



# Cataloging Administration Guide

7.3

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# 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 workform 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 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](#).

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## 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](#).

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## 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](#)

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## 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](#)

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## 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**.

## Deleting MARC Tags from Incoming Bibs

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

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

**Note:**

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

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

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

- **LDR**
- **001**
- **003**
- **005**
- **008**

In addition, the following tags are used in duplicate detection and should not be deleted.

- **010\$a**
- **020\$a**

- 022\$a
- 024\$a
- 028\$a
- 035\$a
- 037\$a
- 1xx\$a
- 245\$a
- 246\$a
- 247\$a
- 260\$c

Tags are never automatically deleted from bibliographic records when:

- the new bibliographic record is created manually by entering tags in the MARC 21 view of the Bibliographic Record workform;
- a new bibliographic record found during a Z39.50 search is saved as a Bibliographic Record template;
- or, a new bibliographic record is overlaid by the database record during importing.

See also:

- [Specify tags to delete from new bibliographic records](#)
- [Enable automatic tag deletion for bibs from remote databases](#)

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## Specify Tags to Delete from New Bibliographic Records

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

**Tip:**

This policy table is also used to specify tags to retain from bibliographic records when they are overlaid during duplicate detection. For information on this process, see [Specify tags to retain from overlaid bibs](#).

To specify the tags to automatically delete from incoming bibliographic records:

**Note:**

These permissions are required to view and change the Bibliographic

Tags Retain/Delete policy table: **Access administration: Allow, Access tables: Allow and Modify Bibliographic Tags Retain/Delete: Allow**

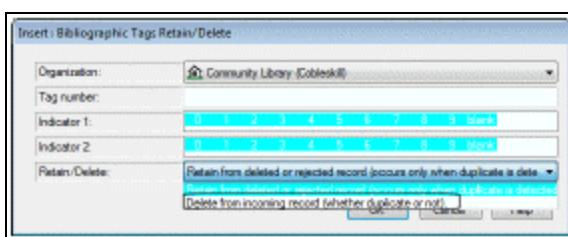
1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Policy Tables** folder.
3. Select **Bibliographic Tags Retain/Delete**.

The Bibliographic Tags Retain/Delete policy table appears.

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



The dialog box has the following fields:

- Organization:** Community Library (Cobleskill)
- Tag number:** (empty)
- Indicator 1:** A dropdown menu showing values 0, 1, 2, 3, 4, 5, 6, 7, 8, 9, blank.
- Indicator 2:** A dropdown menu showing values 0, 1, 2, 3, 4, 5, 6, 7, 8, 9, blank.
- Retain/Delete:** A dropdown menu with options:
  - Retain from deleted or rejected record (occurs only when duplicate is deleted)
  - Retain from deleted or rejected record (occurs only when duplicate is deleted)
  - Delete from incoming record (whether duplicate or not)

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 **Indictor 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 .

---

### Enable Automatic Tag Deletion for Bibs from Remote Databases

To enable tag deletion when saving bibliographic records found via a Z39.50 search of a remote database:

1. Open the Administration Explorer, and select the organization, (System, Library, or Branch) for which you are setting the profile.
2. Select **Profiles > Cataloging**.
3. Select **Delete MARC tags when saving Z39.50 records to local database** and select **Yes** or **No**.

**Note:**

The default setting is **No**.

4. Select **File > Save** to save the changes to the profile.

If this profile is set to **Yes**, a staff member who retrieves a record via a Z39.50 search will see a brief message in the status bar of the Bibliographic Record workform before saving the retrieved record to the local database. This message informs the user that MARC tag deletion is enabled and that the tags selected for deletion in the Bibliographic Tags to Retain/Delete policy table will be removed when the record is saved. When the user saves the record in Polaris, the tags will be removed.

# Administering MARC Validation and Display

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](#).

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## 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.

---

## 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 checkbox to indicate **Yes**. Clear the checkbox 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 checkbox to indicate **Yes**. Clear the checkbox 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 checkbox to indicate **Yes**. Clear the checkbox 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 checkbox 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 checkbox 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**.

