Training

POLARIS CATALOGING

How to Create an Import Profile for Bibliographic Records

What is an Import Profile

The functionality used to import bibliographic records into Polaris is called Import Profiles. Many import Profiles can be created to handle the importing of bibliographic records in different ways. For example, you may want to create different import profiles for bibliographic records for printed audio visual materials.

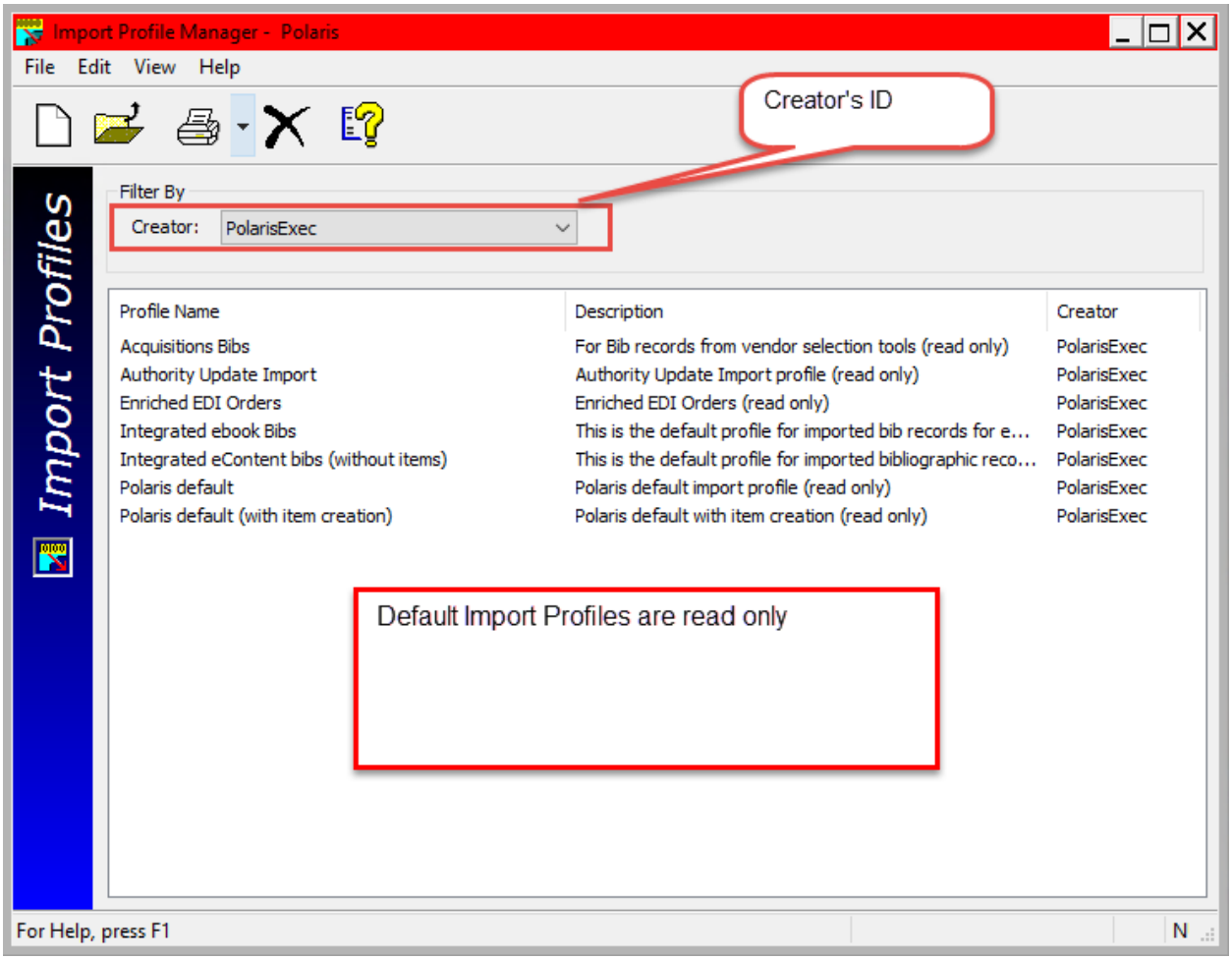
Tip: For best results, start with a Polaris read-only profile that is designed for a specific type of import, copy the profile and rename it. For example, if you are importing bibliographic records with embedded holdings data, you can select the Polaris default (with item creation) profile, copy it, and save it with a different name.

