

SCLS - Polaris Vendor Demo Follow-up Questions

June 26, 2024

Cataloging

- What happens if a bibliographic record is open at the same time by another user? Are you able to save a record that is open at the same time somewhere else?

INNOVATIVE

The record is locked by the first user until she closes it. Any subsequent users can bring the record up, but they're notified that the record is locked and can review the record but not change it.

- Do MARC tags and subfields reorder in the correct order upon import?

INNOVATIVE

The consortium determines the sort order, but whether or not MARC records are sorted on the MARC bib and authority records, can be turned off library by library. MARC tags and subfields are not initially sorted on import; they're sorted if and when a user brings them up in the MARC Record workflow.

- Which types of printers can be used to print spine labels – ink/regular printers, Dymo, Zebra, etc.? Do all of these printers work with PDF files?

INNOVATIVE

Any Windows compatible printer can be used with Polaris.

- Are you able to suppress/hide records from the public catalog? How do these appear to staff?

INNOVATIVE

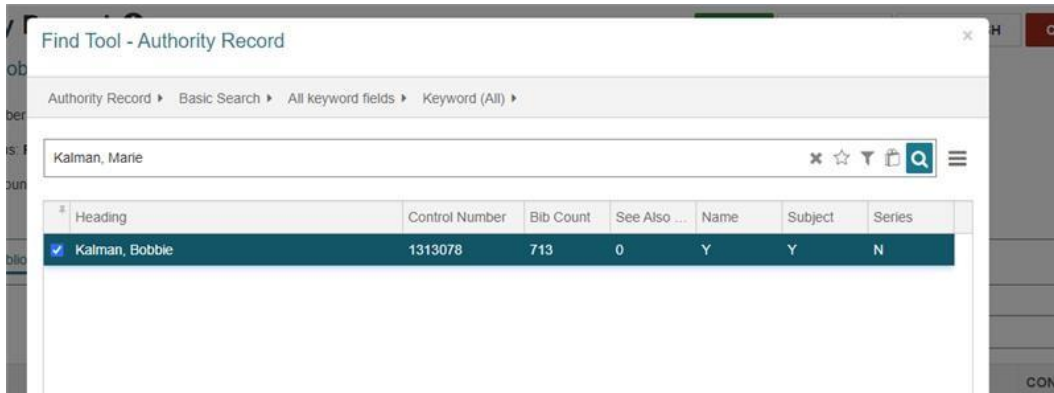
Yes. Bibs and items have a "display in PAC" checkbox. When unchecked, the titles and items do not display in the online catalog, but they DO display any time a staff member performs a search, and they meet the search criteria.

Part of **Clarivate**

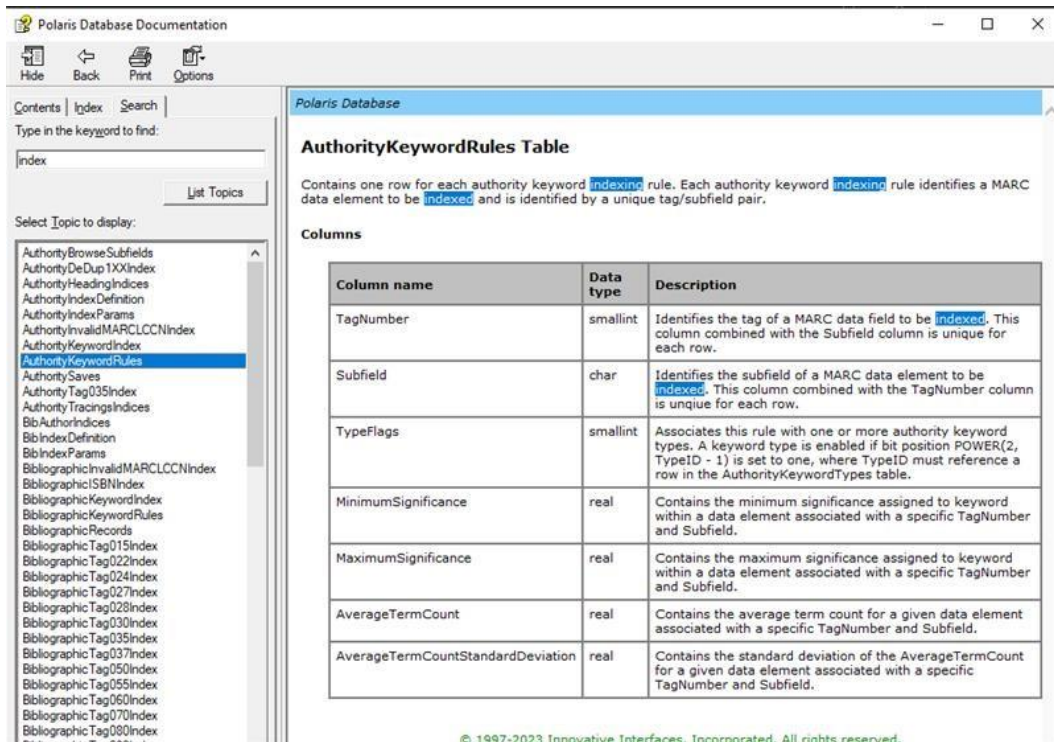
- How are 4XX and 5XX cross-references in authorities indexed?

