



Technical Services Administration Guide

6.7

© 2020

Legal Notices

© Innovative Interfaces Incorporated and/or its affiliates. All rights reserved. All trademarks shown are the property of their respective owners.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

The software and related documentation are provided under an agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of the software, unless required by law for interoperability, is prohibited.

Contents

Cataloging Administration Overview	1
Cataloging Workflow Permissions	2
Enabling Language Display/Entry in Cataloging	18
Cataloging Permissions	20
Managing MARC Re-indexing	22
Managing Auto-Search Suggestions	24
Displaying Cataloging Records	25
Managing Duplicate MARC Records	26
Copying Bib Data to Items	43
Setting Item Copy and Save Options	50
Administering MARC Validation and Display	54
Managing Importing	63
Managing Authority Control	65
Displaying Warning Messages for Bibs and Items	67
Setting Utility to Delete Bib Tags Marked with Subfield 9	69
Managing Record Deletion	73
Setting the Cataloging Directory	75
Setting Up Labels	76
Recommendations for Label Types and Content	76
Set Label Profiles	77
Configuring Existing Label Types	79
Creating Custom Labels	86
Setting the Default Label Printers	88

Acquisitions Administration Overview	90
Acquisitions Administration Overview	1
Acquisitions Workflow Permissions	2
Setting the Acquisitions/Serials default directory	18
Filtering Branches in Line Items	19
Administering Funds/Fiscal Years	22
Managing Selection Lists	27
Managing Supplier Records	30
Administering Purchase Orders	32
Automatically Close Purchase Orders	38
Setting Up EDI Ordering	40
Purging Purchase Orders & Invoices	59
Managing Receiving	64
Setting Up Titles to Go	70
Administering Foreign Currencies	73
Managing Fiscal Year Rollovers	78
Serials Administration Overview	93
Serials Workflow Permissions	93
Serials Permissions	101
Setting the Check In Display	103
Setting Up the Check In Prompt	104
Setting Delete of Issue/Part with Item	104
Setting Up Subscriptions	105
Setting Up Routing	106
Setting Up Serials Claiming	109
Cataloging Administration Reference	111
Cataloging Permissions Reference	111

Cataloging Profiles Reference	120
Acquisitions Administration Reference	135
Acquisitions Workflow Permissions	135
Acquisitions Permissions Reference	150
Acquisitions and Serials Profiles Reference	154
Acquisitions Parameters Reference	158
Serials Administration Reference	165
Serials Permissions Reference	165
Serials Profiles Reference	166
Serials Parameters Reference	167
Glossary	169
Index	175

Cataloging Administration Overview

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

Polaris Administration settings control how Polaris data is categorized, used, and stored, and what functions are available to staff and patrons. You can make most administration settings by two methods: through the Administration Explorer, and through the appropriate workflow for a specific record. You use profiles and parameters to control automated processes, set defaults, indicate the default directory for reports, and specify whether deleted records are retained in the database. In addition, you can set staff members' profiles to allow them to override blocks in Cataloging.

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

See these topics:

- [Enabling Language Display/Entry in Cataloging](#)
- [Managing MARC Re-indexing](#)
- [Managing Auto-Search Suggestions](#)
- [Displaying Cataloging Records](#)
- [Deleting MARC Tags from Incoming Bibs](#)
- [Administering MARC Validation and Display](#)
- [Managing Duplicate MARC Records](#)
- [Managing Importing](#)
- [Managing Authority Control](#)
- [Copying Bib Data to Items](#)
- [Setting Item Copy & Save Options](#)
- [Displaying Warning Messages for Bibs and Items](#)
- [Setting Utility to Delete Bib Tags Marked with Subfield 9](#)
- [Managing Record Deletion](#)
- [Setting the Cataloging Directory](#)

Cataloging Workflow Permissions

The following table lists cataloging tasks, the Polaris permissions required to do the tasks, the administrative levels at which they can be set, and the subsystems where the permissions are located. For a list of all cataloging permissions and the level at which they can be set, see [Cataloging Permissions Reference](#).

Note:

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

- Access administration: Allow
- Modify parameters: Allow
- Modify profiles: Allow

Workflow	Required Permissions	Administration Explorer Security Location
Maintain the Authority Catalog		

Workflow	Required Permissions	Administration Explorer Security Location
<p>Maintain authority control headings</p> <p>Additional permission for enabling or disabling automatic re-indexing during the next server upgrade.</p>	<p>Access cataloging subsystem: Allow</p> <p>Authority records: Access</p> <p>Authority records: Create</p> <p>Authority records: Delete/Undelete</p> <p>Authority records: Modify</p> <p>Authority templates: Access</p> <p>Authority create links to authority records</p> <p>Authority create links to bibliographic records</p> <p>Access MARC Re-index during next server upgrade: Allow</p>	<p>System - Cataloging</p> <p>System - Cataloging</p> <p>System - Cataloging</p> <p>System - Cataloging</p> <p>System - Cataloging</p> <p>System, Library - Cataloging</p> <p>System - Cataloging</p> <p>System - Cataloging</p> <p>System - Cataloging</p>
<p>Maintain the standard authority control templates for the organization</p>	<p>Access cataloging subsystem: Allow</p> <p>Authority records: Access</p> <p>Authority templates: Access</p> <p>Authority templates: Create</p> <p>Authority templates: Delete</p> <p>Authority templates: Modify</p>	<p>System - Cataloging</p> <p>System - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System, Library, Branch - Cataloging</p>
<p>Use and edit the authority</p>	<p>Use 'own' authority templates: Allow</p>	<p>System - Cataloging</p>

Workflow	Required Permissions	Administration Explorer Security Location
record templates the staff member created. (Add this permission to other authority control permissions to give staff members the ability to use their own templates without affecting the organization's templates.)		
Maintain the Bibliographic Catalog		
Add bibliographic entries to the catalog (original and copy cataloging)	Access cataloging subsystem: Allow Bibliographic records: Access Bibliographic records: Create Bibliographic records: Modify Bibliographic templates: Access	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Create authority records from heading tags in a bibliographic record	Authority records: Create Bibliographic records: Access	System - Cataloging System, Library, Branch - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
Maintain existing bibliographic records, including replacing and protecting records.	Access cataloging subsystem: Allow Bibliographic records: Access Bibliographic records: Delete/Undelete Bibliographic records: Modify Modify Do not Overlay setting in Bib records: Allow	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging
Prevent warning messages from appearing when deleting multiple bibliographic records	Suppress warnings for breakable links when deleting multiple bibliographic records: Allow Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple bibliographic records: Allow	System - Cataloging System - Cataloging
Additional permission for enabling or disabling automatic re-indexing during the next server upgrade.	Access MARC Re-index during next server upgrade: Allow	System - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
Bulk change bibliographic records	Access cataloging subsystem	System - Cataloging
	Bibliographic records: Access (for all records)	System, Library, Branch - Cataloging
	Bibliographic records: Modify (for all records)	System, Library, Branch - Cataloging
	Cataloging record sets: Access	System, Library, Branch - Cataloging
	Cataloging record sets: Create	System, Library, Branch - Cataloging
	Cataloging record sets: Delete/Undelete	System, Library, Branch - Cataloging
	Cataloging record sets: Modify	System, Library, Branch - Cataloging
	Access bibliographic bulk change: Allow	System - Cataloging
	Access bibliographic fixed fields bulk change: Allow	System - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
Maintain bibliographic record templates used by the entire organization	Access cataloging subsystem: Allow Bibliographic templates: Create Bibliographic template: Access Bibliographic templates: Delete Bibliographic templates: Modify Bibliographic records: Access	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Use and edit the bibliographic record templates the staff member created. (Add to other bibliographic record permissions so staff members can use their own templates without affecting the organization's templates.)	Use 'own' bibliographic templates: Allow	System - Cataloging
Protect bibliographic records from overlay.	Modify do not overlay setting in bib records: Allow Bibliographic records: Access Bibliographic records: Modify (To change the setting in	System - Cataloging (Note: The Cataloging parameter, Bibliographic record do not overlay feature, must be set to Yes to display the Do not overlay check box in the Bibliographic Record workflow, the Bib Bulk

Workflow	Required Permissions	Administration Explorer Security Location
	the Bib Bulk Change dialog or Import Setup window, the user must also have the required permissions for these functions.)	Change dialog box, and the Import Setup window.)
Maintain Item Records		
Add item records to the catalog	Access cataloging subsystem: Allow Item records: Create Bibliographic records: Access Item records: Access Item records: Modify cataloging view Item templates: Access Override invalid item barcode message: Allow	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System

Workflow	Required Permissions	Administration Explorer Security Location
Maintain existing item records	Access cataloging subsystem: Allow Item records: Access Item records: Modify cataloging view Item records: Modify header Item records: Modify history view Item records: Modify notes and notices view Item records: Modify reserves view Item records: Modify source and acquisition view Item records: Delete/Undelete Bibliographic records: Access Note - Item records: Create is necessary to change the owner on the item record.	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Prevent warning messages from appearing when deleting multiple item records	Suppress warnings for breakable links when deleting multiple item records: Allow Suppress warnings for unbreakable links and	System - Cataloging System - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
	other stopping conditions, when deleting multiple item records: Allow	
Override and continue when invalid barcode message appears	Override invalid item barcode message: Allow	System - Cataloging
Maintain item records for ephemeral items so that they can be circulated	Quick-circ item records: Access	Branch - Cataloging
	Quick-circ item records: Create	Branch - Cataloging
	Quick-circ item records: Modify	Branch - Cataloging
	Quick-circ item records: Delete	Branch - Cataloging
Create bibliographic records from item records or item templates	Create a bib record from the item or item template: Allow	System - Cataloging
Bulk change item records	Access cataloging subsystem: Allow	System - Cataloging
	Item records: Access	System, Library, Branch - Cataloging
	Item records: Bulk change	System, Library, Branch - Cataloging
	Item records: Modify header	System, Library, Branch - Cataloging
	Cataloging record sets: Access	System, Library, Branch - Cataloging
	Cataloging record sets:	System, Library, Branch -

Workflow	Required Permissions	Administration Explorer Security Location
	Create	Cataloging
	Cataloging record sets: Modify	System, Library, Branch - Cataloging
	Access item record bulk change: Allow	System - Cataloging
Bulk change item records using templates	Item bulk change templates: Access	System, Library, Branch - Cataloging
	Item bulk change templates: Create	System, Library, Branch - Cataloging
	Item bulk change templates: Delete	System, Library, Branch - Cataloging
	Item bulk change templates: Modify	System, Library, Branch - Cataloging
Maintain item templates used by the organization	Access cataloging subsystem: Allow	System - Cataloging
	Item templates: Create	System, Library, Branch - Cataloging
	Item templates: Delete	System, Library, Branch - Cataloging
	Item templates: Access	System, Library, Branch - Cataloging
	Item templates: Modify	System, Library, Branch - Cataloging
	Item records: Access	System, Library, Branch - Cataloging
Use and edit the item templates the staff	Use 'own' item templates: Allow	System - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
member created. (Add this permission to other workflow permissions to allow the staff member access to templates they created.)		
	Use 'own' item bulk change templates	System - Cataloging
Maintain Labels for the Organization		
Create, modify, and delete label configurations	Label Manager Configuration: Create Label Manager Configuration: Delete Label Manager Configuration: Modify	System - Cataloging System - Cataloging System - Cataloging
Maintain Import Profiles in Import Profile Manager		
Create, modify, and delete import profiles	Import profiles: Access Import profiles: Create Import profiles: Delete Import profiles: Modify	System - Cataloging System - Cataloging System - Cataloging System - Cataloging
Import Records		

Workflow	Required Permissions	Administration Explorer Security Location
Import bibliographic, authority, and item records using Express Import	Bibliographic records: Create Bibliographic records: Modify Authority records: Create Authority records: Modify Express import: Allow Item records: Create Cataloging record sets: Create Cataloging record sets: Access	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging System - Cataloging System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Import bibliographic, authority, and item records using Full Import	Bibliographic records: Create Bibliographic records: Modify Authority records: Create Authority records: Modify Import bibliographic, item and authority records: Allow Item records: Create Cataloging record sets: Create Cataloging record sets: Access	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging System - Cataloging System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Manage your own import	Import bibliographic, item	System - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
jobs from the import jobs queue	and authority records: Allow or Express import: Allow	
Manage import jobs for a branch or for the system	Manage import jobs for this organization: Allow	System, Branch - Cataloging
Specify blackout times when importing cannot be run.	Modify import blackout times: Allow	System - System Administration
Export Records		
Export bibliographic, authority, and item records from the Polaris catalog	Export bibliographic, item and authority records: Allow	System - Cataloging
Export Cataloging record sets from Leap to Excel Note: You can only export record sets owned at the System, Library, or Branch level. Record sets owned by individuals cannot be exported.	Cataloging record sets: Export	System, Library, Branch - Cataloging
Maintain Cataloging Record Sets		

Workflow	Required Permissions	Administration Explorer Security Location
Maintain authority, bibliographic, and item record sets used by the entire organization	Access cataloging subsystem: Allow Cataloging record sets: Access Cataloging record sets: Modify Cataloging record sets: Delete/Undelete Bibliographic records: Access Authority records: Access Item records: Access	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging System, Library, Branch - Cataloging
Use and edit the authority, bibliographic, and item record sets the staff member created	Use 'own' cataloging record sets	System - Cataloging
Purge Cataloging Records Marked as Deleted		
Maintain purge criteria that are used to purge cataloging records from the database when they are marked for deletion but retained in the database	Purge criteria: Access Purge criteria: Delete Purge criteria: Create Purge criteria: Modify	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Maintain Course Reserves		

Workflow	Required Permissions	Administration Explorer Security Location
Maintain course reserve records	Access cataloging subsystem: Allow Course reserve records: Access Course reserve records: Delete Course reserve records: Create Course reserve records: Modify Patron registration: Access Patron registration: Modify	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging Branch - Circulation Branch - Circulation
Maintain reserve items	Item records: Access Item records: Modify reserves view Auto delete processing of reserve item records: Allow	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging
Maintain reserve item templates used by the organization	Reserve item templates: Access Reserve item templates: Create Reserve item templates: Modify Reserve item templates: Delete	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Use and edit the reserve item templates the staff member created	Use 'own' reserve item templates: Allow	System - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
Maintain course reserve templates for the organization	Course reserve templates: Access Course reserve templates: Delete Course reserve templates: Create Course reserve templates: Modify	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Update URL Links		
Use the Polaris URL Detective, which is available from the Utilities menu if your library has purchased this product.	Use URL Detective: Allow	System - Cataloging
Maintain Community records		
Maintain Community records (if your library has purchased Community Profiles)	Community records: Access Community records: Create Community records: Modify Community records: Delete	System, Library, Branch, Staff, Workstation - Cataloging
Managing Event imports	Event import profiles: Access Event import profiles: Create Event import profiles: Modify Event import profiles:	System- Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
	Delete	
Maintain Promotion records		
Work with Promotion records (if your library has purchased Feature It)	Access cataloging subsystem: Allow Promotion records: Access Promotion records: Create Promotion records: Modify Promotion records: Delete	System System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Feature bibliographic records	Bibliographic records: Access	System, Library, Branch - Cataloging

Enabling Language Display/Entry in Cataloging

If you have the required Cataloging permissions, you can use the MARC Editor to enter text, including international characters and diacritics, on the MARC21 view of the Bibliographic and Authority workforms. These characters are defined in the MARC 21 Specifications for Record Structure, Character Sets, and Exchange Media (2007). The Unicode international characters are stored in UTF-16 and displayed in the Polaris user interface.

The MARC Editor uses the Segoe font by default. If a character does not exist in Segoe, a different font that supports that Unicode character will be used to display the character, provided that font has been installed on the workstation. The fonts are included in the language service packs from Microsoft. If Segoe and the other fonts used to display the characters are not installed, the MARC Editor will use Arial Unicode.

Note:

If the cataloging workstation is being used to catalog primarily in a

specific language, you may want to change the keyboard input setting. See the Cataloging PDF Guide, Enter diacritics/characters using an IME keyboard.

Cataloging Permissions

To use the Cataloging tasks in Polaris, staff members require specific permissions:

- For instructions on setting Cataloging security in Polaris Administration, see [Set Cataloging security](#).
- For a list of permissions required to do specific Cataloging tasks, see [Cataloging Workflow Permissions](#).
- For a reference list of Cataloging permissions, see [Cataloging Permissions Reference](#).

Set Cataloging security

To review and set Cataloging permissions:

1. In the Administration Explorer tree view, select the **Security** folder for the organization for which you want to set permissions.

The Security view is displayed in the details pane.

2. Double-click the **Cataloging** folder in the Control Record list.

The records and tasks are displayed in folders.

3. Expand the folder, and select the permission.

The permission groups, staff members, and workstations with that permission appear in the right pane of the Explorer.

4. Click **Assign**, and select **Permission Group**, **Workstation** or **Staff Member**.

The Find Tool appears.

5. Use the Find Tool to search for and select the staff member, permission group, or workstation to which you want to grant the selected permission.

The staff member, workstation, or permission group appears in the list of those that have the selected permission.

6. Select **File | Save** to save any changes.

For a list of Cataloging workflows and the permissions required to do the tasks, see [Cataloging Workflow Permissions](#).

For a list of Cataloging permissions, see [Cataloging Permissions Reference](#).

Managing MARC Re-indexing

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

Important:

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

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

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

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

See [Enable or Disable Automatic MARC Re-Indexing](#).

Enable or Disable Automatic MARC Re-Indexing

To allow or disallow automatic re-indexing of MARC records when the server is upgraded:

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

The system-level cataloging parameters are displayed.

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

Note:

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

4. Select **File | Save**.

Managing Auto-Search Suggestions

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

Important:

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

- Find Tool - Automatic suggestions appear when staff members do a keyword or phrase search in the Find Tool for any record and access point that is keyword-indexed.
- PAC - Automatic suggestions appear when patrons do quick, keyword, phrase, or advanced searches in Polaris PowerPAC.

See also:

- [Enable or disable the Auto-suggest feature](#)

Enable or Disable the Auto-Suggest Feature

To enable or disable automatic suggestions that appear for certain phrase and keyword searches in the Find Tool, and for quick, keyword, phrase, and advanced searches in Polaris PowerPAC:

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Parameters** and select the **Cataloging** tab.
The Cataloging parameters appear.
3. Select **Auto-suggest feature enabled**, and select **Yes** to enable this feature or **No** to disable this feature.
4. Select **File | Save**, click the save icon or press **Ctrl+S**.

Displaying Cataloging Records

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

See also:

- [Set the circulation history display for item records](#)

Set the Circulation History Display for Item Records

To set the cataloging parameters for the Item Record workform - Circulation History view:

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Parameters** and select the **Cataloging** tab to access the system-level Cataloging parameters.
3. To change the Item Record - Circulation History view, do the following:
 - Select **Yes** or **No** in the **Item record history display assigned branch** value to turn on or off the display of the assigned branch.
 - Select **Yes** or **No** in the **Item record history display patron ID** value to turn on or off the display of the patron ID.
 - Type a different number in the **Item record history time threshold** value to change the number of days a circulation transaction or status change is displayed.
4. Select **File | Save**.

Managing Duplicate MARC Records

Bibliographic and authority records are checked for duplicates automatically when new records are saved or when existing records are checked for duplicates. When you import records, the options for handling potential duplicates can be set in the import profile. See the Cataloging PDF Guide, Setting Up Import Profiles and Importing Records.

The following Cataloging Administration settings are used to manage duplicate detection and overlay:

- **Bibliographic Deduplication** - Rules in this database table determine if imported or saved bibliographic records are duplicates of existing records. For details, see [Bibliographic Duplicate Detection Rules Reference](#).
- **Authority Deduplication** - Rules in this database table determine if imported or saved authority records are duplicates of existing records. For details, see [Authority Duplicate Detection Rules Reference](#).

Note:

You can modify the rule groups in the deduplication tables to include or exclude rules, and you can create rule groups, but you cannot add or modify the rules themselves. The deduplication tables are set up by Innovative Interfaces during Polaris implementation, and the table entries apply to all organizations.

- **Bibliographic Tags to Retain/Delete** - This policy table is used in duplicate detection to specify tags to retain from overlaid duplicate records. See [Specify tags to retain from overlaid bibs](#).
- **Authority Overlay Retention** - This policy table identifies tags to transfer to a new authority record from the duplicate record that is being overlaid. If the authority record contains a tag that is listed in the retention table, the data in the tag is copied into the new record. See [Specify tags to retain from overlaid bibs](#).
- **Authority Record Import: Preferred Cataloging Source** - This policy table identifies the preferred cataloging sources for imported authority records. If the imported record is a duplicate of an existing record, and the incoming record's cataloging

source is preferred over the existing record's source, the existing record is overlaid with the new record. See [Specify preferred cataloging sources for authority records](#).

- **Bibliographic records replace: Maximum allowed in one operation** -This system-level parameter limits the number of records that can be replaced at once. See [Set the number of bibs that can be replaced at once](#).
- **MARC validation immediately after bib replace** - If this profile is set to **Yes**, a MARC validation check is performed immediately after bibliographic records are replaced. This prevents situations such as non-repeatable tags accumulating in the record that overlays the duplicate records. See [Enable validation when duplicate bibs are replaced](#).
- **Check headings immediately after bib replace** - If this profile is set to **Yes**, the headings are checked as soon as a bibliographic record replaces one or more bibliographic records. See [Enable headings check when replacing bibs](#).
- **Bibliographic Record Do Not Overlay feature enabled** - If this system-level parameter is set to **Yes**, staff members with the appropriate permissions can protect certain bibliographic records from being overlaid by selecting the **Do not overlay** check box in the Bibliographic Record workform, the Bibliographic Bulk Change dialog box, the Bibliographic Record template workform, and the Bibliographic Records tab of the Import Setup window. If the parameter is set to **No**, the **Do not overlay** check box does not appear on these workforms or dialog boxes. See [Enable the Do not overlay feature](#).

Change Bibliographic or Authority Deduplication Tables

The Bibliographic Deduplication and the Authority Deduplication database tables contain the rules that determine if a bibliographic or authority record is a duplicate of an existing record. The rules are applied in groups to more efficiently determine a duplicate. Two records must meet all the rules in at least one group to be potential duplicates.

When records are checked for duplicates, the rules group name displays in the duplicate detection dialog box as the duplicate reason. You can rename the group so that the reason for the duplicate is clear. For example, if the rules group name is **245 \$a matches 245 \$a** you could rename it **Matching Title**.

Note:

These permissions are required to view and change the rules groupings in the deduplication tables: **Access administration: Allow; Access tables:**

Allow; Modify bibliographic deduplication table: Allow; Modify authority deduplication table: Allow

For details on the rules and how they are applied, see [Bibliographic Duplicate Detection Rules Reference](#) or [Authority Duplicate Detection Rules Reference](#).

To create a new rules group or modify an existing one:



1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Database Tables** folder.
3. Select the **Bibliographic Deduplication** or **Authority Deduplication** table to display the appropriate table in the details view.

Note:

When you first implement Polaris, a default set of rules groups appears. You can add or remove rules from a group, change the rules group name, add new rules groups, or delete a group.

Bibliographic Deduplication		
Rule Group	De-duplication Rules	Group Name
1	The 001 of the imported record matches the 010 \$a of an existing record	Rule group 1
2	The 001/003 of the imported record matches the 035 \$a of an existing record	Rule group 2
3	The 010 \$a of the incoming record matches the 010 \$a of an existing record	LCCN
4	The ISBN of the incoming record matches the ISBN of an existing record	ISBN
5	The 022 \$a of the incoming record matches the 022 \$a of an existing record	ISSN
5	The LDR/06 of the incoming record matches the LDR/06 of an existing record	ISSN
5	The LDR/07 of the incoming record matches the LDR/07 of an existing record	ISSN
6	The LDR/06 of the incoming record matches the LDR/06 of an existing record	Author/Title
6	The LDR/07 of the incoming record matches the LDR/07 of an existing record	Author/Title
6	The 1xx \$a of the incoming record matches the 1xx \$a of an existing record	Author/Title
6	The 245 \$a of the incoming record matches the 245 \$a of an existing record	Author/Title
6	The 008/07-10 of the incoming record matches the 008/07-10 of an existing rec...	Author/Title
7	The LDR/06 of the incoming record matches the LDR/06 of an existing record	Title/260 \$c
7	The LDR/07 of the incoming record matches the LDR/07 of an existing record	Title/260 \$c
7	The 245 \$a of the incoming record matches the 245 \$a of an existing record	Title/260 \$c
7	The last 260 \$c of the incoming record matches the last 260 \$c of an existing rec...	Title/260 \$c
8	The ISBN of the incoming record matches the ISBN of an existing record	Just Title and
8	The 245 \$a of the incoming record matches the 245 \$a of an existing record	Just Title and
9	The 010 \$a of the incoming record matches the 010 \$a of an existing record	Title/LCCN
9	The LDR/06 of the incoming record matches the LDR/06 of an existing record	Title/LCCN
9	The LDR/07 of the incoming record matches the LDR/07 of an existing record	Title/LCCN
9	The 245 \$a of the incoming record matches the 245 \$a of an existing record	Title/LCCN
10	The 001 of the imported record matches the 001 of an existing record	Control Number match
11	The 001 of the imported record matches the 001 of an existing record	Control Number Only
12	The 022 \$a of the incoming record matches the 022 \$a of an existing record	Control Number/ISSN/Title
12	The 245 \$a of the incoming record matches the 245 \$a of an existing record	Control Number/ISSN/Title
12	The 001 of the imported record matches the 001 of an existing record	Control Number/ISSN/Title

4. Do one of the following actions:

- To create a new rules group, click .
- To modify an existing group, select the group, and click .

The Create or Modify Deduplication Rules dialog box appears.

5. Do one of the following actions:

- To add a rule to the group, select the rules from the Available Rules list, and click **Select**.

Tip:

If you made changes to the group and you want to return the group to its state when you opened the dialog box, click **Reset**.

- To remove a rule from the group, select the rule in the Selections for Rule Group list, and click **Remove**.
 - To name or rename the rules group, type the name in the **Rules Group** box.
6. When you finish changing the current group, click **OK**.
 7. Select **File | Save**.

Bibliographic Duplicate Detection Rules Reference

Two bibliographic records are identified as potential duplicates based on the rules groups in the Bibliographic Deduplication table. Each rules group contains one or more rules. Two bibliographic records must meet all the rules in at least one group to be potential duplicates.

Note:

When you select custom duplicate detection rules in an import profile, each rule is applied as a group, so only one rule needs to be met to identify the records as duplicates. See the *Cataloging Guide*, Set import options for bibliographic records.

Rule	Comment
1. The 001 of the imported record matches the 010 \$a of an existing record.	
2. The 001 tag of the imported record matches the 035 \$a of an existing record.	Applies only to imported records. The 001 tag must match the numeric portion of the 035 tag (normalized). The parenthetical information in the 035 tag is ignored.
3. The 001/003 tags of the imported record matches any 035\$a subfield in the existing record.	Applies only to imported records. The 001 tag must match the numeric portion of the 035 tag (normalized). If the incoming record contains a 003 tag, the 003 data must match the parenthetical

Rule	Comment
	information in the 035 tag. If the incoming record lacks an 003 tag, the parenthetical information in the 035 tag is ignored.
4. The 010\$a subfield of the incoming record matches the 010\$a subfield in the existing record.	For LCCNs, the prefix, year, and serial number (the first 12 characters) must match. Suffixes and revision dates are ignored.
5. The ISBN in the incoming record matches any ISBN in the existing record.	The alphanumeric ISBN must match. Parenthetical and other information is ignored. This rule is applied to any 020 tag and also to any 024 tag where the first indicator = 3.
6. Any 022\$a subfield in the incoming record matches any 022\$a subfield in the existing record.	The 8-digit alphanumeric ISSN must match. Parenthetical and other information is ignored.
7. The LDR/06 value in the incoming record matches the LDR/06 in the existing record.	The value in the Record Type position of the Leader must match exactly.
8. The LDR/07 value in the incoming record matches the LDR/07 in the existing record.	The value in the Bibliographic Level position of the Leader must match exactly.
9. The 1xx\$a subfield in the incoming record matches the 1xx\$a subfield in the existing record.	The entire text of \$a subfield of both records must match. Punctuation is ignored. Tag and indicator values need not match.
10. The 245\$a subfield in the incoming record matches the 245\$a subfield in the existing record.	The entire text of \$a subfield must match. Punctuation is ignored. Indicator values need not match.
11. The 245\$a subfield in the incoming record matches any 246\$a subfield in	The entire text of \$a subfield must match. Punctuation is ignored. Indicator

Rule	Comment
the existing record.	values need not match.
12. Any 246\$a subfield in the incoming record matches the 245\$a subfield of the existing record.	The entire text of \$a subfield must match. Punctuation is ignored. Indicator values need not match.
13. Any 247\$a subfield in the incoming record matches the 245\$a subfield in the existing record.	The entire text of \$a subfield must match. Punctuation is ignored. Indicator values need not match.
14. The 008/07-10 values in the incoming record match the 008/07-10 in the existing record.	The date in the Beginning Date of Publication must match exactly in both records.
15. The last 260\$c subfield in the incoming record matches the last 260\$c subfield in the existing record.	The entire text of the \$c subfield must match in both records. Punctuation is ignored.
16. The 035a of the incoming record matches the 035\$a of an existing record.	
17. Any 035\$a subfield in the incoming record matches the 001 tag in the existing record.	This rule should be enabled only when a library is importing records that have been previously exported from the same Polaris database, when the intent is to have the incoming record replace the existing record.
18. The Bib record owner value in the incoming record matches the value in the existing record.	
19. The UPC of the incoming record matches the UPC of the existing record.	This rule is applied to any 024 tag where the first indicator value =1.
20. The 024\$a (excluding ISBN and UPC) of the incoming record matches the 024\$a (excluding ISBN and UPC) of an existing record.	This rule is applied to any 024 tag where the first indicator value is other than 1 or 3.

Rule	Comment
21.The 028\$a of the incoming record matches the 028\$a of an existing record.	
22.The 037\$a of the incoming record matches the 037\$a of an existing record.	
23. The 001 of the imported record matches the 001 of an existing record.	Applies only to imported records.

Authority Duplicate Detection Rules Reference

Two authority records are identified as potential duplicates based on the rules groups in the Authority Deduplication table.

Rule	Comment
1. The 001 tag of the imported record matches the 010\$a subfield in the existing record.	Applies only to imported records. For LCCNs, the prefix, year, and serial number (the first 12 characters) must match; suffixes and revision dates are ignored.
2. The 001/003 tags of the imported record matches any 035\$a subfield in the existing record.	Applies only to imported records. The 001 tag matches the numeric portion of the 035 tag (normalized). If the incoming record contains a 003 tag, the 003 data matches the parenthetical information in the 035 tag; if no 003 tag, the information in the 035 tag is ignored.
3. The 035\$a subfield of the incoming record matches any 035\$a subfield in the existing record.	
4. The 010\$a subfield of the incoming record matches the 010\$a subfield in the existing record.	For LCCNs, the prefix, year, and serial number (the first 12 characters) must match. Suffixes and revision dates are ignored.

Rule	Comment
5. Any 035\$a subfield of the incoming record matches the 001 tag in the existing record.	Library is importing records that have been previously exported from the same Polaris database, when the intent is to have the incoming record replace the existing record.
6. The 008/11 tag of the incoming record matches the 008/11 of the existing record.	Matches 008 subject heading system code of both records.
7. The 1xx tag of the incoming record matches the 1xx of the existing record.	Matches entire text of the 1xx tag (concatenation of all data fields).
8. The 010\$z of the incoming record matches the 010\$a of the existing record.	

Related Information

You can specify duplicate detection rules to use when importing records. See the *Cataloging Guide*, *Setting Up Import Profiles*.

Set the Number of Bibs That Can Be Replaced at Once

Note:

For information on replacing bibliographic records, see the *Cataloging PDF Guide*, *Detect duplicate or replace bibliographic records*.

To set the maximum number of bibliographic records that can be replaced in one operation:

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

The system-level Cataloging parameters appear.

3. Select **Bibliographic record replace: Maximum allowed in one operation**.
4. Type a number less than 999.
5. Select **File > Save**.

The new limit is saved and applies to all branches in your library system.

Specify Tags to Retain from Overlaid Bibs

The Bibliographic Tags Retain/Delete policy table is used to specify tags to retain from duplicate records that are overlaid.

Note:

This policy table is also used to specify tags to delete from incoming records that are saved to the database, even if the incoming records are not duplicates of existing bibliographic records in the database. For information on this process, see the *Cataloging Administration Guide*, "Deleting MARC Tags from Incoming Bibs."

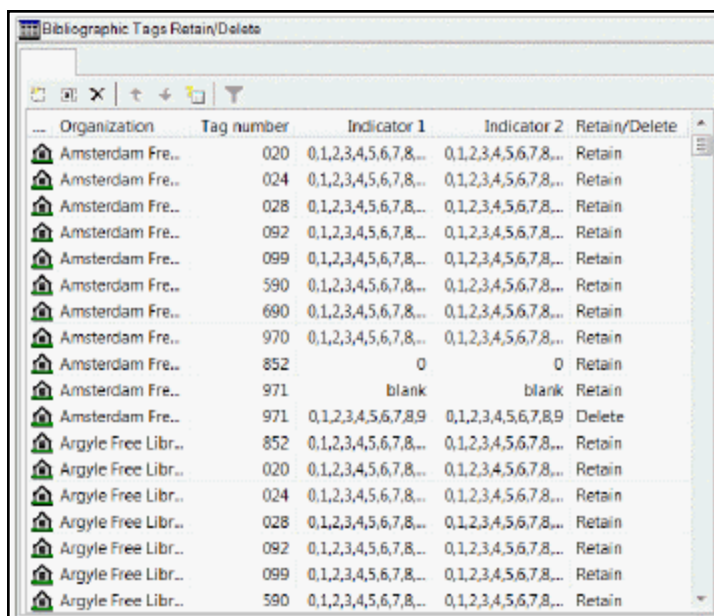
To specify which fields to transfer automatically to the replacement record when a bibliographic record is overlaid:

Note:

These permissions are required to view and change the Bibliographic Tags Retain/Delete policy table: **Access administration: Allow, Access tables: Allow** and **Modify Bibliographic Tags Retain/Delete: Allow**

1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Policy Tables** folder.
3. Select **Bibliographic Tags Retain/Delete**.

