



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.

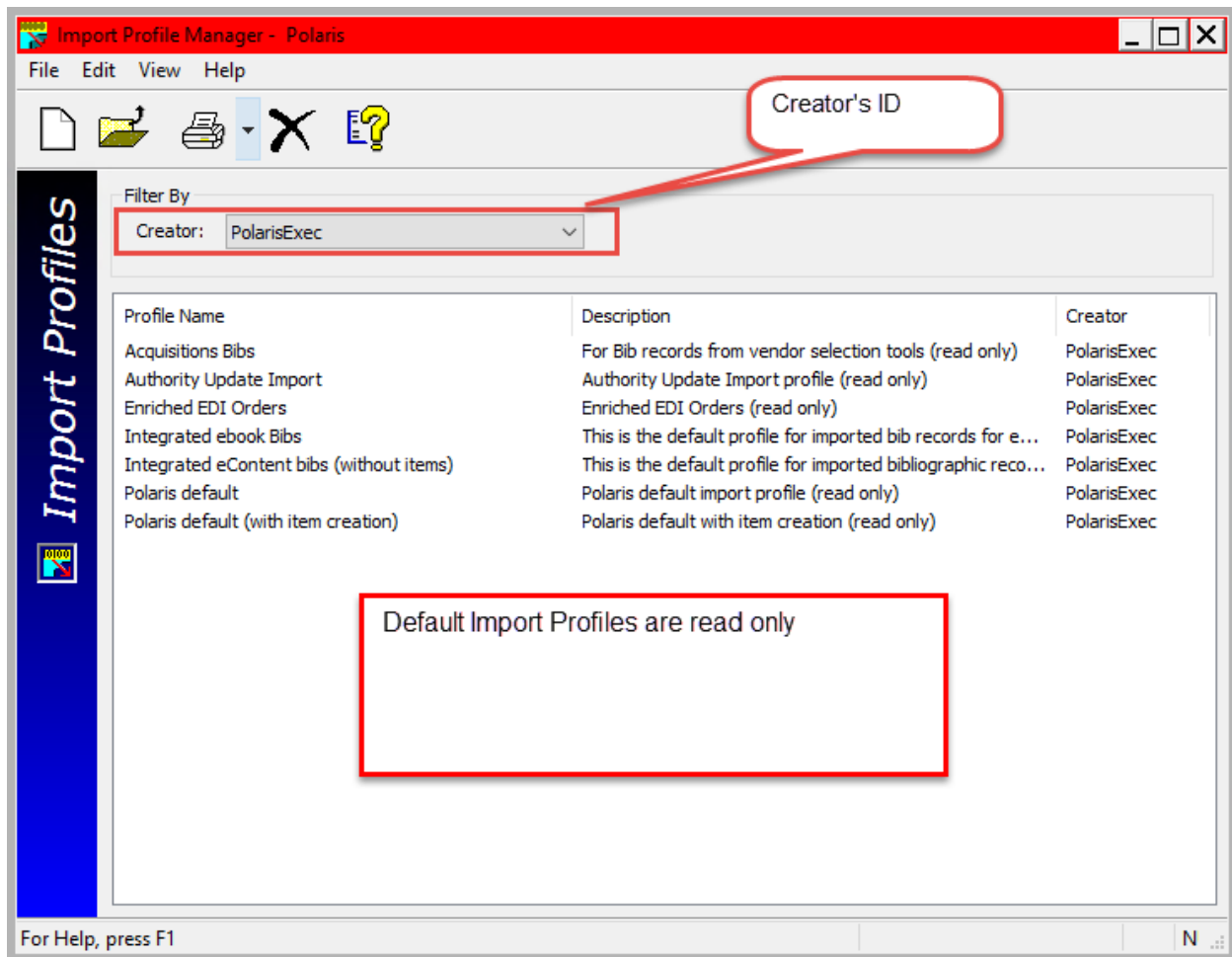
Creating Import Profiles

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

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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.

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Modify Import Profile - Full MARC records with authority control

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

Bibliographic Save Options

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

☒ Display in PAC
☐ Do not overlay

☐ Delete MARC Tags on incoming record
☐ System defined deletion tags
☐ Profile defined deletion tags

Record owner: **Polaris Library Training System (sys)**

When Saving Bibliographic Records as Final

☒ Perform MARC 21 Validation
 If validation errors are found:
☐ Save record as provisional
☒ Ignore errors; save record as final

☒ Perform Authority Control
 If no matching heading is found:
☐ Automatically create new authority record; save bibliographic record as final
☒ Do not create authority record; save bibliographic record as final
☐ Do not create authority record; save bibliographic record as provisional

☒ Perform Duplicate Detection
☐ Use system defined duplicate detection rules
☒ Use profile defined duplicate detection rules