INNOVATIVE

Leap-wise, if I do a keyword search of authorities by something that is in a 400 tag, it pulls up the record that has it:



Database-wise, you can use the AuthorityKeywordsRules table to customize how tags are indexed:



Applying those new rules requires a database reindex and should be done near an upgrade where the library is planning on reindexing since it takes the database offline

Part of **Clarivate**

- Is it possible to search by multiple Collection Codes at the same time for a specific library?

INNOVATIVE

Yes

- Which subfields are shown for 1XX and 7XX fields (on both staff and patron side)?

INNOVATIVE**1xx**

- Vega Discover
 - Shows subfields: a and d
- Leap
 - On the brief search results: subfields a and d
 - On the Full Bibliographic view: All 1xx subfields (and can be mapped by the Library).

7xx

- Vega Discover
 - 7xx does not display in Vega Discover
- Leap
 - 7xx DO NOT display in brief search results
 - 7xx DO display on the Full Bibliographic view (and can be mapped by the Library).

- Do the different batch edit options handle non-alphanumeric data okay (such as putting + or ++ in a call number)?

INNOVATIVE

Yes

- Are there any warnings when the very last item is deleted off of a bib record either on a single record or through batch deleting?

Part of **Clarivate**

- If staff are given the option to delete the bib record as well, can we set permissions so that the bib record is only deleted if the staff have permission to delete the bib record and staff are not given the option to delete the bib record?

INNOVATIVE

Yes, there are warnings and yes, a staff member is prevented from deleting last-copy bibs if they don't have the necessary permissions.

Part of **Clarivate**

Serials

- Is the Create Pub Pattern template functionality in Leap or in the client?

INNOVATIVE

Create Pub Pattern template functionality is currently it is in the client. However, you can USE templates in Leap.

- SCLS created a publication pattern template for Consumer Reports magazine which has been copied and used for multiple libraries. There is ad hoc change to this pattern from 2024 June to 2024 Jun/Jul. What is the simplest way for SCLS staff to make this change in the pub pattern copy/cascade to the subscriptions for our libraries, so they can correctly receive the issue as 2024 Jun/Jul instead of 2024 Jun?
 - What happens if one library already received 2024 Jun before the pub pattern change to 2024 Jun/Jul was made by system staff. How can that be resolved?

INNOVATIVE

If it's an ad hoc change for just 2024 Jun/Jul, the best thing to do is have each library combine the two expected issues (also combing the chronology, enumeration, or both. This is an option on the Serials Checkin workform.

For changes that need to be reflected on an on-going basis – each subscription has its own pub pattern and is managed separately.

If one library mistakenly receives a 2024 Jun copy combining June and July, they can simply unreceive their copy of the issue, combine the issues and then re-receive the corrected issue.

- Demonstrate how multiple subscriptions for a single library are set up and how the issues are received. For example, a library may have 1 regular circulating copy of a magazine and 1 reference copy that does not circulate. How are these issues received?