---

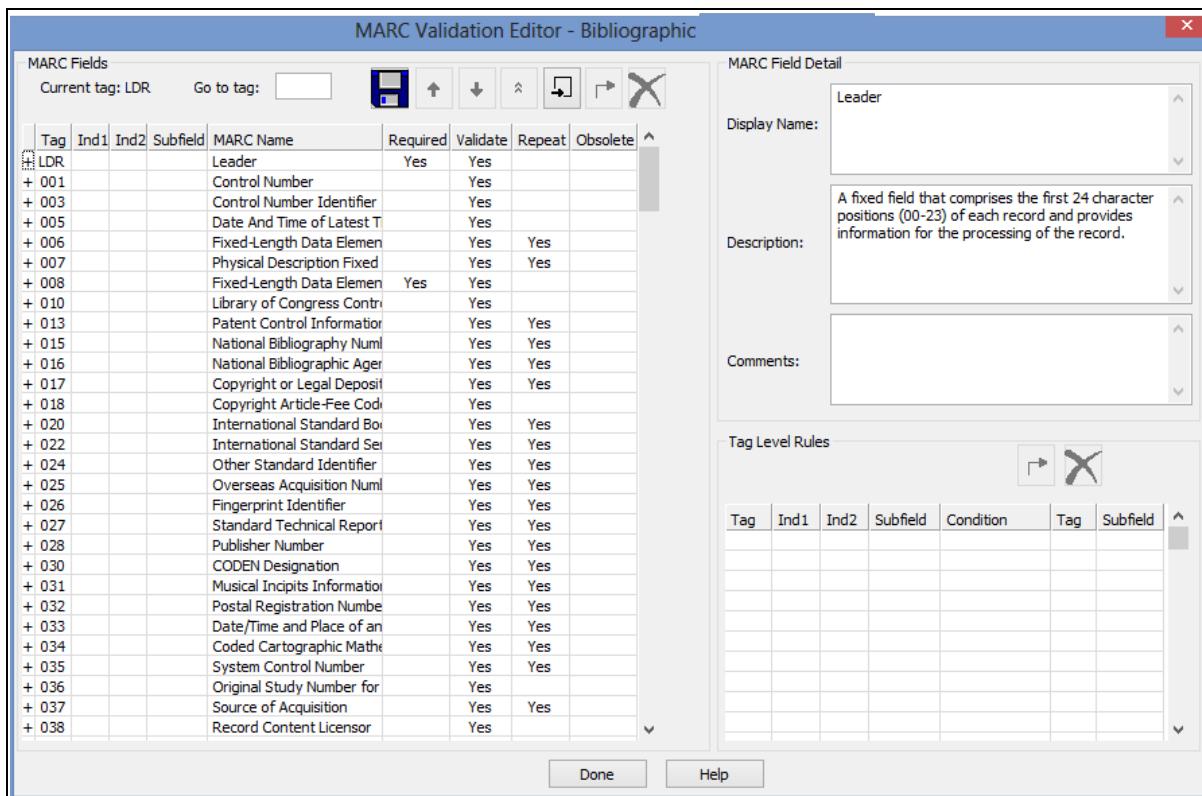
## Change the Sort Order of MARC Tags

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.



