tip:**

Navigate between cells using the arrow keys or **Tab** (to go forward) and **Alt+Tab** to go back. Expand the dialog box by dragging the bottom right corner. To see more of a column's content, select the column's left or right rule in the heading, and drag to expand the column.

4. On the **Settings** tab, select the checkbox in the **Enabled** column next to the label types you want to make available.

When the label types are enabled, they appear in the **Label** menu in the Label Manager.

**Tip:**

The page size must be larger than the label size.

5. Change the page size, margins, or text alignment on the page of labels as follows:
  - a. Right-click in the **Page Size** cell associated with the label type and select **Open**, or tab to the cell and press **Enter**.

The Page Details dialog box appears.

**Tip:**

The measurements are in .Net units (1 unit = 1/100 inch).

- b. Type numeric values in the **Width** and **Height** boxes to specify the dimensions of the labels page.
  - c. Type numeric values in the **Top Margin** and **Left Margin** boxes to determine the placement of the first label on the page.

**Tip:**

If you prefer using the keyboard, you can tab to the **Text Alignment** box and type **L** for left, **C** for center, or **R** for right text alignment.

- d. Select **Center**, **Left**, or **Right** in the **Text Alignment** box to align the text on the label page.
  - e. Click **OK** to save your changes and return to the Label Configuration window.

**Tip:**

The label size must be smaller than the page size.

6. Change the label size, adjust the spacing, modify the text alignment on the label, or specify the label content as follows:
  - a. Right-click in the **Label Size and Content** cell associated with the label type and select **Open**, or tab to the cell and press **Enter**.

The Label Details dialog box appears.

- b. Type numbers for the label's dimensions in the **Width** and **Height** boxes.
- c. Type numbers in the **Vertical Spacing**, **Horizontal Spacing**, and **Indent** boxes to specify the white space between the label borders and the text in the label.
- d. Select the content type in the **Content** box.

**Note:**

The content type is determined by the selections on the Content tab. For information on specifying content for the label types, see [Define the label content](#).

- e. Click **OK** to save the label details.

7. Modify the font as follows:

- a. Right-click in the **Font** cell for the label and select **Open**, or tab to the column, and press **Enter** in the label row.

The Font dialog box appears.

- b. Select the **Font**, **Font Style**, **Size**, **Effects** and **Script** for the text on the label.

8. Click **OK** to save your changes and return to the Label Configuration dialog box.

## Define the Label Content

To set up label content types:


**Note:**

To access the Label Configuration dialog box, select **Profiles, Staff Client, Labels: Options**.

1. Select the Content tab on the Label Configuration dialog box.

The Content tabbed page appears.


2. Select the type of label for which you want to define the content in the **Content type** box.


3. To add a new label content type, click  and type a name for the new content type in the **Add new content type** box.


**Note:**

You cannot create a new label content type at the workstation level in Polaris Administration, but you can assign existing content to the label type.

**Tip:**

To remove fields from the label, select the fields in the **Top Section**, **Middle Section**, or **Bottom Section** box, and click .

4. Select the fields to include in the label from the **Options** list, and click  next to the **Top Section**, **Middle Section**, or **Bottom Section** box. The available selections depend on the content type you selected.

The text wraps within the label section, and breaks separate the sections. To change the position of fields within the sections on the label, select the field, and click the **Up** or **Down** button that corresponds to the section. To delete a content type, select it and click . You cannot delete the default label content types (Spine, Pocket, or Serial) or content types that are used in a label type.

5. Click **Save** to save the label.

---

## Creating Custom Labels

If the available label types do not meet your library's needs, you can set up customized labels in Label Manager. Once the custom labels are defined, they are available in the drop-down list from the Label Manager and from the other areas where labels can be printed. Custom labels can be configured in the Label Configuration dialog box. When you close and reopen Label Manager, the custom label is retained, but the label displayed in the Label Manager window is the default label defined in Polaris Administration.

To define a custom label type:

1. From the Polaris shortcut bar, select **Utilities > Label Manager**.

The Label Manager window appears.



2. Select **Tools > Design Custom Label**.

The Customize Label dialog box appears.

**Tip:**

The limit for the label type name is 80 characters. The name should identify the library and the label stock, for example: OCPL Pocket.

3. Type a name for the label in the **Label Type** box.
4. Select the organization that owns the label in the **Owner** box.
5. Set the page dimensions, margins, and text alignment as follows:

**Tip:**

The page size must be larger than the label size.