INNOVATIVE

You would have a unique Serial Holds Record (SHR) for each subscription. When it comes time to receive issues, you search by the title, UPC code, etc. etc. and the different subscriptions are listed for YOUR library. Note in the example below there are two SHRs – one for issues that go to the Periodicals collection and one for issues that go to the Reference collection.

Find Tool - Serial Holdings Record
✕

Serial Holdings Record ▶ Basic Search ▶ Title ▶ Keyword (All) ▶

✕ ☆ 🔍 ☰

| | Title | ISSN/ISBN | Copy ... | Status | Destination | Collection | Material Type |
|-------------------------------------|-----------------------|-----------|----------|--------------------|-------------|-------------|---------------|
| <input checked="" type="checkbox"/> | Architectural digest. | 0003-8520 | 8 | Currently Recei... | RRPL | Periodicals | Magazine |
| | Architectural digest. | 0003-8520 | 9 | Currently Recei... | RRPL | Reference | Magazine |

Ready
Filtered to 2 of 6 result(s)

Count Only

OPEN
CANCEL

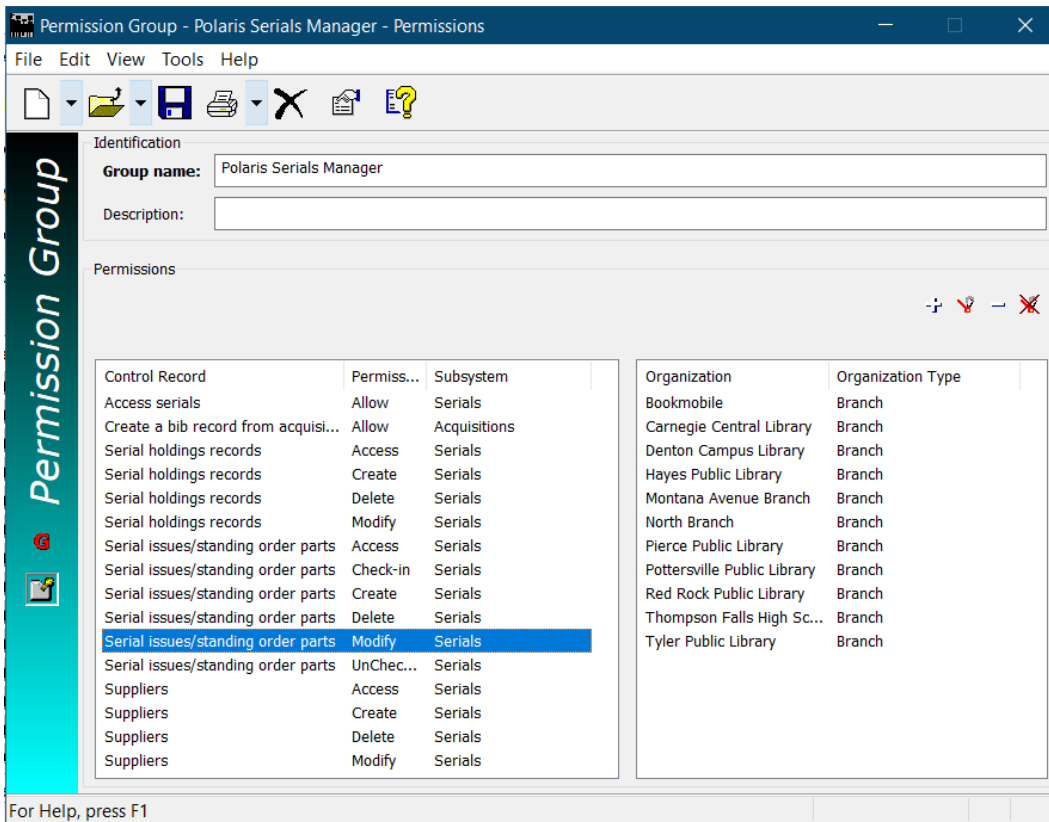
If your library has Polaris automatically create item records are issues are checked in, then Polaris uses underlying item template records to populate each item record. So, you would have 1 item template for the issues that go to the reference collection, and a different item template for issues that go to the periodicals collection. The item template for the reference item would dictate, for example, that those item records are non-circulating.