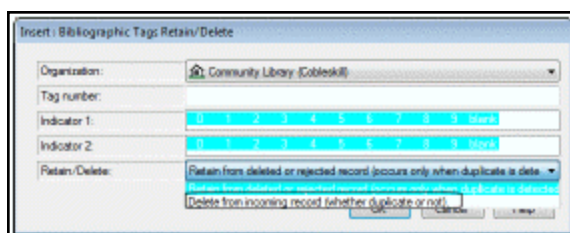
The Bibliographic Tags Retain/Delete policy table appears.




Organization	Tag number	Indicator 1	Indicator 2	Retain/Delete
Amsterdam Fre...	020	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	024	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	028	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	092	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	099	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	590	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	690	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	970	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Amsterdam Fre...	852	0	0	Retain
Amsterdam Fre...	971	blank	blank	Retain
Amsterdam Fre...	971	0,1,2,3,4,5,6,7,8,9	0,1,2,3,4,5,6,7,8,9	Delete
Argyle Free Libr...	852	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Argyle Free Libr...	020	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Argyle Free Libr...	024	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Argyle Free Libr...	028	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Argyle Free Libr...	092	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Argyle Free Libr...	099	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain
Argyle Free Libr...	590	0,1,2,3,4,5,6,7,8...	0,1,2,3,4,5,6,7,8...	Retain

4. Click .

The Insert: Bibliographic Tags Retain/Delete dialog box opens.



Insert: Bibliographic Tags Retain/Delete

Organization:  Community Library (Cobleskill)

Tag number:

Indicator 1:

Indicator 2:

Retain/Delete:

5. In the **Organization** box, select the organization to which this entry applies.

Note:

If the Insert dialog box was opened for a branch, the branch name is the only one listed in the **Organization** box.

6. Enter the tag number in the **Tag number** box tag.
7. If you want all indicator values included, leave them highlighted in the **Indicator 1** and **Indicator 2** boxes. Click an indicator to un-highlight it if you do not want it included.
8. Select **Retain from deleted or rejected record (occurs only when duplicate is**



deleted).

9. Click **OK** to insert the tag.

- If the tag/indicator combination is already in the table, a message appears: **Warning: This table already contains a retain/delete row for this tag.**
- If the tag indicator/combination has already been specified as a tag to be retained, and you attempt to define it as a tag to be deleted, the following message appears: **Warning: The same tag/indicator combination cannot be selected for both retention and deletion.**

10. Select **File | Save**.

Related Information

- Modify a table entry - Select an entry and click .
- Delete a table entry - Select an entry and click .

Specify Tags to Retain from Overlaid Authority Records

The Authority Overlay Retention policy table is used to retain specific tags from duplicate records that are deleted or rejected. When a duplicate authority record is overlaid, the links from the overlaid record are transferred to the new record, and specific tags from the overlaid record are retained in the new record.

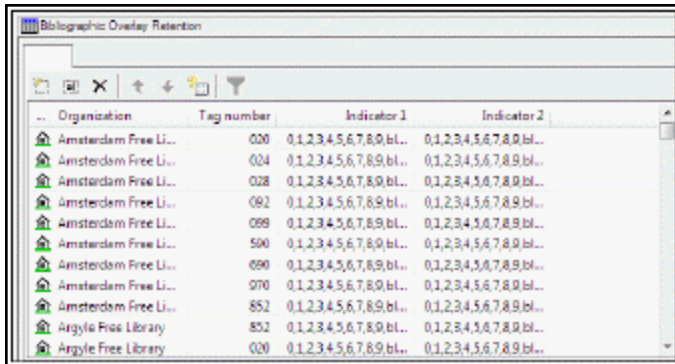
To specify which fields to transfer automatically when an authority record is overlaid:

Note:

These permissions are required to view and change the Authority Overlay Retention policy table: **Access administration: Allow, Access tables: Allow, Modify Authority Overlay Retention: Allow**

1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Policy Tables** folder.
3. Select **Authority Overlay Retention**.

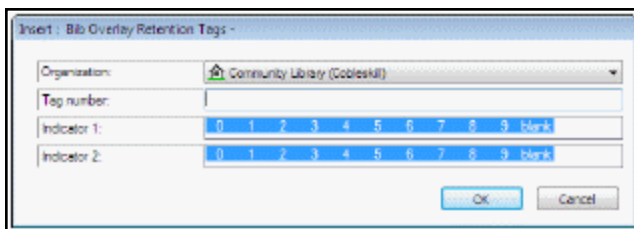
The Authority Overlay Retention Table appears.



Organization	Tag number	Indicator 1	Indicator 2
Amsterdam Free Li...	020	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	024	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	028	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	092	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	096	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	590	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	690	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	970	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Amsterdam Free Li...	852	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Argyle Free Library	852	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...
Argyle Free Library	020	0,1,2,3,4,5,6,7,8,9,bl...	0,1,2,3,4,5,6,7,8,9,bl...

4. Click .

The Insert: Authority Overlay Retention dialog box appears.



Insert: Bib Overlay Retention Tags -

Organization: Community Library (GobleSkill)

Tag number:

Indicator 1: 0 1 2 3 4 5 6 7 8 9 Blank

Indicator 2: 0 1 2 3 4 5 6 7 8 9 Blank

5. In the **Organization** box, select the organization to which this entry applies.

Note:

If the Insert dialog box was opened for a branch, the branch name is the only one listed in the **Organization** box.

6. In the **Tag Number** box, type the tag that you want retained in the new records.
7. To retain the tag only if certain indicators are present, highlight the indicator values in the **Indicator 1** and **Indicator 2** boxes.

Note:



If the tag is in the retention table without indicator values, the tag is always retained. If indicator values are defined along with the tag, the data in the tag is copied only if the indicator values also match.

8. Click **OK** on the dialog box.

The Overlay Retention table is displayed.

9. Select **File | Save**.

Related Information

- Modify a table entry - Select an entry and click .
- Delete a table entry - Select an entry and click .

Specify Preferred Cataloging Sources for Authority Records

The Authority Record Import: Preferred Cataloging Source policy table determines whether imported authority records overlay existing authority records when duplicates are found. When an authority record is imported, and a duplicate record exists in the database, the code in the original cataloging source tag (040 \$a) is checked against the entries in the table. If the code matches an entry in the table, the preference order of the code is checked. The existing record is overlaid with the new record if the code has a higher level of preference than the code in the existing record. For more information about the checking during importing, see the *Cataloging Guide*, Authority Record Overlay Based on Cataloging Source.

Important:

If your library uses the Authorities Weekly service, and you want to ensure that the incoming updated records always overlay the database records, remove all entries from the Authority Record Import: Preferred Cataloging policy table at the System level.

To add a cataloging source to the Authority Record Import: Preferred Cataloging Source table:

Note:

These permissions are required to view and change the preferred cataloging source table: **Access administration: Allow, Access tables: Allow, Modify Authority authority record import: preferred cataloging source: Allow**

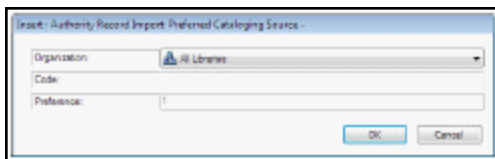
1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Policy Tables** folder.
3. Select **Authority Record Import: Preferred Cataloging Source**.

The Authority Record Import: Preferred Cataloging Source table appears.



4. Click .

The Insert: Authority Record Import: Preferred Cataloging Source dialog box appears.



5. In the **Organization** box, select the organization to which this entry applies.

Note:





If the dialog box was opened for a branch, the branch name is the only one listed in the **Organization** box.

6. Type the MARC code of the cataloging agency in the **Code** box.

Enter the value your cataloging agency uses in tag 040 \$a of the records you receive from the agency. You can also get the MARC code from the MARC Code List for Organizations that is maintained by the Library of Congress.

7. Click **OK** on the dialog box.
8. Select **File | Save**.

Related Information

- Modify a table entry - Select an entry, and click .
- Delete a table entry - Select an entry, and click .
- Change the source preference order - Select an entry, and click  to move the entry up (higher preference), or click  to move the entry down (lower preference).

Enable Validation When Duplicate Bibs are Replaced

You can set the **MARC validation immediately after bib replace** profile to **Yes** if you want bibliographic records to be checked for the correct MARC format immediately after they replace other records. For information on replacing bibliographic records, see the Cataloging PDF Guide, Detect duplicate or replace bibliographic records.

To set the **MARC validation immediately after bib replace** Cataloging profile:

1. In the Administration Explorer tree view, expand the folder for the organization or staff member.
2. Select **Profiles** and select the **Cataloging** tab.
The cataloging profiles appear. See Cataloging Profiles at the Branch Level.
3. Double-click the **MARC validation immediately after bib replace** profile.
4. Select **Yes** to enable the validation check, or select **No** to disable the validation check.
5. Select **File | Save**.

Enable Headings Check When Replacing Bibs

You can set the **Check headings immediately after bib replace** profile to **Yes** if you want to check the headings for bibliographic records immediately after they replace other records.

1. To set the **Check headings immediately after bib replace** Cataloging profile:
2. In the Administration Explorer tree view, expand the folder for the organization or staff member.
3. Select **Profiles** and select the **Cataloging** tab.
The cataloging profiles appear.
4. Double-click the **Check headings immediately after bib replace** profile.
5. Select **Yes** to enable the validation check, or select **No** to disable the validation check.
6. Select **File > Save**.

Enable the Do Not Overlay Feature

To enable the **Do not overlay** feature for protecting bibliographic records from being overlaid:

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

The system-level Cataloging parameters are displayed.

2. Double-click the **Bibliographic record Do not overlay feature enabled** parameter, and select **Yes**.
3. Select **File | Save**.

When the parameter is set to **Yes**, the **Do not overlay** check box appears, unchecked by default, on the Bibliographic Record workform, the Bibliographic Record Template workform, the Import Profile, and the Bibliographic Record Bulk Change dialog box. When the parameter is set to **No**, the **Do not overlay** check box does not appear on any workforms or dialog boxes.

If the parameter is enabled and is subsequently disabled, the state of the **Do not overlay** bit in the records, templates, and import profiles (checked or unchecked) is saved, but it is ignored in any subsequent processing. However, if the library subsequently re-enables the parameter, and any bib records, bib templates or import profiles have the **Do not overlay** bit selected, a message informs the user that the *Do not overlay setting will be restored for ## records, ## bibliographic templates, and xx import profiles*.

Copying Bib Data to Items

You can set Polaris Administration Cataloging profiles to copy the call number and price from bibliographic records to their linked items. Then you use database tables to specify the order in which the bibliographic fields are checked for the call number and price.

If the **Bring call number fields from bib to item record when link is made** profile (available at all organization levels and the staff member level) is set to **Yes**, call number information in bibliographic records is copied to the linked item records according to settings in the Item Create Call Number Hierarchy database table. When a new item record is created and linked to a bibliographic record, the bibliographic record's call number tags are checked based on the item's shelving scheme and assigned branch. The system uses the Item Create Call Number Hierarchy database table settings for the assigned branch and shelving scheme to copy the call number fields and subfields from the bibliographic record.

For information on creating on-order items with call numbers when releasing purchase orders, see the Acquisitions Administration PDF Guide, Setting Up EDI Ordering topic.

The fields are copied to item records as follows:

- If the bibliographic record has a classification and cutter number, they are copied as a group to the item record. However, if the item template has values in the **Class** and **Cutter** fields and the New Item Record Options dialog box has the **Use template values instead of these (if available)** check box checked, the classification and cutter numbers are copied from the item template to the new item records.
- If the bibliographic record has any of the other call number fields (prefix, suffix, volume, copy number), these fields are copied to the item record independently of the other call number fields. If the bibliographic record has some of these fields defined, and the item template has others, the resulting item records can have a mixture, with some fields from the bibliographic record and some from the item template.

If the profile, **Bring price from bib to item record when link is made** is set to **Yes**, the price in bibliographic records is copied to the linked item records according to the

settings in the Item Create Price Hierarchy database table. When a new item record is created and linked to a bibliographic record, the bibliographic record's tags and subfields are checked for a price in the order specified in the Item Create Price Hierarchy database table.

See also:

- [Copy bibliographic call numbers to item records](#)
- [Modify the Item Create Call Number Hierarchy table](#)
- [Copy the price from bibliographic records to item records](#)
- [Modify the Item Create Price Hierarchy table](#)

Copy Bibliographic Call Numbers to Item Records

To automatically copy call number fields from linked bibliographic records (according to the settings in the Item Create Call Number Hierarchy database table):

1. In the Administration Explorer tree view, expand the folder for the organization, staff member or workstation.
2. Select **Profiles** and select the **Cataloging** tab.
3. Select **Bring call number fields from bib to item record when link is made** and set the profile to **Yes** or **No**.
 - **Yes** - When an item record is created for the organization, if there are call numbers in the linked bibliographic record, the numbers are copied to the item record. The system checks for the call number information in fields in the bibliographic record according to the hierarchy set in the Item Create Call Number Hierarchy database table. See [Modify the Item Create Call Number Hierarchy table](#).
 - **No** - When an item record is created for the organization, the classification and cutter numbers in the linked bibliographic record are not copied to the item record.
4. Select **File | Save**.

Modify the Item Create Call Number Hierarchy table

The Item Create Call Number Hierarchy table is set up during Polaris implementation, but you can add and change entries. Each library can specify different tags to use for the call number.

Note:

These permissions are required to view and modify the Item Create Call Number Hierarchy database table: **Access administration: Allow; Access tables: Allow; Modify call number hierarchy table: Allow.**

To add or change call number entries:

Note:

The call number fields in bibliographic records are copied to their linked item records if the **Bring call number fields from bib to item record when link is made** profile is set to **Yes**. See [Copy bibliographic call numbers to item records](#).

In the Administration Explorer tree view, expand the organization's folder.



Expand the **Database Tables** folder.

Select **Item Create Call Number Hierarchy**.

The Item Create Call Number Hierarchy table appears.

Organize...	Precedence	Scheme	Tag	Prefix	Classification	Cutter	Suffix	Volume	Copy
Amste...	1	Library of Congress	00	a		b			
Amste...	2	Library of Congress	50	a		b			
Amste...	1	Dewey Decimal	00	a		b			
Amste...	2	Dewey Decimal	02	a		b			
Argyle...	1	Dewey Decimal	92	a		b			
Argyle...	2	Dewey Decimal	99	a		b			
Balbot...	1	Dewey Decimal	92	a		b			
Balbot...	2	Dewey Decimal	99	a		b			
Bancr...	1	Dewey Decimal	02	a		b			
Bancr...	2	Dewey Decimal	99	a		b			
Bolke...	1	Dewey Decimal	02	a		b			
Bolke...	2	Dewey Decimal	99	a		b			
Burnt...	1	Dewey Decimal	92	a		b			
Burnt...	2	Dewey Decimal	99	a		b			
Camb...	1	Dewey Decimal	92	a		b			
Camb...	2	Dewey Decimal	99	a		b			

Do one of the following actions:

- To add an entry, click .
- To modify an entry, double-click the entry, or select the entry and click .

The Insert or Modify dialog box appears, depending on your selection.

Modify Item Create Call Number Hierarchy - Amsterdam Free Library

Organization:	Amsterdam Free Library
Precedence:	1
Scheme:	Library of Congress
Tag:	90
Prefix:	
Classification:	.
Cutter:	b
Suffix:	
Volume:	
Copy:	

OK Cancel

In the **Organization** box, select the branch for which the call number is used, if it is not already selected.

If you are adding a new entry, select the shelving scheme in the **Shelving Scheme** box. You cannot change the shelving scheme for existing entries.

In the **Bibliographic Tag Number** box, type the bibliographic record tag that contains the call number information.

In the **Prefix** box, type the tag subfield that contains the prefix information.

In the **Classification** box, type the tag subfield that contains the classification information.

In the **Cutter** box, type the tag subfield that contains the cutter number.

Note:

Do not enter the subfield delimiters.

In the **Suffix** box, type the tag subfield that contains the call number suffix.

In the **Volume** box, type the tag subfield that contains the volume number.

In the **Copy** box, type the tag subfield that contains the copy number.

Click **OK** on the dialog box.

Select **File > Save**.

Copy the price from bibliographic records to item records

To set up item records so that price information is automatically copied from linked bibliographic records.

Note:

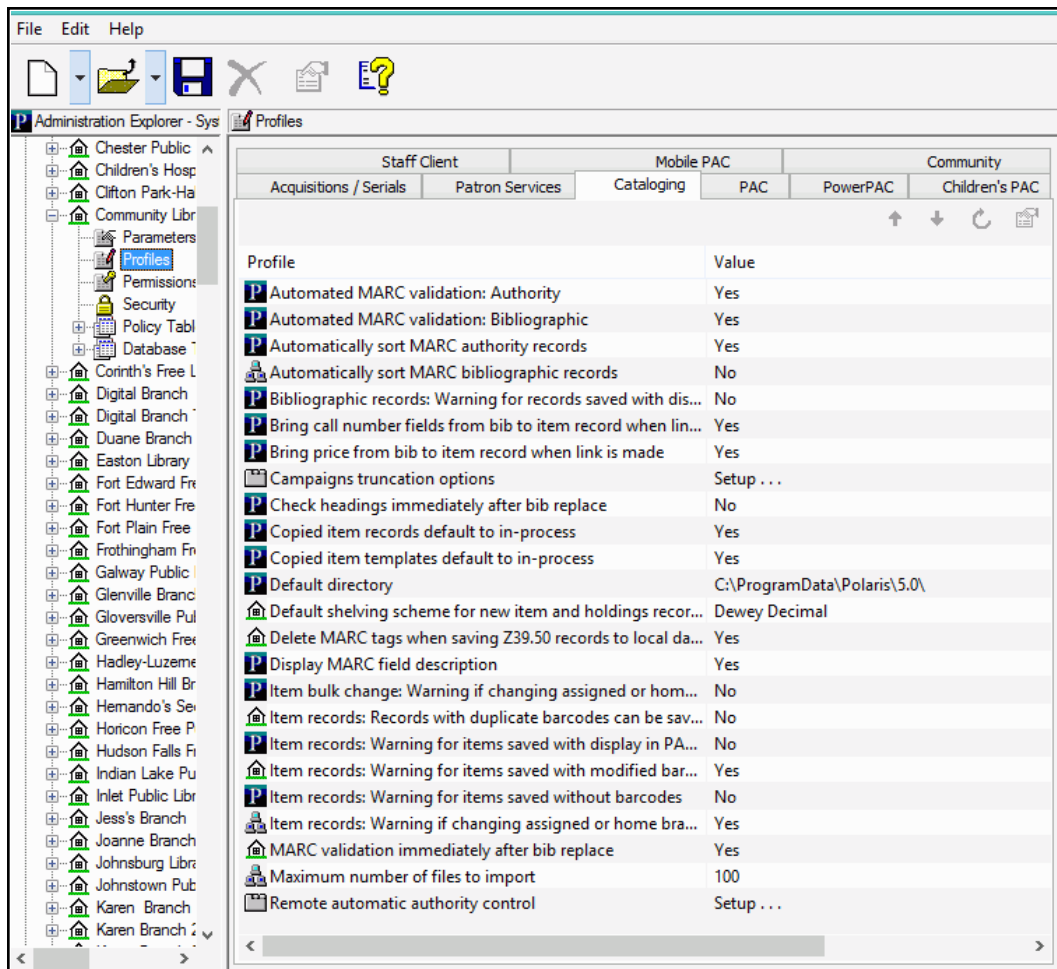
These permissions are required to view and modify the Item Create Price

Hierarchy table: **Access administration: Allow; Access tables: Allow; Modify item create price hierarchy table: Allow.**

In the Administration Explorer tree view, expand the folder for the organization, staff member or workstation.

Select **Profiles** and select the **Cataloging** tab.

The Cataloging profiles are listed.



Select **Bring price from bib to item record when link is made** and set the profiles to **Yes** or **No** to specify if the price is copied to item records:

- **Yes** - When an item record is created for the organization, the price is copied from the linked bib to the item record, according to the hierarchy established in the Item Create Price Hierarchy table; see [Modify the Item Create Price Hierarchy table](#).
- **No** - When an item record is created for the organization, the price in the linked bibliographic record is not copied to the item record.

Select **File, Save**.

Modify the Item Create Price Hierarchy table

You use the Item Create Price Hierarchy database table to specify the order in which fields in bibliographic records are checked for the price. The Item Create Price Hierarchy table is set up during Polaris implementation, but you can add and change entries. Each library can specify different tags to use for the price.

To add or change the tags checked for price:

Note:

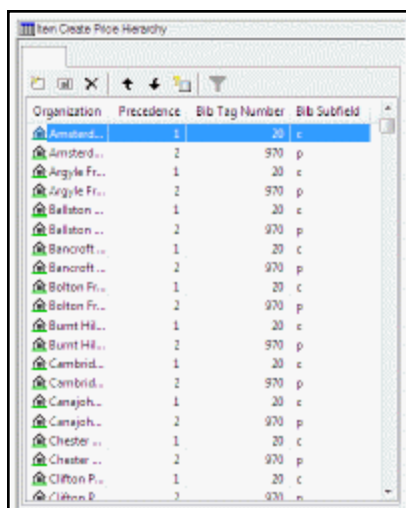
These permissions are required to view and modify the Item Create Price Hierarchy table: **Access administration: Allow; Access tables: Allow; Modify item create price hierarchy table: Allow**

In the Administration Explorer tree view, expand the organization's folder.

Expand the **Database Tables** folder.



Select **Item Create Price Hierarchy**.

The Item Create Price Hierarchy table appears.

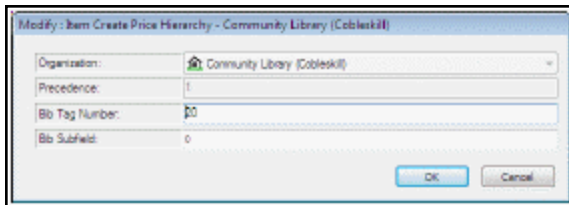


Organization	Precedence	Bib Tag Number	Bib Subfield
Amsterdam...	1	20	c
Amsterdam...	2	970	p
Argyle Fr...	1	20	c
Argyle Fr...	2	970	p
Ballston ...	1	20	c
Ballston ...	2	970	p
Bancroft ...	1	20	c
Bancroft ...	2	970	p
Bolton Fr...	1	20	c
Bolton Fr...	2	970	p
Burnt Hill...	1	20	c
Burnt Hill...	2	970	p
Cambrid...	1	20	c
Cambrid...	2	970	p
Canajoh...	1	20	c
Canajoh...	2	970	p
Chester ...	1	20	c
Chester ...	2	970	p
Clifton P...	1	20	c
Clifton P...	2	970	p

Do one of the following actions:

- To add an entry, click .
- To modify an entry, double-click the entry, or select the entry and click .

The Insert or Modify dialog box appears depending on your selection.





Select the branch for which the price hierarchy is used in the **Organization** box.

The Precedence field is filled in automatically.

In the **Bib Tag Number** box, type the bibliographic record tag that contains the price information (for example, **020** or **970**).

In the **Bib Subfields** box, type the tag subfield that contains the price information. (for example, **\$c** or **\$p**).

Click **OK** to close the dialog box.

To change the order in which a tag is checked, select it in the table, and click  to move the entry up or  to move the entry down.

Select **File > Save**.

Setting Item Copy and Save Options

Several Cataloging profiles affect the creation and modification of item records and item record templates. They specify defaults for copied item records and templates, defaults for the shelving scheme, and whether item records can be saved provisionally if they have duplicate barcodes.

Note:

For information on the profiles that copy the call number and price from bibliographic records, see [Copying Bib Data to Items](#). For information on setting the warning message profiles for item records, see [Displaying Warning Messages for Bibs and Items](#).

The Cataloging profile **Default shelving scheme for new item and holdings records** specifies the scheme that appears by default in new item and serial holdings records. This profile can be set at the system, library, branch, or staff member level in Polaris Administration. The default shelving scheme appears when users create new item records from the New Item Record Options dialog box or the Item Record workform (when **File | New | Clear workform** is selected).

Two other Cataloging profiles determine the default status of copied item records and copied item templates. Copied item records and item templates can be assigned a default status of In-process, or they can retain the status of the record from which they were copied. The **Copied item records default to In-process** profile determines the status of copied item records, and the **Copied item templates default to In-process** determines the status of copied item templates.


The **Item records: Records with duplicate barcodes can be saved provisionally** profile specifies whether an item record can be saved provisionally if its barcode is determined to be a duplicate of existing item record's barcode. If this profile is set to **Yes**, item records with duplicate barcodes can be saved provisionally. If it is set to **No**, the option to save item records with duplicate barcodes provisionally is disabled.

See also:

- [Specify the default shelving scheme for item/holdings records](#)
- [Set the status of copied items to in-process](#)
- [Set the status of copied item templates to in-process](#)
- [Specify if items with duplicate barcodes can be saved provisionally](#)

Specify the Default Shelving Scheme for Item/Holdings Records


To specify the default shelving scheme for new item and serial holdings records:

1. In the Administration Explorer tree view, expand the folder for the organization or staff member.
2. Select **Profiles** and select the **Cataloging** tab.
The Cataloging profiles appear.
3. Double-click **Default shelving scheme for new item and holdings records**.
4. Select the shelving scheme.
5. Select **File | Save**, click  or press **Ctrl+S**.

Set the Status of Copied Items to In-Process

You can set the status of copied item records so that they retain the circulation status of the item record template from which they were copied, or they get set to a status of **In-Process**.


To set the status of copied items:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.
3. Double-click **Copied item records default to In-process**.
4. Choose one of the following options:
 - To set the profile so that new item records created by copying an existing record will always have a status of **In-Process**, select **Yes**.
 - To set the profile so that new item records created by copying an existing record will retain the status of the existing item record, select **No**.
5. Select **File | Save**, click  or press **Ctrl+S**.

Set the Status of Copied Item Templates to In-Process

You can specify the status of copied item record templates so that they retain the circulation status of the item record template from which they were copied, or they are set to a status of **In-Process**.

To set the status of copied item record templates:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.
3. Select **Copied item templates default to In-process**.
4. Choose one of the following options:
 - To set the profile so that new item record templates created by copying an existing template will always have a status of **In-Process**, select **Yes**.
 - To set the profile so that new item record templates created by copying an existing item record template will retain the status of the existing item record template, select **No**.
5. Select **File | Save**, click  or press **Ctrl+S**.

Specify If Items with Duplicate Barcodes Can Be Saved Provisionally


Tip:

This profile setting does not affect bulk item creation, bulk change, or item creation during importing. When barcodes are assigned during bulk creation or bulk change, duplicate barcodes are never assigned. In the import profile, users with the appropriate permissions can still select the import option to create provisional item records when duplicate barcodes are encountered.

This profile is checked when users create or save an item, and its barcode is a duplicate of a barcode for an existing item.

To set the profile to allow or prevent the creation of provisional items with duplicate barcodes:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.
3. Select the **Item records: Records with duplicate barcodes can be saved provisionally** profile.

4. Set the profile to **Yes** to allow users to save an item record provisionally if a duplicate barcode is found. Set the profile to **No** to prevent users from saving an item record provisionally if a duplicate barcode is found.
5. Select **File | Save**, click  or press **Ctrl+S**.

Administering MARC Validation and Display

Displaying diacritics in MARC records requires certain fonts to be installed. For more information, see [Enabling Language Display/Entry in Cataloging](#).

In Polaris, MARC records are validated according to rules defined in the system-level profiles: **MARC Validation Bibliographic** and **MARC Validation Authority**. These rules are applied when new records are created, and when existing records are saved or checked for MARC format. They are also applied to imported records when the option to perform MARC validation is selected in the import profile.

The MARC validation profiles also specify the sort order and the display names for MARC tags in the MARC21 view of the Bibliographic Record and Authority Record workforms. You can edit validation rules and change the display names and sort order of MARC tags using these profiles, but all changes are applied to every organization in your library system. However, you can use separate profiles at the library or branch level to turn off MARC validation, tag display names, or automatic sorting.

See the following topics for information on setting up MARC validation and MARC display to apply to records in your library system:

- [Add or change a MARC validation rule](#)
- [Define a conditional validation rule](#)
- [Specify the display name for MARC tags](#)
- [Change the sort order of MARC tags](#)

See the following topics for information on turning off MARC validation, MARC tag display, and MARC tag sorting for a specific library or branch:

- [Turn automatic MARC validation on or off](#)
- [Turn MARC tag name display on or off](#)
- [Turn automatic MARC tag sorting on or off](#)

Important:

You can also specify whether to perform automatic MARC re-indexing

when the server is upgraded by selecting Yes or No for the system-level cataloging parameter **MARC re-index during next system upgrade**. See [Managing MARC Re-indexing](#).

Add or change a MARC validation rule

To add or change validation rules for bibliographic or authority MARC formats.

Note:

These permissions are required to view and change the MARC Validation Editor:

Access administration: Allow

Modify profiles: Allow

Access MARC Validation: Authority: Allow

Access MARC Validation: Bibliographic: Allow

MARC Validation: Authority - insert row: Allow

MARC Validation: Authority - modify row: Allow

MARC Validation: Authority - delete row: Allow

MARC Validation: Bibliographic - insert row: Allow


MARC Validation: Bibliographic - modify row: Allow

MARC Validation: Bibliographic - delete row: Allow

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles** and select the **Cataloging tab**.
3. Double-click **MARC validation: Bibliographic** or **MARC validation: Authority**.

The MARC Validation Editor appears for the selected MARC format.


Tip:

To add a new row at the end of the validation rules, click 

4. To add a new validation rule, do the following steps:

Note:

You can add only local tags (9xx, x9x, or xx9 tags).

- a. Select the row just below where you want to put the new row, and click  (Insert row) to open a new row.

- b. Type the tag, indicator, or subfield for which you are defining the validation rule.
5. To change an existing validation rule, select the row where the tag, indicator, or subfield is listed.

Note:

To add or view indicator and subfield rows, click the + (plus sign) next to the tag.

6. Set the rules for tag, indicator, or subfield as follows:

Note:

A LDR and an 008 tag are the minimum required tags for a bibliographic record in Polaris.

- To specify that the selected tag, indicator, or subfield is required in order to save a bibliographic or authority record as final, select the **Required** column, and click the check box to indicate **Yes**. Clear the check box if you do not want the tag, indicator, or subfield to be required. If a subfield is required, it must be present when the associated tag is used.
- To specify that the selected tag, indicator, or subfield must be validated, select the **Validate** column, and click the check box to indicate **Yes**. Clear the check box if you do not want the tag, indicator, or subfield to be validated, and it will be ignored when records are validated.
- To allow the tag, indicator, or subfield to appear in the MARC record more than once, select the **Repeat** column, and select the check box to indicate **Yes**. Clear the check box to disallow the tag, indicator, or subfield to be in records of this type more than once. When you do not specify that a tag, indicator, or subfield can be repeated, an error message appears if there is more than one occurrence of the tag.
- To specify that the tag, indicator, or subfield is no longer valid, select the **Obsolete** column, and select the check box to indicate **Yes**. If **Yes** is in this column, and this tag, indicator, or subfield is in a MARC record, a message tells the user it is obsolete. Clear the check box if you do not

want the message to appear.

- To specify tags or subfields that are required or prohibited when certain tags are used, see [Define a conditional validation rule](#). Each tag and subfield designator can have a list of these conditional rules. Conditional rules cannot be applied to the Leader, control fields, fixed fields (fields less than 010), or indicators.

7. Select **File | Save**, click the save icon, or press **Ctrl+S**.

Define a Conditional Validation Rule

You can define a conditional rule to identify the tags and subfields that must be present or prohibited if a particular tag, indicator, or subfield is present. To define a conditional validation rule:


1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles** and select the **Cataloging** tab.
3. Select **MARC validation: Bibliographic** or **MARC validation: Authority**.

The MARC Validation Editor appears for the selected MARC format.

4. Select the tag in the MARC Fields list for which you want to create a conditional validation rule.

Tip:

You cannot set conditional rules for the Leader, control fields, fixed fields (fields less than 010) or indicators.

5. In the **Rules** list, click  to open a conditional rule row.

The selected tag number is displayed in the first column of the first available row in the Rules list.

Tip:

To delete the rule, select it under **Tag Level Rules**, and click the delete button.

6. Type the indicator or subfield in the appropriate column, select the box in the **Condition** column in the same row, and specify the condition:
 - Select **must have** if the tag or subfield is required. For example, a 490 tag must have an 830 tag.

- Select **must not have** if the tag or subfield is prohibited when the tag is used. For example, a 100 tag must not have a 110, 111, or 130 tag.

7. Select **File > Save**.

Change the Sort Order of MARC Tags




To change the MARC tag sort order:

Tip:

When new versions of Polaris contain updates to the validation editor, your changes are not overwritten.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles** and select the **Cataloging** tab.
3. Select **MARC validation: Bibliographic** or **MARC Validation: Authority** to display the MARC Validation Editor for the selected MARC format.

[illegible]

- Click  to move a row up,  to move a row down, or  to move a row to the top.
- Select **File | Save**, click the save button, or press **Ctrl+S**.

Specify the Display Name for MARC tags

To specify the display name of MARC tags:

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles** and select the **Cataloging** tab.
3. Select **MARC validation: Bibliographic** or **MARC validation: Authority** to display the MARC Validation Editor for the selected MARC format.

The screenshot shows the "MARC Validation Editor - Bibliographic" application window. It features two main panes. The left pane displays a table listing various MARC fields along with columns for Tag, Ind1, Ind2, Subfield, Required, Validate, Repeat, and Obsolete. Fields include LDR, Control Number, Control Number Identifier, Date And Time of Latest Transaction, Fixed-Length Data Element, Physical Description Fixed Length Data Element, Library of Congress Control Number, Patent Control Information, National Bibliography Number, National Bibliographic Agency, Copyright or Legal Deposit, Copyright Article-Fee Code, International Standard Book Number, International Standard Serials, Other Standard Identifier, Overseas Acquisition Number, Fingerprint Identifier, Standard Technical Report, Publisher Number, CODEN Designation, Musical Incipits Information, Postal Registration Number, Date/Time and Place of Publication, Coded Cartographic Mathematical System Control Number, Original Study Number for Source of Acquisition, and Record Content Licensor. The right pane provides details for the selected field (001), showing its Display Name as "Leader", its Description as "A fixed field that comprises the first 24 character positions (00-23) of each record and provides information for the processing of the record.", and a section for Comments. At the bottom are "Done" and "Help" buttons.

4. Select a tag, indicator, or subfield.

Tip:

Expand a tag to see the indicators and subfields.