- a. Click the **Open** button in the **Page Size** row, or tab to the **Open** button and press **Enter**.

The Page Details dialog box appears.

- b. Set the page dimensions by typing numeric values in the **Width** and **Height** boxes.

**Note:**

The measurements are in .Net units (1 unit = 1/100 inch).

- c. Set the page margins by typing numeric values in the **Top Margin** and **Left Margin** boxes.
  - d. Select the text alignment in the **Text Alignment** box.
  - e. Click **OK** to close the Page Details dialog box.
5. Set the label's dimensions, spacing, and content as follows:
- a. Click the **Open** button in the **Label Size & Content** row, or tab to the **Open** button and press **Enter**.  
The Label Details dialog box appears.
  - b. Set the label's dimensions by typing numeric values in the **Width** and **Height** boxes.

**Tip:**

The measurements are in .Net units (1 unit = 1/100 inch).

- c. Set the amount of spacing between labels by typing numeric values in the **Vertical Spacing** and **Horizontal Spacing** boxes.
- d. Set the indent from the left edge of the label by typing numeric values in the **Indent** box.
- e. Select the content type for the labels in the **Content** box.

**Note:**

The content types are set in the Label Configuration dialog box. See [Define the label content](#).

- f. Click **OK** to close the Page Details dialog box and return to the Customize Label dialog box.

6. Set the font for the custom labels as follows:

- a. Click the **Open** button in the **Label Font** row, or tab to the **Open** button and press **Enter**.

The Font dialog box appears.

- b. Choose the font, font style, point size, and any other characteristics, and click **OK** to return to the Customize Label dialog box.

7. Click **Save** to save the custom label you created.

The custom label appears in the Label menu in Label Manager and in the list of enabled label types in the Label Configuration dialog box.

## Setting the Default Label Printers

For each enabled label type, you can set a default label printer in Label Manager. To set a default label printer:

1. Select **Utilities** on the Polaris Shortcut Bar and select Label Manager.

The Label Manager appears.

2. Select **Tools > Set Default Printers**.

The Set Default Printers dialog box appears.

3. For each label type that is enabled and appears in the **Label Type** column, select the default printer in the **Printer Name** column.

**Note:**

The choices depend on what printers have been installed on the workstation.

4. Click **Save** to save the printer selections.

## Carousel Toolkit

With the Carousel Toolkit, libraries can copy a code "snippet" for a content carousel from the Polaris ILS and paste the code into an external web site to display the content carousel. When users visit the web site and click the content carousel, the search results page displays in PowerPAC (via a deep link). Each branch can have a content carousel that points to its own PAC configuration. Users can click on a title in the carousel to go to the search results page at the branch (or system) connection specified in the Carousel Toolkit dialog box.

The Carousel Toolkit provides the code for content carousels from a bibliographic record set or from one of the following system-supplied automatic web parts (dashboard elements):

- Book Sense best seller lists
- New Books
- New Large Print
- New Sound Recordings
- New Videos
- Most Circulated Titles
- On Order Titles

The Carousel Toolkit is licensed at the system level; branches that do not want to use the feature can manage access to the feature through permissions. To use the Carousel Toolkit, staff members must be assigned the Access Carousel Toolkit: Allow permission.

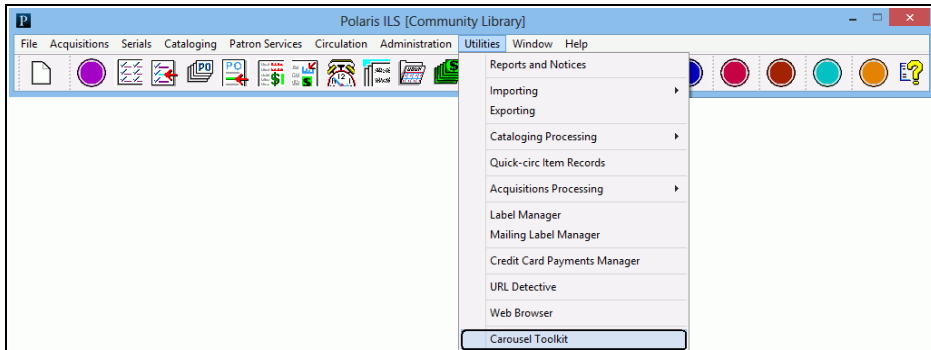
To display cover images in content carousels, enriched data must be set up in Polaris Administration. See the *Public Access Administration Guide*, Enabling Enriched Data. If cover images are not enabled in Administration, the carousels display the format icons and bibliographic information, but no cover images.