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

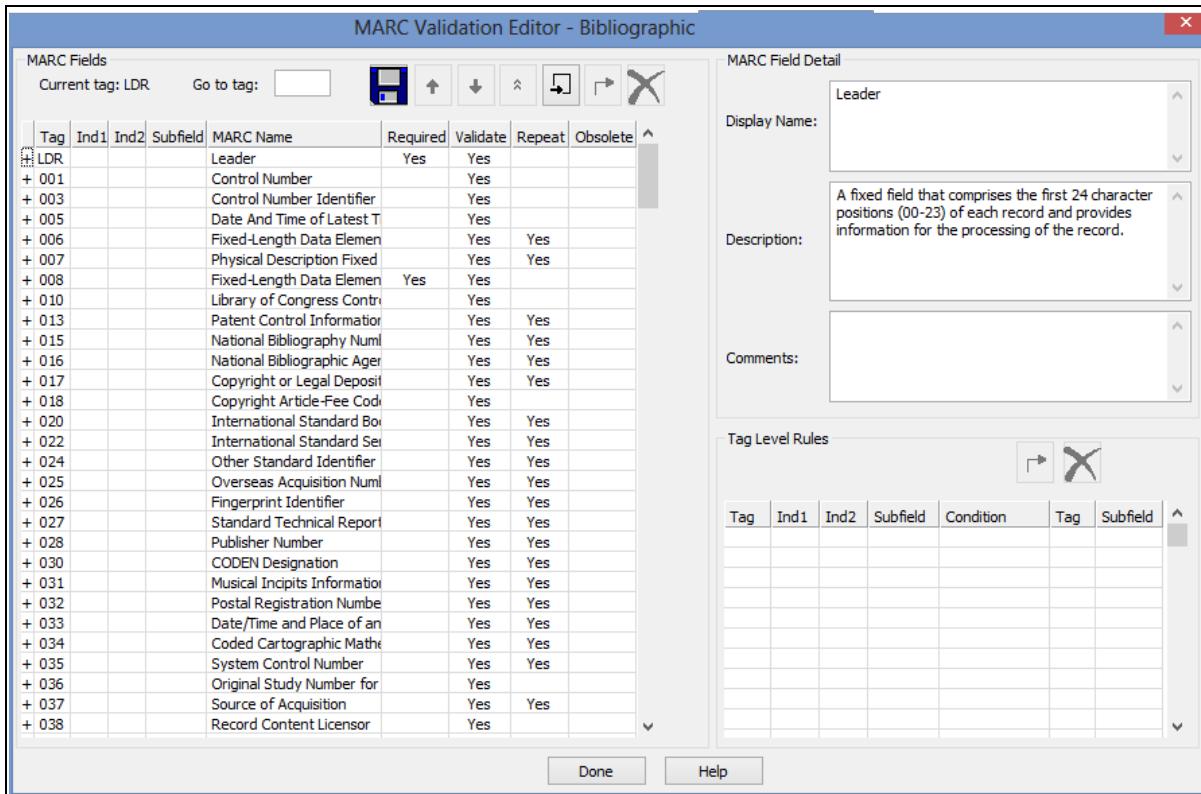
---

## 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.



4. Select a tag, indicator, or subfield.

**Tip:**

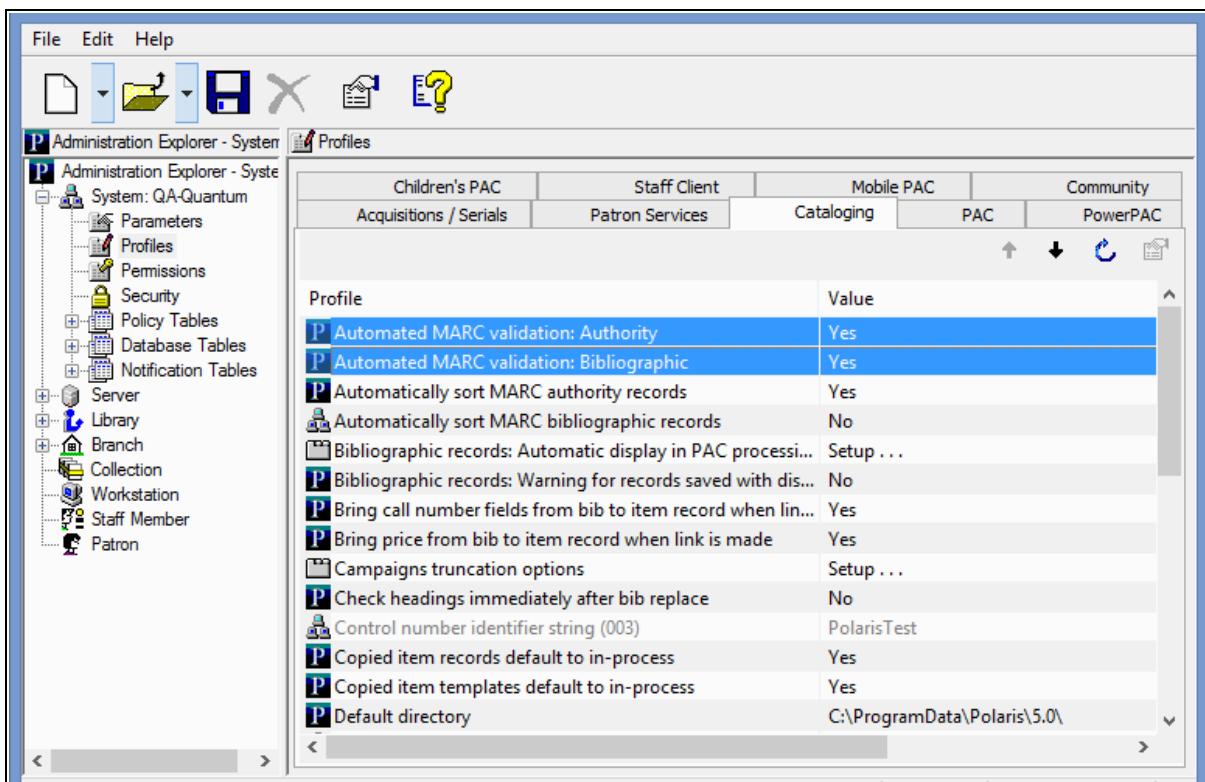
Expand a tag to see the indicators and subfields.

5. Type a name in the **Display Name** box. This is the descriptive phrase/name that will be displayed in the MARC21 view when a user selects the tag, indicator, or subfield in the Bibliographic Record or Authority Record workflow. 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 workflow.
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 workflows.
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

You can enable or disable the display of descriptive MARC tag names that appear in the following locations:

- MARC21 view of the Bibliographic workform
- MARC21 view of the Authority workform
- MARC view of the Bibliographic Record workform in Leap

**Note:**

Label text for the descriptive tag names is configured 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 turn the display of the tag names on or off.

### To configure the display of descriptive MARC tag names in staff client and Leap workforms

1. Go to the Administration Explorer tree view and expand the organization's folder.
2. Select **Profiles** and select the **Cataloging** tab.
3. Select **Display MARC field description**.
4. Select **Yes** to display descriptive MARC tag names, 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 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** checkbox in the Bibliographic Record workflow, the Bibliographic Bulk Change dialog box, the Bibliographic Record template workflow, and the Bibliographic Records tab of the Import Setup window. If the parameter is set to **No**, the **Do not overlay** checkbox 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 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.

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:

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

The Create or Modify Deduplication Rules dialog appears.

5. Do one of the following:

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

**Tip:**

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

- To remove a rule from the group, select the rule in the Selections for Rule Group list, and select **Remove**.
- To name or rename the rules group, type the name in the **Rules Group** box.

6. When you finish changing the current group, select **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
The 001 of the imported record matches the 010 \$a of an existing record.	
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.
The 001/003 tags of the imported record matches any 035 \$a subfield in	Applies only to imported records. The 001 tag must match the numeric portion

Rule	Comment
the existing record.	of the 035 tag (normalized). If the incoming record contains a 003 tag, the 003 data must match the parenthetical information in the 035 tag. If the incoming record lacks an 003 tag, the parenthetical information in the 035 tag is ignored.
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.
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.
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.
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.
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.
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.
The 245 \$a subfield in the incoming record matches the 245 \$a subfield in	The entire text of \$a subfield must match. Punctuation is ignored. Indicator

Rule	Comment
the existing record.	values need not match.
The 245 \$a subfield in the incoming record matches any 246 \$a subfield in the existing record.	The entire text of \$a subfield must match. Punctuation is ignored. Indicator values need not match.
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.
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.
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.
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.
The 035a of the incoming record matches the 035 \$a of an existing record.	
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.
The Bib record owner value in the incoming record matches the value in the existing record.	
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.