5. Type a name in the **Display Name** box. This is the descriptive phrase/name that will be displayed in the MARC21 view when a user selects the tag, indicator, or sub-field in the Bibliographic Record or Authority Record workform. The maximum length is 255 characters. When this box is empty, the MARC name is used for the popup field description in the MARC21 view of the workform.
6. If you want to describe the tag, type additional text in the **Description** box. The text in the **Description** box does not display in the Bibliographic or Authority Record workforms.
7. Click the save button to save the validation rules.

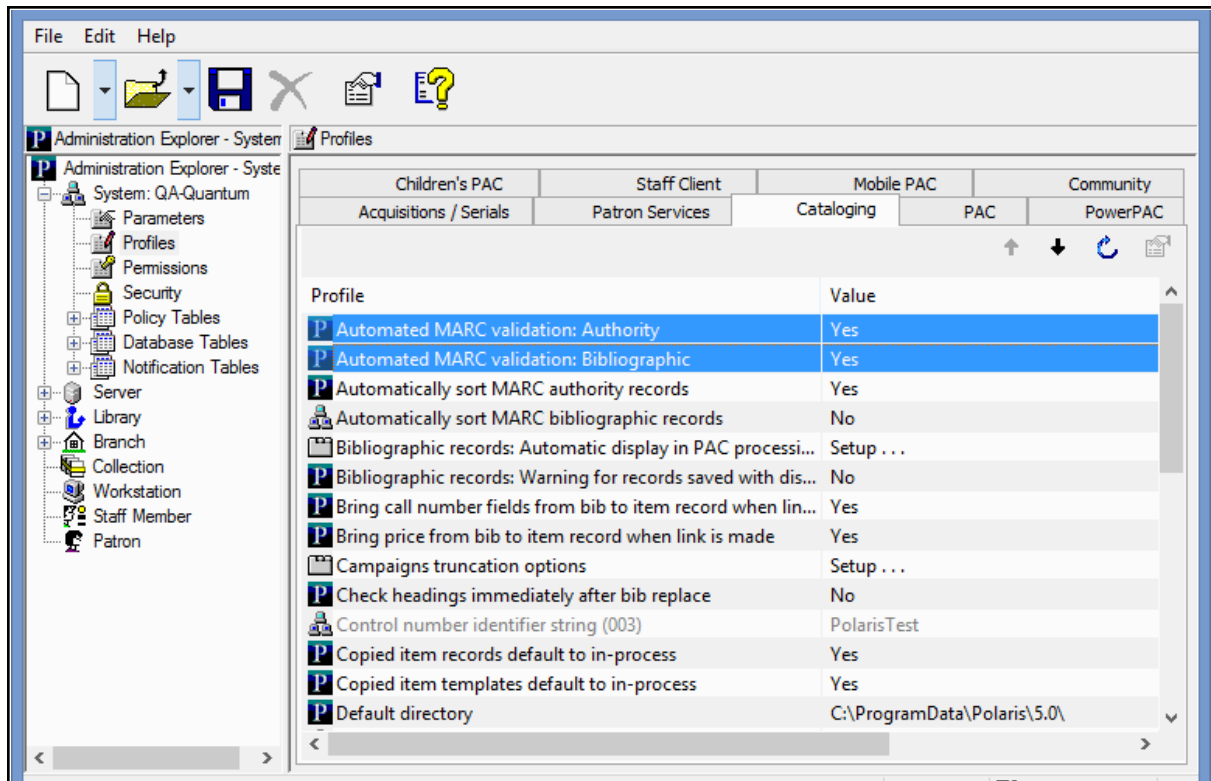
Related Information

[Turn MARC tag name display on or off](#)

Turn automatic MARC validation on or off

MARC validation rules are set at the system level only, but you can turn the validation on or off at the system, library, or branch level. To enable or disable automatic MARC validation:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.
3. Double-click **Automated MARC Validation: Bibliographic** or **Automated MARC Validation: Authority**.



4. Select **Yes** or **No**.
5. Select **File | Save**.

Turn MARC Tag Name Display On or Off

The descriptive tag names displayed in the MARC21 view of the Bibliographic and Authority workforms are set in the Automated MARC Validation Bibliographic and MARC Validation Authority profiles at the system level (see [Specify the display name for MARC tags](#)). You cannot change these descriptive names at the library or branch level, but you can set profiles to turn the display on or off.

To specify if MARC tag descriptions are displayed in the MARC21 view of the workform:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.
3. Select **Display MARC field description**.
4. Select **Yes** to display the MARC field descriptions in the MARC21 view for authority and bibliographic records, or select **No** if you do not want to display the descriptions.

Turn Automatic MARC Tag Sorting On or Off

The sorting order for MARC tags in the MARC21 view of the Bibliographic Record and Authority Record workforms is defined in the MARC Validation profiles at the system level (see [Change the sort order of MARC tags](#)). You cannot change the sorting order at the library or branch level, but you can turn automatic sorting on or off.

To turn automatic sorting of MARC tags on or off:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.
3. Double-click **Automatically sort MARC bibliographic tags** or **Automatically sort MARC authority tags**.
4. Select **Yes** to sort the MARC tags in the MARC21 view of the workform. Users can enter the tags in any order and they will be sorted in the order specified in the MARC validation profiles. Select **No** to turn off automatic sorting of MARC tags.

Managing Importing

The following Cataloging profiles are used to manage import processing as a whole:

- Maximum number of files to import - This profile specifies the limit on the number of files that can be included in a single import job. See [Set the limit on the number of files in a single import job](#).
- Import blackout times - This profile specifies the times during the day that imports are not allowed to be run. Up to three daily time periods can be specified as well as a single one-time date/time range. See [Specify import blackout times](#).

Automatic processing for individual import jobs depends on the options selected in the import profile. See the following topics for information on automatic processing that can be selected in the import profile:

- [Managing Duplicate MARC Records](#)
- [Administering MARC Validation and Display](#)
- [Managing Authority Control](#)

Note:

For information about setting up import profiles for specific uses, see the Cataloging PDF Guide, Setting Up Import Profiles.

Set the Limit on the Number of Files in a Single Import Job

To specify the limit on the number of files that can be included in a single import job:

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles** and select the **Cataloging** tab to see the cataloging profiles set at the system level.
3. Double-click **Maximum number of files to import**, and change the number by typing a different number or by selecting the up or down arrows in the number box. The default is 100 and the maximum setting is 1,000.

Specify Import Blackout Times

To specify the times when import processing cannot be done:

Note:

You must have the System Administration permission **Modify import blackout times: Allow** to set or modify import blackout times.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles** and select the **Cataloging** tab to see the cataloging profiles set at the system level.
3. Double-click the **Import blackout times** profile.

The Import blackout times dialog box appears.

4. Set the blackout times as follows:
 - To set up to three daily blackout times, select **Enable** under **Daily blackout time 1, 2, or 3**, and select a **Start** time and an **End** time.
 - To set a one-time blackout time, select **Enable** under **One-time blackout**, select a **Start** date and time, and select an **End** date and time.
5. Select **OK**.

The import blackout times are set for the system.

6. Select **File | Save**.

Managing Authority Control

The Authority Control read-only database table displays bibliographic tags and the authority tags to which they are matched during authority control processing. This processing occurs automatically when records are imported or saved.

If you have access to the Polaris ZMARC Z39.50 authority record database (or another remote authority record database), you can set the **Remote automatic authority control** Cataloging profile to enable remote automatic authority control and specify the server and database to search. When a user saves a bibliographic record, and no matching authority record is found in the local database, the system automatically searches the remote database you specified. If a matching authority record is found in the remote database, the new authority record is saved in the Polaris database and the bibliographic record is linked to it. Before setting up remote automatic authority control using the ZMARC database, you must set up the ZMARC server connection. Contact your Polaris Site Manager for more information about setting up and using Polaris ZMARC.

See also:

- [View the Authority Control database table](#)
- [Enable remote automatic authority control](#)

View the Authority Control Database Table

To view the Authority Control database table:

1. In the Administration Explorer tree view, expand the System folder.
2. Expand the **Database Tables** folder.
3. Select **Authority Control** to view the table entries in the details view.

Enable Remote Automatic Authority Control

To enable remote automatic authority control:

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

3. Double-click **Remote automatic authority control**.

The Remote Automatic Authority Control Defaults dialog box appears.

4. Select **Enable remote automatic authority control**.
5. Select the server in the **Server** box.
6. Select the database in the **Database** box.
7. Type the amount of time in seconds before the search for a matching authority record times out in the **Search timeout (seconds)** box.
8. Click **OK** to save the remote automatic authority control defaults.

Displaying Warning Messages for Bibs and Items

You can set up warning messages to appear when certain information is missing or changed in a bibliographic or item record, or when the record will not display in the PAC.

See also:

- [Set message for bibs that do not display in PAC](#)
- [Set warnings for changed item records](#)

Set Message for Bibs That Do Not Display in PAC

To turn the message on or off when bibliographic records are saved and the **Display in PAC** check box on the Bibliographic Record workform is unchecked:

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

The Cataloging profiles appear.

3. Double-click **Bibliographic records: Warning for records saved with display in PAC unchecked**.
4. Select **Yes** to display a warning message when users save a bibliographic record with the **Display in PAC** check box unchecked, or select **No** to save or change the records without displaying the message.
5. Select **File | Save**.

Set Warnings for Changed Item Records

To display warning messages when item records are saved, changed, or bulk-changed:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.
3. Set the following profiles to **Yes** to display warning messages, or set them to **No** to save or change the records without displaying a message:
 - **Item bulk change: Warning if changing assigned or home branch** - If this profile is set to **Yes**, a warning message appears when a user attempts to

change the assigned branch or home branch using the Item Record Bulk Change dialog box.

- **Item records: Warning for items saved with modified barcode** - If this profile is set to **Yes**, a warning message appears when a user changes the barcode on a final item record and saves the record.
- **Item records: Warning for items saved with Display in PAC unchecked** - If this profile is set to **Yes**, a warning message appears when a user saves an item record that does not have the **Display in PAC** box checked.
- **Item records: Warning for items saved without barcodes** - If this profile is set to **Yes**, a warning message appears when a user saves an item record that does not have a barcode.
- **Item records: Warning if changing assigned or home branch** - If this profile is set to **Yes**, a warning message appears when a user changes the assigned branch or home branch for an item record.

4. Select **File | Save**.

Setting Utility to Delete Bib Tags Marked with Subfield 9

You can use the system-level Cataloging profile **Subfield 9 cleanup utility** to clean up specific MARC tags marked with a system-supplied subfield 9 and text. The profile specifies the tags to scan for the presence of the \$9 and the date range. When the utility runs, the specified tags are checked for a \$9, and if the subfield was inserted in the time period specified, the whole tag is deleted.

Note:

This utility is used to delete bibliographic tags from existing records after the processing is complete. You can also specify unwanted tags to delete from new bibliographic records when they are imported or saved. See [Specify tags to retain from overlaid bibs](#).

These system-supplied subfields are inserted under the following conditions to prevent bibliographic tags from being used more than once:

- Before item records are created from embedded holdings data in imported bibliographic records, the system first checks for the presence of existing embedded holdings tags. If embedded holdings tags are found and they are not already marked with a \$9 subfield, the tags are marked with the subfield 9 and the text **Tag retained from duplicate overlaymmm dd yyyy hh:mm[AM/PM]**. The marked tags are not used to create item records. See the Cataloging PDF Guide, Bib Tags Marked to Prevent Creation/Updates of Items.
- After item records are created from embedded holdings tags in imported bibliographic records, a subfield 9 and the text **Item generated mmm dd yyyy hh:mm[AM/PM]** is inserted only if the Cataloging parameter **MARC embedded holdings tags as processed** is set to **Yes** in Polaris Administration. The marked tags are not used again.
- After eContent items are created automatically by inserting 852 tags in the bibliographic records.
- After bibliographic records are bulk-added to a purchase order or selection list, a subfield 9 and the text **Processed mmm dd yyyy hh:mm[AM/PM]** is inserted into

the 970 tags if the Acquisitions parameter **Bulk add to PO/SL: Mark 970 data as processed** is set to **Yes**. The marked tags are not used again during bulk add.

Note:

970 tags are also marked during migration from another system with **\$9 Migrated 970: mmm dd yyyy hh:mm[AM/PM]**.

See also:

- [Mark embedded holdings data as processed](#)
- [Set up the Subfield 9 cleanup utility](#)

Mark embedded holdings data as processed

To insert a subfield 9 in embedded holdings tags in bibliographic records after these tags have been used to create item records:

Note:

For more information on setting up import profiles to create item records from embedded holdings data, see the Cataloging PDF Guide, Set import options for item records.

In the Administration Explorer tree view, expand the System folder.

Select **Parameters** and select the **Cataloging** tab.

Select **Mark embedded holdings tags as processed** and select **Yes**.

When bibliographic records with embedded holdings data are imported into Polaris, and item records are created automatically from this data, a **\$9** is inserted into the embedded holdings tag with the following automatic processing information: **Item generated mmm dd yyyy hh:mm[AM/PM]**

Note:

The holdings tag is specified in the import profile used to import the records. If the bibliographic records were imported using the **Polaris default (with item creation)** profile, item records are created using the data in the 852 tags in the imported bibliographic records. You can set up different import profiles where you specify that item records are created from data in other embedded holdings tags, such as the 949 tag. Whatever tag is used to create the item records is the one that will be marked with the \$9.

Set Up the Subfield 9 Cleanup Utility

Important:

To use the Subfield 9 cleanup utility, a subfield 9 must have been inserted into the tags in order to delete them. See [Setting Utility to Delete Bib Tags Marked with Subfield 9](#) for the conditions under which the \$9 is inserted.

To set the Subfield 9 cleanup utility profile:

1. In the Administration Explorer tree view, expand the System folder.

Note:

The **Subfield 9 cleanup utility** profile is available only at the system level.

2. Select **Profiles** and select the **Cataloging** tab. See Cataloging Profiles at the System Level.
3. Select **Subfield 9 cleanup utility**.

The \$9 Cleanup Utility dialog box appears.

Note:

If you want to add another tag to this profile, contact your Polaris Site Manager.

4. Select the check box next to **Subfield 9 created more than ____ before the job run date**, select a number and select **days**, **months** or **years** to indicate the time period (relative to the date the job was run) for which you want the system to check for the presence of the \$9.

Note:

When the tags are marked with a \$9, a date is included. This is the date that will be checked when the utility is run.

5. Select the tags to delete if a \$9 is found with a date within the date range you specified.

When you have set up this profile, a nightly SQL job will run unless it is disabled in the SQL server agent. It will check the tags you specified for the presence of a \$9, and if it finds this subfield in the tag, it will check the date to determine if it is within the date range you specified.

For example, if you select **Subfield 9 created more than 2 months before the job run date**, and select 970, the nightly utility will check the 970 tags. If it finds a

bibliographic record that has a 970 tag with a \$9 and a processed date more than two months before the utility is run, it automatically deletes the 970 tag and all its contents, un-indexes the tag, and adjusts the tag sequence in the bibliographic records. The bibliographic record's modification date is updated and the transaction is logged.

6. Click **OK**.

Managing Record Deletion

You can set Cataloging profiles to retain deleted records and then purge them from the database in a separate process. Bibliographic and item record deletion for ILL requests also honor these settings. The purge process automatically removes records marked for deletion based on criteria in a Purge record. See the Cataloging PDF Guide, Purge cataloging records.

In addition, you can set Cataloging parameters to prevent or allow the deletion of bibliographic or item records with linked hold requests. These parameters are available at the System level only, and the default is **No**, which prevents deletion of bibs or items with linked hold requests. If the parameters are set to **Yes**, the records with linked hold requests can be deleted if the hold requests have a status of Active, Pending, or Inactive.

See also:

- [Retain deleted records](#)
- [Allow or prevent deletion of bibs with linked hold requests](#)
- [Allow or prevent deletion of items with linked hold requests](#)

Retain deleted records

To retain cataloging records that are marked for deletion:

Note:

Options to retain deleted records are available at the System level only in Polaris Administration.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Profiles > Cataloging** to display the profiles list.
3. To retain cataloging records, set the following profiles to **Yes**:
 - **Retain deleted authority records**
 - **Retain deleted bibliographic records**
 - **Retain deleted item records**
4. Select **File > Save** on the Polaris Shortcut Bar.

Allow or Prevent Deletion of Bibliographic Records with Linked Hold Requests

To allow or prevent deletion of bibliographic records that have linked hold requests:

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Parameters**, and select the **Cataloging** tab to display the parameters list.
3. Set the **Bibliographic record delete: Allow if there are holds** parameter to **Yes** to allow the deletion of bibliographic records with linked hold requests, or set the parameter to **No** to prevent the deletion of bibliographic records with linked hold requests.
4. Select **File | Save** on the Polaris Shortcut Bar.

Allow or prevent deletion of items with linked hold requests

To allow or prevent deletion of items with linked hold requests:

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Parameters** and select the **Cataloging** tab to display the parameters list.
3. Set the **Item record delete: Allow if there are holds** parameter to **Yes** to allow the deletion of item records with linked hold requests, or set the parameter to **No** to prevent the deletion of item records with linked hold requests.
4. Select **File | Save** on the Polaris Shortcut Bar.

Setting the Cataloging Directory

You can set up a default directory cataloging so that bulk change and other catalog processing reports are automatically saved to a specific folder.

Note:

Import processing reports are not saved in this directory; they can be accessed from the Import Jobs Queue.

See also:

- [Specify the default directory for Cataloging files](#)

Specify the Default Directory for Cataloging files

To specify where catalog processing reports are saved:

1. In the Administration Explorer tree view, expand the folder for the organization, staff member, or workstation.
2. Select **Profiles** and select the **Cataloging** tab.
3. Select **Default directory**.

The Default Directory Setup for Logs and Files dialog box appears.

4. Type the cataloging default directory location, or click **Browse** and select the location, and select **OK** to update the cataloging default directory.

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:

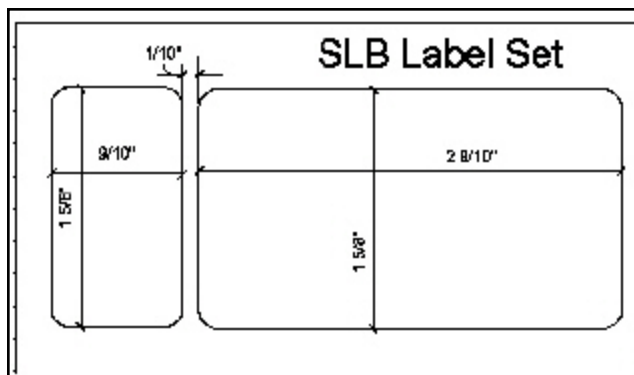
- [Standard Label Types](#)
- [Computype Spine Labels](#)
- [Label Content](#)
- [Set up existing label types](#)
- [Define the label content](#)

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](#).

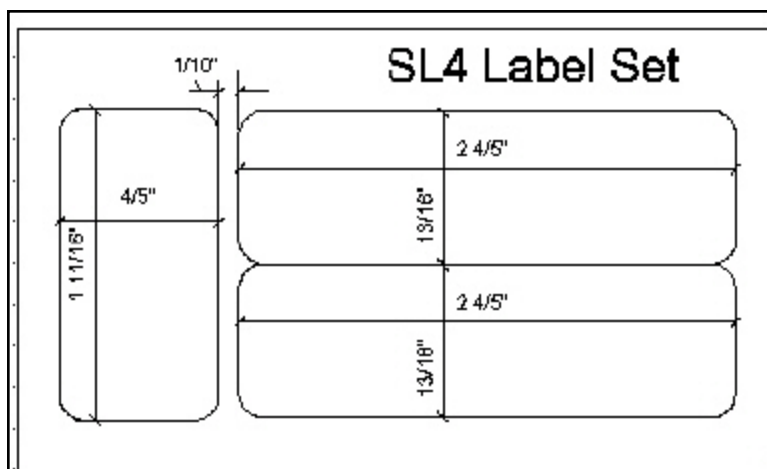
Spine sheets - Spine label sheets contain 50 labels per sheet. Each label is 1.5 inches (3.81 cm) wide and 1 inch (2.54 cm) high. They can have five text lines of 11 characters each.

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.

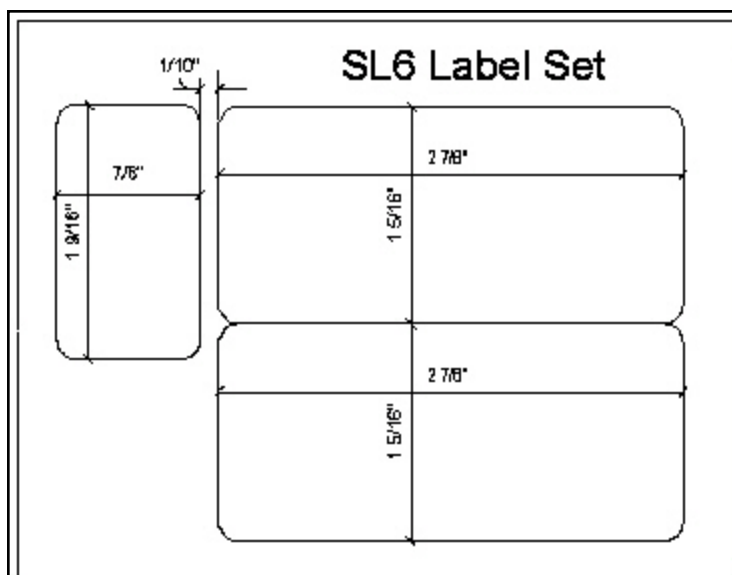


Serial sheets - Serial label sheets contain 20 labels per sheet. Serial labels are 4 inches (10 cm) wide and 1 inch (2.54 cm) high. They have five text lines of 34 characters each.

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 check box in the **Enabled** column next to the label types you want to make available.

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

Tip:

The page size must be larger than the label size.

5. 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.

Acquisitions Administration Overview

Polaris Administration settings control how Polaris data is categorized, used, and stored, and what functions are available to staff and patrons. You can make most administration settings by two methods: through the Administration Explorer, and through the appropriate workflow for a specific record. You can configure Polaris Acquisitions to accommodate a centralized system where one organization handles all acquisitions tasks, or a decentralized system where individual branches handle acquisitions tasks. Or, you can set up Polaris Acquisitions so that certain acquisitions tasks, such as ordering material and handling the budget, are done at a central location while individual libraries select materials.

To enable your staff to perform certain acquisitions tasks, you need to set up the required permissions (security) to access, create, modify, or delete records. Then, you need to set up the appropriate defaults, lists, tables, and automated settings to streamline and standardize your acquisitions processes.

See also:

- [Acquisitions Workflow Permissions](#)
- [Setting the Acquisitions/Serials Default Directory](#)
- [Filtering Branches in Line Items](#)
- [Administering Funds/Fiscal Years](#)
- [Managing Selection Lists](#)
- [Managing Supplier Records](#)
- [Administering Purchase Orders](#)
- [Setting Up EDI Ordering](#)
- [Managing Receiving](#)
- [Setting Up Titles to Go](#)
- [Administering Foreign Currencies](#)
- [Managing Fiscal Year Rollovers](#)
- [Purging Purchase Orders and Invoices](#)

Acquisitions Administration Overview

Polaris Administration settings control how Polaris data is categorized, used, and stored, and what functions are available to staff and patrons. You can make most administration settings by two methods: through the Administration Explorer, and through the appropriate workflow for a specific record. You can configure Polaris Acquisitions to accommodate a centralized system where one organization handles all acquisitions tasks, or a decentralized system where individual branches handle acquisitions tasks. Or, you can set up Polaris Acquisitions so that certain acquisitions tasks, such as ordering material and handling the budget, are done at a central location while individual libraries select materials.

To enable your staff to perform certain acquisitions tasks, you need to set up the required permissions (security) to access, create, modify, or delete records. Then, you need to set up the appropriate defaults, lists, tables, and automated settings to streamline and standardize your acquisitions processes.

See also:

- [Acquisitions Workflow Permissions](#)
- [Setting the Acquisitions/Serials Default Directory](#)
- [Filtering Branches in Line Items](#)
- [Administering Funds/Fiscal Years](#)
- [Managing Selection Lists](#)
- [Managing Supplier Records](#)
- [Administering Purchase Orders](#)
- [Setting Up EDI Ordering](#)
- [Managing Receiving](#)
- [Setting Up Titles to Go](#)
- [Administering Foreign Currencies](#)
- [Managing Fiscal Year Rollovers](#)
- [Purging Purchase Orders and Invoices](#)

Acquisitions Workflow Permissions

Acquisitions permissions define who can create, access, and work with acquisitions records and functions. Some tasks require additional permissions, such as Cataloging permissions to work with bibliographic records. Each organization can specify which groups, workstations, or staff are allowed to work with records and control processes. For general information about setting permissions in Polaris, see the Polaris *Administration Guide*, "Granting Permissions."

The following table lists acquisitions tasks, the Polaris permissions required to do the tasks, the administrative levels at which they can be set, and the subsystems where the permissions are located.

Note:

The following permissions are required to modify Polaris Administration profiles and parameters:

Access administration: Allow

Modify parameters: Allow

Modify profiles: Allow

For more information, see the *Cataloging Administration Guide*, "Administration Workflow Permissions."

Manage the Acquisitions Budget Permissions

Workflow	Required Permissions	Administration Explorer Security Location
Define fund categories	Access acquisitions: Allow	System - Acquisitions
	Access Administration: Allow	System - Acquisitions
	Modify donation fund category table: Allow	System - Acquisitions
Add a fiscal year to Polaris	Access acquisitions: Allow	System - Acquisitions
	Fiscal years: Create	Branch - Acquisitions

Manage the Acquisitions Budget Permissions

Workflow	Required Permissions	Administration Explorer Security Location
Change a fiscal year	Access acquisitions: Allow	System - Acquisitions
	Fiscal years: Access	Branch - Acquisitions
	Fiscal years: Modify	Branch - Acquisitions
Delete fiscal year records	Access acquisitions: Allow	System - Acquisitions
	Fiscal years: Access	Branch - Acquisitions
	Fiscal years: Delete	Branch - Acquisitions
Add a fund record	Access acquisitions: Allow	System - Acquisitions
	Fiscal years: Access	Branch - Acquisitions
	Funds: Create	Branch - Acquisitions
Delete fund records	Access acquisitions: Allow	System - Acquisitions
	Funds: Access	Branch - Acquisitions
	Funds: Delete	Branch - Acquisitions
Maintain fund account information	Access acquisitions: Allow	System - Acquisitions
	Funds: Access	Branch - Acquisitions
	Funds: Modify	Branch - Acquisitions
Transfer money between funds	Access acquisitions: Allow	System - Acquisitions
	Funds: Access	Branch - Acquisitions
	Funds: Modify	Branch - Acquisitions
	Funds: Transfer money between funds	System - Acquisitions

Select Material Permissions

Workflow	Required Permissions	Administration Explorer Security Location
Select Material Permissions		

Workflow	Required Permissions	Administration Explorer Security Location
<p>Create and manage selection lists for the organization, including titles added by other selectors, and copy the selection lists to purchase orders.</p> <p>Add a title that is not in the Polaris database. From the Selection List Line Item workform, search for the title in external databases using Z39.50, and create a provisional bibliographic record.</p>	Funds: Modify	System - Acquisitions
	Funds: Transfer money between funds	Library - Acquisitions
	Selection lists: Create	Library - Acquisitions
	Selection lists: Modify	Library - Acquisitions
	Selection lists: Approve/Reject	Library - Acquisitions
	Selection lists: Delete	Library - Acquisitions
	Access cataloging subsystem: Allow	System - Acquisitions
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Cataloging record sets: Access	System, Library, Branch - Cataloging
	Cataloging record sets: Create	System, Library, Branch - Cataloging
	Cataloging record sets: Modify	System, Library, Branch - Cataloging
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Create	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Bibliographic records: Create Create a bib record from Acquisitions and Serials: Allow	System, Library, Branch - Cataloging System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Create and modify selection lists, selection list line items, and segments. Do Z39.50 searches from a selection list line item, and create provisional records.	Access acquisitions: Allow	System - Acquisitions
	Selection lists: Access	
	Selection lists: Create	Library - Acquisitions
	Selection lists: Modify	Library - Acquisitions
	Bibliographic records: Access	Library - Acquisitions
	Bibliographic records: Create	Library - Acquisitions
	Create a bib record from Acquisitions and Serials: Allow	System, Library, Branch - Cataloging
		System, Library, Branch - Cataloging
Merge selection lists	Access acquisitions: Allow	System - Acquisitions
	Selection lists: Access	Library - Acquisitions
	Selection lists: Modify	Library - Acquisitions
	Selection lists: Delete	Library - Acquisitions
Rename selection lists	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
Delete selection lists	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Delete	Library - Acquisitions
Modify a selection list line item's status	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Approve or reject selection list line items	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
	Selection Lists: Approve/Reject	Library - Acquisitions
Work with selection list line item segments. (This set of permissions allows the user to add, modify, and delete selection list line item segments for the branches at which this permission was granted.)	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection List Line Item Segments: Create, modify, delete	Branch - Acquisitions
Bulk add titles to selection lists from record sets	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Access cataloging subsystem: Allow	System, Library, Branch - Cataloging
	Cataloging record sets: Access	System, Library, Branch - Cataloging
	Cataloging record sets: Create	System, Library, Branch - Cataloging
	Cataloging records sets: Modify	System, Library, Branch - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
Copy selection list line items to a selection list	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
Copy selection list line items to a new or existing purchase order	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
Manage Supplier Records Permissions (Supplier records are available from the Serials and Acquisitions menus on the Polaris Shortcut Bar, but the permissions for Suppliers are available under Serials in the Polaris Administration Explorer Security folder.)		
Add a supplier record to Polaris	Access serials: Allow	System - Serials
	Suppliers: Create	Library - Serials
Delete supplier records	Access serials: Allow	System - Serials
	Suppliers: Access	Branch - Serials
	Suppliers: Delete	Branch - Serials
Maintain the information in existing supplier records	Access serials: Allow	System - Serials
	Suppliers: Access	Branch - Serials
	Suppliers: Modify	Branch - Serials
	Suppliers: Modify postal address fields	System - Serials
Maintain Link to Supplier Databases Table Permissions		
Add and remove suppliers	Access administration:	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
from the Link to Supplier Databases table	Allow	
	Modify links to supplier databases table: Allow	System - Acquisitions
Order Materials Permissions		
Create new purchase orders and add titles to existing purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Create	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Funds: Access	Branch - Acquisitions
Add line items to a purchase order. Add a title without a bib in the database by doing a Z39.50 search.	Suppliers: Access	Branch - Acquisitions
	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Bibliographic records: Create	System, Library, Branch - Cataloging
	Create a bib record from acquisitions and serials: Allow	System - Acquisitions
	Modify a bib record from acquisitions and serials: Allow	System - Acquisitions
	Selection Lists: Access	Branch - Acquisitions
	Funds: Access	Branch - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Bulk add titles to purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Access Cataloging subsystem: Allow	System - Cataloging
	Cataloging record sets: Access	System, Library, Branch - Cataloging
	Use 'own' cataloging record sets: Allow	System, Library, Branch - Cataloging
	Purchase orders: Modify	Branch
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Funds: Access	Branch - Acquisitions
	Express importing: Allow	System, Library, Branch - Cataloging
Remove unused purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Delete	Branch - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Release purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Purchase orders: Release, receive, cancel, close PO	Branch - Acquisitions
	Purchase orders: Release order exceeding fund encumbrance limits	Branch - Acquisitions
	Purchase orders: Release order resulting in negative fund free balance	Branch - Acquisitions
	Modify a bib record from acquisitions and serials: Allow (This permission allows user to change only the Display in PAC setting in bibliographic records.)	System - Acquisitions
Create item records when material is ordered	Access acquisitions: Allow	System - Acquisitions
	Create and delete item records from acquisitions and serials: Allow	System - Acquisitions
Print purchase orders to mail or fax to supplier	Access acquisitions: Allow	System - Acquisitions
	Print purchase orders: Allow	Branch - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Send purchase orders electronically via EDI	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Send electronic purchase orders	Branch - Acquisitions
Receive Materials Permissions		

Workflow	Required Permissions	Administration Explorer Security Location
Receive purchase orders and create invoices. Receive from an invoice.	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Create	Branch - Acquisitions
	Invoices: Modify	Branch - Acquisitions
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Purchase orders: Access	Branch - Acquisitions
	Suppliers: Access	Branch - Acquisitions
	Purchase orders: Print workslips	Branch - Acquisitions
	Funds: Access	Branch - Acquisitions
	Purchase orders: Release, receive, cancel, close PO	Branch - Acquisitions
	Purchase orders: Undo receipt	Branch - Acquisitions
	Access cataloging subsystem: Allow	System - Cataloging
Check in shelf-ready items and receive purchase order line items using the Check In Shelf-Ready Materials workform.	Check in shelf-ready materials: Allow (Only this permission and Access acquisitions: Allow are required to use the Check In Shelf-ready Materials workform.)	System - Acquisitions
Receive cartons of materials by scanning (or entering) the barcode on	Receive ASN Shipments: Allow	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
the outside of the box.		
Claim Ordered Items Permissions		
Claim items when shipments are processed and materials did not arrive as expected	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Claim record: Create	Branch - Acquisitions
Claim from the Claim Alert List	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Claim record: Access	Branch - Acquisitions
	Claim record: Create	Branch - Acquisitions
	Claim alert list: Access	System - Acquisitions
Maintain claim records	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Claim record: Access	Branch - Acquisitions
	Claim record: Create	Branch - Acquisitions
	Claim record: Modify	Branch - Acquisitions
	Claim record: Delete	Branch - Acquisitions
Print from Claim Alert List	Access acquisitions: Allow	System - Acquisitions
	Claim alert list: Access	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Cancel Ordered Items Permissions		
Cancel purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Purchase orders: Release, receive, cancel, close PO	Branch - Acquisitions
	Claim record: Access	Branch - Acquisitions
	Claim record: Modify	Branch - Acquisitions
	Claim record: Delete	Branch - Acquisitions
	Claim alert list: Access	System - Acquisitions
Delete canceled purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Delete cancelled purchase orders: Allow	Branch - Acquisitions
Remove unused purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Delete	Branch - Acquisitions
Invoice Materials Permissions		
Create invoices	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Create	Branch - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Pay, undo payment, credit, or adjust invoices	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Adjust	Branch - Acquisitions
	Invoices: Modify	Branch - Acquisitions
	Invoices: Pay, credit	Branch - Acquisitions
	Invoices: Print vouchers	Branch - Acquisitions
	Invoices: Pay invoice exceeding fund expenditure limits (allows user to exceed the expenditure limits and the fund free balance)	Branch - Acquisitions
Delete invoices	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Modify	Branch - Acquisitions
	Invoices: Delete	Branch - Acquisitions
Link invoices	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Modify	Branch - Acquisitions
Generate EDI invoices for partial shipments	Process EDI Invoices: Allow	System - Acquisitions
Manage Foreign Currencies Permissions		
Add or modify a currency in the Currencies policy table	Modify currencies table: Allow (Administration permission)	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
	Access tables: Allow (Administration permission)	System - Acquisitions
Adjust the currency exchange rate	Adjust currency exchange rates: Allow	System, Library - Acquisitions

Related Information

- Permissions for administering acquisitions - Administration permissions are required to modify the donation fund database table and create links to supplier databases. See the *Polaris Administration Guide*, "Acquisitions Administration Permissions."
- Acquisitions permissions list - See Acquisitions Permissions for an alphabetical reference list.