See also:

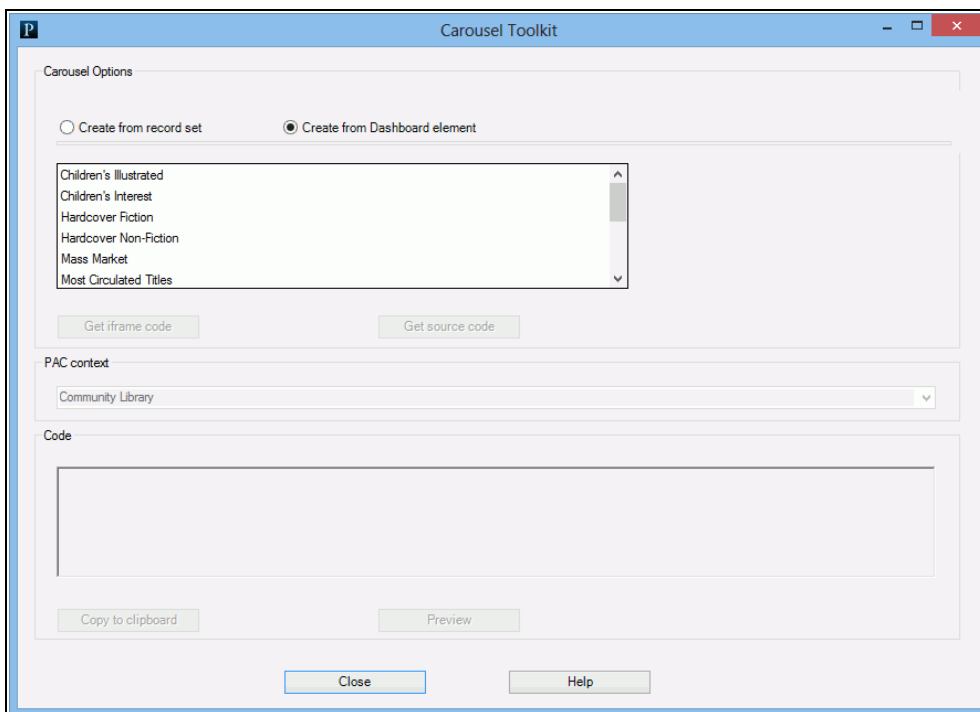
- [Generating and Copying Content Carousel Code](#)
- [Placing Multiple Carousels on a Page](#)

## Generating and Copying Content Carousel Code

To generate and copy the content carousel code for a record set or dashboard element:  
Select **Utilities > Carousel Toolkit**.



The Carousel Toolkit dialog box opens.