Creating Import Profiles

Permissions needed to work with import profiles are set at the System level and control who can work with import profiles: Import profiles: Access, Create, Delete, and Modify

Tip: When setting up a new import profile, always keep the goal of the profile in mind. How do you want to handle the records in this file you are bringing into Polaris?

- Profile Manager allows staff to create and maintain needed import profiles
- To access Profile Manager, go to **Utilities/Importing/Profile Manager**
- Polaris is loaded with several read only profiles
- Import profiles are saved under individual user IDs
- Staff may right mouse click on an existing profile to copy it and then make necessary edits to create a new profile
- Staff may also click the New icon on the Profile Manager workform to create a new profile from scratch

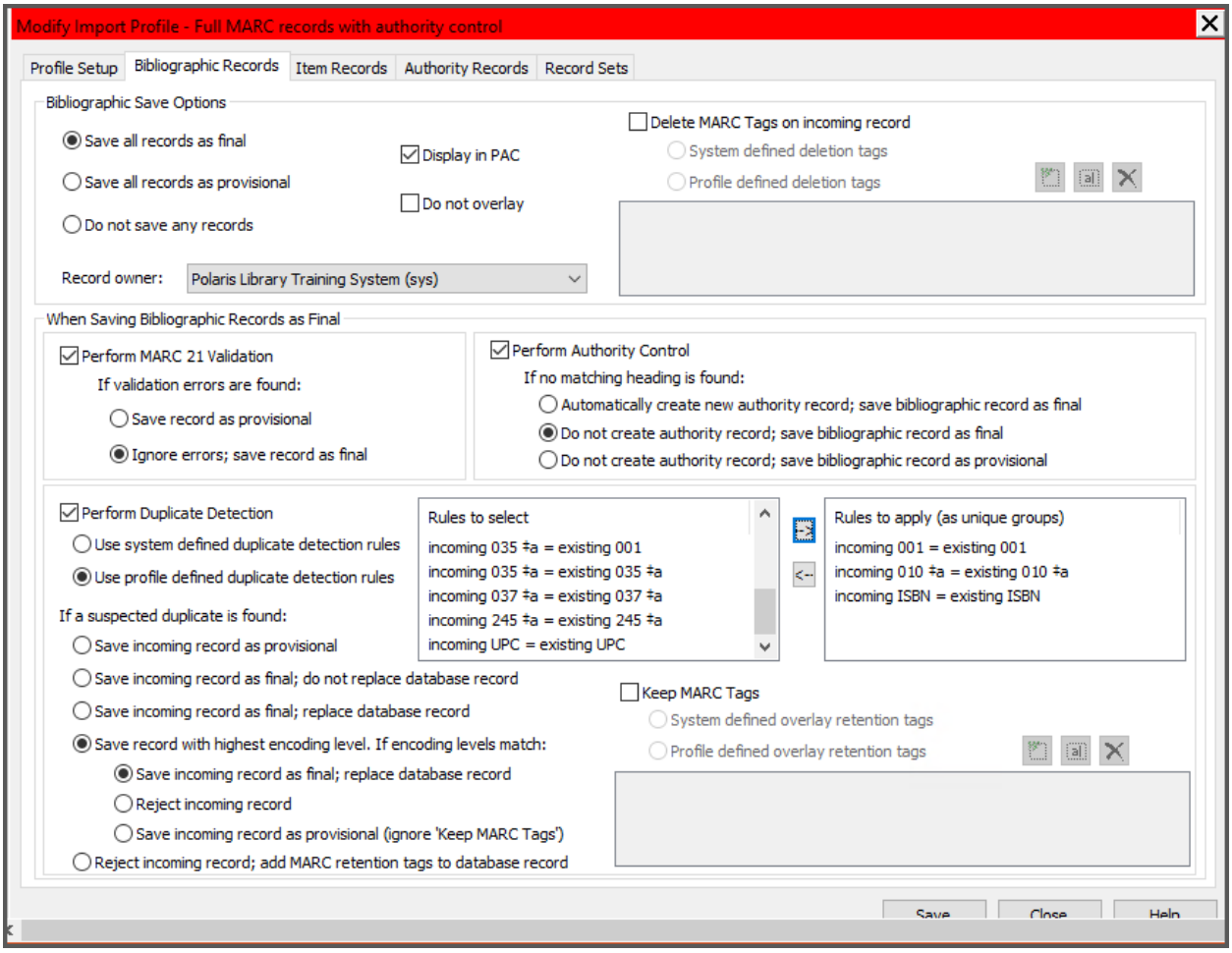


Import Profile Example 1

Settings to import fully cataloged bib records to overlay Acquisitions brief order records

- The records are imported as final, the owner is the system and they will display in the PAC
- MARC validation is performed, but records will still be saved as final—the import report will list MARC errors
- Authority control is performed, but new authority records are not created—the import report will list unlinked headings
- Duplication detection is being performed using profile defined rules—ISBN in this instance
- Encoding level restrictions are considered and if a suspected duplicate is found, the incoming record will be saved as final, overlaying the brief order record
- No MARC tags are being protected

Tip: Every MARC record has a defined encoding level in the LDR/17.