Setting the Acquisitions/Serials default directory

The Acquisitions/Serials default directory profile specifies the location where Acquisitions logs and files are saved. For example, this is the default location where import and the bulk add reports are generated.

See also:

- [Specify the Acquisitions default directory](#)

Specify the Acquisitions default directory

To set up the Acquisitions default directory.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select Profiles and select the Acquisitions/Serials tab.
3. Double-click **Default directory** to display the Default Directory Setup for Logs and Files - Acquisitions dialog box.
4. Type the new path, or click **Browse** and select another location, then click **OK** to update the directory.

If the value in the **Default directory** profile displays the location where you want to save your organization's Acquisitions/Serials logs and files, no changes are needed.

Filtering Branches in Line Items

You can set the **Filter branches in line item segments** profile to limit the destination branches that display in line item segments for selection lists, purchase orders, and invoices. You can also set this profile to limit the 970 tags that are used to create selection list or purchase order line item segments during the bulk add process.

If the profile is set to **Yes**, the branches are limited by the parent library as follows:

- Purchase order line item segments - The branches in the **Destination** drop-down list box have the same parent library as the branch selected in the **Ordered at Name** box on the General view of the Purchase Order workflow. The default branch selected in the segment is the same as the one selected in the **Ordered at Name** box.
- Invoice line item segments - The branches in the **Destination** drop-down list box have the same parent library as the branch selected in the **Paid by Name** box on the General view of the Invoice workflow. The default branch selected in the segment is the same as the one selected in the **Paid by Name** box.
- Selection list line item segments - The branches in the **Destination** drop-down list box in the selection list line item segment have the same parent library as the one selected in the **Created at Library** on the Selection List Line Item workflow.

Note: Selection list line items use the setting at the system or library level.
Purchase order and invoice line items use the setting at the branch level.

- Bulk add to selection list and Bulk add to purchase order - If the 970 tag has a subfield \$I (branch abbreviation) with the same parent library as the **Ordered At** branch on the purchase order or the **Library** on the selection list, the 970 tag is used to create a segment on the purchase order or selection list. If the profile is set to **Yes**, and the branch abbreviation in a 970 tag does not have the same parent library as the **Ordered At** branch on the purchase order or the **Library** on the selection list, it will not be used in the purchase order line item. If the profile is set to **No**, the default branch selected in the **Destination** box is the user's login branch,

and the **Destination** list includes all branches in the library system. All 970 tags will be bulk-added to a purchase order or selection list if this profile is set to **No**.

Important: If selectors add selection list line item segments for branches with different parent libraries, the **Filter branches in line item segments profile** should be set to **No**. Then, use the **Acq fund droplist setup** profile at the staff member level to specify exactly which branches' funds appear in the segments for that selector. See [Specify how funds are displayed in Acquisitions](#). The user must also have the permission **Selection list line item segment: Create, modify, delete** for the branch selected in the **Destination** box for the selection list line item segment.

See also:

- [Filter destination branch lists by parent library](#)

Filter Destination Branch Lists by Parent Library

To specify whether you want **Destination** branch lists in selection lists, purchase orders, and invoices to be filtered by the parent library:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Acquisitions/Serials** tab.
3. Select **Filter branches in line item segments** and select **Yes** or **No**.

If this filter is set to **Yes**, it also filters branches in the bulk add process. For more information on the implications of setting this filter, see [Filtering Branches in Line Items](#).

Note:

This profile also affects which 970 tags are used in the bulk add process. See [Filtering Branches in Line Items](#).

Tip:

If you want the profile to affect selection lists, you must set the profile at the system or library level. The profile can be set at the branch level for purchase order line items or invoice line items.

Related Information

The **Filter branches in line item segments** profile does not affect selection list line items when it is set at the branch level, but you can use the **Acq fund droplist setup** profile at the staff member level to specify exactly which branches' funds appear in the selection

list line item segments for that selector. See [Specify how funds are displayed in Acquisitions](#).

Administering Funds/Fiscal Years

Do the following tasks in Polaris Administration before setting up your organization's fund structure in Polaris Acquisitions:

- Allow the appropriate staff members to manage fiscal years and funds, transfer money between funds, and modify fund categories.
- Create and maintain the Fund Categories table, which lists the fund categories an organization can use to designate donation funds. The fund categories are the same for all branches and libraries in the system.
- Specify which funds display in invoices, purchase orders, and selection lists—all funds for all branches linked to the same parent library as the branch selected in the workform, or only the selected branch's funds. For selection lists, an additional option lets you select specific branches and funds to display in selection list line item segments for specific selectors.

See also:

- [Set up donation fund categories](#)
- [Specify How Funds are Displayed in Acquisitions](#)

Set up Donation Fund Categories

To set up the donation fund categories for your library system:

Note:



These permissions are required to view and change the donation fund categories: **Access administration: Allow, Access tables: Allow, Modify donation fund category table: Allow**

1. In the Administration Explorer tree view, expand the organization's folder for which you want to set the donation fund categories.
2. Expand the **Policy Tables** folder.
3. Select **Fund Categories**.

The Fund Categories table appears.

4. Click  to display the Insert: Donation Fund Categories dialog box.

Note:

To modify a fund category, select an entry and click . To delete a fund category, select an entry and click .

5. Type the fund category you want to add.
6. Click **OK**.

The new entry appears in the Fund Categories table, and it will appear in the **Fund Category** box on the Donor view of the Fund workform.

7. Select **File | Save**.

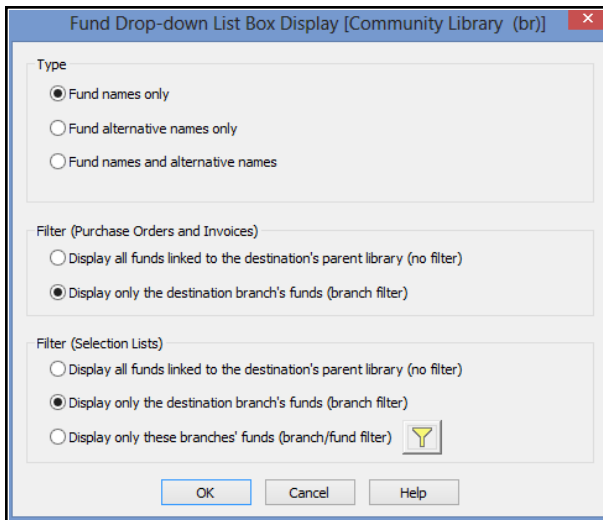
Specify How Funds are Displayed in Acquisitions

To specify how you want funds to display in fund lists in selection lists, purchase orders, and invoices:

Important:

The **Acq fund droplist setup** profile can be set at the system, library, branch, or staff level. If a staff member has a different setting from the organization, the fund list is displayed according to the staff member's setting. If selectors add selection list line item segments for branches with different parent libraries, the **Filter branches in line item segments profile** should be set to **No**. See [Filter destination branch lists by parent library](#). Then, open the **Acq fund droplist setup** profile at the staff member level, select **Display only these branches' funds (branch/fund filter)** and specify exactly which branches' funds appear in the segments for that selector. See step 6 below.

1. In the Administration Explorer tree view, expand the folder for the organization or staff member.
2. Select **Profiles** and select the **Acquisitions/Serials** tab.
The Acquisitions/Serials profiles appear.
3. Double-click **Acq fund droplist setup**.
The Fund Drop-down List Box Display dialog box appears.



4. Under **Type**, select the appropriate option to display the fund names only, alternative names only, or both.

Important:

If you select **Fund names only** or **Fund alternative names only**, the number of entries in the fund list is reduced by half. If you select **Fund names and alternative names**, each fund is listed twice, first by the fund name and then by the alternative name.

Tip:


Header funds are used to pay for charges not associated with a specific line item, such as shipping charges. They appear on the General view of the Purchase Order and Invoice workforms.

5. Under **Filter (Purchase Order/Invoice)**, select one of the following options:
 - **Display all funds linked to the destination's parent library (no filter)** - With this option selected, Fund lists are displayed as follows:
 - **Header Funds** - Purchase Order workform - All funds linked to all branches that have the same parent library as the selected **Ordered at** branch.
 - Invoice workform - All funds linked to all branches that have the same parent library as the selected **Paid By** branch.
 - **Line Item Segment Funds** - Purchase Order Line Item and Invoice Line Item workforms - All funds linked to all branches that have the same parent library as the selected **Destination** branch.

- **Default Funds in Bulk Add to Purchase Order dialog** - All funds linked to all branches that have the same parent library as the selected **Destination** branch.
 - **Display only the destination branch's funds (branch filter)** - With this option selected, Fund lists are displayed as follows:
 - **Header Funds** - Purchase Order workflow - Only funds linked to the **Ordered at** branch.
 - Invoice workflow - Only funds linked to the **Paid by** branch.
 - **Line Item Segment Funds** - Purchase Order Line Item and Invoice Line Item workflows - Only those funds linked to the **Destination** branch.
 - **Default Funds in Bulk Add to Purchase Order dialog box** - Only those funds linked to the Destination branch.
6. Under **Selection List Filter**, select one of the following options to display fund lists in selection list line item segments:

Tip:

These settings also apply to the funds list in the Bulk Add to Selection List dialog box.

- **Display all funds linked to the destination's parent library (no filter)** - Displays all the funds linked to all branches with the same parent library as the selected **Destination** branch.
- **Display only the destination branch's funds (branch filter)** - Displays only the funds linked to the selected **Destination** branch.
- **Display only these branches' funds (branch/fund filter)** - To select specific funds to display in selection list line item segments for **Destination** branches:
 - Click  to open a tree view of the branches and their associated open funds.
 - Expand the branches, and select the funds to display.
 - Click **OK** to close the Branch/Fund Filter dialog box.

Tip:

All funds are unselected by default. You can click **Select All** to select all branches and all funds, or **Unselect All** to start over. To select

most funds, but not all, you can click **Select All** and then click the check box for certain funds so that they are not selected.

If you select specific funds to display for a branch, only those funds display in the **Funds** list when that branch is selected in the **Destination** box in the selection list line item segment.

Important:

If selectors add selection list line item segments for branches with different parent libraries, the **Filter branches in line item segments profile** should be set to **No**. See [Filter destination branch lists by parent library](#).

Be sure that the selectors also have the permission **Selection List Line Item Segment: Create, Modify, Delete** for the selected branches.

7. Click **OK** on the Fund Drop-down List Box Display dialog box to save the fund list display settings.

Managing Selection Lists

Selection lists in Polaris Acquisitions are lists of bibliographic titles (selection list line items) that can have a status of Approved, Consider, Desiderata, Rejected or Processed. Selection list line items can be copied to purchase orders or other selection lists. Do the following tasks to set up selecting in Polaris for your organization:

- Allow the appropriate staff members to access, create, modify, merge, copy, approve, reject or delete selection lists. You can set up permissions so that some selectors have complete control over selection lists, while other selectors can only add or change the distribution (segment) information for a title (line item).
- Set selection list line item defaults for the destination, collection, fund, and supplier. When authorized staff members create selection lists, the line items automatically contain this default information unless the staff member changes it.
- Set up the display of **Destination** branches so that line item segments display all branches in the system or only branches linked to the parent library.
- Set up the display of funds in selection list line item segments so that all funds linked to all branches with the same parent library as the **Destination** branch are displayed, only funds linked to the **Destination** branch are displayed, or only selected branches and funds are displayed.
- Specify whether the material type is copied to a new selection list line item when users add new selection list line items by copying existing line items.
- Specify whether defaults will substitute for missing data when bibliographic titles are bulk-added to selection lists.
- Specify if 970 tags will be marked as processed when you bulk add titles to purchase orders or selection lists. This prevents 970 tags from creating duplicate line item segments.

See also:

- [Select Material Permissions](#)
- [Specify defaults for selection list line items](#)

- [Filter destination branch lists by parent library](#)
- [Set bulk add to use default data in selection lists](#)

Specify Defaults for Selection List Line Items

To specify defaults for the supplier, destination, collection, and fund when line items are added to selection lists:

1. In the Administration Explorer tree view, expand the folder for the organization or staff member.
2. Select **Profiles** and select the **Acquisitions/Serials** tab.
3. Double-click **Selection list line item defaults**.

The Selection List Line Item Defaults dialog box appears.

4. Select the default destination in the **Destination** box.
5. Select the default collection in the **Collection** box.
6. Select the default fund in the **Fund** box.

Tip:

You can also specify which funds display in the **Funds** list in the selection list line item segment. See [Specify how funds are displayed in Acquisitions](#).

7. Click **Find** to search for and select the supplier using the Find Tool.

The supplier information appears in the **Name**, **Account**, and **Owner** boxes. The owner is the library that has the account with the supplier.

8. Click **Save** to save your settings and close the dialog box.

Set Bulk Add to Use Default Data in Selection Lists

To specify whether the default quantity, material type, destination, collection, fund, and supplier information should substitute for missing or invalid information when bulk-adding titles to selection lists.

Note:

The default information is set up when the staff member is bulk-adding titles to selection lists from a record set, using the Bulk Add to Selection List dialog box. See [Create a selection list by bulk adding titles](#).

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.
3. Double-click **Bulk Add to SL: Replace invalid fields with default data**.
4. Select **Yes** if you want default data to fill in missing data on selection list line items, or select **No** if you do not want default data on selection list line items.
5. Select **File | Save**.

Managing Supplier Records

Supplier records in Polaris contain information about the suppliers from which your library acquires materials. These records are used in both acquisitions and serials processing. In addition, you can add links to supplier databases to the Polaris Shortcut Bar.

Note:

The permissions for working with supplier records are located under the Serials folder in the Administration Explorer, Security view. To access supplier records, you must also have permission to access Serials.

Do the following administration tasks to work with suppliers:

- Allow the appropriate staff members to access, create, modify or delete supplier records. [Manage Supplier Records Permissions](#)
- Allow the appropriate staff members to modify the Link to Supplier Databases policy table.
- Add suppliers' Web addresses to the Link to Supplier Database policy table. The Web addresses in the policy table appear in the dialog box when users select **Utilities, Acquisitions Processing, Link to supplier databases** from the Polaris Shortcut Bar.
- If you order materials using electronic data interchange (EDI), specific data needs to be entered in the supplier record.
- If you want to use Titles to Go, contact your Polaris Site Manager and your suppliers (except Baker & Taylor, who does not need to be contacted before using Titles to Go).
- If you use any foreign suppliers that use a currency other than your country's base currency, establish the currency in the Currencies table, set your base currency in the System workform, and set an exchange rate in the Update Currency Exchange Rates dialog box.

See also:

- [Manage Supplier Records Permissions](#)
- [Maintain Link to Supplier Databases Table Permissions](#)
- [Add links to supplier databases](#)

Add Links to Supplier Databases

To add a link to a supplier's database:

Note:

These permissions are required to view and change the Links to Supplier Databases table: **Access administration: Allow, Access tables: Allow, Modify links to supplier databases: Allow**

1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Policy Tables** folder for the organization.
3. Select **Link to Supplier Databases**.



The Link to Supplier Databases table appears.

4. Click .

The Insert: Link to Supplier Database dialog box appears.

5. Type the supplier's name and the URL for their database in the **Supplier Name** and **Supplier URL** boxes, and click **OK** to close the dialog box.
6. Select **File | Save**.

Related Information

Modify or delete an entry - Select an entry and click  to change it or click  to delete it.

Administering Purchase Orders

Your staff can use several different methods to create purchase orders in Polaris. They can import records into Cataloging record sets and bulk add them to a purchase order, or they can copy titles from selection lists. They can also add titles one at a time. You can set up ordering to fit your organization's workflow.

Do the following tasks to set up ordering for your organization:

- Set permissions for staff members (and their workstations) that allow them to access, create, modify and delete purchase orders.
- Enable or disable automatic numbering for purchase orders.
- Set up the display of branches in purchase orders to display all branches or a limited list of branches.
- Set up the display of funds in purchase orders to display a limited list of funds. You can also reduce the funds list by displaying only the fund name or fund alternative name.
- Specify whether segment data will be copied when a subsequent purchase order line item segment is added.
- Specify whether the material type will be retained when users select **File | New | Copy Segment Data** from an existing purchase order line item.
- Specify if an alert should appear automatically on a purchase order line item if a bulk-added bibliographic record contains multiple ISBNs.
- Specify whether defaults will be used for missing data when titles are bulk-added to purchase orders.
- Mark 970 data as processed after bibliographic records are bulk-added to purchase orders.
- Specify whether brief bibliographic records will display in the PAC. These are the brief records that are created when the purchase order line item is saved.
- Specify whether a warning should appear when a purchase order line item or invoice line item is saved and the **Display in PAC** option is not selected in the linked bibliographic record.
- Specify another header charge type to be used for purchase orders and invoices.

- If you want to use Titles to Go, contact your Polaris Implementation Manager or Polaris Site Manager to activate your access to the Polaris Administration profile for enabling Titles to Go. Then, contact your supplier and tell them of your plan to use Titles to Go (Baker & Taylor does not require you to contact them before using Titles to Go). The supplier will give you the necessary authentication information.
- Specify whether on-order item data is printed on purchase order line item workslips.
- Specify whether purchase orders will be closed automatically via an SQL job.
- Set up import profiles specifically for Acquisitions tasks.

See also:

- [Order Materials Permissions](#)
- [Enable automatic purchase order numbers](#)
- [Filter destination branch lists by parent library](#)
- [Specify how funds are displayed in Acquisitions](#)
- [Enable copy segment data to next segment](#)
- [Retain material type in copied line items](#)
- [Set alert indicator for bulk adding titles with multiple ISBNs](#)
- [Set bulk add to use default data in purchase orders](#)
- [Mark 970 data as processed after bulk adding titles](#)
- [Specify whether on-order item data prints on POLI workslips](#)
- [Enable brief bib record display in PAC](#)
- [Enable warning if no Display in PAC setting](#)
- [Rename the purchase order and invoice header Other charge type](#)
- [Automatically Close Purchase Orders](#)
- [Setting Up Import Profiles.](#)

Enable Automatic Purchase Order Numbers

To set up automatic purchase order numbering:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.
3. Double-click **Generate purchase order number**, and select **Yes**.

Tip:

The **Last used purchase order number** parameter is for display only.

4. If your library policy requires a prefix for purchase order numbers, double-click **Prefix for system generated purchase order number**, and type the prefix text.
5. Double-click the **Purchase order number increment**, and type or select the increment to use between consecutive purchase orders.
6. Double-click the **Purchase order starting number**, and type or select the first number to use.
7. Select **File | Save**.

Enable Copy Segment Data to Next Segment

When you enable the parameter **Copy last segment data to next segment**, the system automatically copies the data from the previous purchase order line item segment to the next segment. Fewer keystrokes are required when adding titles to a purchase order.

To enable the system to copy the information from a purchase order line item segment to the next segment automatically:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.
3. Double-click **Copy last segment data to next segment**, and select **Yes**.
4. Select **File | Save**.

Retain Material Type in Copied Line Items

You can set an Acquisitions profile to retain the material type or leave the material type blank when users copy a selection list or purchase order line item to create a new one.

To set the option to retain the material type or leave it blank when copying a selection list or purchase order line item:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Acquisitions/Serials** tab.
3. Set the **Retain Material type when copying line item segment data** profile as follows:
 - Select **Yes** to retain the material type when users create a new selection list or purchase order line item by selecting **File | New | Copy Segment Data** or **CTRL+N** from an existing selection list or purchase order line item.
 - Select **No** if you want the material type to be blank when users create a new selection list or purchase order line item by selecting **File | New | Copy**

Segment Data or **CTRL+N** from an existing selection list or purchase order line item.

Set Alert Indicator for Bulk Adding Titles with Multiple ISBNs

If this indicator is set to **Yes**, the **Alert** box on the Purchase Order Line Item workform will be checked automatically when a bulk-added bibliographic record has multiple ISBNs. A red exclamation point also appears next to the purchase order line item in the Find Tool results list in the Purchase Order workform, Line Items view.

To set the automatic alert:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.
3. Double-click **Bulk add to PO: Add Alert to PO line item for multiple ISBNs**, and select **Yes** or **No**.
4. Select **File | Save**.

Set Bulk Add to Use Default Data in Purchase Orders

When you set the **Bulk add to PO: Replace invalid fields with default data** parameter to **Yes**, you can enter default data on the Add to New Purchase Order dialog box, and this data is used to create the line items on the purchase order. If there are no 970 tags in the bibliographic records, or the tags are missing data, the line items are created using the data entered in the following fields on the Add to New Purchase Order dialog box: **Material type, Destination, Collection, Fund, Quantity, List Price, and Discount**.

To allow default information to be substituted for missing or invalid data when titles in record sets are bulk-added to purchase orders:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.
3. Double-click **Bulk add to PO: Replace invalid Fields with default data**, and select **Yes**.
4. Select **File | Save**.

Related Information

[Create a purchase order by bulk adding titles](#)

Mark 970 Data as Processed After Bulk Adding Titles

If you import bibliographic records that contain 970 tags, the distribution information in the tags is used to create line item segments in purchase orders or selection lists when you bulk add the titles. You can set the **Bulk add to PO/SL: Mark 970 data as processed** parameter to **Yes**, so that if you import the same title again with new 970 tags and bulk add the title, the old 970 tags are not used.

To mark 970 tags as processed:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.
3. Double-click **Bulk add to PO/SL: Mark 970 data as processed**, and select **Yes**.
4. Select **File | Save**.

Related Information

Delete the processed 970 tags - You can set up a Polaris Administration Cataloging profile to run a utility that periodically deletes processed 970 tags. See [Set up the Subfield 9 cleanup utility](#).

Specify whether on-order item data prints on POLI workslips

To specify whether on-order item data prints on purchase order line item workslips.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.
3. Select **PO line item workslips: Print on-order item data parameters**, and select one of the following options:
 - **Yes** (default) - If the purchase order line item has any linked on-order items, the data from the linked on-order items is printed on the workslip. A blank line appears if a segment does not have linked items. The segment data is printed only if no on-order items are linked to the purchase order line item.
 - **No** - Purchase order line item segment data will be printed on the purchase order line item workslip, regardless of the presence of on-order items.
4. Select **File > Save**.

Enable Brief Bib Record Display in PAC

To display brief bibliographic records created in Acquisitions in the PAC:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Acquisitions/Serials** tab.
3. Double click **Display in PAC: Brief bibliographic records created from Acquisitions**, and select **Yes**.
4. Select **File | Save**.

Enable Warning if No Display in PAC Setting

To enable a warning message if the **Display in PAC** setting is not selected when saving a purchase order line item or invoice line item:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** and select the **Acquisitions/Serials** tab.
3. Double-click **Display in PAC: Warn if unchecked at POLI/INLI save**, and select **Yes**.
4. Select **File | Save**.

Rename the Purchase Order and Invoice Header *Other* Charge Type

If you want a more specific name for a purchase order or invoice header charge (charges that apply to the purchase order or invoice as a whole), you can rename the charge type of **Other**. The renamed charge type will appear in the **Charge Type** list on the General view of the Purchase Order and Invoice workflow.

To rename the **Other** header charge:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.
3. Double-click **Other charge description**.
4. Type a new name to give the **Other** charge.

The name can have up to 19 alphanumeric characters.

5. Select **File | Save**.

The charge type is saved and is available to select for purchase order or invoice header charges.

Automatically Close Purchase Orders

The **Close Purchase Orders** SQL job will close purchase orders automatically if the Polaris Administration Acquisitions parameter, **Automatically close purchase orders**, is set to **Yes**. This parameter is available at the System, Library, and Branch organization levels, and it is set to **No** by default. See [Enable the Close Purchase Order job](#).

When the job runs, purchase orders are closed if: the **Automatically close purchase orders** parameter is set to **Yes** for the purchase order's **Ordered at** organization; the purchase order has a type of Firm, Gift or Donation; all line items have a status of Received, Canceled or Partly Received; and all segments have a status of Canceled or Received. See

Note:

The Close Purchase Orders job does not affect standing order or subscription purchase orders or purchase order lines that have a status of On Order, Backordered, Exceptional Condition, Never Published, Out of Print, Return Requested, Returned, Pending Claim or Claimed.

Users can continue to manually close purchase orders when the lines are received but not yet paid (still encumbered). When a user manually closes a line item, a message informs the user that one or more lines have been received, but not yet paid and provides the option for the user to select **Yes** to continue to close the purchase order or **No** to cancel the closure. With the SQL job, any eligible purchase order will be closed automatically.

Purchase Order Transactions and Transaction Subtypes

The following information is recorded and available in the transaction database for a **Purchase order closed** transaction:

Supplier ID of the closed PO (SUPPLIER_ID)

Purchase Order number (without suffix) (PO_NUMBER)

Order type (ORDER_TYPE)

Payment method (PAYMENT_METHOD)

Purchase Order ID that was deleted (PURCHASE_ORDER_ID)

Purchase order's Ordered At Org (Branch)

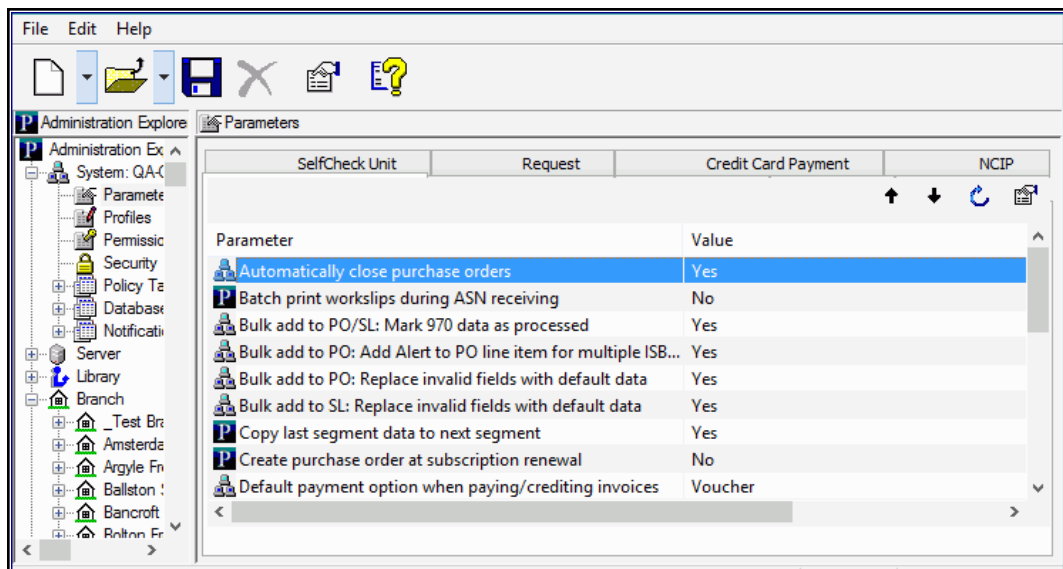
User ID for the user who closed the purchase order or **PolarisExec** if the purchase order was closed automatically

Enable the Close Purchase Order job

If the **Automatically close purchase orders** parameter is set to **Yes** for the organization, the **Close Purchase Orders** SQL job runs on a default schedule of 6:59 a.m. each morning and closes the eligible purchase orders. The job must be run prior to the DBCC nightly job.

To enable the job that automatically closes purchase orders:

1. Select **Administration| Explorer**, and select the system, library, or branch organization for which you want to enable the Close Purchase Orders job.
2. Select **Parameters**, and select the **Acquisitions/Serials** tab.



3. Double-click the **Automatically close purchase orders** parameter, and select **Yes**.
4. Select **File > Save** to save the parameter setting.

Setting Up EDI Ordering

Innovative Interfaces offers a separately-licensed set of services for setting up, implementing, and supporting Electronic Data Interchange (EDI) ordering and invoicing. EDI services include support for Enriched EDI orders, shelf-ready items, and Advanced Shipping Notices (ASN). If you are interested in implementing EDI ordering through Polaris Acquisitions, contact your Polaris Site Manager.

Once you have implemented EDI with a supplier, your library can send electronic purchase orders and receive acknowledgments and invoices electronically (and advanced shipping notices, if the supplier produces them) using electronic data interchange (EDI) and Polaris Acquisitions.

After the supplier receives the EDI order, an electronic order acknowledgment is put into the library's account folder on the supplier's FTP server. If the supplier can produce Advanced Shipping Notice (ASN) files, an ASN is also put into this folder when the order is prepared for shipment.

Then, when the order is filled, the electronic invoice is put into this folder. The SQL job **PolarisEDIAgent** retrieves the files from the supplier's FTP server and loads them into a directory in Polaris, creating an invoice with the suffix **EDI**. The purchase order acknowledgment file (POA) is used to create the Electronic Purchase Order Acknowledgment report, the ASN file is used to receive shipments in bulk, and the invoice file is used to create the EDI invoice record in Polaris.

See also:

- [About the Polaris EDIAgent Job](#)
- [EDIAgent and EDIFTP Logs](#)
- [Prepare for EDI Ordering](#)
- [Setting Up Importing and Bulk Adding](#)
- [Specify the EDI FTP transmission mode](#)

About the Polaris EDI Agent Job

Tip:

You can change the EDI Agent schedule through SQL Server Enterprise Manager. For more information on the EDI Agent and SQL jobs, see the *Administration Guide*, Default Permissions Reference.

The SQL job, Polaris EDI Agent, runs on a default schedule of 8:00 a.m. every morning and scans the supplier's FTP server looking for files in the library's directory. The EDI Agent identifies the supplier's FTP server by the address in the **FTP Address** field and the library's directory by the **Username** and **Password** fields in the Supplier record.

The first time the EDI Agent is run, it creates the **EDINew** directory (**C:\ProgramData\Polaris\[version]\datalink\EDI Agent\EDINew**) and the **EDIDone** directory (**C:\ProgramData\Polaris\[version]\datalink\EDI Agent\EDIDone**). (The datalink portion of the file path depends on how your library server is set up.)

When the EDI Agent finds electronic purchase order acknowledgment, invoice, or advanced shipping notice files in the library's account directory on the supplier's FTP server, it retrieves them and loads them into the **EDINew** directory (or any other directory specified in the Polaris Administration Acquisitions profile **Default directory**). Once the files are loaded into the SQL database, they are moved to the **EDIDone** directory. If any of these steps fail, the errors are logged in the event viewer.

If available, the files retrieved by the EDI Agent are used as follows:

- Purchase Order Acknowledgments - The purchase order acknowledgment data is used to generate the PO Acknowledgment Report, a standard report available from the Polaris Shortcut Bar. See [Acquisitions Reports](#).
- EDI Invoices - The invoice data automatically creates EDI invoices in Polaris, and you can search for these invoices by the suffix EDI. You can select the **Hold partial shipment invoices** in the EDI Defaults profile in Polaris Administration to prevent EDI invoices from being created automatically if the number of copies received does not equal the number of copies ordered on any of the line items in the invoice. You can generate these partially received invoices using the Process EDI Invoices workform. See [Set up EDI invoice defaults](#).
- Advanced Shipping Notices (ASN) - The ASN (X12 transaction set 856) is composed of data related to the shipment, orders, packages or cartons, and the items inside the cartons. When the shipment arrives, the user opens the Receive ASN Shipments workform and receives the purchase order line items by scanning the UCC-

128 barcode on the outside of the carton. See [Receive using the Advanced Shipping Notice \(ASN\)](#).

EDIAgent and EDIFTP Logs

The EDIAgent and EDIFTP log files are saved in the following location:

C:\ProgramData\Polaris\[version]\Logs\SQLJobs.

When the EDIAgent runs, one file for each EDI-enabled Polaris supplier record will be created (or overwritten if already created for the supplier) and saved in the EDIFTP folder. If the EDIAgent log reports a connection failure, a Polaris representative or authorized library staff member can use the supplier ID to find the file in the EDIFTP folder.

EDIAgent Log and FTP Message Examples

If the FTP transmission is successful and files are retrieved, the EDIAgent log provides information regarding the date and time the EDIAgent ran, the information retrieved for each supplier, and the EDI Invoice e-mail sent to the library staff member. If the FTP transmission is successful, but no files were available for retrieval, the EDIAgent log indicates that the transmission was successful, but no files were retrieved. If the FTP transmission is unsuccessful, the EDIAgent shows the error, and the EDIFTP file for the supplier contains more details regarding the problem.

- EDIAgent Log - FTP transmission successful and files retrieved

Began Executing 2017-04-30 10:35:13

Start EDI expired data cleanup [SQLSTATE 01000]

Errno 0

finished EDI expired data cleanup [SQLSTATE 01000]

Run the EDIAgent executable [SQLSTATE 01000]

output

Accessing FTP Server ftp.polarislibrary.com for Supplier ID: 77

InternetConnect - File Transfer on FTP Server ftp.polarislibrary.com successful.

Accessing FTP Server ftp.polarislibrary.com for Supplier ID: 234

InternetConnect - File Transfer on FTP Server ftp.polarislibrary.com successful.

Accessing FTP Server ftp.polarislibrary.com for Supplier ID: 296

InternetConnect - File Transfer on FTP Server ftp.polarislibrary.com successful.