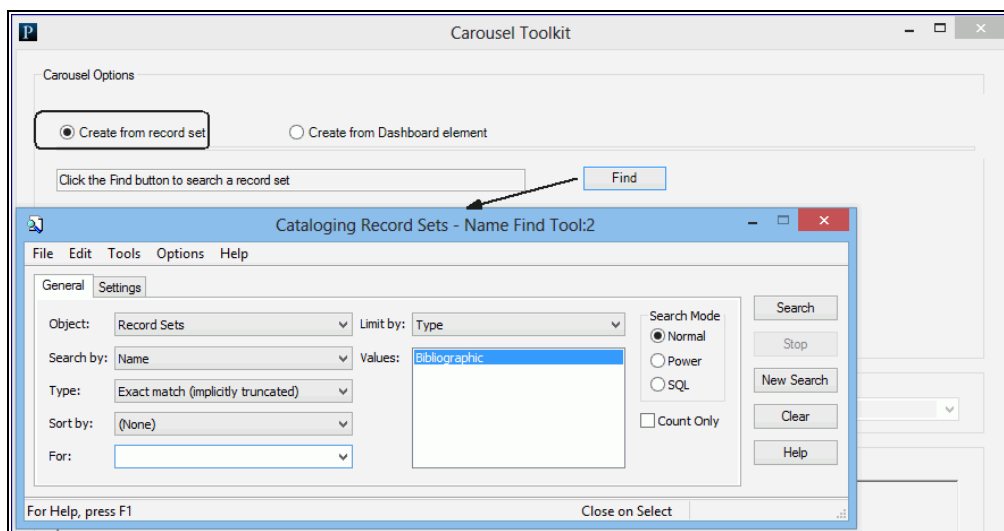


**Tip:**

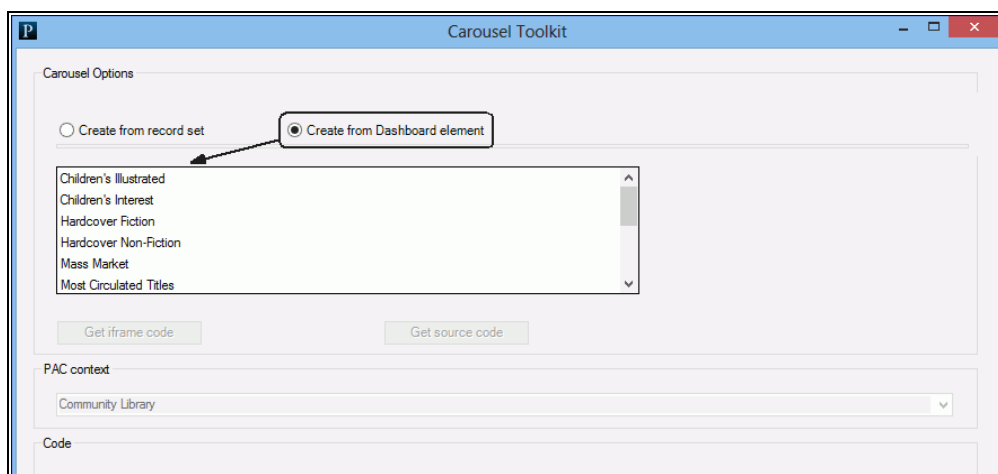
If the record set is modified after it is selected in the carousel toolkit, it can still be selected for the carousel.

Select one of the following options to create the content carousel:


**Create from record set** - Click **Find**. The Find Tool opens with bibliographic record set selected. Search for and select the record set.



**Create from Dashboard element** - Select a single dashboard element from the list.



If you want to change the PAC connection branch where users will go when they click the title in the carousel, select a different branch in the PAC context drop-down list.



PAC context

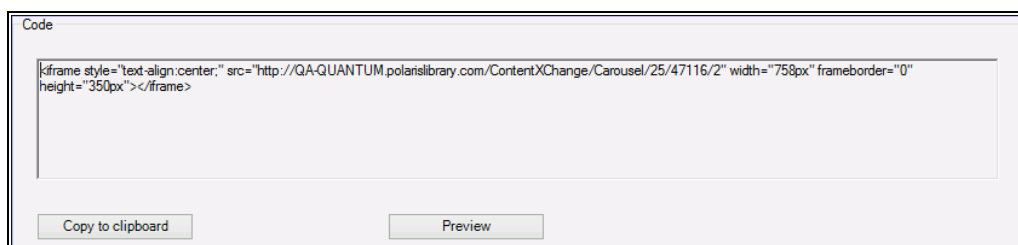
Community Library

**Note:**

The **PAC context** box displays the branch for your user login, but you can select another branch or the system. The drop-down list contains the system PAC connection and all branches that are not suppressed in the system-level PAC profile setting **Suppress branches**.

After selecting the record set or dashboard element, select one of these options:

**Get iframe code** - The iframe code is displayed in the **Code** box.

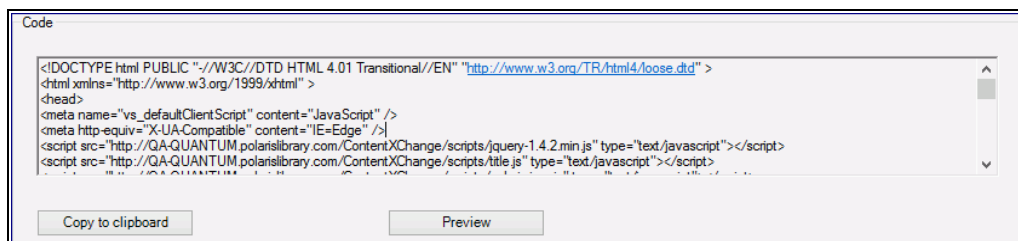


Code

```
<iframe style="text-align:center;" src="http://QA-QUANTUM.polarislibrary.com/ContentXChange/Carousel/25/47116/2" width="758px" frameborder="0" height="350px"></iframe>
```