Import Profile Example 2

Settings to import fully cataloged media records

- The records are imported as final, the owner is the system and they will display in the PAC
- MARC validation is performed, but records with errors will be saved as final—the import report will list MARC errors
- Authority control is performed, but new authority records are not created—the import report will list unauthorized headings
- Duplication detection is being performed using profile defined rules
- If a suspected duplicate is found, the incoming record is saved as final replacing the database record
- MARC tags are being protected using the Bibliographic Tags to Retain/Delete Policy Table in System Administration

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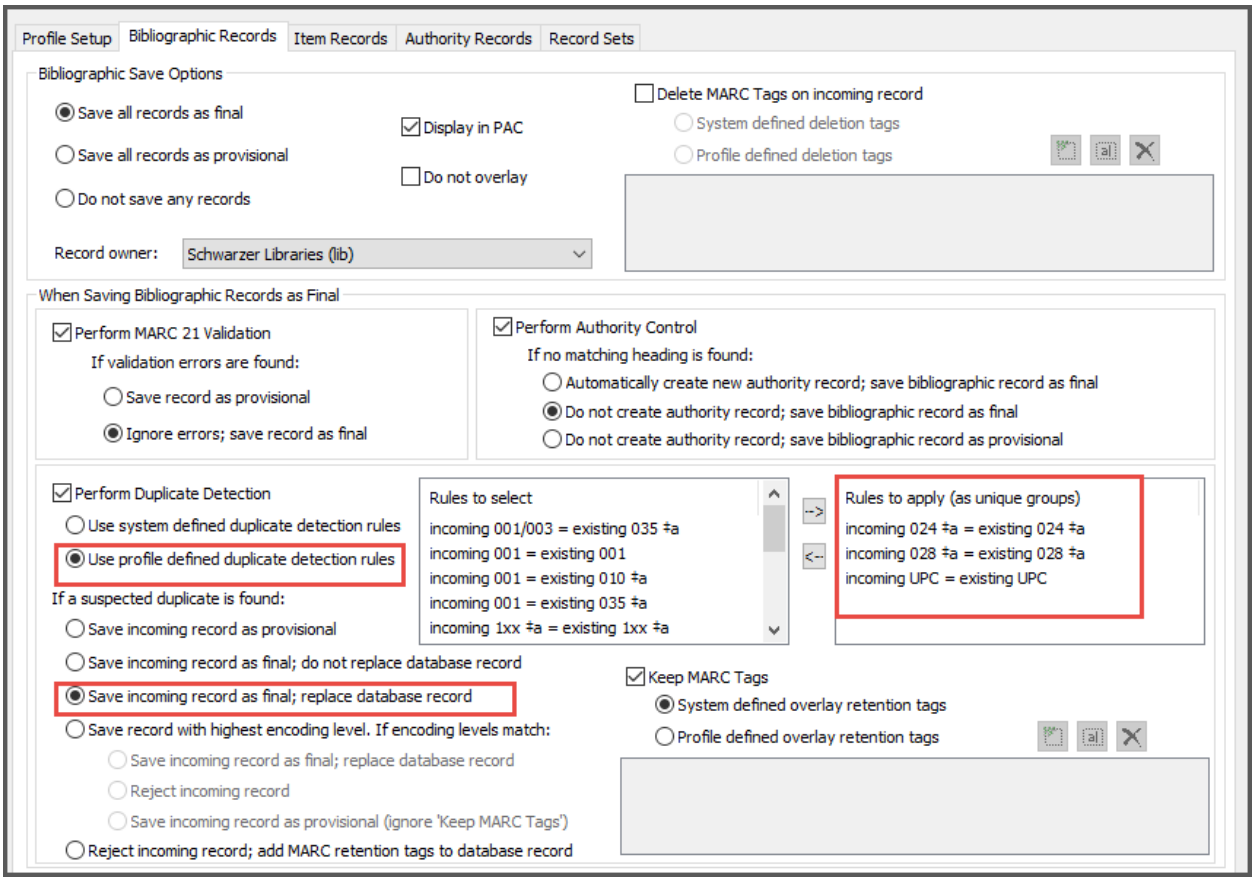
Tip: Keeping MARC Tags will protect variable fields in both the record in the database and the new incoming record