Processing files AudioBookR2.txt

Copying file AudioBookR2.txt to Done directory

Processing files AudioGoR2.txt

Copying file AudioGoR2.txt to Done directory

Processing files BrodartR2.txt

Copying file BrodartR2.txt to Done directory

Processing files BTR2.txt

Copying file BTR2.txt to Done directory

Processing files FindAwayR2.txt

Copying file FindAwayR2.txt to Done directory

exiting EDIAgent

There were no errors in the EDIAgent process, invoice creation starting [SQLSTATE 01000]

Emailing file at location: "C:\ProgramData\Polaris\
[version]\EDIAgent\EDIInvoiceResults_FindawayWorld_SAL.log" To =
staffone@polarislibrary.com; stafftwo@polarislibrary.com From =
yourlibrary@polarislibrary.com [SQLSTATE 01000]

Apr 30 2017 10:35AM ""C:\Program Files (x86)\Polaris\
[version]\Bin\PolarisEmailer.exe" Newman-R2
"staffone@polarislibrary.com;stafftwo@polarislibrary.com"
"yourlibrary@polarislibrary.com" EDIInvoiceResults_FindawayWorld_SAL.log
"C:\ProgramData\Polaris\4.1R2\EDIAgent\EDIInvoiceResults_FindawayWorld_
SAL.log"" [SQLSTATE 01000]

output

(null)

Apr 30 2017 10:35AM Edi Agent Invoice Creation Successful [SQLSTATE 01000]

Apr 30 2017 10:35AM Edi Agent completed with no errors. [SQLSTATE 01000]

- **EDIAgent Log - FTP successful, but no files retrieved**

Starting EDIFTP - 4/17/2017 9:24:56 AM

Number of files retrieved: 0

Finishing EDIFTP - 4/17/2017 9:24:57 AM

- **FTP message - FTP successful, but no files created in Polaris**

- EDI Agent Log - FTP unsuccessful

Starting EDIFTP - 4/17/2017 9:30:21 AM

This EDI Agent FTP experienced the following error.

Exception Message: The remote server returned an error: (530) Not logged in.

Response Status: 530 Not logged in.

If error code = 530, check username and password.

Number of files retrieved: 0

Finishing EDIFTP - 4/17/2017 9:30:22 AM

- **FTP message - FTP unsuccessful**

Prepare for EDI Ordering

To enable EDI ordering with Polaris, your IT staff verifies that orders can be sent via FTP; your administrator grants permissions, sets EDI invoice defaults and verifies the library SAN is in the Branch workflow; and your library staff member contacts the suppliers that accept EDI orders, contacts your Polaris representative, and sets up supplier records.

Prepare for EDI Ordering - IT Staff

- Verify that your library can send and receive files via FTP - Electronic Data Interchange (EDI) orders are sent via File Transfer Protocol (FTP), and purchase order acknowledgments and invoices are received via FTP. Therefore, your library must be able to send outbound files and receive inbound files via FTP, and staff members who send EDI orders must have the appropriate administrative settings to send an order via FTP from their workstations.
- Determine if EDI files should be transmitted in active or passive mode - When you transmit or receive files via FTP in active mode, both the server and client are required to open up ports to check for incoming traffic. This can cause problems when you are working behind a firewall. However, when you transmit or receive files via FTP in passive mode, only the server is required to open up ports for incoming traffic. If you are working behind a firewall, transmitting and receiving via FTP in passive mode gives you a better chance of being able to connect to an FTP server.

Prepare for EDI Ordering - Polaris Administrator

- Set the transmission mode to active or passive in Polaris Administration - Your IT staff determines whether the transmission mode should be set to active or passive. Then, the Polaris Administrator sets the Acquisitions/Serials parameter **Transmit EDI files in passive mode FTP** to **Yes** for passive mode or **No** for active mode. The parameter's default setting for all new installations of Polaris is **Yes** (passive mode). See [Specify the EDI FTP transmission mode](#).
- Grant permissions to staff who send EDI orders - Any staff member who sends EDI orders requires the permission Send electronic purchase orders. Additional permissions are required for importing, receiving shelf-ready materials, processing EDI invoices and receiving via the Advanced Shipping Notice (ASN).
- Enter the library SAN in the Branch workform - The library SAN must be entered in the Branch workform for each branch that sends EDI orders.
- Set up EDI invoice defaults - Select the EDI Invoice Defaults Acquisitions profile in Polaris Administration. See [Set up EDI invoice defaults](#).
- Verify call number setup - If you will be generating on-order items with call numbers pulled from the linked bibliographic records, verify that the Polaris Administration Cataloging profile **Bring call number fields from bib to item record when link is made** is set to **Yes**. If this profile is set to **Yes**, call number information is copied from the linked bibliographic record to the on-order items according to the settings in the Item Create Call Number Hierarchy database table. The system checks the On-order Item template's shelving scheme and assigned branch to determine the Item Create Call Number Hierarchy table settings to use. The call number information in the bibliographic record supersedes any call number information that may be in the On-order Item template. However, if the item template contains call number subfields that are not in the linked bibliographic record, the data in the template is used. For example, if the bibliographic record has a class and cutter number but no prefix or suffix, and template does contain a prefix and suffix, the resulting on-order item will contain the class and cutter number from the bib and the prefix and suffix from the template. See the Cataloging Administration PDF Guide, Copying Bib Data to Items.
- Add links to supplier databases - (Optional) You can add a link from Polaris to your suppliers' Web databases so you can access them directly from Polaris. After setting up the links, you can go to **Utilities, Acquisitions Processing, Link to supplier databases** and select the supplier. You will still need to log in with a username and password on the supplier's site. See the Acquisitions Administration PDF Guide, Add

links to supplier databases.

- (Optional) If your library receives shipments via ASN, set option to print workslips. To allow purchase order line item workslips to be printed in batch from the Receive ASN Shipments workform, set the **PO line item workslips: Batch print during ASN receiving** Acquisitions parameter to **Yes** in Polaris Administration.

Prepare for EDI Ordering - Library Staff

- Contact your suppliers that accept Polaris EDI orders - Tell the supplier your library will be sending EDI orders (X12 format) via the Polaris Integrated Library System. If you are a new Polaris customer who previously sent EDI orders using a different ILS, tell the supplier your library now uses Polaris. Then get the following information from the supplier, and record it so that you can enter it in the Supplier record in Polaris.

Tip:

You may also want to check the supplier's limit for the number of characters in an EDI purchase order number. Polaris automatically checks the purchase order length and blocks the release of the order if it exceeds the supplier's limit.

Note:

Some suppliers use the account number in the EDI transmission, while others use a SAN as the account number.

- Supplier's Standard Address Number (SAN)
- Library's Account number
- Username
- Password
- Supplier's FTP address
- Supplier's purchase order directory for incoming EDI orders
- Supplier's POA/ INV directory for outgoing purchase order acknowledgments and invoices
- Supplier's purchase order file extension

- (Optional for libraries interested in shelf-ready materials) Verify that the supplier accepts Enriched EDI Orders - If your library is interested in getting “shelf-ready” materials from the supplier, verify that the supplier accepts Enriched EDI Orders. Enriched EDI orders include additional branch-specific information so the supplier can provide embedded holdings data in the full MARC records it returns. When the MARC records are imported into Polaris, the brief bibliographic records are overlaid, and the on-order item records are updated so that the materials are ready for circulation with minimal processing. The cataloging services offered and the costs differ among suppliers. See [Enriched EDI Orders and Shelf-Ready Items](#).
- (Optional for libraries interested in receiving via the Advanced Shipping Notice) Ask if the supplier can send an Advanced Shipping Notice (ASN) - If the supplier can produce an ASN, you can receive cartons of materials by scanning a barcode on the outside of the carton. See [Receive using the Advanced Shipping Notice \(ASN\)](#).

Important:

If you are implementing ASN processing with a supplier to whom you have already sent EDI orders, before you enable ASN in the supplier record, make sure the **Hold partial shipment** invoices are created for the day when ASN processing will begin by following these steps:

- Ask the supplier the exact date when they will start producing ASN files.
 - In the morning of the day the ASN processing will begin, wait until the Polaris EDI Agent has run and all remaining EDI invoices for that supplier have been created automatically. If your library does not process partial EDI invoices separately (the **Hold partial shipments** box is unchecked in the **EDI Invoice Defaults** profile), skip the next step.
 - If the **Hold partial shipment** box is checked in the **EDI Invoice Defaults** profile for your library organization, go to the Process EDI Invoice workform as soon as the EDI Agent runs, and create the invoices for this supplier.
 - After the invoices are created automatically via the EDI Agent, or manually via the Process EDI Invoices workform, enable ASN processing by checking the ASN box in the Supplier Record workform. See [Enter the supplier's EDI ordering data](#).
- Contact your Polaris Implementation or Site Manager - After getting the information from the suppliers to whom you are sending EDI orders, contact your Polaris Implementation Manager or Polaris Site Manager and tell them the names of the

suppliers to which you plan to send EDI orders; whether you plan to send enriched EDI orders and receive shelf-ready materials; and whether you plan to use the Advanced Shipping Notice (ASN) for any of the suppliers that offer this functionality. Then request a license from Polaris to enable EDI ordering.

- Set up supplier records for EDI ordering - With the help of your Polaris Implementation or Site Manager, enter the supplier's account information in the Supplier record in Polaris Acquisitions. See [Enter the supplier's EDI ordering data](#).

Setting Up Importing and Bulk Adding

Importing bibliographic records with 970 subfield data and then bulk adding them to a purchase order is the most efficient way to create purchase orders in Polaris, whether or not the orders are sent via EDI. When bibliographic records are bulk added to a purchase order, the bibliographic title-level information creates each purchase order line item, and the following subfield data in the 970 tags creates the distribution grid, or segments, for each line item:

Note:

The collection information, material type, and non-public note are not required to create a segment.

Tip:

The subfields can be in any order in the 970 tag.

- **\$l** - location (Polaris branch abbreviation)
- **\$q** - quantity
- **\$f** - fund (Polaris fund name or fund alternative name)
- **\$c** - collection (Polaris collection abbreviation)
- **\$p** - price
- **\$m** - material type (Polaris material type name or code)
- **\$n** - non-public note (appears on the Instructions to Supplier view of the Purchase Order Line Item workform)
- **\$h** - item template code. If the supplier supports copy-level information in subfield h, it is used in the creation of on-order items. The library creates item templates with the copy-level code in the template name. When the purchase order is released, the item template codes in the purchase order line item segments are

matched to the template code and create the on-order items. For more information, see the *Acquisitions Guide*, Matching With Item Template Codes.

If a price is not in the MARC record's **970 \$p**, the system checks for the price in the following tags:

- **020** - If an ISBN is present in **020 \$a**, the corresponding **020 \$c** is checked for a price. If both are found, the ISBN is copied to the purchase order line item's **ISBN** field, and the price is copied to the purchase order line item's **Unit price** field.
- **024** - If no price is found in the **020 \$c**, the system checks for a **024 \$a** with a first indicator of **3**, and if present, the corresponding **024 \$c** is checked for a price (in OCLC records, the 13-digit ISBN and the accompanying price are in the 024 tag, if the first indicator is a 3). If both are found, the number in the **024 \$a** is copied to the purchase order line item's **ISBN** field, and the price is copied to the purchase order line item's **Unit price** field.

To set up importing and bulk adding in Polaris, the Polaris Administrator grants permissions for importing and bulk adding, and sets up Administration profiles and parameters. Library staff members set up the distribution grids at suppliers' web sites and set up import profiles for acquisitions.

Set Up Importing & Bulk Adding - Polaris Administrator

- Grant permissions to staff who manage import jobs - The Cataloging permission **Manage import jobs for this organization: Allow** should be granted to senior-level cataloging staff to allow them to stop import jobs and specify blackout times for the system or branch organization.
- Grant permissions to staff who manage import profiles - The Cataloging permissions **Import profiles: Access, Create, Modify**, and **Delete** should be granted to senior-level cataloging staff. It is important to limit the permissions to modify import profiles because the correct settings are essential for successful creation of the purchase order line item segments. To copy an existing profile, a user must have the permissions: **Import profiles: Access, Create**, and **Modify**.
- Grant permissions to staff who import records - Staff members who import records can be granted either of the following permissions:
 - **Import bibliographic, item and authority records: Allow** - Staff members can make changes to settings on any tab in the Polaris Import Setup window. They can access the Polaris Import Setup window by selecting **Utilities, Importing, Full Import**.

- **Express importing: Allow** - Staff members can make changes to settings on the Profile setup and the Record set tabs in the Polaris Import Setup window, but they cannot make changes on any other tab. They can access the Polaris Import Setup window by selecting **Utilities, Importing, Express Import**. This permission allows staff members to import records without full cataloging permissions.
- Grant permissions to staff members who bulk add records from record sets and create purchase orders. For information on the permissions required to order materials, see the *Acquisitions Guide*, Order Materials Permissions.

Set Up Importing & Bulk Adding - Library Staff

- Copy the Polaris read-only profile Acquisitions bibs - Select **Utilities, Importing, Profile Manager** to open the Profiles Manager. The Acquisitions Bibs profile is already set up to: ignore MARC validation (because the incoming records are brief); check duplicates and if duplicates are found, retain the 970 tags from the brief records while keeping the full bibliographic records. Select the **Acquisitions bibs** profile, right-click, and select **Copy**. Then, for each of your suppliers, type the supplier's name or abbreviation in the **Name** box and a description for the profile in the **Description** box. For more information, see the *Cataloging Guide*, Setting Up Import Profiles .
- (Optional) **Copy the Enriched EDI Orders profile** - If you are importing records from a supplier that provides shelf-ready cataloging, select the **Enriched EDI Orders** read-only import profile, right-click, and select **Copy**. Then, name it with the supplier's name. The **Enriched EDI Orders** profile is set up to import full bibliographic records containing embedded holdings data. The holdings data automatically updates on-order items to fully-cataloged items.
- Set Up Bulk Add in Polaris - Use the following Polaris Administration parameters:

Note:

You can clean up 970 tags that are marked as processed using the Polaris Administration profile \$9 Cleanup Utility. See the *Cataloging Administration Guide*, Set up the Subfield 9 cleanup utility.

- **Bulk Add to PO: Replace Invalid Fields with Default Data** - This parameter specifies default information that is used to create segments if data is missing in the imported records' 970 tags. If you are using a

Web-based selection tool at your supplier's site, you can set this parameter to **No** so missing or inaccurate information appears in the import log, rather than creating default segments in your purchase orders.

- **Bulk add to PO/SL: Mark 970 data as processed** - Set this parameter to **Yes** so that each 970 tag is updated with a subfield 9 (\$9) indicating the date and time the tag was used to create a line item segment. If the title is ordered again using the same bibliographic record, the previous 970 tags will not be used again and new 970 tags will be used to create the purchase order line item segments. It is recommended that you leave this set to **Yes** (the default setting).
- **Bulk Add to PO: Add Alert to PO line item for multiple ISBNs**
This parameter specifies whether the **Alert** check box is automatically checked for purchase order line items created from bulk-added bibliographic records with more than one ISBN. We recommend that you leave it set to **Yes** (the default).

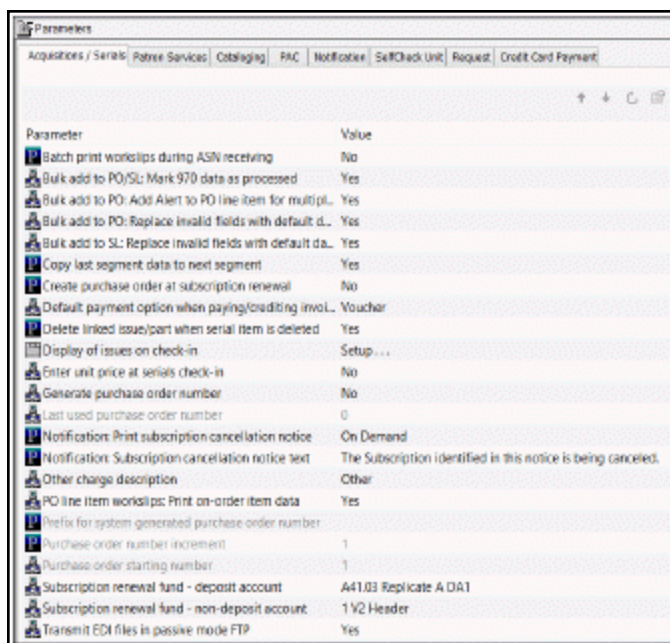
Specify the EDI FTP transmission mode

You can specify whether EDI files are transmitted and received in passive or active mode using an Polaris Administration Acquisitions/Serials parameter that is set at the system level. The mode applies to all EDI orders and purchase order acknowledgments for all EDI suppliers.

Note:

For more information on active and passive FTP modes, see [Setting Up EDI Ordering](#).

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



3. Double-click **Transmit EDI files in passive mode FTP**.
4. Select **Yes** to transmit EDI files in passive mode, or **No** to transmit files in active mode.
5. Select **File > Save**.

Set up EDI invoice defaults

When the EDI invoice is created, the invoice line items are automatically linked to purchase order lines, if there is a matching purchase order line item. Additionally, you can set up invoice defaults that create an invoice line item if no matching purchase order line item is found. The **EDI Invoice Defaults** profile can be set to update the linked purchase order line item to received as soon as the invoice is saved in the Polaris database, or you can choose not to automatically receive the purchase order line item, and receive later when the shipment arrives.

If no matching bibliographic record is found, the invoice line item is created using all the information in the EDI Invoice Defaults profile. Polaris searches for a matching ISBN in the database, and if one is found, the invoice line item is created from the title information in the bibliographic record and the information in the EDI Invoice Defaults profile. If the default information is used to create an invoice line item, it appears on the error log, so you can update the invoice line item with accurate information.

Note:

When the defaults are used to create an invoice line item, an exclamation

point appears next to the line item in the Find Tool results list and the line items view of the Invoice workflow.

The dialog box for the EDI Invoice defaults profile also includes options for automatically updating the linked purchase order line item, loading header funds, updating the item records linked to the purchase order, and preventing the automatic creation of EDI invoices when any of the line items has a quantity sent less than the quantity ordered. See the Acquisitions PDF Guide, Receiving Orders.

Tip:

If no matching purchase order line item can be found, or if the matching purchase order line item has an incorrect status, a red exclamation point icon appears next to the invoice line item in results list and in the Line Items view of the Invoice workflow. Check the e-mail log if you see this icon.

To set up the defaults for EDI invoices:

1. In the Administration Explorer tree view, select the organization's folder.
2. Select **Profiles** and select the **Acquisitions/Serials** tab.
3. Double-click **EDI Invoice defaults**.

The EDI Invoice Defaults dialog box appears.

4. Type the default title in the **Title** box.

Example:

Enter **No PO line found** in the **Title** box to indicate that the invoice line item was created using default information.

5. Select the default destination in the **Destination** box.

Tip:

If you have specified default funds for segments and header charges, the funds will be updated to the new funds automatically during the fiscal year rollover process. See the Acquisitions Administration PDF Guide, Managing Fiscal Year Rollovers .

6. Select the default fund for the segment in the **Segment fund** box.

If you want an alert note to appear in the Additional Information view of the Invoice Line Item workflow when defaults are used to create an invoice line item, type a note in the **Alert note** box.

Note:

When defaults are used to create an invoice line item, an

exclamation mark automatically appears next to an invoice line item in Find Tool search results and in the Line Items view of the Invoice workform. You can use the alert note box to include a description for this alert, such as "This invoice line item was created using default information." You can limit invoice line item search results by alert note.

7. Specify if you want header charges loaded automatically when EDI invoices are created:

- To load the header charges from the supplier, select the **Load supplier header charges** check box, and select the fund in the **Header fund** box.
- To keep the header charges from loading automatically, uncheck the **Load supplier header charges** box.

Note:

If you do not load the header charges automatically, you can add them and select specific funds to use for each charge type on the Invoice workform when the EDI invoice is created.

8. To update any matched purchase order line items to *Received* automatically as soon as the EDI invoice is created, select **Update linked PO line item to received**.

9. If you selected **Update linked PO line item to received**, specify if you want to update the linked on-order item records:

- To change the linked on-order item records to in-process automatically, select the **Update on-order item circulation status**.
- To leave the linked on-order item records with a status of on-order until the physical item is received, uncheck the **Update on-order item circulation status**.

Important:

If the Update on-order item circulation status check box is not selected, staff members will never see on-order items with an in-process status; they are updated to a status of **In** when they are checked in through circulation.

10. To prevent EDI invoices from being created automatically when the quantity sent does not equal the quantity ordered for any of the line items on the invoice, select **Hold partial shipment invoices**.

When this option is selected, EDI invoices are created automatically only if the quantity sent matches the quantity ordered on all line items. If the quantities do not match, the invoice is not generated automatically. The EDI invoice reflects the contents of the actual shipment and may contain line items (titles) that were ordered via various EDI purchase order transactions. You can use the Process EDI Invoices workform to generate the partial shipment invoices separately. See [Process EDI invoices for partial shipments](#).

11. In the **Email addresses** box, type the e-mail addresses of staff members to whom you want invoice details sent. Use semicolons to separate multiple e-mail addresses, but do not leave a semicolon at the end of an e-mail address. You must enter at least one valid e-mail address.

Important:

If an e-mail address ends with a semicolon, the e-mail program expects another e-mail address to follow and it fails on the blank address. The invoices are created but no e-mails are sent.

12. Select **Save** to save the EDI invoice defaults.
13. Select **Administration, Profiles, PAC** and confirm that the profile **Email Notification: Server running SMTP service** displays your library's e-mail server name.

Related Information

- EDI Invoice log E-mail - The e-mail message is a log of the generated invoice files that the EDI Agent picked up from the supplier's site. If there are errors in the invoice, such as a line item was already canceled, the e-mail log shows the reason for the error. If there are holds on any of the titles, they will be listed in the e-mail. For more information on the EDI e-mail log, see [The EDI Invoice E-mail Log](#).

The e-mail messages are created by Innovative Interfaces. However, the sender of the e-mail is not polariscommunications@polarislibrary.com because this address causes some libraries' SPAM filters to reject e-mails. The sender in the **From** field is whatever address is entered in the PAC profile **Email notification: Email address of sender**. See Setting Public Access Profiles and Parameters.

- Generating partial shipment invoices - If you select the option **Hold partial shipment invoices**, you can generate the invoices later using the Process EDI Invoices

workform. The invoices generated using the Process EDI Invoices workform use the same EDI Invoice Defaults settings as automatically-created invoices.

Purging Purchase Orders & Invoices

You can set up purge criteria and schedule the Purge Acquisitions Records SQL job to automatically delete purchase orders and invoices for a library organization (or organizations) based on the age of the records. When the job is run, the Acquisitions records that meet the specified criteria are removed from the database permanently, and the data cannot be recovered. Data from the deleted records no longer displays in other records, such as item records, and it is not available for reports or other functions.

To specify the job criteria and schedule the job, you must have the **Purge purchase orders and invoices: Allow** permission for at least one library organization. This permission can be set at the System and Library levels in Polaris Administration. For instructions, see [Purge Purchase Orders and Invoices](#).

Note:

The permission to purge purchase orders and invoices must be granted for each organization separately because granting the permission at the System level does not filter down to the Library levels.

Purge Acquisitions Records Job

When the Purge Acquisitions job runs, it purges the selected organizations' invoices of any type with an invoice status date of paid, prepaid, or credited, and a status date less than the date in the **Purge purchase orders and invoices before** field. Invoices are deleted before their linked purchase orders.

Invoices that meet the criteria for deletion, based on the specified organization and date in the Purge Purchase Orders and Invoices dialog box, will be skipped in the purge process if:

- The invoice has a status of Open or PartPaid
- The invoice is linked to a purchase order with a status that prevents deletion.
- The invoice is linked to a purchase order with a status that allows deletion, but the purchase order is also linked to another invoice (or invoices) with a status that prevents deletion.

It also purges the selected organizations' purchase orders of any type with an order status of Canceled, Closed, or Received, and a status date less than the date in the **Purge purchase orders and invoices before** field.

Purchase orders that meet the criteria for deletion, based on the specified organization and date criteria in the Purge Purchase Orders and Invoices dialog box, will be skipped in the purge process if:

- The purchase order has any line items with a payment status of Open.
- The purchase order has a status of Pending, Released, Partly Received, or Continuing.

When a purchase order or invoice is deleted, any links to other records are also deleted. The links that may be deleted are listed below.

Invoice Deleted	Purchase Order Deleted
Bibliographic records	Bibliographic records
Funds (header and line item segment funds)	Claims
Fiscal years	Funds (header and line item segment funds)
(Other linked) Invoices	Fiscal Years
Item records	Invoice lines, Invoice line segments
PO lines, PO line segments	Invoices
Purchase Orders	Item records
Serial Holdings Records	Selection Lists

Invoice Deleted	Purchase Order Deleted
Standing Order parts	Selection List Lines, SL line segments
Subscription records	Serial Holdings Records
Suppliers	Subscription records
	Suppliers

Transactions Logging

When an invoice is purged, an *Invoice Deleted* transaction is logged. When a purchase order is purged, a *Purchase Order Deleted* transaction is logged.

Acquisitions Data in SimplyReports

Since all data in purged invoices and purchase orders is deleted, you may find unexpected results in reports that contain data from records linked to the purged records. For example, a fund report may show money encumbered and expended, but the data from the linked purchase order or invoice cannot be retrieved in a purchase order or invoice report.

Selecting the Organization Level for the Purge

Before specifying the purge criteria and scheduling the job, ensure that the settings reflect how your library system orders and invoices materials:

- If your library uses centralized processing, grant the **Purge purchase orders and invoices: Allow** permission to staff members at the System level in Polaris Administration. When an authorized staff member sets up the purge criteria in the Purge Purchase Orders and Invoices dialog box, only the System organization will be available to select, so the purge criteria will apply to all organizations in the library system.

Tip:

Although invoices and purchase orders are “owned” at the Branch level, purging is done at the Library level.

- If your library uses de-centralized processing or a combination of centralized and de-centralized processing, grant the Purge purchase orders and invoices: Allow permission to staff members at the Library level in Polaris Administration. When an authorized staff member sets up the purge criteria in the Purge Purchase Orders and Invoices dialog box, only the Library organization will be available to select, so the purge criteria will apply to the Library organization and all its associated branches.

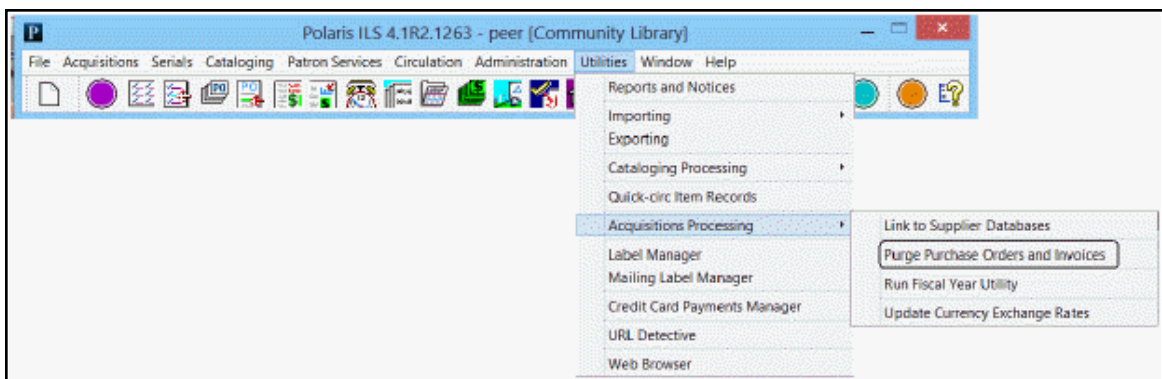
Note:

The job looks at any saved entry at the Library level, with object locks honored. If, for some reason, the SQL job fails to purge an invoice or PO, the deletion of that record is reversed, the transaction is rolled back and the job continues. If one or more purchase orders cannot be deleted, the invoice deletion fails.

Purge Purchase Orders and Invoices

To purge purchase orders and invoices:

1. Select **Utilities, Acquisitions Processing, Purge Purchase Orders and Invoices** from the Polaris Shortcut Bar.



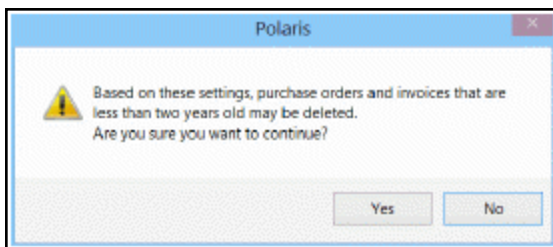
The Purge Purchase Orders and Invoices dialog box appears.

Tip:

Only the organizations for which the user has the Purge purchase orders and invoices: Allow permission appear in the list.

2. In the **Organization** box, select the system or library organization for which the job purge job is scheduled.
3. Select a date in the **Purge purchase orders and invoices before** box. Invoices and purchase orders with a status date before the specified date will be deleted, provided they have a status that permits their deletion.
4. Schedule the job to run by selecting a date in the **Scheduled** field. This option must be selected for the job to run. The time of day that the job runs is set in Polaris Administration.
5. Click **Save**.

If the selected dates could result in the deletion of purchase orders and invoices that are less than two years old, a warning message appears.



6. Click **Yes** if you want to continue, or **No** to go back and select different **Purge purchase orders and invoices before** and **Schedule** dates.
7. Close the dialog box.

The job is scheduled to run. When the purge job is complete, the check box in the **Scheduled** date field is cleared, and the **Last run** and **By** fields are updated. To run the job again, re-check the scheduled box and enter a new date.

Managing Receiving

When materials shipments arrive, your staff updates the purchase order line items to received, claimed (when items are missing, damaged, or incorrect), or canceled. Then, the received items are invoiced and paid for, and canceled items are credited. You can delete purchase orders or purchase order line items that were canceled.

Do the following tasks to set up receiving for your organization:

- Grant permissions to receive orders; claim missing or damaged items and cancel orders; pay, credit and adjust invoices.
- Specify whether you want warnings to appear when you receive items that have holds placed on them.
- Set claim and cancellation notice defaults.
- Define claiming reasons.
- If you receive EDI orders via the ASN, set the option to batch print purchase order line item workslips from the Receive ASN Shipments workflow.
- Set the default payment option to Check or Voucher.

You can use the Acquisitions parameter **Default payment option when paying/crediting invoices** to specify whether **Check** or **Voucher** is selected by default when staff members prepay, pay or credit an invoice. The parameter can be set at the System, Library, or Branch level.

See also.

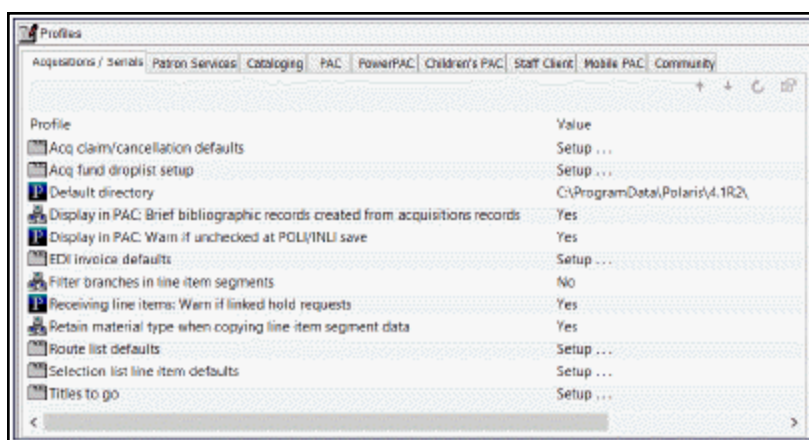
- [Receive Materials Permissions](#)
- [Claim Ordered Items Permissions](#)
- [Cancel Ordered Items Permissions](#)
- [Invoice Materials Permissions](#)
- [Set warning when receiving line items with holds](#)
- [Set claim/cancellation notice defaults](#)

- [Define claiming reasons](#)
- [Set batch print worksheets option for ASN receiving](#)
- [Set the default payment option to check or voucher](#)

Set warning when receiving line items with holds

To turn the holds warning message off or on.

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

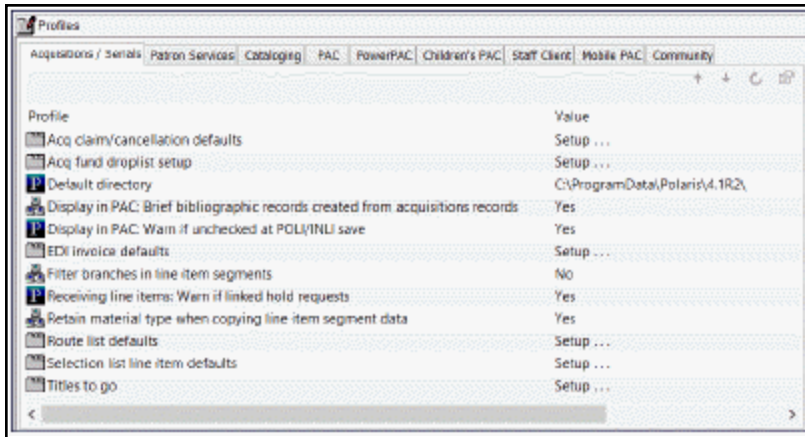


3. Double-click **Receiving line items: Warn if linked hold requests**, and select **Yes** or **No**.
4. Select **File > Save**.

Set claim/cancellation notice defaults

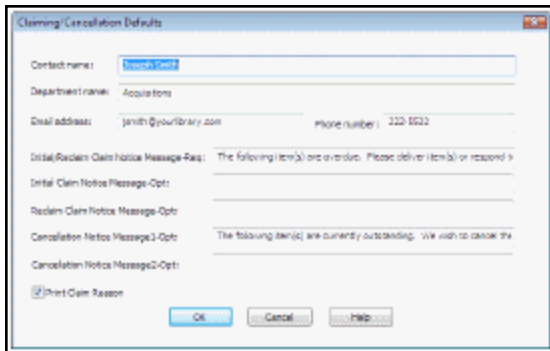
To define the claim and cancellation notice information that appears on all new acquisitions claims created for an organization.

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



3. Double-click **Acq claim/cancellation defaults**.

The Claiming/Cancellation Defaults dialog box appears.



4. Type the following information for the contact at the library:

- **Contact name**
- **Department name**
- **E-mail address**
- **Phone number**

5. In the **Initial/Reclaim Claim Notice Message-Req** box, type the message to print on every claim (initial and reclaim) notice.

Example:

The following items were not received. Please deliver items or respond to the contact listed below.