Copy to clipboard Preview

**Get source code** - The source code is displayed in the **Code** box.



Code

```
<!DOCTYPE html PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN" "http://www.w3.org/TR/html4/loose.dtd" >
<html xmlns="http://www.w3.org/1999/xhtml" >
<head>
<meta name="vs_defaultClientScript" content="JavaScript" />
<meta http-equiv="X-UA-Compatible" content="IE=Edge" />
<script src="http://QA-QUANTUM.polarislibrary.com/ContentXChange/scripts/jquery-1.4.2.min.js" type="text/javascript"></script>
<script src="http://QA-QUANTUM.polarislibrary.com/ContentXChange/scripts/title.js" type="text/javascript"></script>
```

Copy to clipboard Preview

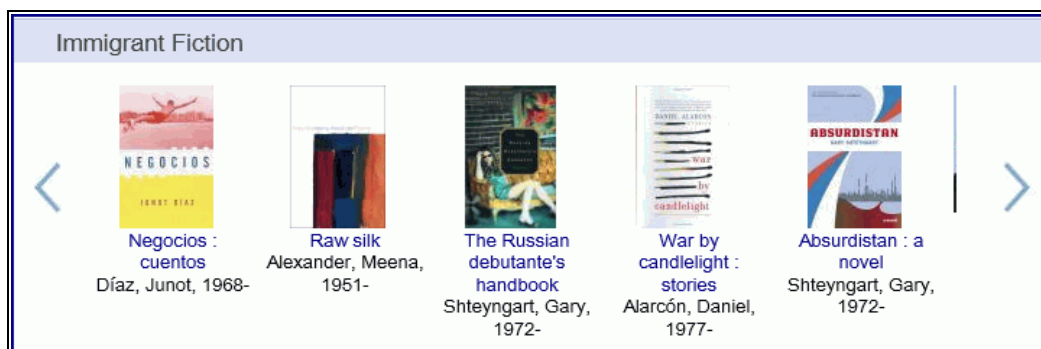
To see how the content carousel will look in the web page, click **Preview**.

To see the preview, a browser must be installed and accessible on the workstation.

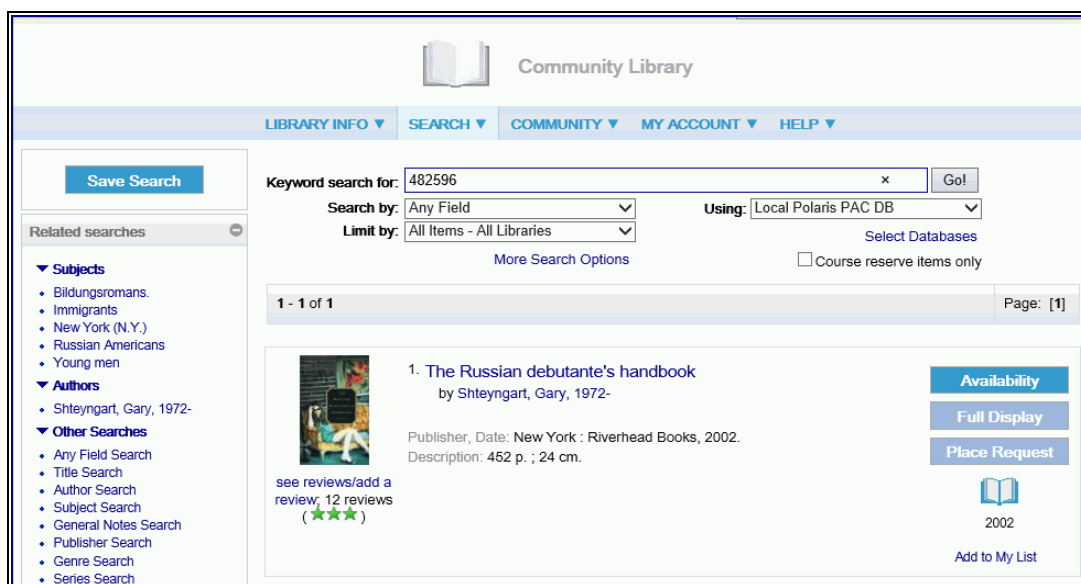
When the source code or iframe code is displayed in the **Code** box, click **Copy to clipboard**.

Paste the code snippet into the code for a web page.