Rule	Comment
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 <b>other than 1 or 3</b> .
The 028 \$a of the incoming record matches the 028 \$a of an existing record.	
The 037 \$a of the incoming record matches the 037 \$a of an existing record.	
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
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.
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.
The 035 \$a subfield of the incoming	

Rule	Comment
record matches any 035 \$a subfield in the existing record.	
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.
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.
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.
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).
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 [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**

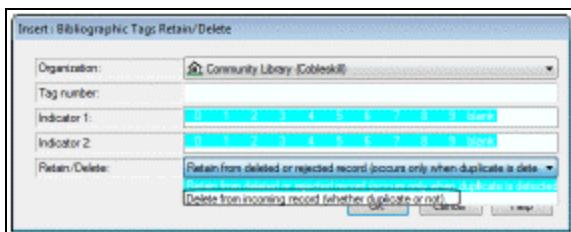
1. In the Administration Explorer tree view, expand the organization's folder.
2. Expand the **Policy Tables** folder.
3. Select **Bibliographic Tags Retain/Delete**.

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. Select .

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



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

**Note:**

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

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

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

**Notes:**

- 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 is already in the table, a message appears: **Warning: This table already contains a retain/delete row for this tag.**
- If a tag/indicator combination is selected to be both retained and deleted, and the tag/indicator combination exists in both records, only the retention is processed.

10. Select **File > Save**.

**Related Information**

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

---

## 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:

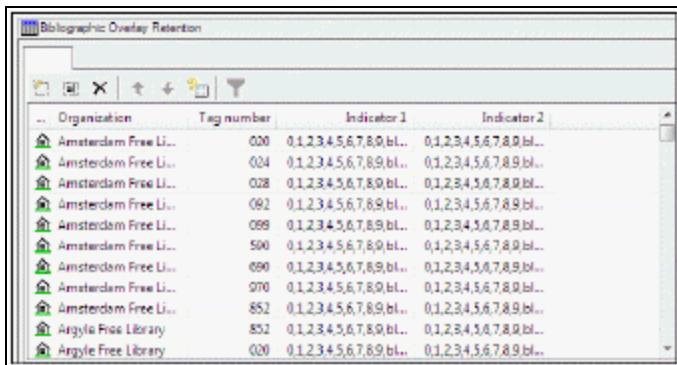
**Note:**

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**.

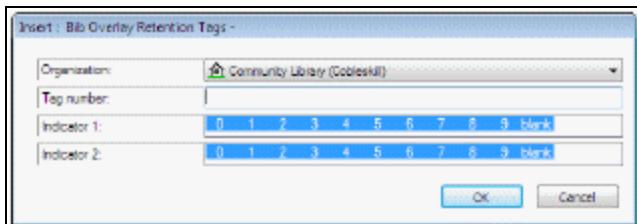
The Authority Overlay Retention Table appears.



Organization	Tag number	Indicator 1	Indicator 2
Amsterdam Free Li...	000	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...	098	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...	500	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...
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	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	920	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.



### 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.

- In the **Tag Number** box, type the tag that you want retained in the new records.
- 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.

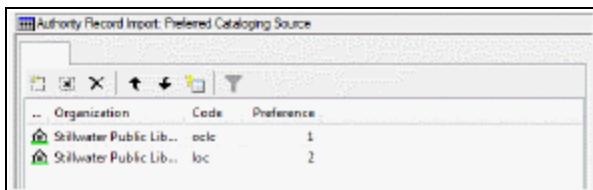
To add a cataloging source to the Authority Record Import: Preferred Cataloging Source table:

**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**.

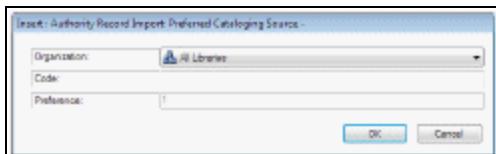
The Authority Record Import: Preferred Cataloging Source table appears.



Organization	Code	Preference
Stillwater Public Lib..	oclc	1
Stillwater Public Lib..	loc	2

4. Click .

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



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** checkbox 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** checkbox does not appear on any workforms or dialog boxes.

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

# Managing Importing

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

- Maximum number of files to import - This profile specifies the limit on the number of files that can be included in a single import job. See [Set the limit on the number of files in a single import job](#).
- 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.

## 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)** checkbox 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**.

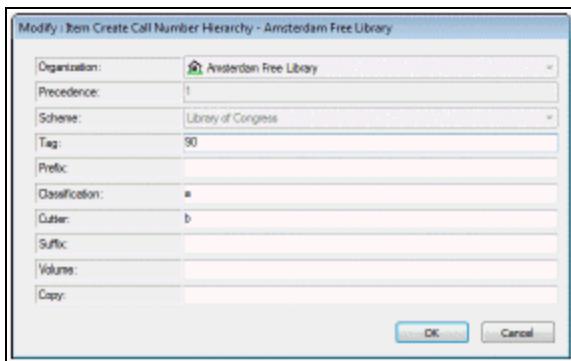
The Item Create Call Number Hierarchy table appears.

Organization	Precedence	Scheme	Tag	Prefix	Classification	Cutter	Suffix	Volume	Copy
Armit...	1	Library of Congress	00	a	b				
Armit...	2	Library of Congress	50	a	b				
Armit...	1	Dewey Decimal	99	a	b				
Armit...	2	Dewey Decimal	92	a	b				
Argyle...	1	Dewey Decimal	92	a	b				
Argyle...	2	Dewey Decimal	99	a	b				
Balto...	1	Dewey Decimal	92	a	b				
Balto...	2	Dewey Decimal	99	a	b				
Banc...	1	Dewey Decimal	92	a	b				
Banc...	2	Dewey Decimal	99	a	b				
Bolto...	1	Dewey Decimal	92	a	b				
Bolto...	2	Dewey Decimal	99	a	b				
Burnt...	1	Dewey Decimal	92	a	b				
Burnt...	2	Dewey Decimal	99	a	b				
Carbo...	1	Dewey Decimal	92	a	b				
Carbo...	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.