- Can individual libraries change the enumeration/chronology of issues on the fly or can they only combine issues? What are the permissions for this?

INNOVATIVE

Individual libraries CAN change the enumeration/chronology on their issue record from the Serials Checkin Workform. There are specific permissions for this, of course:

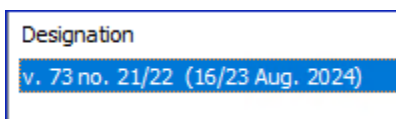
Part of **Clarivate**



- Is it possible to set up these types of unique publication patterns without doing manual editing at the point of receipt?
 - TV Guide: lists 2 dates, no. goes up by 3 every issue (v.72 no.18 : 2024 Apr 22-May 12, v.73 no.21 : 2024 May 13-Jun 02)
 - Nature: v. goes up every month, no. goes up every issue (v.628 no.8009 : 2024 Apr 25, v.629 no.8010 : 2024 May 02)
 - The Cottage Journal: Spring, Summer, Autumn, Christmas, Winter (has later year on it, like this year's issue would be 2025 Winter not 2024)

INNOVATIVE

For TV Guide, to get a date range, it would need to be combined. And even then, it's not a range, but two dates. And if there is enumeration, it would combine those as well. We suggest polling the Users Forum to see how other libraries are handling TV Guide. We can also discuss this further with our team and SCLS.



Part of **Clarivate**

Nature should be possible if you know how many issues per month there are. For example, if there are 4 issues per month, that could be:

| Level No. | Caption | Format | Units | Continuity | Start Value | Display As... |
|-----------|---------|--------|-------|------------|-------------|---------------|
| 1 | v. | Number | | | 628 | v. 628 |
| 2 | no. | Number | 4 | Continues | 8009 | no. 8009 |

Which would result in:

| Designation |
|--------------------------------|
| v. 628 no. 8009 (26 July 2024) |
| v. 628 no. 8010 (2 Aug. 2024) |
| v. 628 no. 8011 (9 Aug. 2024) |
| v. 628 no. 8012 (16 Aug. 2024) |
| v. 629 no. 8013 (23 Aug. 2024) |
| v. 629 no. 8014 (30 Aug. 2024) |
| v. 629 no. 8015 (6 Sep. 2024) |
| v. 629 no. 8016 (13 Sep. 2024) |
| v. 630 no. 8017 (20 Sep. 2024) |
| v. 630 no. 8018 (27 Sep. 2024) |

For Cottage Journal, you could set that up as a quarterly and caption for chronology as season.

| Level No. | Caption | Format | Start Value | Display As... |
|-----------|---------|-----------|-------------|---------------|
| 1 | Season | Full text | 22 | Summer |

That would provide 4 of the issues:

| Designation | Publication ... | Expected A... |
|-------------|-----------------|---------------|
| (Summer) | 7/26/2024 | 7/26/2024 |
| (Autumn) | 10/26/2024 | 10/26/2024 |
| (Winter) | 1/26/2025 | 1/26/2025 |
| (Spring) | 4/26/2025 | 4/26/2025 |
| (Summer) | 7/26/2025 | 7/26/2025 |
| (Autumn) | 10/26/2025 | 10/26/2025 |
| (Winter) | 1/26/2026 | 1/26/2026 |

And then add Christmas as a separate supplement that would be published annually. This would be set up in enumeration, not chronology.