The content carousel is displayed in the web page.



When a user selects a title in the content carousel, the title is displayed in the Polaris PowerPAC for the branch (or the system) selected in the **PAC context** box.



## Placing Multiple Carousels on a Page

To place multiple carousels on a page:

1. [Generate and copy carousel source code](#) into the HTML document for each carousel that you wish to place on the page.
2. Remove extra <DOC>, <HTML>, <HEAD>, and <BODY> tags. These should only appear in the HTML document once.



3. Rename additional DIV tags and references for each additional carousel after the first. For example, each carousel has a section of code similar to that shown below. For additional carousels 2 and 3, change the highlighted areas to div2 and div3.

```

<script>
var url = 'http://QA-QUANTUM.polarislibrary.com/ContentXChange/APICarouselToolKit/92/11/4?callback=?';
$.getJSON(url, function (data) {
var Div1 = document.createElement("div");
Div1.id = "id-drawer-head-xri" + data.CarrouselUniqueID;
Div1.className = "statichead";
Div1.innerHTML = data.CarouselName;
var Div2 = document.createElement("div");
Div2.id = "id-drawer-body-xri" + data.CarrouselUniqueID;
Div2.className = "drawer-body";
Div2.innerHTML = data.Carousel_Str;
$("#div1").append(Div1);
$("#div1").append(Div2);
var DivName = "#" + data.CarrouselUniqueID
var nItems = data.nCarLength
if (nItems > 0)
{
jQuery(DivName).river({ scroll: 5, wrap: 'circular', size: nItems });
}
else
{
var Div3 = document.createElement("div");
Div3.id = "id-drawer-body-xri" + "NoItemsFound";
Div3.className = "drawer-body2";
Div3.innerHTML = "No titles are available for display at this time. For more information, please consult with a lib:
$("#div1").append(Div3);
}
});
</script>
<div id="div1">
</div>

```

## Cataloging Shortcut Keys

These charts list the keyboard shortcuts you can use with Polaris cataloging workflows.

- [Record Operations Shortcut Keys](#)
- [Navigation Actions](#)
- [MARC Editor \(Keyboard\)](#)
- [Select Actions \(Keyboard\)](#)
- [Select Actions \(Pointer\) Shortcut Keys](#)

### Record Operations Shortcut Keys

FUNCTION	KEYS
Workform help	F1
Print current view	CTRL+P
Save record	CTRL+S
Check for duplicates	CTRL+I
Check headings	CTRL+J
Display MARC description	CTRL+L
Check MARC format	CTRL_M
Display Macros tool bar	ALT+F8
Display Find Tool with Item Records selected	CTRL+ALT+F9
Display Find Tool with Bibliographic	F12

<b>FUNCTION</b>	<b>KEYS</b>
Records selected	
Check Authority headings	ALT+S
Check for linked records	ALT+C
Bulk change records	CTRL+B
Add records to record set	CTRL+E
Remove records from a record set	CTRL+R
Create record set of linked items from the Bibliographic Record Set workflow	CTRL+T
Create record set of linked items from the Item Record Set workflow	CTRL+T
Print single labels from the Item Record workflow	CTRL+ALT+L
Print multiple labels from the Item Record	CTRL+ALT+M

FUNCTION	KEYS
workform	

## Navigation Actions Shortcut Keys

FUNCTION	KEYS
Move cursor up	up arrow
Move cursor down	down arrow
Move cursor left	left arrow
Move cursor right	right arrow
Go to beginning of word	CTRL+left arrow
Go to end of word	CTRL+right arrow
Previous subfield	SHIFT+TAB
Next subfield	TAB
Next tag	CTRL+down arrow
Previous tag	CTRL+up arrow
Beginning of record	CTRL+HOME
End of record	CTRL+END
Beginning of line	HOME
End of line	END
Previous screen	PAGE UP

FUNCTION	KEYS
Next screen	PAGE DOWN

## MARCEditor Shortcut Keys

FUNCTION	KEYS
Insert blank line	ENTER
Insert subfield delimiter	CTRL+Q
Insert fill character	SHIFT+I
Insert blank character	Space
Sort fields	CTRL+N
Delete highlighted text	DELETE
Delete character left	BACKSPACE
Delete character right	DELETE
Delete word left	CTRL+BACKSPACE
Delete word right	CTRL+DELETE
Cut highlighted text	CTRL+X
Copy highlighted text	CTRL+C
Paste text	CTRL+_V
Insert mode	INSERT