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.

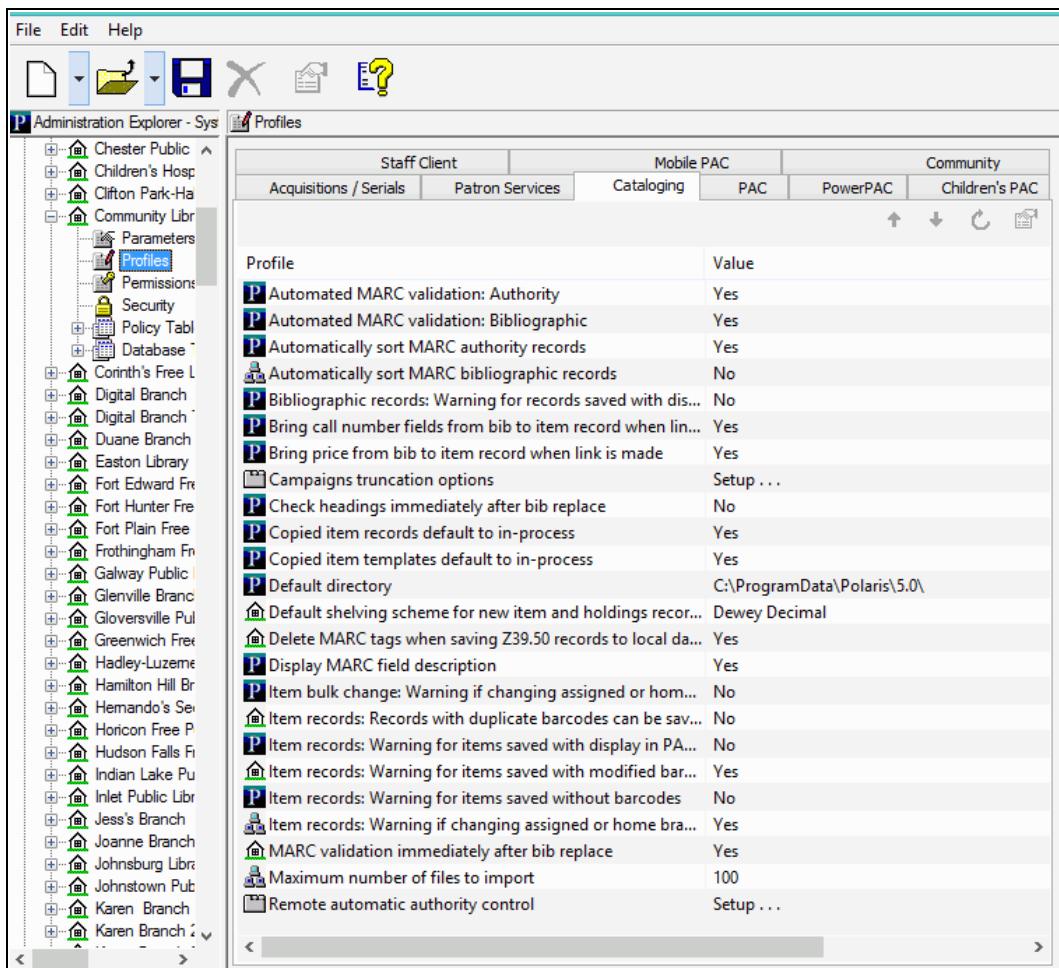
**Note:**

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**.

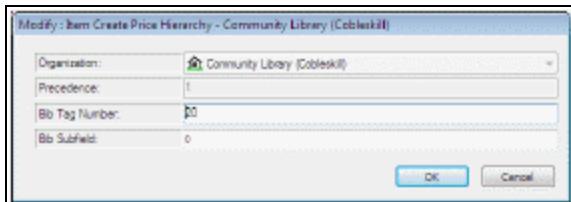
The Item Create Price Hierarchy table appears.

Organization	Precedence	Bib Tag Number	Bib Subfield
Amsterdam...	2	20	c
Amsterdam...	2	970	p
Angèle Fr...	1	20	c
Angèle 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	n

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**.

## 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** checkbox on the Bibliographic Record workflow 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** checkbox 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 within the Item Record Bulk Change Tool when a user selects both the Home Branch and the Item's Assigned Branch to be changed at the same time. The warning informs the user that the selected locations within the Item Record Bulk Change Tool are mismatched.

**Note:**

The warning message for the Item Record Bulk Change Tool does not display if only the Item's Assigned Branch or the Home Branch are selected for change, even if that change will result in a mismatch within the item records.

- **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 overlay mmm 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 checkbox 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](#)

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## 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.

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## 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.

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## 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](#)

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## 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.

## Automatic Display in PAC Processing for Bibs

Your library can use the Cataloging profile in Polaris Administration to specify criteria by which the **Automatic display in PAC processing** job will set the **Display in PAC** checkbox to suppress (or enable) the title's display in PowerPAC and Mobile PAC. With this automatic processing enabled, staff members do not need to manually check or uncheck the **Display in PAC** box on the Bibliographic Record workform or bulk-change records to change the checkbox setting.