If a suspected duplicate is found:

☐ Save incoming record as provisional
☐ Save incoming record as final; do not replace database record
☐ Save incoming record as final; replace database record
☒ Save record with highest encoding level. If encoding levels match:
☒ Save incoming record as final; replace database record
☐ Reject incoming record
☐ Save incoming record as provisional (ignore 'Keep MARC Tags')
☐ Reject incoming record; add MARC retention tags to database record

Rules to select

- incoming 035 #a = existing 001
- incoming 035 #a = existing 035 #a
- incoming 037 #a = existing 037 #a
- incoming 245 #a = existing 245 #a
- incoming UPC = existing UPC

Rules to apply (as unique groups)

- incoming 001 = existing 001
- incoming 010 #a = existing 010 #a
- incoming ISBN = existing ISBN

☐ Keep MARC Tags
☐ System defined overlay retention tags
☐ Profile defined overlay retention tags

Save Close Help

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

Bibliographic Save Options

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

☒ Display in PAC
☐ Do not overlay

Record owner: **Schwarzer Libraries (lib)**

☐ Delete MARC Tags on incoming record
☐ System defined deletion tags
☐ Profile defined deletion tags

When Saving Bibliographic Records as Final

☒ Perform MARC 21 Validation
If validation errors are found:
☐ Save record as provisional
☒ Ignore errors; save record as final

☒ Perform Authority Control
If no matching heading is found:
☐ Automatically create new authority record; save bibliographic record as final
☒ Do not create authority record; save bibliographic record as final
☐ Do not create authority record; save bibliographic record as provisional

☒ Perform Duplicate Detection
☐ Use system defined duplicate detection rules
☒ Use profile defined duplicate detection rules

If a suspected duplicate is found:
☐ Save incoming record as provisional
☐ Save incoming record as final; do not replace database record
☒ Save incoming record as final; replace database record
☐ Save record with highest encoding level. If encoding levels match:
☐ Save incoming record as final; replace database record
☐ Reject incoming record
☐ Save incoming record as provisional (ignore 'Keep MARC Tags')
☐ Reject incoming record; add MARC retention tags to database record

Rules to select

- incoming 001/003 = existing 035 #a
- incoming 001 = existing 001
- incoming 001 = existing 010 #a
- incoming 001 = existing 035 #a
- incoming 1xx #a = existing 1xx #a

Rules to apply (as unique groups)

- incoming 024 #a = existing 024 #a
- incoming 028 #a = existing 028 #a
- incoming UPC = existing UPC

☒ Keep MARC Tags
☒ System defined overlay retention tags
☐ Profile defined overlay retention tags

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

Bibliographic Save Options

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

☐ Display in PAC
☐ Do not overlay

Record owner: Polaris Library Training System (sys)

☒ Delete MARC Tags on incoming record
☐ System defined deletion tags
☒ Profile defined deletion tags

Tag	Indicator 1	Indicator 2	MARC Description
998	0,1,2,3,...	0,1,2,3,...	
999	0,1,2,3,...	0,1,2,3,...	

When Saving Bibliographic Records as Final

☐ Perform MARC 21 Validation
 If validation errors are found:
☐ Save record as provisional
☐ Ignore errors; save record as final

☐ Perform Authority Control
 If no matching heading is found:
☐ Automatically create new authority record; save bibliographic record as final
☐ Do not create authority record; save bibliographic record as final
☐ Do not create authority record; save bibliographic record as provisional

☒ Perform Duplicate Detection
☐ Use system defined duplicate detection rules
☒ Use profile defined duplicate detection rules

If a suspected duplicate is found:

☐ Save incoming record as provisional
☐ Save incoming record as final; do not replace database record
☐ Save incoming record as final; replace database record
☐ Save record with highest encoding level. If encoding levels match:
☐ Save incoming record as final; replace database record
☐ Reject incoming record
☐ Save incoming record as provisional (ignore 'Keep MARC Tags')
☒ Reject incoming record; add MARC retention tags to database record

Rules to select

incoming 001/003 = existing 035 #a
 incoming 001 = existing 001
 incoming 001 = existing 010 #a
 incoming 001 = existing 035 #a
 incoming 1xx #a = existing 1xx #a

Rules to apply (as unique groups)

incoming 010 #a = existing 010 #a
 incoming ISBN = existing ISBN

☒ Keep MARC Tags
☐ System defined overlay retention tags
☒ Profile defined overlay retention tags

Tag	Indicator 1	Indicator 2	MARC Description
970	0,1,2,3,...	0,1,2,3,...	Polaris Defined Bulk Add Enhanced Data
020	0,1,2,3,...	0,1,2,3,...	International Standard Book Number

Save Close Help

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