FUNCTION	KEYS
Undo last action	CTRL+Z
Redo last action	CTRL+Y
Unicode to character	ALT+X

## Select Actions (Keyboard) Shortcut Keys

FUNCTION	KEYS
Select all lines	CTRL+A
Select to end of word	SHIFT+CTRL+right arrow
Select to beginning of word	CTRL+SHIFT+left arrow
Select to end of line	SHIFT+END
Select to beginning of line	SHIFT+HOME
Select entire tag	SHIFT+CTRL+down arrow
Select multiple lines	SHIFT+down arrow
Select or extend a block of text	SHIFT+arrow keys

## Select Actions (Pointer) Shortcut Keys

FUNCTION	KEYS
Select the entire word	Double-click the word

FUNCTION	KEYS
Select the entire tag field	Double-click the tag number
Select the entire line	Triple-click the tag number
Select multiple lines	Drag the cursor along the left margin
Select a block of text	Drag the cursor over the text to highlight

## Glossary

---

### 0

---

#### **006 field**

Fixed-length Data Elements - Additional Material Characteristics: This field contains 18 character positions (00-17) that provide for coding information about special aspects of the item being cataloged that cannot be coded in field 008 (Fixed-Length Data Elements). It is used in cases when an item has multiple characteristics. It is also used to record the coded serial aspects of nontextual continuing resources. The field has a tree structure, whereby the code given in 006/00 (Form of material) determines the data elements defined for subsequent character positions. Except for code s (Serial/Integrating resource), the codes in field 006/00 correspond to those in Leader/06 (Type of record). For each occurrence of field 006, the codes defined for character positions 01-17 will be the same as those defined in the corresponding field 008, character positions 18-34. Configurations of field 006 are given in the following order: books, computer files/electronic resources, maps, music, continuing resources, visual materials, and mixed materials.

#### **007 field**

Physical Description, Fixed Field - This field contains special information about the physical characteristics in a coded form. The information may represent the whole item or parts of an item such as accompanying material. The data elements in field 007 are positionally defined and the number of character positions in field 007 depends upon the code contained in 007/00. Character position 00 contains a code that identifies the category of material. The fill character (I) is not allowed in this position. The fill character may be used in any other character position when the cataloging agency makes no attempt to code the position. The categories of material for which field 007 is applicable in bibliographic records are presented in the following order in the field description: map, electronic resource, globe, tactile material, projected graphic, microform, non-projected graphic, motion picture, kit, notated music, remote-sensing image, sound recording, text, videorecording, and unspecified.



---

**008 field**

Fixed-length Data Elements - General Information This field contains 40 character positions (00-39) that provide coded information about the record as a whole and about special bibliographic aspects of the item being cataloged. These coded data elements are potentially useful for retrieval and data management purposes. The data elements are positionally defined. Character positions that are not defined contain a blank (#). All defined character positions must contain a defined code; for some field 008 positions, this may be the fill character (I). The fill character may be used (in certain character positions) when a cataloging organization makes no attempt to code the character position. The fill character is not allowed in field 008 positions 00-05 (Date entered on file). Its use is discouraged in positions 07-10 (Date 1), 15-17 (Place of publication, production, or execution), and the 008 position defined for Form of item (either position 23 or 29 depending upon the 008 configuration). Character positions 00-17 and 35-39 are defined the same across all types of material, with special consideration for position 06. The definition of character positions 18-34 was done independently for each type of material, although certain data elements are defined the same in the specifications for more than one type of material. When similar data elements are defined for inclusion in field 008 for different types of material, they occupy the same field 008 character positions.

---

**A****added entry**

A secondary entry to the main entry in a MARC record.

**approval plan**

An arrangement with a publisher or vendor to send materials automatically. With an approval plan, it is not necessary for the library to order each title individually, and titles that are not considered appropriate may be returned by the library. An approval plan with a vendor is usually an agreement that the library will receive current imprints selected for the library on the basis of a detailed profile.

**ASN (Advanced Shipping Notice)**

An advance shipping notice or advance ship notice (ASN) is an electronic notification of pending shipments that is provided by a supplier after an EDI order is received and processed. If the supplier has the capability to produce ASNs (X12

---

transaction set 856), the Polaris EDI Agent utility retrieves the shipment information, and loads the data into Polaris. This enables users to receive materials in Polaris by scanning the tracking barcode on the outside of the carton.