This job will run as part of the Overnight Processing job that runs a series of overnight jobs consecutively. The jobs included in this series are run in the following order:

1. PAC Availability
2. Automatic Display in PAC Processing
3. Keyword Processing
4. DBCC Nightly

Once this profile is set, the job updates bibliographic records to turn off or turn on the **Display in PAC** setting with the exception of the following types of bibliographic records, which are excluded from automatic Display in PAC processing:

- bib records with resource entities for integrated eContent vendors regardless of whether the vendor account is active or not
- bib records with linked serial holdings records
- bib records that are constituent records in a bound-with group

In addition, the state of linked item records is considered only for item records with a status of final; provisional or deleted items are never considered during automatic Display-in-PAC processing.

If a bibliographic record meets the criteria for automatic change, a manual change to the bibliographic record are overwritten by the overnight job if the underlying conditions do not change. For example, if a bibliographic record meets the criteria for automatically turning off display in PAC because all final linked item records are set to not display, and you manually check the **Display in PAC** box in the bibliographic record, the overnight job will clear the **Display in PAC** box so that the record does not display in the PAC. This is

because the underlying conditions did not change, and all linked final items do not display in the PAC.

See [Set up automatic Display in PAC processing for bibliographic records](#).

## Set up Automatic Display in PAC Processing for Bibliographic Records

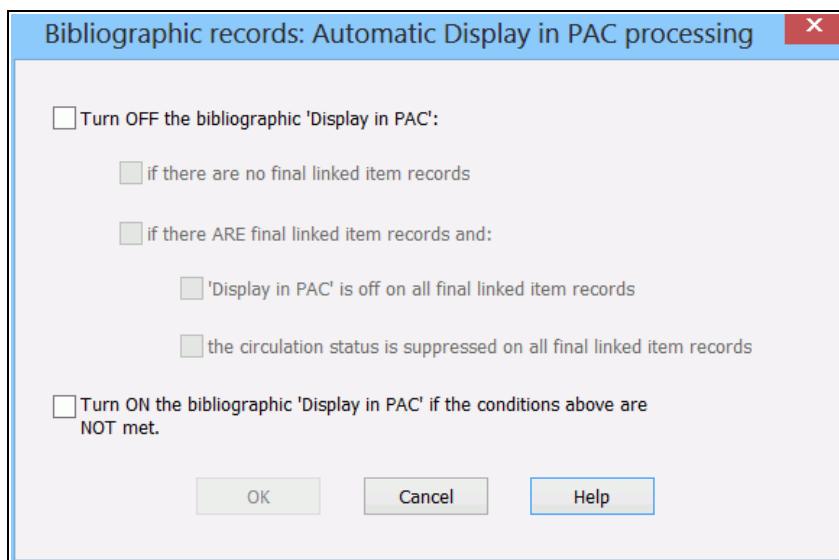
To set up automatic Display in PAC processing:

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

The cataloging profiles appear.

3. Double-click the **Bibliographic records: Automatic Display in PAC** processing profile.

The profile dialog box opens. By default, no checkboxes are selected.



4. To suppress the display of bibliographic records based on the state of their linked item records, select the **Turn OFF the bibliographic 'Display in PAC' checkbox** and select from the following options:
  - **if there are no final linked item records** - When this option is selected, the job looks for bibliographic records that have the **Display in PAC** box checked but have no linked item records with a status of **Final**. If it finds such bibliographic records,

it clears (un-checks) the **Display in PAC** checkbox, and those titles will not display in the PAC.

- **if there ARE final linked item records and:**

- **Display in PAC is off on all final linked item records** - When this option is selected, the job looks for bibliographic records that have the **Display in PAC** box checked but all the final linked item records have the **Display in PAC** box unchecked. If it finds such bibliographic records, it clears (un-checks) the **Display in PAC** checkbox in the bibliographic records, and those titles will not display in the PAC.
- **the circulation status is suppressed on all final linked item records** - When this option is selected, the job looks for bibliographic records that have the **Display in PAC** box checked but all final linked item records have circulation statuses that prevent the items from displaying in PAC. If it finds such bibliographic records, it clears (un-checks) the **Display in PAC** checkbox in the bibliographic records, and those titles will not display in the PAC.

**Note:**

This option uses the **Suppress item display** PAC profile table for the item's assigned branch.

5. To ensure that bibliographic records display in PAC if the linked item records are in a state where they can be circulated, select **Turn ON the bibliographic 'Display in PAC' if the conditions above are NOT met**. When this option is selected, the job looks for any bibliographic records that do not already have the **Display in PAC** box checked, and whose linked items do not collectively meet the criteria selected under the **Turn OFF Display in PAC** setting. If it finds such bibliographic records, it checks the **Display in PAC** checkbox, and those titles will display in the PAC.

**Note:**

If your library has non-integrated eContent titles that you want to display in PAC even though they do not have linked item records, do not select the following options: **Turn OFF the bibliographic 'Display in PAC'** and **if there are no final linked item records**.

**Tip:**

To identify bibliographic records that were modified by the job, you can search for bibliographic records that were modified during the overnight window when the job ran.

When a bibliographic record is updated by the **Automatic display in PAC processing** job, the transaction is logged and the modifier and date last modified fields reflect these changes.

## Set Truncation for Campaign-Generated Promotions

This profile limits the number of characters in the headline, midline, and footline fields in campaigns for community promotions. For more information, see the Community Profiles Guide, Campaigns for Community Promotions.