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| Enumeration Setup | | | | | | |
|----------------------------------|----------------------|-------------|----------------------|--------------------------|-----------------------|---------------|
| Caption: | <input type="text"/> | Format: | <input type="text"/> | Start value: | <input type="text"/> | |
| Bib units per next higher level: | <input type="text"/> | Continuity: | <input type="text"/> | <input type="checkbox"/> | Alternative enumer... | |
| Level No. | Caption | Format | Units | Continuity | Start Value | Display As... |
| 1 | [Christmas] | Free text | | | Christmas | Christmas |

That would produce something like this:

| Designation | Category / Linka... | Expected | Status | Status Date | Patter |
|-------------|---------------------|------------|----------|-------------|--------|
| (Autumn) | Basic Bib / 1 | 10/26/2024 | Expected | 7/26/2024 | Open |
| Christmas | Supplement / 1 | 12/25/2024 | Expected | 7/26/2024 | Open |
| (Winter) | Basic Bib / 1 | 1/26/2025 | Expected | 7/26/2024 | Open |
| (Spring) | Basic Bib / 1 | 4/26/2025 | Expected | 7/26/2024 | Open |
| (Summer) | Basic Bib / 1 | 7/26/2025 | Expected | 7/26/2024 | Open |
| (Autumn) | Basic Bib / 1 | 10/26/2025 | Expected | 7/26/2024 | Open |
| Christmas | Supplement / 1 | 12/25/2025 | Expected | 7/26/2024 | Open |

- What workflow would you recommend for deleting item records created via serials so that the issue is removed from the subscription, holdings summary, etc?
 - For instance, if a library removes all of their 2022 items for a magazine, how does this affect their subscription/predictions?

INNOVATIVE

Removing all 2022 items for a magazine (as in the example) has no effect on the Serial Holdings Record or the prediction pattern.

- Does the holdings summary displayed to library staff and patrons automatically update to remove issues that have been deleted from the catalog?

INNOVATIVE

Issues are removed automatically when you delete the associated item record. One typical workflow is to remove issues from the current periodicals shelf and scan them all into a record set. When you delete the item records, the issue records are automatically deleted as well. The compressed summary of holdings statement is updated via an overnight process.

Discovery Layer

Part of **Clarivate**

- Format roll-up:

- In the Edition Information view can we customize the fields that display?

INNOVATIVE

Not currently.

- For example, for works that are translated, it should be very clear which item is which translator. The 700 information doesn't appear to display. Same for audiobooks – how do you view the narrator? Some audiobooks are published with different narrators.

INNOVATIVE

Narrators will be considered "contributors" in Discover. Those fields will show at the bottom of the bib record.

- How does the system decide to pull materials together under one tab? Can we adjust this? For example, titles such as *Brown Bear, Brown Bear What do you see?* are available in multiple book formats – board book, picture book, early reader. In the examples that we checked these formats appeared to be lumped together as "book" but they are different types of books and patrons will want different formats based on their needs.

INNOVATIVE

Tabs are created based on the bib material type. Board books, pictures books, and others are considered a collection and will be rolled up together.

- If different versions are grouped together in a roll-up and we want to separate them, is it possible to manually separate the versions?

INNOVATIVE

You can separate them if you manually change details in the MARC record. Full answer below.

- Could we get a written explanation of how the system determines what records to roll up together?

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INNOVATIVE

The roll up depends on:

1. Title
2. Author or Publisher
3. Language
4. Leader/06 Record Type
5. Diacritics appearing in title or author fields

Step 1. Do the titles match exactly?

For editions to rollup into a work level rollup, the titles must have an exact match. These are the rules for title matching that you should check your title data against:

1. 245 match on \$abnp
2. mainTitle and subTitle, partNumber and partName are all used for matching if present and must exist in all editions record for them to rollup. The order of partNumber and partName subfields does not matter. Keep in mind that each subfield is separately matched so a title with subtitle information must match both the values in \$a and \$b exactly to rollup.
3. Non-filing characters specified by the incoming 245 title tag are ignored (the number of leading characters to ignore is indicated by the value in the second indicator for the 245)
4. mainTitle string matching criteria:
 - a. Title match is case-insensitive and ignores trailing commas, semicolons, periods, and colons, and leading and trailing spaces
 - b. Trailing text in parentheses of mainTitle is ignored (e.g., "The Elephant (the movie)" matches "The elephant")
1. subTitle string matching criteria: The following punctuation is ignored: .,:[] as well as leading and trailing spaces.
2. Subtitles of "a novel" or "a thriller" (case insensitive exact match, ignoring leading and trailing spaces and trailing punctuation) are ignored.
3. Any text found within [] brackets and the brackets themselves are ignored.