---

## B

### **blanket plan**

A blanket plan (also called a blanket order) is most commonly used for ordering all materials or a specific subset of materials that are published by an organization. In contrast with approval plans, blanket plans do not generally allow return privileges with simple deductions from the invoice. With blanket plans, quality is less important than comprehensiveness of coverage. Blanket plans can be as narrow as a specific publisher's series or as broad as a request to send all material of a particular type or on a particular subject.

### **blind reference**

1) An authority link (see or see also - 4xx and 5xx respectively) which points to an authority heading that does not exist in the database. 2) An authority heading (1xx) to which no bibliographic records are linked.

---

## C

### **cataloging source**

A code stored in tag 040 \$a that tells who created the record. These codes are governed by the MARC code list for libraries.

### **chronology**

The date(s) used by the publisher on a serially-issued bibliographic unit to help identify or indicate when it was published. The chronology may reflect the dates of coverage, publication, or printing.

### **content designators**

Tags, indicators, and subfield codes in a MARC record.

---

**D**

---

**delimiter**

A separate character used in conjunction with a subfield code and introduces each subfield in a variable field.

**deposit account**

A deposit account is an account with a vendor that allows customers to pay all or a portion of the estimated annual billing in advance. Depending on the amount prepaid, the typical discount is from 1.5% to 4.5% more than with a regular plan, where invoices are paid after the receipt of titles.

**diacritical mark**

Any of various marks, such as a macron or cedilla, added to a letter or symbol to indicate its pronunciation or to distinguish it in some way.

---

**E**

---

**enumeration**

The designation reflecting the alphabetic or numeric scheme used by the publisher on an item or assigned when the holdings statement is created to identify the individual bibliographic or physical parts and to show the relationship of each unit to the unit as a whole.

**express registration**

Entering patron information during the check-out process as a service to new, unregistered patrons.

---

**F**

---

**first available copy requests**

Hold requests for specific issues of a serial title (such as the May 2015 issue of *Horticulture Magazine*) or specific parts of a multi-part title (such as the first season of a television series on DVD).

---

**form subdivision**

A division of a subject heading which brings out the form of the work. For example, in the headings: Internet (Computer network) - Periodicals Library technicians - Bibliography

**free days**

A value applied at normal and bulk check-in, renewal, and offline that allows you to omit a specified number of days from the overdue fine calculation.

---

**G****geographic qualifier**

The name of a larger geographic entity added to a local place name. For example, in the headings: Cambridge (Mass.) Toledo (Spain)

**geographic subdivision**

A subdivision which limits a topical subject heading to a specific geographic location. For example, in the headings: Women - Peru Libraries - New York (State)

---

**M****monographic series**

A group of monographs with a collective title in addition to their individual titles. The individual titles may or may not be numbered. The collective title is generally found on the title page or the cover of each monograph.

---

**N****non-integrated serial**

A non-integrated serial is an item that is linked to a bibliographic record with a MARC bibliographic level entry of S , but is not linked to a Serial Issue Record created through the Polaris Serials Module.

---

**R**

---

**RTF**

Requests-To-Fill or RTF processing sends hold requests to designated libraries in a specified order. A library chooses to fill or deny the request. The request is routed until it is filled, it expires, or every library denies it.

**RTF routing cycle**

The request-to-fill (RTF) routing cycle includes a primary and a secondary cycle defined by the Holds Routing Tables. You can enter a number of branches as responder branches, beginning with the requestor (your) branch. The cycle tries to fill a hold at the same branch first, and then tries to fill the hold at the next branch listed in the primary routing table. After a preset amount of time, the branches in the secondary table try to fill the hold, each in turn.

---

**S**

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**SICI**

The colloquial name for Serial Item and Contribution Identifier. The SICI is the SISAC bar code. The SICI incorporates the ISSN and is used on scholarly, technical, medical and other subscription based serials.

**SISAC**

Serials Industry Systems Advisory Committee. This committee was instrumental in creating the supporting documentation for the NISO z39.56 standard.

**standing order**

An order placed with a vendor or the publisher directly for all publications in a series, all volumes in a set, or all publications of a single publisher.

---

**T**

---

**trapped**

An item is said to be trapped for a hold when an item that fills a request is scanned at circulation and the system links the item to a specific request, either automatically or by displaying a message that prompts you for a decision.

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