To set truncation for Campaign-generated promotions:

1. Select **Administration > Explorer > System** and select the organization (system, library, or branch) in the tree view.  
The organization folder expands.
2. Select **Profiles** to display the profiles for the organization in the details view.
3. Select the **Cataloging** tab to display the Cataloging profiles.
4. Double-click **Campaigns truncation options**.  
The Campaign truncation option dialog box opens.
5. To limit the number of characters in the headline, midline, and footline fields, type a number less than 255 characters (the default and the maximum) in the appropriate box.

# 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](#)

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## 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
<b>Maintain the Authority Catalog</b>		

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, 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>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.)		
<b>Maintain the Bibliographic Catalog</b>		
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 Bibliographic records: Access (for all records) Bibliographic records: Modify (for all records) Cataloging record sets: Access Cataloging record sets: Create Cataloging record sets: Delete/Undelete Cataloging record sets: Modify Access bibliographic bulk change: Allow Access bibliographic fixed fields bulk change: Allow	System - Cataloging System, Library, Branch - Cataloging System - Cataloging 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 <b>Do not overlay</b> checkbox 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.)
<b>Maintain Item Records</b>		
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

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
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
<b>Maintain Labels for the Organization</b>		
Create, modify, and delete label configurations	Label Manager Configuration: Create Label Manager Configuration: Delete Label Manager Configuration: Modify	System - Cataloging System - Cataloging System - Cataloging
<b>Maintain Import Profiles in Import Profile Manager</b>		
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
<b>Import Records</b>		

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
<b>Export Records</b>		
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  <b>Note:</b> 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
<b>Maintain Cataloging Record Sets</b>		

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
<b>Purge Cataloging Records Marked as Deleted</b>		
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
<b>Maintain Course Reserves</b>		

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
<b>Update URL Links</b>		
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
<b>Maintain Community records</b>		
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	System- Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
	Event import profiles: Delete	
<b>Maintain Promotion records</b>		
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
<b>Feature bibliographic records</b>	Bibliographic records: Access	System, Library, Branch - Cataloging

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## 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

Control Record	Org Levels	Permission	Description
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
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.

Control Record	Org Levels	Permission	Description
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 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	System, Library,	Access; Create;	Maintain course

Control Record	Org Levels	Permission	Description
records	Branch	Modify; Delete	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
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

Control Record	Org Levels	Permission	Description
Item records	System, Library, Branch	Access; Create; Modify; Delete/Undelete; Modify cataloging view; Modify header; Modify history view; Modify notes and notices view; Modify reserves view; Modify source and acquisitions view	Maintain and catalog item records
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 <b>Do not overlay setting in bibliographic records</b> . With this permission, staff members can modify the <b>Do not</b>

Control Record	Org Levels	Permission	Description
			<b>overlay</b> checkbox in the Bibliographic Record workform, the Bib Bulk 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	Branch	Access; Create;	Maintain

Control Record	Org Levels	Permission	Description
records		Modify; Delete	ephemeral (quick-circ) items.
Reserve item templates	System, Library, Branch	Access; Create; Modify; Delete	Maintain reserve item templates.
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.

Control Record	Org Levels	Permission	Description
Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple item records	System	Allow	Users can stop warning messages regarding unbreakable links 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.

Control Record	Org Levels	Permission	Description
			access.
Use 'own' course reserve templates	System	Allow	Maintain own course reserve templates.
Use 'own' item templates	System	Allow	Maintain own item 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.

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## 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	Enables or disables the automatic population of the heading in the <b>Authority Records - Heading Find Tool</b> when checking for duplicate headings.	Yes

Profile	Org Levels	Description	Default
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 record that does not have the Display in PAC checkbox checked. This warns the user that the saved record will not display in the PAC.	No

Profile	Org Levels	Description	Default
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 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	Yes

Profile	Org Levels	Description	Default
		records.	
Copied item records default to In-process	System, Library, Branch	Specifies whether copied item records get a default status of In-process.	<b>Yes</b>
Copied item templates default to In-process	System, Library, Branch	Specifies whether copied item templates get a default status of In-process.	<b>Yes</b>
Default directory	System, Library, Branch, Workstation	Displays the Default Directory Setup dialog box which specifies the folder used as the default path for cataloging functions. The folder can be a shared folder on the network or a folder on the staff computer. Each workstation can have a different default directory.	The default is: <b>C:\Polaris Reports</b>
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.	<b>Dewey Decimal</b>
Delete MARC tags when saving	System	Specifies whether	<b>No</b>

Profile	Org Levels	Description	Default
Z39.50 tags to local databases		tags set up for deletion from incoming bibliographic records in the Bibliographic Tags to Retain/Delete policy table are also deleted from bibliographic records when the records are found via a Z39.50 search of a remote database and saved to the local database.	
Display MARC field description	System, Library, Branch, Staff	<p>Specifies whether descriptive MARC tag names are displayed in the following locations:</p> <ul style="list-style-type: none"> <li>• MARC21 view of the Bibliographic workflow</li> <li>• MARC21 view of the Authority workflow</li> <li>• MARC view of the Bibliographic Record</li> </ul>	Yes

Profile	Org Levels	Description	Default
		workform in Leap	
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.	<b>Yes</b>
Item records: Records with duplicate barcodes can be saved provisionally	System, Library, Branch	Specifies whether item records can be saved provisionally if they have duplicate barcodes.	The default is <b>Yes</b> ; to disable, select <b>No</b> .
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	The default is <b>Yes</b> ; to disable, select <b>No</b> .