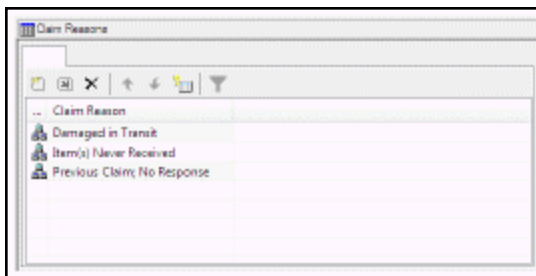
6. Type a message in the **Initial Claim Notice Message-Opt** box that is only printed on initial claim notices.
7. Type a message in the **Reclaim Claim Notice Message-Opt** box that is only printed on claim reminder notices.
8. In the **Cancellation Notice Message1-Opt** and **Cancellation Notice Message2-Opt** boxes, type the message that you want to appear on cancel order notices.
9. Specify whether claim reasons are printed on the claim notices by selecting or clearing the **Print Claim Reason** check box.
10. Click **OK**.

Define claiming reasons

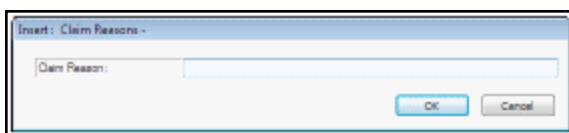
To define the standard claim reasons that can be selected in the **Reason** box on the Claim workflow:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Policy Table** folder.
3. Select **Claim Reasons**.

The Claim Reasons table appears.



4. Click  to open the Insert: Claim Reasons dialog box.



5. Type the claim reason you want to add, and click **OK**.
6. Select **File > Save**.

Modify or Delete a Claim Reason

To modify a claim reason, select an entry in the Claim Reasons policy table, and click



. To delete a claim reason, select an entry in the Claim Reasons policy table, and



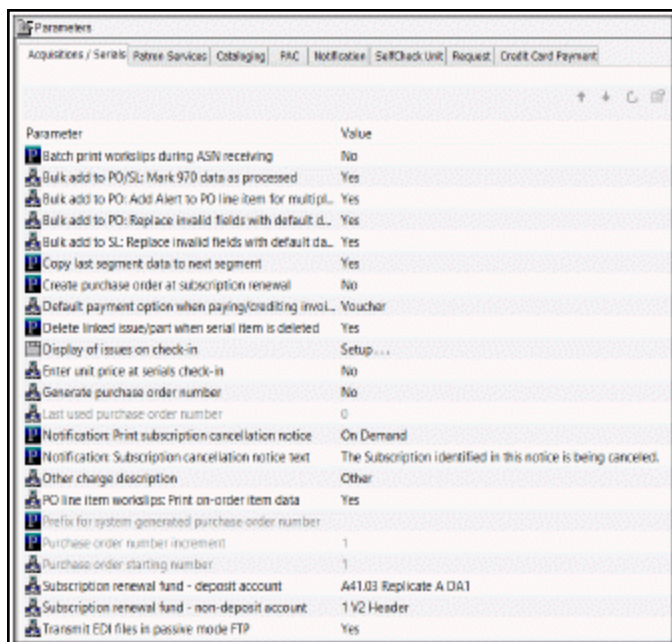
Set batch print workslips option for ASN receiving

Note:

Set this parameter only if your library receives shipments using the Advanced Shipping Notice (ASN).

To allow or prevent batch printing of purchase order line item workslips from the Receive ASN Shipments workflow.

1. In the Administration Explorer tree view, expand the **System** folder.
2. Select **Parameters > Acquisitions/Serials** tab.



3. Double-click **PO line item workslips: Batch print during ASN receiving**.
4. Select **Yes** to allow purchase order line item workslips to be printed in batch from the Receive ASN Shipments workflow.
5. Select **File > Save**.

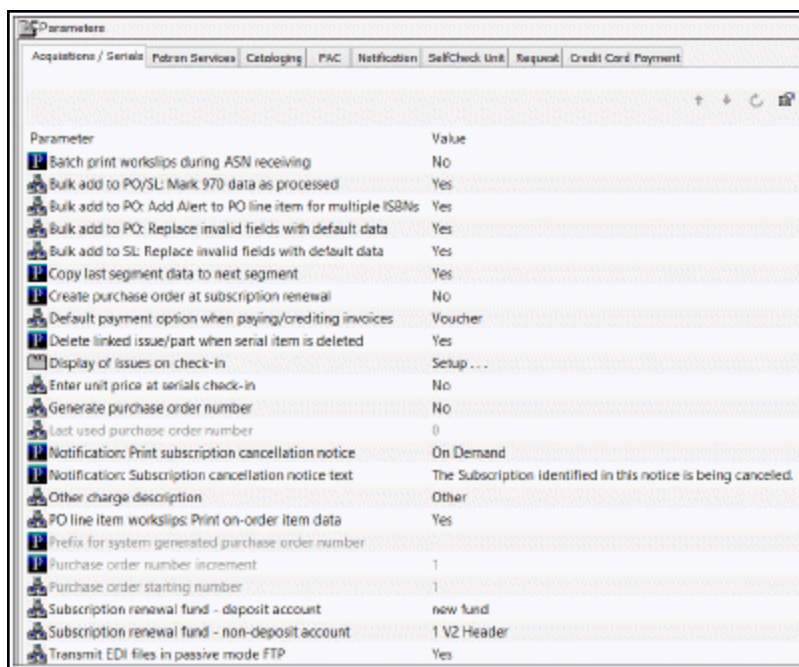
Set the default payment option to check or voucher

When a payment is made, the Check/Voucher dialog box is set to **Check** or **Voucher** according to the parameter setting at the System, Library or Branch of the **Paid by** branch selected in the Invoice. When prepaying, the payment dialog is set to **Check** or **Voucher** according to the parameter setting for the **Ordered at** branch selected in the Purchase Order.

To set the default payment option selected in the Check/Voucher dialog box when staff members prepay, pay, or credit an invoice.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters > Acquisitions/Serials** tab.

The organization's Acquisitions/Serials parameters are displayed.



3. Select **Default payment option when paying/crediting invoices**.
4. Select **Check** or **Voucher** to set the default payment option that appears in the Check/Voucher dialog box when staff members prepay, pay, or credit an invoice.
5. Select **File > Save** or press **Ctrl + S**.

Setting Up Titles to Go

With the Polaris Titles to Go service, you can quickly check a title's availability at your supplier's site and bring back bibliographic, pricing, inventory, and binding data directly into the purchase order line item in Polaris. Currently, Titles to Go operates with the following book suppliers: Ingram Books, Inc. (Ingram), Baker & Taylor (B&T), Brodart, and United Library Services (ULS).

Before you can enable Titles to Go in Polaris, do the following:

- Contact your Innovative Interfaces Site Manager and explain that you want to use Titles to Go.
- Record the following authentication data for querying your suppliers:
 - Baker & Taylor (B&T) - You do not need to contact B&T before using Titles to Go. The username will always be GIS (case sensitive), and the password will always be Polaris (case sensitive).
 - Brodart - Contact Brodart to get a username and password to use Titles to Go.
 - Ingram - Contact Ingram to get a username to use Titles to Go. Ingram provides a form on their EDI ordering page for customers who want to use Titles to Go.
 - United Library Services (ULS) - Contact ULS to get a username and password to use Titles to Go. (ULS is a Canadian supplier).
- Ensure that the Supplier records in Polaris have the correct supplier SAN:
 - Baker & Taylor (B&T) - SAN is 1556150
 - Brodart - SAN is 1697684
 - Ingram - SAN is 1697978
 - United Library Services (ULS) - SAN is 1699342

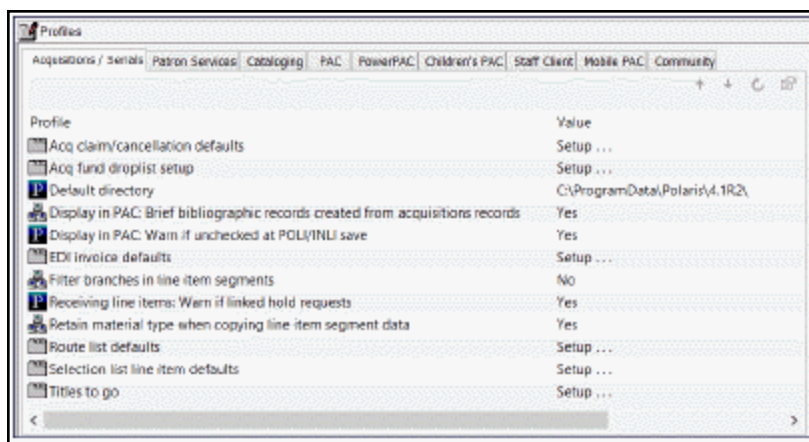
See also:

- [Enable Titles to Go for your suppliers.](#)

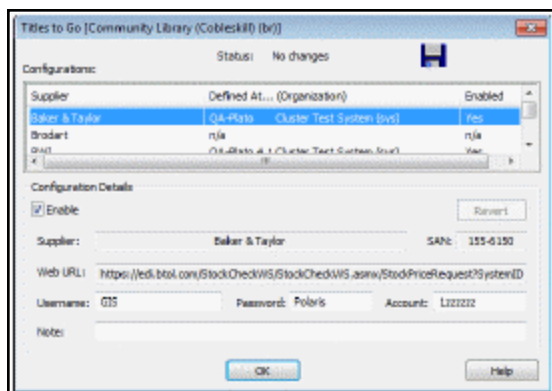
Enable Titles to Go for your suppliers

To enable Titles to Go at your suppliers' sites:

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



3. Double-click **Titles to Go** to open the Titles to Go dialog box.



4. Select the supplier in the list, and select **Enable**.

Important:

Make sure the SAN in the Supplier Record workform matches the one in the SAN box in this profile. See [Create a new supplier record](#).

Tip:

if you change a supplier's configuration details and make an error, select **Revert** to go back to the original configuration details.

5. Type the authentication information in the **Username > Password** and **Account** boxes. The required authentication information varies by supplier.

Important:

Baker & Taylor (B&T) uses the account number in the linked Supplier record in addition to the account number you enter in the Titles to Go profile.

6. Click **OK**.

Titles to Go is enabled for the supplier you specified.

Administering Foreign Currencies

If you have any suppliers that require payment in a currency other than your country's default (base) currency, the foreign currency must be enabled in the **Currencies** policy table in Polaris Administration. Next, if your default currency is other than United States dollars, you need to update the default currency in the System workform in Polaris Administration. Then, the exchange rate for the foreign currency must be set in the Update Exchange Rate dialog box.

After you establish the foreign currencies, you need to select the currency code in the Supplier record for each foreign supplier. When you order from a foreign supplier, all purchase orders and invoices that are linked to the foreign supplier record will reflect the foreign currency. During fund transactions, the amounts will be converted to the base currency before posting against the funds.

See also:

- [Manage Foreign Currencies Permissions](#)
- [Add or enable a foreign currency](#)
- [Select your system's base currency](#)
- [Set the currency exchange rate](#)

Add or Enable a Foreign Currency

To add or enable a foreign currency:

1. In the Administration Explorer tree view, expand the **System** folder.
2. Expand the **Policy Tables** folder.
3. Select **Currencies** to open the Currencies policy table.
4. Do one of the following steps:

Tip:

You can select a currency and click  to modify it. Or, click  to add a new currency.

- To enable a currency that is already listed, select the currency and press **Enter**, or right-click and select **Modify**. In the **Enabled** box, select **Yes**.
- To add a new currency, press the **Insert** key, or right-click and select **Insert**. Then, type the currency in the **Currency** box, type the currency code in the **Code** box, and select **Yes** in the **Enabled** box.

Tip:

Polaris does not check the ISO currency standard.

- Click **OK**.

The currency is enabled and will be available in the drop-down list in the Supplier workform.

5. Set the default currency in the System workform. See [Select your system's base currency](#).

Select your system's base currency

To set your system's base currency.

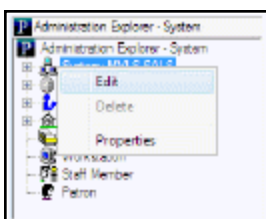
Note:

The default currency is United States dollars. If your library system is in the United States, you do not need to change the setting.

Tip:

You can also select **Administration > System** and search for your system record using the Find Tool.

1. In the Administration Explorer tree view, select the **System** folder.
2. Right-click, and select **Edit**.



The System workform appears.

The screenshot shows the 'System' configuration window in Polaris. The 'Default Currency' dropdown menu is highlighted with a red box, showing 'US Dollar' as the selected option. Other fields include 'Name' (QA-Plato Cluster Test System), 'Display Name' (QA-Plato), 'System' (52 Perry Street; Schuylerville, NY; USA; 12071), 'Email', 'WWW', 'Primary' (Director), 'Alternate' (Director), 'Phone Numbers' (Primary, Alternate, Fax), 'Default Country' (USA), and 'Error Reporting Email'.

3. Select your library system's base currency in the **Default Currency** box.
4. Select **File > Save** to save the workform.

All Supplier records will display this currency unless you change it.

Set the currency exchange rate

You can change the exchange rate without System Administration permissions. You do need the Acquisitions permission: **Allow Adjust currency exchange rates**.

Note:

The currency must be enabled in the Currencies policy table in Polaris Administration before you can update it. See [Add or enable a foreign currency](#).

To change the exchange rate for a foreign currency.

1. On the Polaris Shortcut Bar, select **Utilities > Acquisitions Processing > Update Currency Exchange Rates**.

The Update Currency Exchange Rates dialog box appears.

2. Select the organization for which you want to update the currency exchange rate in the **Organization** box.

Important:

If your library does centralized ordering, set up the currency exchange rate at the system level **All Libraries (sys)**, and make any changes to the exchange rate at the system level. If you set the initial exchange rate at the system level and always update the exchange rate at the system level, the rate is the same for all libraries and branches below the system level. However, if you update the currency exchange rate at the library level, the system's exchange rate no longer applies, and all subsequent changes to the rate must be made at the library level.

3. Select the currency to update in the **Currency** box.

Important:

Only foreign currencies are displayed in the list. The default currency is not listed.

4. Type the exchange rate in the **Rate** box and click **Save** to save the exchange rate.

The **Last modified date** displays the date and time the exchange rate was updated, and the **By** box displays the user name of the staff member who updated the exchange rate. These fields cannot be modified.

Related Information

- Supplier records for foreign suppliers - When you have finished enabling the foreign currency or currencies and updating the exchange rates, you can select the appropriate currency in the supplier records for all foreign suppliers. See [Set up a supplier record for a foreign vendor](#).
- Currency Exchange Rates report - The Currency Exchange Rates report shows the currency exchange rates for the foreign currencies your library uses, the date and

time of the latest update to the exchange rate, and the user who changed the exchange rate. For more information, see [Acquisitions Reports](#).

Managing Fiscal Year Rollovers

Polaris provides a utility with the following options for handling fiscal year rollovers:

- **Run fiscal year utility** - Create a new fiscal year record that replaces the old fiscal year and re-links the old fiscal year's funds to the new fiscal year, replicating the fund structure. Any amount left in the funds can be carried over into the next fiscal year, or the amount can be zeroed out.
- **Replicate fiscal year hierarchy** - Replicate the fund structure in the new fiscal year, but keep the old fiscal year open for a time until all money in the linked funds is expended. With this option, funds can be expended in the old fiscal year's funds, but not encumbered. The library can continue to receive, cancel, and invoice in the current fiscal year using the old funds, while ordering, receiving, and invoicing in the new fiscal year using the new funds.
- **Close fiscal year** - This closes the current fiscal year and all linked funds.

Important:

If you are changing your fund structure significantly and want to create a new fund hierarchy, first check to make sure no pending purchase orders are linked to these funds, and select **Replicate fiscal year hierarchy**. Once the hierarchy has been replicated, delete the newly-generated (Open) fiscal year hierarchy and close the old (Encumbrances closed) hierarchy. When you delete the new fiscal year before closing the old fiscal year, you can deal with any open invoices that are still linked to the closed fund. If you need assistance with the fiscal year rollover workflow, contact your Polaris site manager.

Users who have the permission for *at least one* Organization linked to at least one Fiscal Year record with a status other than Closed can access the Fiscal Year utility dialog. Additionally, users meeting these requirements can see one or more branch Organizations displayed in the Owner drop-down list box on the Fiscal Year Utility dialog.

Note:

The utility is governed by the Acquisitions permission, Run Fiscal Year Utility: Allow available at the Branch level only and unassigned by default.

Users without the permission for at least one Organization will be blocked when trying to open the Run Fiscal Year Utility dialog. If a user does not have the permission, no supervisor override is allowed.

Note:

If your library uses foreign currencies, the amounts disencumbered and re-encumbered in the new fiscal year will use the exchange rate recorded at the time the purchase order was released.

See also:

- [Run fiscal year utility - checklist](#)
- [Replicate fiscal year - checklist](#)
- [Use the Fiscal Year Rollover Utility](#)
- [Run fiscal year rollover utility results](#)
- [Replicate fiscal year hierarchy results](#)
- [Close fiscal year](#)
- [Fiscal Year Rollover Reports](#)

Run fiscal year utility - checklist

The following is an overview of the steps to accomplish the fiscal year rollover in Polaris:

Note:

For more details, see [Use the Fiscal Year Rollover Utility](#)

- Perform a database backup prior to running the rollover process. It is also recommended that the rollover be performed at a time the library is not operational so that the library can restore from the backup if necessary, make changes to the fiscal year rollover settings, and re-run the rollover.
- If you are using EDI, turn off the EDI Agent job a day or two before the rollover.
- Decide which of the following options your organization will use for closing out a fiscal year that has a surplus of money remaining in its linked funds:
 - Keep all unexpended funds and roll them into the next fiscal year.
 - Zero out all the unexpended funds. Keep only the funds that are encumbered.

- If you are using Polaris Serials, and you want to increase the percentage encumbered in funds used to pay for standing orders and subscriptions, make a note of the percentage increase.
- Run the Outstanding Orders report, which lists the purchase orders to be rolled over.
- Run the Fiscal Year/Fund Balances Report - Select **Run pre-processing reports** from the Fiscal Year Rollover Utility. This report shows the current state of the fund balances to be rolled over.
- Run the Fiscal Year Rollover Utility against each fiscal year.
- In the Polaris Staff Client, search for open Fiscal Year records. Rename the open fiscal year(s) to show the current year because the name of the new fiscal year will be the same as the old fiscal year.
- Review the newly created Fiscal Year(s) and Fund records in the Fiscal Year and Fund explorers. See if fund names need to be changed to reflect the new fiscal year. You can also run the fiscal year rollover reports. If you have any questions about the results, contact your Polaris Site Manager.
- If you use EDI ordering, the default segment and header funds are updated automatically in the **EDI Invoice Defaults** profile. Check the profile to confirm that the default header and segment funds are set correctly. See [Set up EDI invoice defaults](#). Then, re-enable your Polaris EDI Agent job.

Replicate fiscal year - checklist

Replicate fiscal year checklist

The following is an overview of the steps to replicate the fiscal year's fund hierarchy:

- Perform a database backup prior to running the rollover process. It is also recommended that the rollover be performed at a time the library is not operational so that the library can restore from the backup if necessary, make changes to the fiscal year rollover settings, and re-run the rollover.
- Run the Fiscal Year/Fund Balances Report - Select Run pre-processing reports from the Fiscal Year Rollover Utility. It shows the current state of the fund balances to be rolled over.

Tip:

For more information on these reports, see Fiscal Year Rollover Reports

- Run the Fiscal Year Rollover utility.
- Review the newly created Fiscal Year(s) and Fund records in the Fiscal Year and Fund explorers. See if fund names need to be changed to reflect the new fiscal year.
- Rename the new fiscal year to distinguish it from the old fiscal year.

Note:

If your library does EDI ordering and has a default fund selected in the EDI Invoice Defaults profile, the fund is not replaced by the new fund because the library can still expend from the old fund. The new fund can be selected at any time after the replication.

Use the Fiscal Year Rollover Utility

The utility is governed by the Acquisitions permission, Run Fiscal Year Utility: Allow. This permission is available at the Branch level only and is unassigned by default. The permission is assigned by Administration Group and workstations, and may not be assigned to individual staff members.

Users who have the permission for *at least one* Organization linked to at least one Fiscal Year record whose status is not Closed, will be able to access the Fiscal Year utility dialog. Additionally, users meeting these requirements will be able to see one or more branch Organizations displayed in the Owner droplist box on the Fiscal Year Utility dialog.

Users without the permission for *at least one* Organization (with linked FY) will be blocked when trying to open the **Run Fiscal Year Utility** dialog. If insufficient permission, no supervisor override is allowed. A standard message, with only the cancel option enabled, will display.

To use the Fiscal Year Rollover Utility

1. From the Polaris Shortcut Bar, select **Utilities > Acquisitions Processing > Run Fiscal Year Utility**.

The Fiscal Year Rollover Utility window is displayed.

2. Select the fiscal year branch in the **Owner** box.
3. Select the fiscal year to be rolled over in the **Fiscal year** box.

Note:

Fiscal year records with a status of Open or Encumbrances Closed appear in the list. You can roll over or replicate a fiscal year with a status of Open, or close a fiscal year with a status of Encumbrances closed.

4. If you want new start and end dates for the fiscal year, select the dates in the **New start date** and the **New end date** boxes.

Note:

The current start and end dates are based on the selected fiscal year, and the new start and end dates are a year later.

5. Select **Run pre-processing reports**.
6. Select one of the following options:
 - **Run fiscal year rollover utility** - If you select this option, select **Rollover free balance** or **Zero-out free balance**. If you are using Polaris Serials and you want to increase the amount encumbered in funds linked to standing orders or

subscriptions, type the percentage increase in the **Standing Orders** and **Subscriptions** boxes. See [Run fiscal year rollover utility results](#).

- **Replicate fiscal year hierarchy** - If you select this option, the current fiscal year's fund structure is replicated. See [Replicate fiscal year hierarchy results](#).
7. Click **OK** to run the utility (or the report if you have chosen to run the report). To close the utility, click **Cancel**.

While the utility is running **Working** is displayed in the lower left corner. When the job is complete, **Fiscal year rollover completed successfully** is displayed.

Run fiscal year rollover utility results

When the **Run fiscal year rollover utility** option is selected, the utility does the following:

- Creates a new fiscal year by replicating the current fiscal year record and its fund structure. A copy of each fund is created with all parent/child links in the new fund structure remaining as in the previous fiscal year.
- Copies the following information from the old funds to the new funds from these views of the Fund workform:

General view of the Fund Record workform -

Name

Alternative name

Transfers (checked = allowed, unchecked = disallowed)

Fiscal year

Fund type

Parent fund

External name

Owner

Source

Display

Renewal date

Fund Balances view of the Fund Record -workform

Note (General)

Encumbrance Limits (fund, order, line)

Expenditure/Debit Limits (fund, invoice, line)

Donor view of the Fund Record (if money in the fund was donated) -

Donor name (first)

Donor name (last)

Corporate name

Address 1

Address 2

County

City

State

Postal code

Country

Phone

Fax

Email

Note (in memory of)

Description

Restriction

- If you chose **Rollover the free balance**, the following fields are set to \$0.00:

Beginning Allocation

Expended

Percent Expended

- If you chose **Zero out free balance** the following fields are set to \$0.00:

Beginning Allocation

Carryover Allocation

Total Allocation

Expended

Percent Expended

- Unlinks the old funds and relinks the corresponding new funds from the following records:
 - Pending purchase orders with header funds
 - Purchase order line item segments on pending purchase orders
 - Open invoices with header funds
 - Invoice line item segments with a status of Prepaid and the linked Purchase Order Line Item segment has a status of On-order, Backordered, Exceptional condition, Never published, Out of print, Return requested, Returned, Pending claim or Claimed.
 - Selection list line item segments on open selection lists
 - Purchase order templates
- Disencumbers any amounts that are encumbered in the funds linked to the existing fiscal year. These encumbrances are from purchase orders and purchase order line item segments that have not yet been paid. The encumbrances may be for charges such as shipping at the purchase order header level, or for purchase order line item segment charges for materials ordered but not yet received, or received but not yet paid for. In addition, the encumbrances may be for standing order or subscription purchase orders that are still open.
- Encumbers the amounts in the new funds in one transaction. The transaction includes all amounts for all purchase orders and purchase order line item segments that had amounts encumbered in the old funds linked to the old fiscal year. If you use Polaris Serials and you have chosen to increase subscriptions or standing orders by a percentage, the amount encumbered is increased by this percentage for all Subscription and/or Standing Order purchase orders that had amounts encumbered in the old fund.
- If the old funds were selected in the following Polaris Administration profiles, they are replaced by the corresponding new funds:

Acq fund droplist setup

Selection list line item defaults

EDI Invoice Defaults

- Closes the old funds. A status of **Closed** displays for the fund record.

Rollover Free Balance Option

If you have chosen to carry over the money from funds linked to the old fiscal year, and the free balance in the old fund is not equal to \$0.00, the utility keeps the unexpended and encumbered funds and rolls them into the next fiscal year. The transactions in the old and the new fund records are posted in the General view of the Fund workform with the date and time of the transaction, a User ID of **1**, the amount, the transaction type, the source of the transaction, and a note that describes the transaction.

Old Fund (donation or regular) - The following transactions are posted:

- Disencumber - The amount equals the sum of all linked encumbered purchase order line item segments and purchase order header charges, the transaction type is **Disencumber**, the source is **Fiscal Year Close**, and the note is **Amount currently encumbered in linked orders**.
- Expenditure - The amount equals the free balance of the fund plus the sum of all the linked encumbered purchase order line item segments and purchase order header charges, the transaction type is **Expenditure**, the source is **Fiscal Year Close**, and the note is **Free balance was rolled over to [name of new fund]**.

Note:

For deposit account funds with a free balance not equal to 0, the money is always rolled over to the next fiscal year; deposit funds are never zeroed out. A **Debit** transaction is posted in the old fund and a **Credit-Carryover** transaction is posted in the new fund.

New Fund - The following transactions are posted:

- Carryover allocation - The amount is the amount expended from the old fund, the transaction type is **Carryover Allocation**, the source is the old fiscal year and fund, and the note is **Carried over from End of year processing**.
- Encumbrance - The amount equals the sum of all purchase order line item segments and purchase order header charges previously encumbered in the old fund, the transaction type is **Encumbrance**, the source is the old fiscal year and fund, and the note is **Amount Currently Encumbered from End of Year processing**. If the encumbrance is for Subscription purchase orders, the note is **Subscription Encumbrance from Fiscal Year Rollover**. If the encumbrance is for Standing Order

purchase orders, the note is **Standing Order encumbrance from Fiscal Year Rollover**.

Note:

If you chose to increase the percentage for subscriptions or standing orders, the amount encumbered for subscription or standing order purchase order line item segments and purchase order header charges is increased by this percentage, then posted in one encumbrance amount.

Zero-Out Free Balance Option

If you chose **Zero-out free balance** in the utility, the free balance in the fund is set to \$0.00. Only encumbered funds are carried over into the next fiscal year. The transactions in the old and the new fund records are posted in the General view of the Fund workform with the date and time of the transaction, a User ID of **1**, the amount, the transaction type, the source of the transaction, and a note that describes the transaction.

Note:

Donation funds and Deposit account funds are always rolled over into the new fiscal year if the balance is not equal to 0; they are never zeroed out even if you chose this option in the Fiscal Year Rollover utility.

Old Fund - If the old fund's free balance is not equal to \$0.00, the following transactions are posted:

- Disencumber (positive or negative) - The amount is the sum of all the encumbrances for linked purchase order line item segments and purchase order header charges, the transaction type is **Disencumber**, the source is **Fiscal Year Close**, and the note is **Amount currently encumbered in linked orders**.
- Expenditure (positive or negative) - The amount is equal to the free balance plus the sum of all the encumbrances for linked purchase order line item segments and purchase order header charges, the transaction type is **Expenditure**, the source is **Fiscal Year Close**, and the note is **Free balance was not rolled over**.
- Balance - The Free Balance in the old fund is updated to \$0.00, and the amount expended is updated to 100% on the Fund Balance view of the Fund workform.

New Fund - The following transaction is posted in the new fund:

Tip:

If you chose to increase the percentage for subscriptions or standing

orders, the amount encumbered for subscription or standing order purchase order line item segments and purchase order header charges is increased by this percentage, then posted in one encumbrance amount

- **Encumbrance** - The amount is the sum of all the linked purchase order line item segments and purchase order header charges (previously encumbered in the old fund), the transaction type is **Encumbrance**, the source is **Fiscal Year Close**, and the note is **Amount currently encumbered in linked orders**. If the encumbrance is for Subscription purchase orders, the note is **Subscription encumbrance from Fiscal Year Rollover**. If the encumbrance is for Standing Order purchase orders, the note is **Standing Order encumbrance from Fiscal Year Rollover**.
- **Free Balance** - The Free Balance in the new fund is the total allocated amount minus the amount encumbered. Since there is no balance carried over from the old fund, the balance in the new fund is a negative amount (shown in parentheses) if there is an encumbrance carried over.

Replicate fiscal year hierarchy results

When the **Replicate fiscal year hierarchy** option is selected, the utility does the following:

- Creates a new fiscal year by replicating the current fiscal year record and its fund structure. A copy of each fund is created with all parent/child links in the new fund structure remaining as in the previous fiscal year.
- Updates status of old fiscal year from **Open** to **Encumbrances closed**.
- Updates status of linked funds from **Open** to **Encumbrances closed**.

Tip:

You can still expend from funds with a status of **Encumbrances closed**. If the money is already encumbered, it can be expended. Or, remaining balances can be expended by paying an invoice without a purchase order. However, funds with a status of **Encumbrances closed** cannot be bulk added to selection list or purchase order line items, even if the fund's name is in the 970\$.f.

- New funds - The funds are updated in:
 - (Open) Selection List Line Item Segments, Fund drop list
 - (Pending) PO Header, Fund drop list
 - (Pending) PO Line Item Segments
 - PO Template, Header, Fund drop list
 - PO Template, PO Line Item Segment, Fund drop list
 - (Open) Subscription Records, view 1
 - SA profile - Acq Fund Drop-down List box (Selection List Funds)
 - SA profile - Selection List (Line Item) Defaults

Close fiscal year

When you replicate a fiscal year, the status of the old fiscal year changes to *Encumbrances closed*, and you can then close the old fiscal year. Unlike rolling over amounts, replicating and then closing a fiscal year does not roll over purchase order line items to the new fiscal year, carry over fund balances, zero-out fund balances, or post transactions in the closed funds. The old funds linked to the old fiscal year can be closed even if a balance remains. Therefore, your organization needs to carefully review the old fiscal year to see if any amounts remain and adjust the new fiscal year and funds accordingly. When the **Close fiscal year** option is selected, the utility does the following:

Tip:

Closed funds do not display in funds lists in selection lists, purchase orders, invoices, or Polaris Administration profiles/parameters. They cannot be bulk added to selection list or purchase order line items, even if the fund's name is in the 970\$F.

Important:

Be sure you have verified that all orders/invoices have been properly reconciled before closing the fiscal year because undoing these changes would be difficult, if not impossible.

- Updates the fiscal year's **Encumbrance closed** status to **Closed**.
- Updates the fiscal year's status date to the current date.

- Updates the linked funds' statuses to **Closed**.
- Updates the EDI Invoice Defaults profile fund IDs to the current open fund ID.

Fiscal Year Rollover Reports

You can run the following reports before and after you run the Fiscal Year Rollover utility.

Fiscal Year/Fund Balance

Select **Run pre-processing reports** from the Fiscal Year Rollover Utility. See [Use the Fiscal Year Rollover Utility](#). The Fiscal Year/Fund Balance report displays the various balances in the funds. After the utility is finished, you can run the report again to make sure that all the funds and the new fiscal year are balanced.

The report lists the following information:

- Owner - Name of the owner for the fund structure.
- Date - Date the report was created.
- Fiscal Year Name - Name of the fiscal year.
- Dates - The fiscal year start and end dates.
- Fund Name - Name of the fund.
- Fund Alternative Name - Abbreviation for the fund.
- Total Allocated - Total amount allocated for the fund.
- Currently Encumbered - Total dollar amount that is encumbered for the fund.
- Amount Expended - Total dollar amount that is expended for the fund.
- Free Balance - Amount of money that is available in the fund.
- Totals - Total dollar amount for the specific fund in the fiscal year.
- Totals for Fiscal Year - Grand total for all the monies in the entire fiscal year. Lists the total allocated, currently encumbered, expended, and free balance.

Outstanding Orders Report

From the Polaris Shortcut Bar, select **Utilities > Reports and Notices > Outstanding Orders**. Then select the organization and time period for which you want to see the status of orders that have not been paid or deleted. Run the Outstanding Orders report again after the Fiscal Year Rollover utility is finished to verify that all titles have been successfully linked to the funds in the new fiscal year.

The reports lists the following information:

Report Date

Date the report was created.

Fiscal Year

Fiscal year for which the titles are being rolled over.

Fiscal Year Start and End Dates

Fiscal year start and end dates.

Order Type

Type of purchase order.

PO Number and Suffix

Numeric identification for the purchase order and its suffix.

Header level Fiscal Year

Fiscal year linked to the fund at the purchase order header level.

Header level Fund

Fund linked to the purchase order as a whole, not to particular line item segments.

Total

Total for the header fund.

Destination

Destination library for the line item.

Title

Title of the line item.

ISBN/ISSN

ISBN/ISSN for the line item.

Line Number

Number for the line item.

Segment Number

Number of the purchase order line item segment.

POLI Segment Status

Status of the purchase order line item segment.

Payment Status

Payment status for the line item segment.

Linked Subscription record status

The status of the linked subscription record. This is only for purchase orders with an order type of Subscription.

Date Ordered

Date the line item was ordered.

Date Received

Date the line item was received.

Total for this fund

Total amount of line item segment charges allocated to a specific fund (repeated for each fund).

Serials Administration Overview

Polaris Administration settings control how Polaris data is categorized, used, and stored, and what functions are available to staff and patrons. You can make most administration settings by two methods: through the Administration Explorer, and through the appropriate workflow for a specific record.

Configure your Polaris system to process serials in the way that is most efficient for your organization. Serials processing in Polaris includes:

- subscription maintenance
- predicting issues
- receiving
- routing pieces

To enable your staff to perform certain serials tasks, you need to set up the required permissions (security) to access, create, modify, or delete records. Then, you set up the appropriate defaults and settings to streamline and standardize your serials processing.

See also:

- [Serials Permissions](#)
- [Setting the Check In Display](#)
- [Setting Up the Check In Prompt](#)
- [Setting Delete of Issue/Part with Item](#)
- [Setting Up Subscriptions](#)
- [Setting Up Routing](#)
- [Setting Up Serials Claiming](#)

Serials Workflow Permissions

The following table lists serials tasks, the Polaris permissions required to do the tasks, the administrative levels at which they can be set, and the subsystems where the permissions are located. Some permissions required for Serials processing are also used in other subsystems. For example, the Acquisitions permission **Create a bib record from acquisitions and serials: Allow** is used in both subsystems.