Import Profile Example 3

Settings for importing MARC records from a vendor's website for a book order

- The records are imported as final, the owner is the system and they will not display in the PAC
- Profile defined tags are being deleted out of the incoming MARC records
- MARC validation and authority control is not performed
- Duplication detection is being performed using profile defined rules
- If a suspected duplicate is found, the incoming record is rejected
- MARC tags are being protected using profile defined overlay retention tags

Tip: Protecting 020 tags from order records will insure you are ordering with the correct ISBN.

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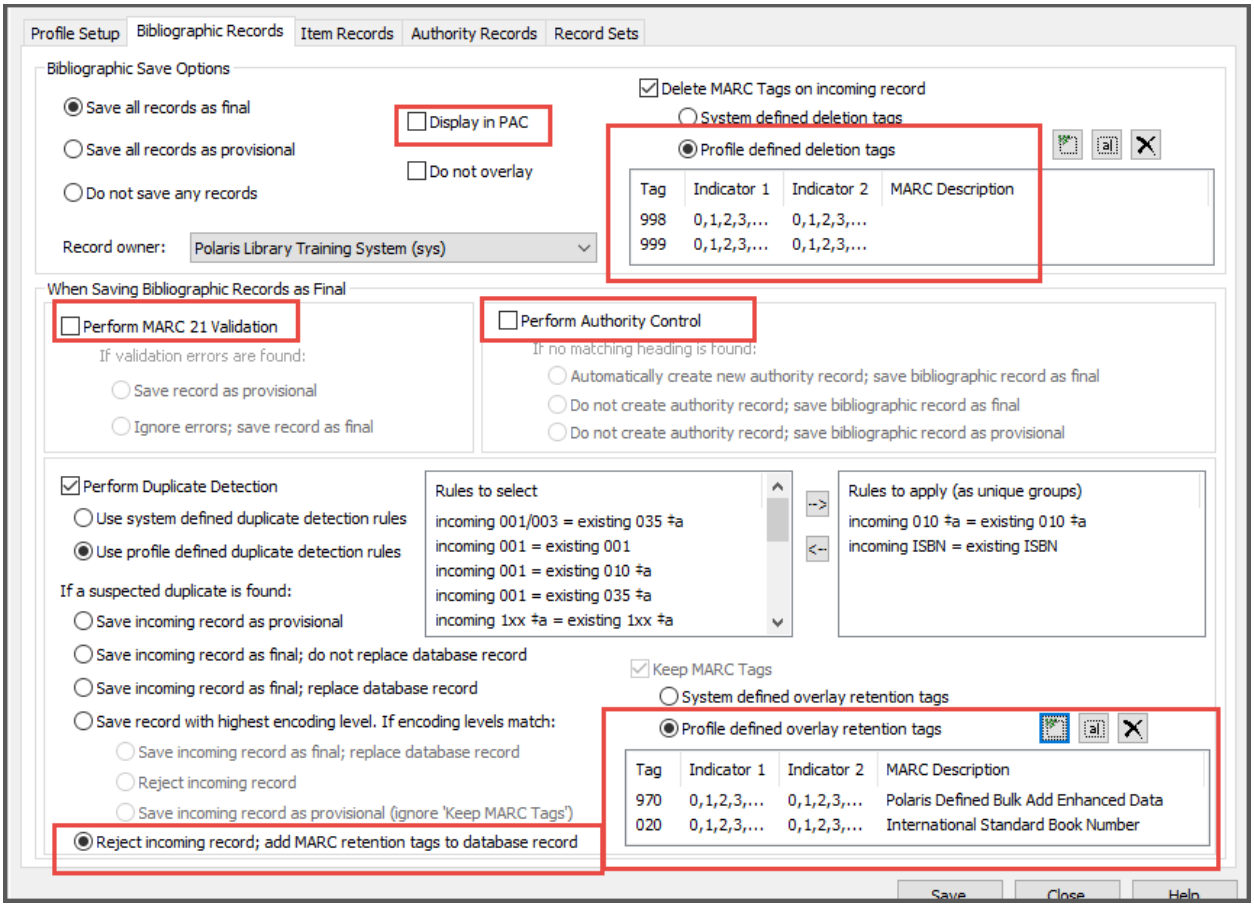

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