Profile	Org Levels	Description	Default
		branch on an Item record.	
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 <b>Yes</b> ; to disable, select <b>No</b> .
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 <b>Yes</b> ; to disable, select <b>No</b> .
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 <b>Yes</b> ; to disable, select <b>No</b> .
MARC validation immediately after bib replace	System, Library, Branch, Staff	Specifies whether MARC validation is performed automatically after a bibliographic record replaces other bibliographic records.	The default is <b>No</b> ; to enable, select <b>Yes</b> .
MARC Validation: Authority	System	Opens the MARC Validation Editor - Authority where you can specify how authority records	

Profile	Org Levels	Description	Default
		are validated.	
MARC Validation: Bibliographic	System	Opens the MARC Validation Editor - Bibliographic where you can specify how bibliographic records are validated.	
Maximum number of files to import	System, Library, Branch	Specifies the maximum number of files that can be included in a single import job.	The default is 100; the limit is 1,000.
Override Cataloging blocks	Staff	Specifies whether the selected staff member can override permission blocks in cataloging functions. Staff members with this permission must also be allowed to do the restricted functions.	The default is <b>No</b> ; to enable, select <b>Yes</b> .
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	

Profile	Org Levels	Description	Default
		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 <b>No</b> ; to enable, select <b>Yes</b> .
Retain deleted bibliographic records	System	Specifies whether bibliographic records are retained in the database when they are marked for deletion.	The default is <b>No</b> ; to enable, select <b>Yes</b>
Retain deleted cataloging record sets	System	Enables the system to retain deleted cataloging record sets.	<b>Yes</b>
Retain deleted item records -	System	Specifies whether item records are retained in the database when they are marked for deletion.	The default is <b>No</b> ; to enable, select <b>Yes</b> .
Retain deleted record sets	System	Specifies whether cataloging record	The default is <b>No</b> ; to enable, select

Profile	Org Levels	Description	Default
		sets are retained in the database when they are marked for deletion.	Yes.
Subfield 9 cleanup utility	System	Controls the cleanup utility that deletes processed tags from bibliographic records. Specifies the tags to check for the presence of a \$9 and the time period (relative to the day the utility is run) to check.	No defaults are set.
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 search in the staff client for patron, bibliographic, item, or authority records, and a phrase, keyword, and advanced search in the Polaris PowerPAC.	Yes
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

Profile	Org Levels	Description	Default
Bibliographic record do not overlay feature enabled	System	<p>Specifies whether the <b>Do not overlay</b> feature is enabled. When enabled, the Bibliographic Record workform, the Bibliographic Records tab of the Import Setup window, and Bibliographic Record Bulk Change dialog box will have a <b>Do not overlay</b> checkbox that staff members with the appropriate permissions can select to prevent specific bibliographic records from being overlaid.</p>	No
Item record delete: Allow if there are holds	System	<p>Specifies whether item records can be deleted if there are linked hold requests</p>	No
Item record history display assigned branch	System	<p>Specifies whether the Assigned branch appears in the Item record</p>	Yes

Profile	Org Levels	Description	Default
		Circulation History view.	
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 change to an item record appears in the Circulation History view of the Item record workform.	365
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	Yes

Profile	Org Levels	Description	Default
		created from these tags during the import process.	
Normalize ambiguous LCCNs as if they are in the old format	System	Specifies how to process Library of Congress Control Numbers in MARC records that do not have a distinct format. This setting applies to all organizations and resources in the Polaris installation where bibliographic records are saved.	The default is <b>Yes</b> , normalize LCCNs (where the format is not distinct) as if the LCCN is in the old control number format

# Glossary

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## 0

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### **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 (|) is not allowed in this position. The fill character may be used in any other character position when the cataloging agency makes no attempt to code the position. The categories of material for which field 007 is applicable in bibliographic records are presented in the following order in the field description: map, electronic resource, globe, tactile material, projected graphic, microform, non-projected graphic, motion picture, kit, notated music, remote-sensing image, sound recording, text, videorecording, and unspecified.

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**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 (!). 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.

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**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

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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

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### **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

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### **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**

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**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**

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**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**

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**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**

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### **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**

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### **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**

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### **RTF**

Requests-To-Fill or RTF processing sends hold requests to designated libraries in a specified order. A library chooses to fill or deny the request. The request is routed until it is filled, it expires, or every library denies it.

### **RTF routing cycle**

The request-to-fill (RTF) routing cycle includes a primary and a secondary cycle defined by the Holds Routing Tables. You can enter a number of branches as responder branches, beginning with the requestor (your) branch. The cycle tries

to fill a hold at the same branch first, and then tries to fill the hold at the next branch listed in the primary routing table. After a preset amount of time, the branches in the secondary table try to fill the hold, each in turn.

**S**

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**SICI**

The colloquial name for Serial Item and Contribution Identifier. The SICI is the SISAC bar code. The SICI incorporates the ISSN and is used on scholarly, technical, medical and other subscription based serials.

**SISAC**

Serials Industry Systems Advisory Committee. This committee was instrumental in creating the supporting documentation for the NISO z39.56 standard.

**standing order**

An order placed with a vendor or the publisher directly for all publications in a series, all volumes in a set, or all publications of a single publisher.

**T**

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**trapped**

An item is said to be trapped for a hold when an item that fills a request is scanned at circulation and the system links the item to a specific request, either automatically or by displaying a message that prompts you for a decision.

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