Tip:

Not all permissions are specific to Serials. There are other permissions which apply to Serials, but are not configured within Serials, such as the Cataloging permission **Override invalid item barcode message: Allow** and the Acquisitions permission **Create a bib record from acquisitions and serials: Allow**.

Note:

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

Access administration: Allow

Modify parameters: Allow

Modify profiles: Allow

For more information, see the Polaris Administration Guide, "Setting Administration Permissions."

Workflow	Required Permissions	Administration Explorer Security Location
Manage Serial Holdings		
Maintain serial holdings records (including publication patterns)	Access serials: Allow	System - Serials
	Serial holdings records: Create	System, Branch - Serials
	Serial holdings records: Modify	System, Branch - Serials
	Serial holdings records: Access	System, Branch - Serials
	Serial holdings records: Delete	System, Branch - Serials
Control whether Polaris automatically creates issues or part records	Access serials: Allow	System - Serials
	Serial holdings	System, Branch -

Workflow	Required Permissions	Administration Explorer Security Location
	records: Access	Serials
	Serial holdings records: Modify	System, Branch - Serials
Manage Subscriptions		
Add a subscription icon	Access serials: Allow	System - Serials
	Subscription records: Access	System, Library, Branch - Serials
	Subscription records: Create	System, Library, Branch - Serials
	Funds: Access	System, Library, Branch - Acquisitions
Maintain subscription records	Access serials: Allow	System - Serials
	Subscription records: Access	System, Library, Branch - Serials
	Subscription records: Modify	System, Library, Branch - Serials
	Funds: Access	System, Library, Branch - Acquisitions
Renew or cancel a subscription	Access serials: Allow	System - Serials
	Subscription records: Cancel and Renew	System, Library, Branch - Serials

Workflow	Required Permissions	Administration Explorer Security Location
Delete subscription records	Access serials: Allow	System - Serials
	Subscription records: Access	System, Library, Branch - Serials
	Subscription records: Delete	System, Library, Branch - Serials
Set subscription cancellation text and print parameters	Access serials: Allow	System - Serials
	Access reports and notices: Allow	System - System Administration
Manage Serial Issues/Parts		
Create, access, modify, and delete issues or parts	Access serials: Allow	System - Serials
	Serial Issues/Standing Order Parts: Create	Branch - Serials
	Serial Issues/Standing Order Parts: Access	Branch - Serials
	Serial Issues/Standing Order Parts: Modify	Branch - Serials

Workflow	Required Permissions	Administration Explorer Security Location
	Serial Issues/Standing Order Parts: Delete	Branch - Serials
	Serial holdings records: Access	Branch - Serials
Checking in serial issues/parts	Access serials: Allow	System - Serials
	Serial Issues/Standing Order Parts: Access	Branch - Serials
	Serial Issues/Standing Order Parts: Delete	Branch - Serials
	Serial Issues/Standing Order Parts: Check-in Serial Issues/Standing Order Parts:	Branch - Serials
	UnCheck-in	Branch - Serials
	Serial holdings records: Access	Branch - Serials
	Serial Issues/Standing Order Parts: Modify	System, Branch

Workflow	Required Permissions	Administration Explorer Security Location
	Create a bib record from acquisitions and serials: Allow (optional)	System - Acquisitions
	Create and delete item records from acquisitions and serials: Allow (if creating item records)	System - Acquisitions
	Default shelving scheme for new item and holdings records: Allow	System - Cataloging
Delete serial items linked to issues or parts	Access serials: Allow	System - Serials
	Serial Issues/Standing Order Parts: Create	System, Branch - Serials
	Serial Issues/Standing Order Parts: Access	System, Branch - Serials
	Serial Issues/Standing Order Parts: Modify	System, Branch - Serials
	Serial	System, Branch -

Workflow	Required Permissions	Administration Explorer Security Location
	Issues/Standing Order Parts: Delete	Serials
	Item records: Delete/Undelete	System, Branch - Serials
	Create and delete item records from acquisitions and serials: Allow	System, Branch - Acquisitions
Maintain Route Lists		
Create a route list	Access serials: Allow	System - Serials
	Route lists: Create	System, Library, Branch - Serials
	Serial holdings records: Access	System, Branch - Serials
	Route lists: Access	System, Library, Branch - Serials
Modify a route list	Access serials: Allow	System - Serials
	Route lists: Access	System, Library, Branch - Serials
	Route lists: Modify	System, Library, Branch - Serials
	Route lists: Modify route status	System, Library, Branch - Serials

Workflow	Required Permissions	Administration Explorer Security Location
Delete a route list	Access serials: Allow	System - Serials
	Route lists: Access	System, Library, Branch - Serials
	Route lists: Delete	System, Library, Branch - Serials
Set up route list defaults	Access serials: Allow	System - Serials
	Access administration: Allow	System - System Administration
	Modify profiles: Allow	System - System Administration
Claim Serials Issues/Parts		
Enter and change serials claiming information in supplier records	Access serials: Allow	System - Serials
	Suppliers: Create	Branch - Serials
	Suppliers: Access	Branch - Serials
	Suppliers: Modify	Branch - Serials
	Suppliers: Modify postal address fields	Branch - Serials
Generate serials claims	Access serials: Allow	System - Serials
	Claim alert list: Access	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
	Serial issues/standing order parts: Claim	System, Branch - Serials
Set up claim notices in Polaris Administration	Access serials: Allow	System - Serials
	Access administration: Allow	System - System Administration
	Modify parameters: Allow	System - System Administration
	Access reports and notices: Allow	System - System Administration
	Suppliers: Access	Branch - Serials
	Suppliers: Modify	Branch - Serials
Generate claim notices	Access serials: Allow	System - Serials
	Access reports and notices: Allow	System - System Administration
	Claim alert list: Access	System - Acquisitions

Serials Permissions

Serials permissions define who can create, access, and work with serials records and functions. Each organization can grant the appropriate permissions that enable staff members to work with serials records and control serial processing.

See also:

- [Set serials security](#)
- [Serials Permissions Reference](#)
- [Serials Workflow Permissions](#)

Set serials security

To review and set Serials permissions:

Note:

Certain System Administration permissions are required to assign permissions.

In the Administration Explorer tree view, select the **Security** folder for the organization for which you want to set permissions.

The Security view is displayed in the details pane.

Double-click the **Serials** folder in the Control Record list.

The permissions appear under the object folders.

Select the permission.

The permission groups, staff members, and workstations with that permission appear in the right pane of the Explorer.

Click **Assign**, and select **Permission Group > Workstation** or **Staff Member**.

The Find Tool appears.

Use the Find Tool to search for and select the staff member, permission group, or workstation to which you want to grant the selected permission.

The staff member, workstation, or permission group appears in the list of those that have the selected permission.

Select **File > Save**.

See also:

- [Serials Workflow Permissions](#)
- [Serials Permissions Reference](#)

Setting the Check In Display

You can set the display of issues or parts in the Check In workform so that only issues or parts with a specific status or statuses are displayed when the workform is opened. To see all the issues that have not been received, you can define which statuses are included in the **Not Received** category.

See also:

- [Specify the display of issues on the Check In workform](#)

Specify the Display of Issues on the Check In Workform

To specify how issues are displayed in the Check In workform:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.
3. Select **Display of issues on Check In**.

The Display of Issues on Check In dialog box appears.

4. Select the status of issues that you want to display in the Check In workform in the **Issue status** box.

Note:

If you select **<Not Received>**, you can define which statuses are included in the Not Received category. See step 5.

5. If you selected **Not Received**, define which statuses you want to include by selecting one or more check boxes: **Claimed**, **Expected**, **Never published**, **Not available**, **Pending Claim**.
6. Click **Save** to save your changes.
 - If you selected **All**, the Check In workform displays issues/parts with all statuses.
 - If you selected **Not received**, the Check In workform displays the issues/parts with the statuses you defined as **Not Received**.
 - If you selected any other status, the Check In workform displays only the issues/parts with that specific status.

Setting Up the Check In Prompt

The serials parameter **Enter unit price at serials check-in** controls whether a prompt for the price appears when you check in a serials issue. The default setting is **Yes**.

See also:

- [Set the prompt for price at check-in](#)

Set the Prompt for Price at Check-In

To specify whether you want a price prompt to appear along with the barcode prompt when you check in serial issues:

Tip:

The **Enter unit price at serials check in** parameter applies only when the serial holdings record has the settings **Generate item records at check-in** and **Prompt for barcode** enabled.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.
3. Double-click **Enter unit price at serials check-in**.
4. Set the parameter to **Yes** or **No**.
 - If the parameter is set to **Yes**, when the issues are checked in, the cursor is in the **Price** field and both fields are enabled.
 - If the parameter is set to **No**, when the issues are checked in, the cursor is in the barcode field and the price field is read-only.
5. Select **File | Save**.

Setting Delete of Issue/Part with Item

You can specify whether issues/parts should be deleted automatically when the linked item record is deleted. The Acquisitions/Serials parameter, **Delete linked issue/part when serial item is deleted** must be set to **Yes** for the linked serial record to be deleted automatically.

See also: [Set automatic deletion of linked issues/parts when items are deleted](#)

Set automatic deletion of linked issues/parts when items are deleted

To specify whether you want linked serial issues/parts to be deleted when item records are deleted.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.
3. Double-click **Delete linked issue/part when serial item is deleted**.
4. Select **Yes** to delete all linked issues/parts when linked item records are deleted in Cataloging, or select **No** to retain the issues/parts when the linked item records have been deleted.
5. Select **File > Save**.

Setting Up Subscriptions

You do not need to set up subscription records to use Polaris Serials. However, if you create a Subscription Record for each serial title your library has, you can manage your subscriptions (view, renew, cancel) from the Subscriptions List. You also have the option to create purchase orders automatically when a subscription is renewed.

See also: Set up subscriptions

Set Up Subscriptions

To set up subscriptions in Polaris:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.
3. Double-click **Create purchase order at subscription renewal**, and select **Yes** or **No**. If the parameter is set to **Yes**, when users renew subscriptions a dialog box opens with the **Create POs at Subscription renewal** option selected. If the parameter is set to **No**, the dialog box does not appear when users renew subscriptions.
4. If you selected **Yes** in the **Create purchase order at subscription renewal** parameter, specify default funds for the automatic purchase orders:
 - Double-click the **Subscription renewal fund - deposit account** parameter, and select a default fund to use when **Depository agreement** is selected in the **Payment Method** box on the Subscription Record workform, and no fund is selected.

- Double-click **Subscription renewal fund - non-deposit account**, and select a default fund to use when **Purchase** or **Free** is selected in the **Payment Method** box on the Subscription record workform, and no fund is selected.
- 5. Double-click **Notification: Print subscription cancellation notice**, and select **Automatic** or **Batch** to specify if cancellation notices are to be printed automatically or in a batch.
- 6. Double-click **Notification: Subscription cancellation notice text**, and type the text to appear on subscription cancellation notices. This text will appear on all subscription cancellation notices.
- 7. Select **File | Save**.

Setting Up Routing

You can use Polaris Administration settings to define the defaults that display on route slips; specify whether route slips are printed in batch or individually; specify a receipt or a regular printer for route slips; and (optionally) set up routing notices to notify members of a route list when issues are routed to them.

To print route slips on a receipt printer, the receipt printer must be the default printer for the workstation where staff members do serials check in. If another type of printer is the workstation's default printer, route slips will be printed on regular 8.5 x 11 inch paper.

Note:

The information printed on route slips is defined in the Route List workform, but only the **Return by** date, the title and designation of the issue, and the list of names appear on the route slip if you use a receipt printer. If you print route slips on 8.5 x 11 sheets of paper, the route list name, owner, return by date, home location, return instructions, and header and footer are printed. See the *Polaris Serials Guide*, "Creating Route Lists."

See also:

- [Set up serials route list defaults](#)
- [Set up routing notices](#)

Set Up Serials Route List Defaults

Use the **Route list defaults** profile to define the default information that displays in the Route List workform for the organization, workstation, or staff member, and to specify

how route slips are printed.

To set up serial route list defaults:

1. In the Administration Explorer tree view, expand the folder for the organization, workstation, or staff member.
2. Select **Profiles** and click the **Acquisitions/Serials** tab.
3. Double-click **Route list defaults**.

The Route List Defaults Dialog box appears.

4. Specify the default routing duration by typing a number and selecting **weeks** or **days** in the **Route Period** boxes.

Note:

The routing duration is used to calculate the **Return by** date that appears on route slips.

5. In the **Home Location** box, select the organization where the piece should be returned.
6. Select one of the following print options:
 - Select **Batch** if the route slip should be printed with all other route slips needed during a serial check-in session.
 - Select **Automatic** to print the route slip as each piece is checked in.
7. Type the instructions for returning the routed piece in the **Return Instructions** box.
8. Type the text for the header in the **Header** box. This is the information that appears at the top of route slip.
9. Type the text for the footer in the **Footer** box.
10. Specify the columns that display in the Route List workform by selecting the data elements in the **Piece Display Options** box on the left and clicking **Add** to move them to the box on the right.
11. Click **OK** to set the route list defaults and close the Route List dialog box.
12. Select **File > Save**.

Set Up Routing Notices

When you route an issue, you can notify the members of the route list that the issue has been routed to them. You can specify whether the notice will be sent in an e-mail or printed.

Tip:

A routing notice is not a route slip, which is a printed list of the people to whom the issue is routed. A route slip is attached to the issues being routed. For more information about route slips, see the *Polaris Serials Guide*, "Routing Serial Issues." Routing notices can be e-mailed or printed.

To set up routing notices:

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and click the **Notification** tab.
3. Double-click **Notification options**.

The Notification Options dialog box - General tabbed page appears.

4. Select the **Serial** tab.
5. Select **Routing**.
6. Select a method in the **Notification method** box.

Note:

Phone and **TXT message** notification methods are not available for routing.

7. If you selected **E-mail** or **Patron Preference** in the **Notification Method** box, set up the notice in the **E-mail notice** area:
 - Type the subject of the e-mail in the **Subject** box.
 - Type the text of the e-mail notice in the **Text** box. There is no default or item-specific information for routing notices.
8. If you selected **Print** or **Patron Preference** in the **Notification Method** box, set up the notice in the **Printed notice** area:
 - Type the heading of the notice in the **Header** box. This is the information that appears in the top portion of the notice.
 - Type the text of the notice in the **Text** box. There is no default or item-specific information for routing notices.
9. Click **Save**.

See also

the *Polaris Serials Guide*, "Routing Serial Issues."

Setting Up Serials Claiming

An issue or part may be claimed if it does not arrive when expected, it arrives damaged, or it is the wrong issue. To work with serials claiming, staff members require permissions for serials records, including supplier records. They also require permissions to claim serial issues and parts, and manage notices. See [Serials Workflow Permissions](#).

See also: [Set up claiming notification](#)

Set Up Serials Claiming Notification

To specify how claim notices will be sent for serials issues or parts that are not received as expected:

Important:

If your serials claiming is centralized, set up notification at the system level. If your serials claiming is decentralized, set up notification at the library or branch level.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and click the **Notification** tab.
3. Double-click **Notification options**.

The Notification options - General tabbed page appears.

4. Select the **Serial** tab.

Note:

To generate claim notices for a supplier, the **Claim Notice** box must be checked in the Supplier record.

5. Select the **Serial claim** check box.
6. Select the method by which you want to generate and send claim notices in the **Notification method** box.

Note:

If you want the claim notice method set in supplier records to control how notifications are sent, make sure you select all the possible notification methods on the General tab, and then set the **Notification method** to **Supplier Preference** on the Serial tab.

7. Select **Automatic claiming** to have a claim notice sent out automatically when an issue or part is eligible to be claimed.
8. In the following fields, type the contact information for the library staff member who handles serials claims:
 - **Contact name**
 - **Department name**
 - **Phone number**
 - **Email address**
9. In the **Return address** box, select the library whose return address should be used on the serial claim notices.
10. To include the claim reason on serial claim notices, select **Include Claim Reason**. The claim reason comes from the **Reason** box in the Claims view of the Issue record.
11. To include a claim note, select **Include Claim Note**. The claim note comes from the text in the **Note** box in the Issue record.

Note:

If the **Subscription ID** has been entered in the Serial Holdings Record - Orders view, it appears on the claim notice.

12. Click **Save** to save the notice settings you entered.

Related Information

- Claiming serials issues or parts - See the Polaris Serials Guide, "Claiming in Serials."
- Printing claim notices - See the Polaris Serials Guide, "Print a Claim Notice."

Cataloging Administration Reference

The following tables include the permissions required to do specific Cataloging tasks, and reference lists for Cataloging permissions, parameters, and profiles:

- [Cataloging Workflow Permissions](#)
- [Cataloging Permissions Reference](#)
- [Cataloging Parameters Reference](#)
- [Cataloging Profiles Reference](#)

Cataloging Permissions Reference

These permissions are available under **Security, Cataloging** at the listed organizational levels on the Administration Explorer.

Note:

To do a cataloging task, both the staff member and the workstation must have the permission. For more information on the permissions required for specific Cataloging tasks, see [Cataloging Workflow Permissions](#).

Control Record	Org Levels	Permission	Description
Access cataloging subsystem	System	Allow	Access the Cataloging menu and workforms
Access bibliographic bulk change	System	Allow	Bulk change bibliographic records
Access bibliographic fixed fields bulk change	System	Allow	Bulk change fixed fields in bibliographic records

Control Record	Org Levels	Permission	Description
Access Carousel Toolkit	System	Allow	Use the Carousel Toolkit on the Utilities menu
Access item record bulk change	System	Allow	Bulk change item records. (You must also have the Item record: Bulk change permission to change item records owned by your organization.)
Authority create links to authority records	System	Allow	Create links from an authority record to other authority records.
Authority create links to bibliographic records	System	Allow	Create links from an authority record to bibliographic records.
Authority records	System	Access; Create; Modify; Delete/Undelete	Maintain authority control in the catalog.
Authority templates	System, Library, Branch	Access; Create; Modify; Delete	Maintain templates for authority MARC records.
Auto delete processing of reserve item records	System	Allow	Maintain course reserve item records; invoke the

Control Record	Org Levels	Permission	Description
			auto-delete process from the course reserve item record.
Bibliographic records	System, Library, Branch	Access; Create; Modify; Delete/Undelete	Maintain bibliographic MARC records.
Bibliographic templates	System, Library, Branch	Access; Create; Modify; Delete	Maintain templates for bibliographic MARC records
Campaigns	System, Library, Branch	Access; Create; Modify; Delete	Maintain campaigns or automatic promotions for the organization
Cataloging record sets	System, Library, Branch	Access; Create; Delete/Undelete; Export; Modify	Maintain cataloging record sets
Community records	System, Library, Branch, Staff, Workstation	Access; Create; Modify; Delete	Maintain community records for a library organization.
Course reserve records	System, Library, Branch	Access; Create; Modify; Delete	Maintain course reserve records
Course reserve templates	System, Library, Branch	Access; Create; Modify; Delete	Use course reserve templates.
Event import profiles	System	Access; Create; Modify; Delete	Manage Community Event import profiles

Control Record	Org Levels	Permission	Description
Export bibliographic, item and authority records	System	Allow	Export cataloging records
Express Importing	System	Allow	Users with this permission can use the Express Import option on the Utilities menu. This permission allows users to change settings on the Profile Setup and Record Set tabs on the Import Profile dialog box but not change the import settings for bibliographic, authority, or item records.
Import profiles	System	Access; Create; Modify; Delete	Maintain import profiles
Item Bulk Change Templates	System	Access: Create: Modify: Delete	Maintain Item Bulk Change Templates
Item records	System, Library, Branch	Access; Create; Modify; Delete/Undelete; Modify cataloging view; Modify header; Modify	Maintain and catalog item records

Control Record	Org Levels	Permission	Description
		history view; Modify notes and notices view; Modify reserves view; Modify source and acquisitions view	
Item templates	System, Library, Branch	Access; Create; Modify; Delete	Maintain item templates
Label Manager Configuration	System	Create; Modify; Delete	Maintain labels for the organization
Manage import jobs for this organization	System, Branch	Allow	Manage import jobs launched by users logged into the system or the branch for which the permission is granted; specify blackout times for the organization.
Modify Do not overlay setting in bib records	System	Allow	Modify the Do not overlay setting in bibliographic records . With this permission, staff members can modify the Do not overlay check box in the Bibliographic Record workform, the Bib Bulk

Control Record	Org Levels	Permission	Description
			Change dialog box, and the Import Setup window (provided they have the other required permissions).
Override invalid item barcode message	System	Allow	Override invalid item barcode message when saving an item record, including serial item records.
Promotions	System, Library, Branch	Access; Create; Modify; Delete	Maintain promotion records used to feature resources in the PAC. The library must have a license for Feature It.
Purge criteria	System, Library, Branch	Access; Create; Modify; Delete	Use the purge process to purge records marked as deleted but not removed from the database.
Quick-circ item records	Branch	Access; Create; Modify; Delete	Maintain ephemeral (quick-circ) items.
Reserve item templates	System, Library, Branch	Access; Create; Modify; Delete	Maintain reserve item templates.

Control Record	Org Levels	Permission	Description
Suppress warnings for breakable links when deleting multiple bibliographic records	System	Allow	Users can stop warning messages regarding breakable links to other records when deleting multiple bibliographic records
Suppress warnings for breakable links when deleting multiple item records	System	Allow	Allow - Users can stop warning messages regarding breakable links to other records when deleting multiple item records.
Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple bibliographic records	System	Allow	Users can stop warning messages regarding unbreakable links and other conditions when deleting multiple bibliographic records.
Suppress warnings for unbreakable links and other stopping	System	Allow	Users can stop warning messages regarding unbreakable links

Control Record	Org Levels	Permission	Description
conditions, when deleting multiple item records			and other conditions when deleting multiple item records.
Use 'own' authority templates	System	Allow	Maintain own authority templates.
Use 'own' bibliographic templates	System	Allow	Maintain own bibliographic templates.
Use 'own' item bulk change templates	System	Allow	Allows staff to 'own' item record bulk change templates.
Use 'own' cataloging record sets	System	Allow	A staff member with this permission can create record sets that no other staff member or system administrator can access or modify. Grant this permission only if you want the staff member to create record sets that no one else can access.
Use 'own' course reserve templates	System	Allow	Maintain own course reserve templates.
Use 'own' item	System	Allow	Maintain own item

Control Record	Org Levels	Permission	Description
templates			templates.
Use 'own' reserve item templates	System	Allow	Maintain own reserve item templates.
Use URL Detective	System	Allow	Use the URL Detective utility available from the Utilities menu. A license for this utility is also required.

Cataloging Profiles Reference

These profiles are available when you select **Profiles, Cataloging** for the listed organizational levels in the Administration Explorer. For more information, see [Cataloging Administration](#).

Profile	Org Levels	Description	Default
Automated MARC validation: Authority	System, Library, Branch, Staff	Specifies whether the format of MARC authority records is checked automatically when the record is saved for the organization or resource	Yes
Automated MARC validation: Bibliographic	System, Library, Branch, Staff	Specifies whether the format of MARC bibliographic records is checked automatically when the record is saved for the organization or resource.	Yes
Automatically populate authority heading in Find Tool during check headings	System	Enable or disable the automatic population of the heading in the Authority Records - Heading Find	Yes

Profile	Org Levels	Description	Default
		Tool when checking for duplicate headings.	
Automatically sort MARC Authority Records	System, Library, Branch	Specifies whether the MARC tags in an authority record are sorted automatically when the record is opened or saved for the organization.	Yes
Automatically sort MARC bibliographic records	System, Library, Branch	Specifies whether the MARC tags in a bibliographic record are sorted automatically when the record is opened or saved for the organization.	Yes
Bibliographic records: Automatic display in PAC processing	System	Opens a dialog box where the automatic display in PAC options are set for bibliographic records.	
Bibliographic records: Warning for records saved with display in PAC unchecked	System, Library, Branch	Specifies whether a warning message appears when users save a bibliographic	No

Profile	Org Levels	Description	Default
		record that does not have the Display in PAC check box checked. This warns the user that the saved record will not display in the PAC.	
Bring call number fields from bib to item record when link is made	System, Library, Branch, Staff, Workstation	Specifies whether the call number fields from the bibliographic record automatically complete the appropriate boxes in the item record when the staff member creates a linked item.	Yes
Bring price from bib to item record when link is made	System, Library, Branch, Staff, Workstation	Specifies whether the price from the bibliographic record automatically fills the Price box in the item record when the staff member creates a linked item.	Yes
Campaigns truncation option	System, Library, Branch	Opens a dialog box where the	

Profile	Org Levels	Description	Default
		number of characters to display in the campaign headline, midline and footer are set.	
Check headings immediately after bib replace	System, Library, Branch, Staff	Specifies whether bibliographic record headings are checked immediately after they replace other bibliographic records.	Yes
Copied item records default to In-process	System, Library, Branch	Specifies whether copied item records get a default status of In-process.	Yes
Copied item templates default to In-process	System, Library, Branch	Specifies whether copied item templates get a default status of In-process.	Yes
Default directory	System, Library, Branch, Workstation	Displays the Default Directory Setup dialog box which specifies the folder used as the default path for cataloging functions. The folder can be a	The default is: C:\Polaris Reports

Profile	Org Levels	Description	Default
		shared folder on the network or a folder on the staff computer. Each workstation can have a different default directory.	
Default shelving scheme for new item and holdings records	System, Library, Branch	Specifies the default shelving scheme that appears when you create new item and serial holdings records.	Dewey Decimal
Delete MARC tags when saving Z39.50 tags to local databases	System	Specifies whether tags set up for deletion from incoming bibliographic records in the Bibliographic Tags to Retain/Delete policy table are also deleted from bibliographic records when the records are found via a Z39.50 search of a remote database and saved to the local database.	No
Display MARC	System, Library,	Specifies whether	Yes

Profile	Org Levels	Description	Default
field description	Branch, Staff	the descriptions for the MARC tags and subfields automatically display when the cursor is positioned in the MARC21 view.	
Import blackout times	System	Specifies the times when no importing jobs can be processed for the library system. Double-click to open the Import Blackout Times dialog box to enable and schedule the blackout times.	
Item bulk change: Warning if changing the Assigned or Home branch	System, Library, Branch	Specifies whether a warning appears when you are bulk changing item records and you have selected to change the Assigned or Home branch.	Yes
Item records: Records with duplicate barcodes can be saved	System, Library, Branch	Specifies whether item records can be saved provisionally if they have	The default is Yes ; to disable, select No .

Profile	Org Levels	Description	Default
provisionally		duplicate barcodes.	
Item records: Warning if changing the Assigned or Home branch	System, Library, Branch	Specifies whether a warning message appears when you change the Assigned or Home branch on an Item record.	The default is Yes ; to disable, select No .
Item records: Warning for items saved with display in PAC unchecked	System, Library, Branch	Specifies whether a warning appears when item records are saved and they do not have the Display in PAC box checked.	The default is Yes ; to disable, select No .
Item records: Warning for items saved without barcodes	System, Library, Branch	Specifies whether a warning appears when an item record is saved without a barcode.	The default is Yes ; to disable, select No .
Item records: Warning for items saved with modified barcode	System, Library, Branch	Specifies whether a warning message appears when an item record is saved with a modified barcode.	The default is Yes ; to disable, select No .
MARC validation immediately after bib replace	System, Library, Branch, Staff	Specifies whether MARC validation is performed automatically after a	The default is No ; to enable, select Yes .

Profile	Org Levels	Description	Default
		bibliographic record replaces other bibliographic records.	
MARC Validation: Authority	System	Opens the MARC Validation Editor - Authority where you can specify how authority records are validated	
MARC Validation: Bibliographic	System	Opens the MARC Validation Editor - Bibliographic where you can specify how bibliographic records are validated.	
Maximum number of files to import	System, Library, Branch	Specifies the maximum number of files that can be included in a single import job.	The default is 100; the limit is 1,000.
Override Cataloging blocks	Staff	Specifies whether the selected staff member can override permission blocks in cataloging functions. Staff members with this	The default is No ; to enable, select Yes .

Profile	Org Levels	Description	Default
		permission must also be allowed to do the restricted functions.	
Remote automatic authority control	System, Library, Branch	Displays the Remote Automatic Authority Control Defaults dialog box where you enable automatic authority control, specify the Z39.50 server and database to search for authority records when no matching records are found in your local database, and specify the length of time (in seconds) to search before timing out.	
Retain deleted authority records	System	Specifies whether authority records are retained in the database when they are marked for deletion	The default is No ; to enable, select Yes .
Retain deleted bibliographic records	System	Specifies whether bibliographic records are	The default is No ; to enable, select Yes

Profile	Org Levels	Description	Default
		retained in the database when they are marked for deletion.	
Retain deleted cataloging record sets	System	Enables the system to retain deleted cataloging record sets.	Yes
Retain deleted item records -	System	Specifies whether item records are retained in the database when they are marked for deletion.	The default is No ; to enable, select Yes .
Retain deleted record sets	System	Specifies whether cataloging record sets are retained in the database when they are marked for deletion.	The default is No ; to enable, select Yes .
Subfield 9 cleanup utility	System	Controls the cleanup utility that deletes processed tags from bibliographic records. Specifies the tags to check for the presence of a \$9 and the time period (relative to the day the utility is run)	No defaults are set.

Profile	Org Levels	Description	Default
		to check.	
Web App: Remote databases: Maximum number of records to return	System, Library, Branch	Specifies the maximum number of records to return in the result set for each remote database in Leap.	The default is 250. The maximum is 999.
Web App: Remote databases: Maximum number that can be searched at once	System, Library, Branch	Specifies the maximum number of local or remote databases that you can search at one time in Leap.	The default is 10. The maximum is 25.
Web App: Remote databases: Maximum search time (seconds)	System, Library, Branch	Specifies the maximum number of seconds to actively search all selected databases.	The default is 30. The maximum is 300.

Cataloging Parameters Reference

These are the parameters you set to administer and maintain the Cataloging subsystem.

These parameters are available when you select **Parameters, Cataloging** for the listed organizational levels in the Administration Explorer. For more information, see [Cataloging Administration](#).

Profile	Org Levels	Description	Default
Auto-suggest feature enabled	System	Specifies whether automatic suggestions appear for a phrase or keyword	Yes

Profile	Org Levels	Description	Default
		search in the staff client for patron, bibliographic, item, or authority records, and a phrase, keyword, and advanced search in the Polaris PowerPAC.	
Bibliographic record replace: Maximum allowed in one operation	System	Sets the maximum number of bibliographic records that can be replaced at once.	The default is 50; the limit is 999.
Bibliographic record delete: Allow if there are holds	System	Specifies whether bibliographic records can be deleted if there are linked hold requests.	No
Bibliographic record do not overlay feature enabled	System	Specifies whether the Do not overlay feature is enabled. When enabled, the Bibliographic Record workform, the Bibliographic Records tab of the Import Setup window, and Bibliographic Record Bulk	No

Profile	Org Levels	Description	Default
		Change dialog box will have a Do not overlay check box that staff members with the appropriate permissions can select to prevent specific bibliographic records from being overlaid.	
Item record delete: Allow if there are holds	System	Specifies whether item records can be deleted if there are linked hold requests	No
Item record history display assigned branch	System	Specifies whether the Assigned branch appears in the Item record Circulation History view.	Yes
Item record history display patron ID	System	Specifies whether the patron ID appears in the Item Record workform, Circulation History view.	Yes
Item record history time threshold	System	Specifies the number of days that a status	365

Profile	Org Levels	Description	Default
		change to an item record appears in the Circulation History view of the Item record workform.	
MARC Re-index during next server upgrade		Specifies whether to re-index MARC records when the server is upgraded.	No
Mark embedded holdings tag as processed	System	Specifies whether a \$9 with processing information is inserted in embedded holdings tags in bibliographic records when item records are created from these tags during the import process.	Yes
Normalize ambiguous LCCNs as if they are in the old format	System	Specifies how to process Library of Congress Control Numbers in MARC records that do not have a distinct format. This setting applies to all organizations	The default is Yes , normalize LCCNs (where the format is not distinct) as if the LCCN is in the old control number format

Profile	Org Levels	Description	Default
		and resources in the Polaris installation where bibliographic records are saved.	

Acquisitions Administration Reference

The following tables include the permissions required to do specific Acquisitions tasks, and reference lists for Acquisitions permissions, parameters and profiles.

- [Acquisitions Workflow Permissions](#)
- [Acquisitions Permissions Reference](#)
- [Acquisitions Profiles Reference](#)
- [Acquisitions Parameters Reference](#)

Acquisitions Workflow Permissions

Acquisitions permissions define who can create, access, and work with acquisitions records and functions. Some tasks require additional permissions, such as Cataloging permissions to work with bibliographic records. Each organization can specify which groups, workstations, or staff are allowed to work with records and control processes. For general information about setting permissions in Polaris, see the Polaris *Administration Guide*, "Granting Permissions."

The following table lists acquisitions tasks, the Polaris permissions required to do the tasks, the administrative levels at which they can be set, and the subsystems where the permissions are located.

Note:

The following permissions are required to modify Polaris Administration profiles and parameters:

Access administration: Allow

Modify parameters: Allow

Modify profiles: Allow

For more information, see the *Cataloging Administration Guide*, "Administration Workflow Permissions."