Step 2. Depending on the type of rollup, check the Author/Publisher metadata in the record that is not rolling up, vs an edition that is rolling up in the format tab that you expect.

1. (Textual Works) Which Author is being used for each edition?

Vega BibFrame chooses the primary author based on the following rules:

1. The first 1xx field is chosen as the primary author. All 1xx roles are considered valid for selection as primaryAuthor.

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2. IF there is no \$e role value Vega assumes that the role is 'author'.

2. (Textual Works) Do the author names match exactly?

In order for editions to rollup into a work level rollup the authors must have an exact match. These are the rules for author name matching that you should check your title data against:

1. Authors metadata used for matching is \$ae of 100, 110, and 111 tags.
2. Author string matches are case-insensitive and ignore trailing spaces, commas, semicolons, and periods

Author Matching Fixes

Correct any metadata discrepancies between mismatched author fields. Note that the order of data in the \$a must match exactly except for the ignored punctuation mentioned above. \$d dates are ignored for authors. After editing MARC data, save the record in the ILS, and run a MARC record extraction in Vega to reingest records that were updated today.

1. (Visual Material Works) Which Publisher(s) are being used for each edition?

Vega BibFrame selects publisher data for rollup matching based on the following rules:

4. All 260\$b and 264 (2nd indicator must be 1) \$b are considered for matching. If there are multiple publishers found all must match exactly across all editions for a rollup to occur.
5. Author fields are ignored for moving image (video) materials

2. (Visual Material Works) Do the Publisher(s) match exactly?

Vega BibFrame matches all selected publishers based on the following rules:

1. Publisher data matching is case insensitive and ignores trailing punctuation ;,.,/, and leading and trailing white spaces.
2. The list of publishers is sorted alphabetically, and then strings are concatenated using "|" as delimiter before matching is applied

Step 3. Check the Language of the editions

Language Matching Problems

Vega matches the language of editions for work level rollups so that works presented in different languages do not rollup. Vega determines the language of an edition by checking each of the language fields below in the order given. If Vega finds a language value in any of the fields it uses the value it found and will not check the other field values from the rest of the list:

1. 008 language code

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- a. invalid/unusable codes are 'und', 'mul', 'zxx', '|||', '###'
2. 041 \$a (if 041 is repeated, all languages in the edition must match for a rollup to occur)
3. 130/240 \$l (Vega attempts to interpret the text in this field and map it to a language code)
4. If none of the above are present Vega assumes the language of the material matches the default language of Vega Discover set in the Localization settings of the Vega Staff Admin.

Language Fix

Correct any missing or erroneous 008 language codes or other language fields. After editing MARC data, save the record in the ILS, and run a MARC record extraction in Vega to re-ingest records that were updated today.

Step 4. Is the edition that is not rolling up an Audiobook or eAudiobook?

Record Type Error for Audiobooks

In order for audiobooks to rollup with other textual works, the Record Type (LDR06) must be set to non-musical audio (i).

Record Type Fix

Change all audiobooks and eaudiobooks LDR06 values to "I" for non-musical audio to avoid this problem. After editing MARC data, save the record in the ILS, and run a MARC record extraction in Vega to re-ingest records that were updated today.

Step 5. Does the title or author include a diacritic character?

Diacritic Problems

In order for editions to rollup into a work there must be an exact match of the characters in the title, author, and language fields. Sometimes the character used in the metadata record looks the same in the catalog but is actually a different diacritic character.

- Facets:

- Can these be customized? For example, Persons appears to be used instead of Author. Could we change that to a different label?

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INNOVATIVE

Yes. You will have access to the translation files where you will be able to change the labels in Discover.

- Can we decide to hide or display certain facets?

INNOVATIVE

Yes.

- Are there more sorting options available other than Relevancy, Date and New Materials?

INNOVATIVE

Not currently. More sort options are planned.

- Could you show us examples of how different item statuses display to the public? For example, on order, in storage or unavailable, mending, in transit, on hold shelf, etc.