Manage the Acquisitions Budget Permissions

Workflow	Required Permissions	Administration Explorer Security Location
Define fund categories	Access acquisitions: Allow	System - Acquisitions
	Access Administration: Allow	System - Acquisitions
	Modify donation fund category table: Allow	System - Acquisitions
Add a fiscal year to Polaris	Access acquisitions: Allow	System - Acquisitions
	Fiscal years: Create	Branch - Acquisitions
Change a fiscal year	Access acquisitions: Allow	System - Acquisitions
	Fiscal years: Access	Branch - Acquisitions
	Fiscal years: Modify	Branch - Acquisitions
Delete fiscal year records	Access acquisitions: Allow	System - Acquisitions
	Fiscal years: Access	Branch - Acquisitions
	Fiscal years: Delete	Branch - Acquisitions
Add a fund record	Access acquisitions: Allow	System - Acquisitions
	Fiscal years: Access	Branch - Acquisitions
	Funds: Create	Branch - Acquisitions
Delete fund records	Access acquisitions: Allow	System - Acquisitions
	Funds: Access	Branch - Acquisitions
	Funds: Delete	Branch - Acquisitions
Maintain fund account information	Access acquisitions: Allow	System - Acquisitions
	Funds: Access	Branch - Acquisitions
	Funds: Modify	Branch - Acquisitions

Manage the Acquisitions Budget Permissions

Workflow	Required Permissions	Administration Explorer Security Location
Transfer money between funds	Access acquisitions: Allow	System - Acquisitions
	Funds: Access	Branch - Acquisitions
	Funds: Modify	Branch - Acquisitions
	Funds: Transfer money between funds	System - Acquisitions

Select Material Permissions

Workflow	Required Permissions	Administration Explorer Security Location
Select Material Permissions		

Workflow	Required Permissions	Administration Explorer Security Location
<p>Create and manage selection lists for the organization, including titles added by other selectors, and copy the selection lists to purchase orders.</p> <p>Add a title that is not in the Polaris database. From the Selection List Line Item workform, search for the title in external databases using Z39.50, and create a provisional bibliographic record.</p>	Funds: Modify	System - Acquisitions
	Funds: Transfer money between funds	Library - Acquisitions
	Selection lists: Create	Library - Acquisitions
	Selection lists: Modify	Library - Acquisitions
	Selection lists: Approve/Reject	Library - Acquisitions
	Selection lists: Delete	Library - Acquisitions
	Access cataloging subsystem: Allow	System - Acquisitions
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Cataloging record sets: Access	System, Library, Branch - Cataloging
	Cataloging record sets: Create	System, Library, Branch - Cataloging
	Cataloging record sets: Modify	System, Library, Branch - Cataloging
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Create	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Bibliographic records: Create Create a bib record from Acquisitions and Serials: Allow	System, Library, Branch - Cataloging System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Create and modify selection lists, selection list line items, and segments. Do Z39.50 searches from a selection list line item, and create provisional records.	Access acquisitions: Allow	System - Acquisitions
	Selection lists: Access	
	Selection lists: Create	Library - Acquisitions
	Selection lists: Modify	Library - Acquisitions
	Bibliographic records: Access	Library - Acquisitions
	Bibliographic records: Create	Library - Acquisitions
	Create a bib record from Acquisitions and Serials: Allow	System, Library, Branch - Cataloging
		System, Library, Branch - Cataloging
Merge selection lists	Access acquisitions: Allow	System - Acquisitions
	Selection lists: Access	System - Acquisitions
	Selection lists: Modify	Library - Acquisitions
	Selection lists: Delete	Library - Acquisitions
Rename selection lists	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
Delete selection lists	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Delete	Library - Acquisitions
Modify a selection list line item's status	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Approve or reject selection list line items	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
	Selection Lists: Approve/Reject	Library - Acquisitions
Work with selection list line item segments. (This set of permissions allows the user to add, modify, and delete selection list line item segments for the branches at which this permission was granted.)	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection List Line Item Segments: Create, modify, delete	Branch - Acquisitions
Bulk add titles to selection lists from record sets	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Access cataloging subsystem: Allow	System, Library, Branch - Cataloging
	Cataloging record sets: Access	System, Library, Branch - Cataloging
	Cataloging record sets: Create	System, Library, Branch - Cataloging
	Cataloging records sets: Modify	System, Library, Branch - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
Copy selection list line items to a selection list	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
Copy selection list line items to a new or existing purchase order	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
Manage Supplier Records Permissions (Supplier records are available from the Serials and Acquisitions menus on the Polaris Shortcut Bar, but the permissions for Suppliers are available under Serials in the Polaris Administration Explorer Security folder.)		
Add a supplier record to Polaris	Access serials: Allow	System - Serials
	Suppliers: Create	Library - Serials
Delete supplier records	Access serials: Allow	System - Serials
	Suppliers: Access	Branch - Serials
	Suppliers: Delete	Branch - Serials
Maintain the information in existing supplier records	Access serials: Allow	System - Serials
	Suppliers: Access	Branch - Serials
	Suppliers: Modify	Branch - Serials
	Suppliers: Modify postal address fields	System - Serials
Maintain Link to Supplier Databases Table Permissions		
Add and remove suppliers	Access administration:	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
from the Link to Supplier Databases table	Allow	
	Modify links to supplier databases table: Allow	System - Acquisitions
Order Materials Permissions		
Create new purchase orders and add titles to existing purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Create	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Funds: Access	Branch - Acquisitions
Add line items to a purchase order. Add a title without a bib in the database by doing a Z39.50 search.	Suppliers: Access	Branch - Acquisitions
	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Bibliographic records: Create	System, Library, Branch - Cataloging
	Create a bib record from acquisitions and serials: Allow	System - Acquisitions
	Modify a bib record from acquisitions and serials: Allow	System - Acquisitions
	Selection Lists: Access	Branch - Acquisitions
	Funds: Access	Branch - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Bulk add titles to purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Access Cataloging subsystem: Allow	System - Cataloging
	Cataloging record sets: Access	System, Library, Branch - Cataloging
	Use 'own' cataloging record sets: Allow	System, Library, Branch - Cataloging
	Purchase orders: Modify	Branch
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Funds: Access	Branch - Acquisitions
	Express importing: Allow	System, Library, Branch - Cataloging
Remove unused purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Delete	Branch - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Release purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Purchase orders: Release, receive, cancel, close PO	Branch - Acquisitions
	Purchase orders: Release order exceeding fund encumbrance limits	Branch - Acquisitions
	Purchase orders: Release order resulting in negative fund free balance	Branch - Acquisitions
	Modify a bib record from acquisitions and serials: Allow (This permission allows user to change only the Display in PAC setting in bibliographic records.)	System - Acquisitions
Create item records when material is ordered	Access acquisitions: Allow	System - Acquisitions
	Create and delete item records from acquisitions and serials: Allow	System - Acquisitions
Print purchase orders to mail or fax to supplier	Access acquisitions: Allow	System - Acquisitions
	Print purchase orders: Allow	Branch - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Send purchase orders electronically via EDI	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Send electronic purchase orders	Branch - Acquisitions
Receive Materials Permissions		

Workflow	Required Permissions	Administration Explorer Security Location
Receive purchase orders and create invoices. Receive from an invoice.	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Create	Branch - Acquisitions
	Invoices: Modify	Branch - Acquisitions
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Purchase orders: Access	Branch - Acquisitions
	Suppliers: Access	Branch - Acquisitions
	Purchase orders: Print workslips	Branch - Acquisitions
	Funds: Access	Branch - Acquisitions
	Purchase orders: Release, receive, cancel, close PO	Branch - Acquisitions
	Purchase orders: Undo receipt	Branch - Acquisitions
	Access cataloging subsystem: Allow	System - Cataloging
Check in shelf-ready items and receive purchase order line items using the Check In Shelf-Ready Materials workform.	Check in shelf-ready materials: Allow (Only this permission and Access acquisitions: Allow are required to use the Check In Shelf-ready Materials workform.)	System - Acquisitions
Receive cartons of materials by scanning (or entering) the barcode on	Receive ASN Shipments: Allow	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
the outside of the box.		
Claim Ordered Items Permissions		
Claim items when shipments are processed and materials did not arrive as expected	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Claim record: Create	Branch - Acquisitions
Claim from the Claim Alert List	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Claim record: Access	Branch - Acquisitions
	Claim record: Create	Branch - Acquisitions
	Claim alert list: Access	System - Acquisitions
Maintain claim records	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Claim record: Access	Branch - Acquisitions
	Claim record: Create	Branch - Acquisitions
	Claim record: Modify	Branch - Acquisitions
	Claim record: Delete	Branch - Acquisitions
Print from Claim Alert List	Access acquisitions: Allow	System - Acquisitions
	Claim alert list: Access	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Cancel Ordered Items Permissions		
Cancel purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Purchase orders: Release, receive, cancel, close PO	Branch - Acquisitions
	Claim record: Access	Branch - Acquisitions
	Claim record: Modify	Branch - Acquisitions
	Claim record: Delete	Branch - Acquisitions
	Claim alert list: Access	System - Acquisitions
Delete canceled purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Delete cancelled purchase orders: Allow	Branch - Acquisitions
Remove unused purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Delete	Branch - Acquisitions
Invoice Materials Permissions		
Create invoices	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Create	Branch - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Pay, undo payment, credit, or adjust invoices	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Adjust	Branch - Acquisitions
	Invoices: Modify	Branch - Acquisitions
	Invoices: Pay, credit	Branch - Acquisitions
	Invoices: Print vouchers	Branch - Acquisitions
	Invoices: Pay invoice exceeding fund expenditure limits (allows user to exceed the expenditure limits and the fund free balance)	Branch - Acquisitions
Delete invoices	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Modify	Branch - Acquisitions
	Invoices: Delete	Branch - Acquisitions
Link invoices	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Modify	Branch - Acquisitions
Generate EDI invoices for partial shipments	Process EDI Invoices: Allow	System - Acquisitions
Manage Foreign Currencies Permissions		
Add or modify a currency in the Currencies policy table	Modify currencies table: Allow (Administration permission)	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
	Access tables: Allow (Administration permission)	System - Acquisitions
Adjust the currency exchange rate	Adjust currency exchange rates: Allow	System, Library - Acquisitions

Related Information

- Permissions for administering acquisitions - Administration permissions are required to modify the donation fund database table and create links to supplier databases. See the *Polaris Administration Guide*, "Acquisitions Administration Permissions."
- Acquisitions permissions list - See Acquisitions Permissions for an alphabetical reference list.

Acquisitions Permissions Reference

Note:

To do an acquisitions task, both the staff member and the workstation on which they are doing the task must have the permission. For more information on the set of permissions required to do specific Acquisitions tasks, see [Acquisitions Workflow Permissions](#).

Control Record	Org Levels	Permissions	Description
Access acquisitions	System	Allow	Open Acquisitions workforms.
Adjust currency exchange rate	System, Library	Allow	Update the currency exchange rates for enabled currencies.
Check in shelf ready materials	System	Allow	Use the Check In Shelf Ready Materials workform to

Control Record	Org Levels	Permissions	Description
			receive shelf-ready items.
Claim alert list	System	Access	Process and manage Acquisitions claims.
Claim record	Branch	Access, Create, Modify, Delete	Manage claiming.
Create a bib record from acquisitions and serials	System	Allow	Create bibliographic records as part of acquisitions and serials processing.
Create and delete item record from acquisitions and serials	System	Allow	Create and delete item records while performing acquisitions and serials tasks. This permission is required to automatically delete item record when deleting serials issues.
Export acquisitions data	System	Access	Access the application to export acquisitions data from the Polaris ILS.
Fiscal Years	Branch	Access, Create, Modify, Delete	Work with fiscal year records
Funds	Branch	Access, Create, Modify, Delete, Transfer money between funds.	Maintain the budget accounts owned by the branch.

Control Record	Org Levels	Permissions	Description
Invoices	Branch	Access, Create, Modify, Delete, Pay invoices exceeding fund expenditure limits, Pay, Undo payment, Credit, Print vouchers	Maintain invoices owned by the branch.
Modify a bibliographic record from acquisitions and serials	System	Allow	Modify bibliographic records as part of acquisitions and serials processing. With this permission, you can change the Display in PAC setting for bibliographic records linked to the line items when you release or cancel a purchase order. This permission alone does not allow you to open bibliographic records and modify the MARC data. To do this, you also need the Cataloging permission Bibliographic records: Modify .
Process EDI invoices	System	Allow	Use the Process EDI Invoices workform to display and process EDI invoices

Control Record	Org Levels	Permissions	Description
			for partial shipments.
Purchase orders	Branch	Access; Change fund, destination, collection; Create; Delete; Delete cancelled orders; Modify; Print purchase orders; Print workslips; Release order exceeding fund encumbrance limits; Release order resulting in negative fund free balance; Release, receive, cancel, close PO; Send electronic purchase orders; Undo Receipt; Change fund, destination, collection	Work with purchase orders at the branch at which the permissions were assigned.
Purge purchase orders and invoices	System	Allow	Use the purge process to remove old purchase orders and invoices from the database.
Receive ASN Shipments	System	Allow	Use the Receive ASN Shipment workform to receive shipments.
Run fiscal year utility	System	Allow	Use the fiscal year utility to roll over fiscal years.

Control Record	Org Levels	Permissions	Description
Selection List Line Item Segments	Branch	Access; Create; Modify; Delete	Work with selection list line item segments for the branches at which the permission is granted.

Acquisitions and Serials Profiles Reference

These profiles are available when you select Profiles, Acquisitions/Serials at the listed organizational levels.

Profile	Org Levels	Description	Default Setting
Acq claim/cancellation defaults	System, Library, Branch	Sets the default values for creating claim or cancellation notices.	
Acq fund droplist setup	System, Library, Branch, Staff	Specifies whether fund drop-down lists in Acquisitions workforms display the fund name, the fund alternative name, or both. It also specifies whether only the branch's funds, or the all funds for all branches linked to the parent library are displayed in purchase orders, invoices, and	

Profile	Org Levels	Description	Default Setting
		selection lists. For selection lists, you can also specify the exact destinations and funds that display in selection list line item segments.	
Default directory	System, Library, Branch, Workstation	Specifies where Acquisitions logs and files are stored.	The default is C:\Polaris Report.
Display in PAC: Brief bibliographic records created from Acquisitions records	System, Library, Branch	Specifies whether bibliographic records created from Acquisitions appear in the PAC.	The default is Yes; to disable, set to No.
Display in PAC: Warn if unchecked at POLI/INLI save	System, Library, Branch	Specifies whether a warning appears when a purchase order line item or invoice line item is saved, and the title will not display in the PAC because the Display in PAC check box is not checked.	The default is Yes; to disable, set to No.
EDI invoice defaults	System, Library, Branch	Specifies the default values to use for EDI invoices when no matching purchase order line item is found.	

Profile	Org Levels	Description	Default Setting
		Includes settings for the following: holding invoices for partial shipments so they are not created automatically; updating linked purchase order line items to received automatically when the EDI invoice is created; loading the supplier's header charges; updating on-order item records' circulation status. Also specifies the e-mail address for the invoice log.	
Filter branches in line item segments	System, Library, Branch	Specifies how branches are displayed in selection list, purchase order, and invoice line item segments. If set to Yes, the default Destination is the same as the branch selected in the workform header (the Created at library in the Selection List workform, the Ordered at	The default is No; to enable, set to Yes

Profile	Org Levels	Description	Default Setting
		library in the Purchase Order workform, or the Paid by library in the Invoice workform). The drop-down list displays branches with the same parent library as the branch selected in the workform header. If set to No, the default branch selected is the user's login branch, and all branches from all organizations in the system display in the Destination drop-down list.	
Override Acquisitions Blocks	Staff	Specifies whether the selected staff member can override permission blocks in Acquisitions functions. Staff members with this profile set to Yes must also have permissions to do the restricted functions.	The default is No; to enable, set to Yes.
Receiving line	System, Library,	Specifies whether a	The default is Yes;

Profile	Org Levels	Description	Default Setting
items: Warn if linked hold requests	Branch	warning message appears when users receive a line item for which there is a hold request.	to disable, set to No.
Retain material type when copying line item segment data	System, Library, Branch	Specifies whether to copy the material type when line item segment data is copied in a selection list or purchase order.	The default is Yes; to disable, set to No.
Selection list line item defaults	System, Library, Branch, Staff	Sets the default distribution and supplier information for selection lists.	
Titles to Go	System, Library, Branch	Enables the Titles to Go service with the suppliers you select.	

Acquisitions Parameters Reference

These parameters are available under **Parameters > Acquisitions/Serials** in System Administration.

Parameter	Org Levels	Description	Default Setting
Bulk Add to PO: Add Alert to PO line item for multiple ISBNs	System, Library, Branch	Specifies whether the Alert check box is automatically checked for pur-	The default is Yes; to disable, set to No.

Parameter	Org Levels	Description	Default Setting
		chase order line items created from bulk added bibliographic records with more than one ISBN.	
Bulk Add to PO/SL: Mark 970 data as processed	System, Library, Branch	Specifies whether 970 tags in bibliographic records are marked as processed when used to create line item segments in a purchase order or selection list. This eliminates duplicate line item segments in a purchase order, which would prevent it from being released.	The default is Yes; to disable, set to No.
Bulk Add to PO: Replace invalid fields with default data	System, Library, Branch	Specifies whether invalid data is replaced with default data when adding line items to a purchase order from a bibliographic record set.	The default is Yes; to disable, set to No.
Bulk Add to SL: Replace invalid fields with default data	System, Library, Branch	Specifies whether invalid data is replaced with default data when adding line items to	The default is Yes; to disable, set to No.

Parameter	Org Levels	Description	Default Setting
		a selection list from a bibliographic record set.	
Copy last segment data to next segment	System, Library, Branch	Specifies whether information from the previous purchase order or invoice line item segment automatically populates fields in the new segment.	The default is Yes; to disable, set to No.
Default payment option when paying/crediting invoices	System, Library, Branch	Specifies the default payment option selected in the Check/Voucher dialog box when staff members pay, prepay, or credit an invoice.	The default is Voucher.
Generate purchase order Number	System, Library, Branch	Specifies whether Polaris automatically provides a purchase order number or the staff member enters the purchase order number when a purchase order is created. Be sure to specify the increment, prefix, and starting number for the Polaris-gen-	The default is No; to enable, set to Yes.

Parameter	Org Levels	Description	Default Setting
		erated number	
Last used purchase order Number	System, Library, Branch	Displays the number of the last purchase order produced by the selected organization. The number could be automatically generated or entered by a user.	This parameter is for information only; you cannot change the value.
Other charge description.	System, Library, Branch	Use this parameter to rename the Other header charge type to be used in purchase orders and invoices to specify a charge for the purchase order or invoice as a whole (at the header, rather than line item level). When the Other charge type is renamed, the new name appears in the list of charge types on the Purchase Order and Invoice workforms on view 1.	The default is Other
PO line item workslips: Batch print during ASN receiving .	System, Library, Branch	Specifies whether purchase order line items can be printed in batch from the	The default is No; to enable, set to Yes

Parameter	Org Levels	Description	Default Setting
		Receive ASN Shipments workform.	
PO line item workslips: Print on-order item data	System, Library, Branch	Specifies whether item data is printed on purchase order line item workslips.	The default is Yes; to disable, set to No
Prefix for system generated purchase order number	System, Library, Branch	Specifies the prefix for the Polaris-generated purchase order number. Each branch organization can specify a different prefix to uniquely identify the purchase order. This parameter is not required for Polaris to generate purchase order numbers.	No default value is assigned.
	System, Library, Branch		
Purchase order starting number	System, Library, Branch	Specifies the number for the first generated purchase order number.	The default is 1.
Purchase order number increment	System, Library, Branch	Specifies the numerical interval Polaris automatically assigns between sequential purchase	The default is 1.

Parameter	Org Levels	Description	Default Setting
		order numbers. For example, if the increment is set to 10 and one PO number is 10080, the next number to be generated is 10090. Polaris begins incrementing from the number specified in the Purchase Order Starting Number parameter, or from the value specified in the Last Used Purchase Order Number parameter, whichever is greater.	
Transmit EDI files in passive mode FTP	System	Specifies whether the transmission of EDI files is in active or passive mode. If this profile is set to Yes, all EDI orders, purchase order acknowledgments and invoices for all EDI suppliers will be transmitted in passive mode. If this profile is set to No, they will be transmitted in active mode. The	If the EDI Agent has been run before at your site, the default setting is No.

Parameter	Org Levels	Description	Default Setting
		default is Yes - for new Polaris installations.	

Serials Administration Reference

The following tables include the permissions required to do specific Serials tasks, and reference lists for Serials permissions, parameters and profiles.

- [Serials Workflow Permissions](#)
- [Serials Permissions Reference](#)
- [Serials Profiles Reference](#)
- [Serials Parameters Reference](#)

Serials Permissions Reference

These permissions are available under **Security** > **Serials** at the listed organizational levels on the Administration Explorer.

Note:

To do a serials task, both the staff member and the workstation must have the permissions.

For more information on setting permissions for specific Serials workflows, see the Serial Administration PDF Guide, Set serials security topic.

Control Record	Org Levels	Permission	Description
Access serials	System	Allow	Access the Serials menu and work-forms
Route lists	System, Library, Branch	Access; Create; Modify; Delete; Modify route status	Route serial issues and other materials
Serial holdings records	Branch	Access; Create; Modify; Delete	Work with serial holdings records including publication patterns and pattern tem-

Control Record	Org Levels	Permission	Description
			plates
Serial issues/standing order parts	Branch	Access; Create; Modify; Claim; Delete; Check-in; Uncheck-in	Work with serial issues and standing order parts
Subscription records	System, Library, Branch	Access; Create; Modify; Delete; Cancel and Renew	Maintain subscriptions
Suppliers	Branch	Access; Create; Modify; Delete; Modify postal address fields	Work with supplier records that belong to the branch

Serials Profiles Reference

These are the parameters and profiles that you set to administer and maintain the Serials subsystem in Polaris Administration.

Note:

Not all permissions, parameters, and profiles are specific to Serials. There are other permissions which apply to Serials, but are not configured within Serials, such as **Override invalid item barcode message: Allow** and the Acquisitions permission **Create a bib record from acquisitions and serials: Allow**.

The following profiles are available when you select **Profiles, Acquisitions/Serials** at the listed organizational levels. For more information, see [Serials Administration](#).

Route List defaults

(System, Library, Branch, Workstation, Staff)

Sets the default values used when creating new route lists. See [Setting Up Routing](#).

Override Serials blocks

(Staff)

Specifies whether the selected staff member can override blocks in Serials functions. Staff members with this profile set to **Yes** must also have permissions to the restricted functions. The default is **No**; to enable, set to **Yes**.

Serials Parameters Reference

These are the parameters and profiles that you set to administer and maintain the Serials subsystem in Polaris Administration.

Note:

Not all permissions, parameters, and profiles are specific to Serials. There are other permissions which apply to Serials, but are not configured within Serials, such as **Override invalid item barcode message: Allow** and the Acquisitions permission **Create a bib record from acquisitions and serials: Allow**.

The following parameters are available when you select **Parameters, Acquisitions/Serials** in the System Administration Explorer at the listed organizational levels. For more information, see [Serials Administration](#).

- Create purchase order at subscription renewal
(System, Library, Branch)

Specifies whether a purchase order should be created when a subscription is approved for renewal. The default is **No**; to enable, set to **Yes**.

- Display of Issues on Check In
(System, Library, Branch)

Specifies the status of issues that appear when the Check In workform is first opened. It can be set to **All** which displays all issues regardless of their status, or to Not received. You can define which statuses are included in the category Not received using the check boxes.

- Delete linked issue/part when serial item is deleted
(System, Library, Branch)

Specifies if issues/parts are automatically deleted when you delete the linked serial item record. The default is **Yes**; to disable, set to **No**.

- Enter unit price at serials check-in

Specifies whether the **Unit price** box appears in the prompt for barcode dialog box when serial issues or parts are checked in. When it is set to **Yes** (default), and the serial holdings record has the settings **Generate item records at check-in** and **Prompt for barcode** turned on, the dialog box also includes the unit price. The default is **Yes**; to disable, set to **No**.

- Notification: Print subscription cancellation notice
(System, Library, Branch)

Specifies when a subscription cancellation notice is printed. The default is **Automatic**, cancellation notices are printed as individual subscriptions are canceled. If set to **Batch**, the Cancellation Notices report must be generated to print notices for canceled subscriptions.

- Notification: Subscription cancellation notice text
(System, Library, Branch)

Specifies the wording of the subscription cancellation notice for the organization. The default text is **The Subscription identified in this notice is being canceled**.

- Subscription renewal fund - deposit account
(System, Library, Branch)

Specifies the budget account to use for the subscription renewal line item on a purchase order if a fund is not specified for the subscription. This fund is used if the payment method for the subscription is a depository agreement.

- Subscription renewal fund - non-deposit account
(System, Library, Branch)

Specifies the budget account to use for the subscription renewal line item on a purchase order if a fund is not specified for the subscription. This fund is used if the payment method is something other than a depository agreement.

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, nonprojected 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.

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.

S

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.

Index

\$

\$9

deleting processed MARC tags 71

\$h

970 subfield for copy-level information 49

0

020 tag

price in subfield c 49

9

970 tags

\$h copy level code 49

marking as processed after bulk adding 36

A

acquisitions and serials default directory

specifying 18

acquisitions permissions

by workflow 2, 135

authority control

enabling automatic remote 65

managing, overview 65

authority deduplication rules

reference list 33

authority records

- deduplication overview 26
- permissions 2
- retaining deleted 73
- specifying preferred cataloging source 39

authority templates

- permissions 3

auto-suggest

- enabling or disabling for staff searches 24

automatic MARC validation

- enabling or disabling 60

automatic suggestions

- See auto-suggest 24

B

base currency

- selecting for the system 74

batch

- label printing profile 78

bibliographic duplicate detection rules

- reference list 30

bibliographic records

- automatically delete processing data 69
- deduplication overview 26
- displaying or suppressing brief bibs in PAC 36
- enabling headings check when replaced 41
- enabling MARC validation when replaced 41

- enabling protection from overlay 41
- permissions 4
- preventing deletion when linked hold requests 74
- protecting from overlay, permissions 7
- setting warning when display in PAC is off 67
- specifying replace maximum 34
- Bibliographic Tags Retain Delete policy table
 - using 35
- bibliographic templates
 - permissions 7
- blackout times
 - specifying for import jobs 63
- branches
 - filtering lists in acquisitions 19
- bulk adding bibs
 - filtering destination branches 19
 - MARC tags checked for unit price when no 970 \$c 50
 - marking 970 data as processed 36
 - setting selection list defaults 28
 - specifying purchase order defaults 35
 - specifying selection list defaults 28
- bulk changing
 - permissions 6, 10

C

- call numbers
 - specifying fields to copy from bibs to items 44

- specifying line breaks on spine labels 79
- canceling purchase orders
 - permissions 15, 148
- cancellation notices
 - setting up for serials subscriptions 105
- cataloging
 - deleting processing data from bibs 69
- cataloging parameters
 - reference list 130
- cataloging profiles
 - reference list 120
- cataloging records
 - displaying, overview 25
 - retaining deleted 73
- characters
 - displaying international in Polaris 18
- charge types
 - renaming other 37
- check in, serials
 - specifying issue statuses to display 103
- check or voucher
 - setting the payment option in administration 69
- circulation history
 - changing number of days displayed in items 25
- claiming notices, serials
 - permissions 101

claiming, acquisitions

defining claim reasons 67

permissions 14, 147

setting up claiming and cancellation notices 65

claiming, serials

permissions 100

setting up notices 109

closing purchase orders

automatically 38

enabling the job to close automatically 39

Community records

permissions 17

Computype printers

setting up labels for 83

spine label measurements 82

course reserves

permissions 15

currencies

adding or enabling foreign 73

link to ISO standard list of codes 74

permissions 16, 149

selecting the base currency for the system 74

updating exchange rates 75

custom labels

creating 86

D

deduplication

- bibliographic and authority overview 26

- setting bibliographic and authority 27

default directory

- specifying for acquisitions and serials 18

deleting items with linked holds

- allowing or preventing 74

destination branches

- filtering lists in acquisitions 19

diacritics

- displaying in Polaris 18

Do not overlay

- enabling the feature 41

duplicate barcodes

- preventing provisional items with 50

duplicate detection

- authority rules reference list 33

- bibliographic rules reference list 30

- renaming rules groups 27

- setting rules groups 27

E

EDI

- troubleshooting FTP connection 43

EDI invoices

- e-mail 57

- setting defaults 53

EDI ordering

- call number setup for on-order items 46

- setting up, overview 40

EDI transmission mode

- setting active or passive FTP 52

EDI Agent

- files retrieved by 41

- overview 41

EDI Agent logs

- described 43

- examples 43

EDIFTP logs

- described 43

email

- EDI invoice 57

enabling or disabling automatic suggestions 24

exchange rate

- updating 75

exclamation point

- alert for line items with multiple ISBNs 35

exporting cataloging records

- permissions 14

F

fiscal year rollover

- manual fund adjustments 83
- outstanding orders report 90
- overview 78
- replicate the fiscal year checklist 80
- reports 90
- running the rollover checklist 79

fiscal years

- permissions 2, 136

fonts

- changing existing label type 85
- required for diacritics 18

foreign currencies

- adding or enabling 73
- permissions 16, 149
- setting up overview 73

FTP

- EDI troubleshooting 43
- message examples 43
- setting EDI transmission mode 52

funds

- setting up donation categories 22
- specifying lists displays in acquisitions 23

funds and fiscal years

- initial setup 22

H

header charges

- renaming other type 37

holds for on-order items

- setting warning when receiving 65

I

importing

- managing, overview 63

- permissions 12

- setting maximum number of files for a job 63

- specifying blackout times 63

indexing

- automatic MARC re-indexing 22

indexing MARC records

- enabling or disabling automatic re-indexing 23

international characters

- language support setup 18

invoices

- permissions 15, 148

- purging 62

- renaming other header charge type 37

- setting EDI defaults 53, 56

ISBNs

- setting bulk add alert for titles with multiple 35

ISO currency codes

link to URL 74

issue records

deleting automatically when linked items deleted 105

item records

changing days of circ history displayed 25

copying bib call numbers 44

copying data from linked bibs, overview 43

copying price from bibs 46

permissions 8

preventing duplicate barcodes in provisional 50

retaining deleted 73

setting up label printing 77

setting warnings for changes 67

specifying bib call number fields to copy 44

specifying default shelving scheme 51

specifying price fields to copy from bibs 48

item records with linked holds

allowing or preventing deletion 74

item templates

permissions 11

L

Label Manager

permissions 12, 76

setting opening view 77

label printing profile

- batch 78
- on demand 77
- quick print 78

label requests

- described 80

label types

- changing the font 85
- standard, dimensions 80

labels

- Computype, measurements 82
- configuring 83
- creating custom 86
- defining content types 85
- recommendations for setting up 76
- setting options 78
- setting serials type 78
- setting the default printer 88
- setting up cataloging and serials 76
- setting up Computype printers 83
- setting up label types 83
- specifying call number line breaks 79
- specifying cataloging print method 77
- specifying cataloging type 77
- specifying serials print method 78

M

manual fund adjustments

 fiscal year rollover 83

MARC Editor

 see MARC21 view 18

MARC re-indexing

 automatic, overview 22

 enabling or disabling automatic 23

MARC records

 deduplication overview 26

MARC tags

 automatically deleting \$9 processed tags 71

 changing sort order 58

 displaying descriptions 59, 61

 enabling or disabling automatic sorting 62

 retaining from replaced or overlaid bibs 35

MARC validation

 adding or changing rules 55

 defining conditional rules 57

 enabling or disabling 60

 overview 54

N

notices

 setting up acquisitions claiming and cancellation 65

 setting up serials claim 109

notices, serials

 setting up routing 108

O

on-order item records

 call number setup for 46

on demand

 label printing option profile 77

overlying records

 preventing, permissions 7

 specifying MARC tags to retain from bibs 37

P

parameters

 cataloging reference list 130

 serials reference list 167

payment option

 setting default to check or voucher 69

permissions

 serials, reference list 165

Polaris EDI Agent

 See EDI Agent job 41

preferred cataloging source

 specifying 39

price

 bib tags checked if no 970 \$c 50

 copying from bibs to items 46

- in 020 tag subfield c 49
- prompting for entry at serials check in 104
- specifying field to copy from bibs to items 48
- printers
 - setting defaults for labels 88
 - setting up Computype label 83
- printing labels
 - specifying method for cataloging 77
 - specifying method for serials 78
- profiles
 - cataloging reference list 120
 - serials reference list 166
- Promotion records
 - permissions 18
- protect bibliographic records from overlay
 - permissions 7
- protecting database bibs
 - enabling the feature 41
- provisional item records
 - preventing duplicate barcodes 50
- purchase order line items
 - setting bulk add alert for multiple ISBNs 35
 - specifying data for workslips 36
- purchase orders
 - closing automatically, overview 38
 - copying data to next segment 34

- displaying or suppressing brief bibs in PAC 36
- generating numbers automatically 33
- permissions 9, 142
- purging 62
- renaming other header charge type 37
- retaining material type in copied lines 34
- setting bulk add alert for multiple ISBNs 35
- setting up, overview 32
- setting warning for bibs with display in PAC off 37
- specifying bulk add defaults 35
- specifying data on line item workslips 36

purging

- invoices and purchase orders 62

purging cataloging records

- permissions 15

Q

quick print

- label printing profile 78

R

re-indexing MARC records

- automatic, overview 22
- enabling or disabling automatic 23

receiving in acquisitions

- setting up overview 64
- setting warning for on-order item holds 65

receiving orders

- permissions 12, 145

receiving shipments

- permissions 13, 146

record sets (cataloging)

- permissions 14

remote automatic authority control

- enabling 65

replacing bibliographic records

- enabling headings check 41

- enabling MARC validation 41

- setting the maximum number 34

replacing duplicate MARC records

- specifying tags to retain 35, 37

reports

- fiscal year rollover 90

retaining MARC tags

- specifying tags to keep from replaced or overlaid records 37

rollover See fiscal year rollover 78

route lists

- permissions 99

routing

- setting up notices 108

S

selection lists

- permissions 4, 137

- setting defaults for bulk adding 28
- setting up, overview 27
- specify defaults for line items 28
- specifying bulk add defaults 28
- serial holdings records
 - permissions 94
- serial issues
 - deleting automatically when linked items deleted 105
- serial issues and parts
 - permissions 96
- serial items
 - permissions 97
- serials
 - prompting for price at check in 104
 - setting up claiming notices 109
- serials claiming
 - setting up, overview 109
- serials parameters
 - reference list 167
- serials permissions
 - reference list 165
- serials profiles
 - reference list 166
- serials subscriptions
 - creating automatic renewal orders 105
 - permissions 95

- specifying renewal funds 105
- shelving scheme
 - specifying default 51
- sorting MARC tags
 - enabling or disabling 62
- spine labels
 - Computype measurements 82
 - specifying call number line breaks 79
- subscriptions for serials
 - setting up 105
 - setting up cancellation notices 105
- supplier records
 - adding links to supplier databases 31
 - setting up, overview 30
- suppliers
 - enabling Titles to Go 71
 - names and SANs for Titles to Go 70

T

- tags
 - changing the order of MARC 58
 - displaying descriptions 59
 - displaying MARC descriptions 61
- templates (cataloging)
 - permissions for authority 3
 - permissions for bibs 7
 - permissions for items 11

Titles to Go

enabling 71

list of suppliers and SANs 70

setting up overview 70

U

URL links

permissions for maintaining 17

V

validation for MARC records

adding or changing rules 55

W

workslips

including on-order item data 36