INNOVATIVE

| Publication Date | Edition | Details | Publisher | Physical Description | Availability | |
|------------------------------|----------------|---------|--|----------------------------|-------------------------------------|---------|
| 2019 | First edition. | ⓘ | New York : Nan A. Talese/Doubleday, [2019] | 1 volume (unpaged) : 25 cm | Checked out Place Hold | |
| LOCATION | | DETAILS | CALL NUMBER | STATUS | DUE DATE | MESSAGE |
| Bedford Falls Public Library | | ⓘ | FIC ATW | Transferred | — | |
| Bedford Falls Public Library | | ⓘ | FIC ATW | In-Transit | — | |
| Red Rock Public Library | | ⓘ | 741.5/971 | Checked out | 2024-03-15 | |
| Tyler Public Library | | ⓘ | 741.5/971 | Held | — | |

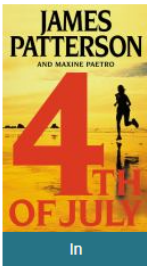
| Publication Date | Edition | Details | Publisher | Physical Description | Availability |
|------------------------------|---|--------------|------------------------------------|----------------------|-------------------------------------|
| 2022 | Ballantine Books trade paperback edition. | | New York : Ballantine Books, 2022. | 374 pages ; 21 cm | Unavailable Place Hold |
| LOCATION | DETAILS | CALL NUMBER | STATUS | DUE DATE | MESSAGE |
| Bedford Falls Public Library | | FIC 813.5400 | On-Order | — | |
| Pottersville Public Library | | 813.5400 | On-Order | — | |
| Red Rock Public Library | | 813.5400 | On-Order | — | |

- Could you show us how a Display item appears to the public? What if items are sent to different owning libraries for a temporary display? How can the actual location of the item be displayed to the public on a temporary basis?

INNOVATIVE

Polaris lets you have more than one field for location. One of those fields is the "Owning Branch" of an item, while a second field is "Assigned Branch". Discover will display the "Assigned Branch".

Item Record



4th of July/ by James Patterson and Maxine Paetro.

By Patterson, James, 1947-

Barcode: **94845940850948**

Call number:

Collection: **Adult Fiction**

Shelf location: **None**

Owning branch: **Galway County Libraries**

ILL Non-circulating

Record status: **Final**

Bib control number: **766913**

Parent item:

Assigned branch: **Pierce Public Library**

[Details](#)
[Circulation](#)
[Blocks and Notes](#)
[History](#)
[Statistics](#)
[Record Sets](#)
[Notices](#)
[Source and Donor](#)

| | |
|--|--|
| Barcode <input type="text" value="94845940850948"/> | Owning Branch* <input type="text" value="Galway County Libraries (lib)"/> |
| Collection <input type="text" value="Adult Fiction (AFIC)"/> | Assigned Branch* <input type="text" value="Pierce Public Library (PIERCE)"/> |

Get a Library Card Suggest a Purchase Personalized Event Calendar Newsletter Signup Article Search

| Publication Date | Edition | Details | Publisher | Physical Description | Availability |
|-----------------------------|---------|-------------|---|----------------------|-----------------------------------|
| 2005 | 1st ed. | ⓘ | New York : Little, Brown and Co., 2005. | 392 p. : 25 cm. | Available Place Hold |
| LOCATION | DETAILS | CALL NUMBER | STATUS | DUE DATE | MESSAGE |
| Carnegie Central Library | ⓘ | — | In-Process | — | |
| Carnegie Central Library | ⓘ | — | In-Process | — | |
| Pierce Public Library | ⓘ | — | In | — | |
| Pottersville Public Library | ⓘ | — | In | — | |
| Red Rock Public Library | ⓘ | F | In | — | |

Showcases

- How is the data from authority records incorporated into the Discovery Layer?

INNOVATIVE

Discover converts the authority record MARC into BIBFRAME. Those are then displayed under "Agents" and "Concepts".

- What happens when no search results are found?

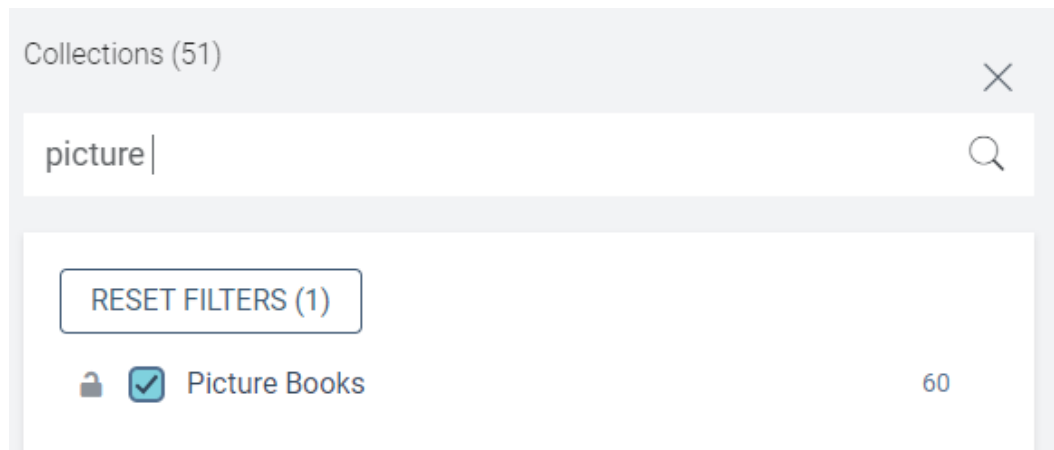
INNOVATIVE

Currently nothing happens. We would like a library partner to work with to develop a purchase request workflow.

- When you search by format, where is this coming from? For example, how does the system know that a picture book is a picture book?

INNOVATIVE

That would be a "Collection" under the "Collection" tab.

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- Can the system handle large checkout histories? For example, some of our patrons have checkout histories spanning a decade or more, with thousands of checkouts.

INNOVATIVE

Yes.

- What languages, other than English, are available for the Discovery Layer display?

INNOVATIVE

- English (US, UK, CA, NZ, AU)
- French (FR, CA)
- Catalan (ES)
- Chinese (CN, simplified Chinese)
- Chinese (TW, simplified Chinese)
- Icelandic (IS)
- Maori (MI)
- Polish (PL)
- Spanish (US, ES)
- Swedish (SE)

- Can you show the following in the Discovery Layer for a bib record?

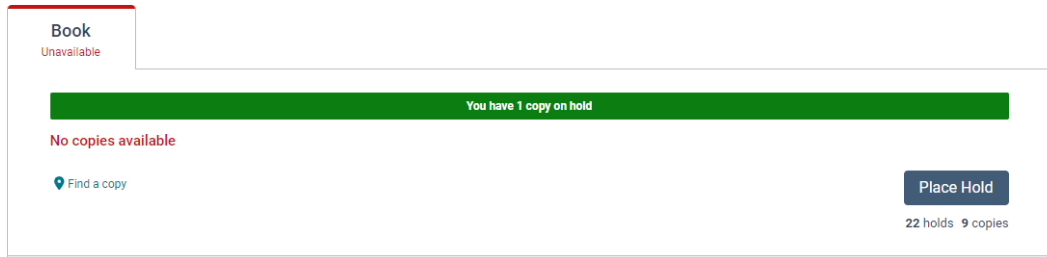
- Total holds
- # of active holds

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○ # of suspended holds

INNOVATIVE

Discover shows the total of active holds.



- Can the relevance ranking be adjusted so exact titles are ranked first? For example, searching for *It* (by Stephen King) doesn't always bring up that exact title match first.

INNOVATIVE

We are currently working on relevance ranking.

In Vega Discover, for known item searches, our goal is to display the title the user entered as the first item in the search results list whenever possible. To this end, we have developed special algorithms for handling single word serial and monograph titles – known items – such as “It” or “Beloved” to insure they are visible immediately. Vega Discover also allows the user to search using specific known-item identifiers, such as ISBN, ISSN, or other standardized numbers, without resorting to using an advanced search. The user simply types what they want to find, and Vega Discover brings back the best matching results.

Open-ended searching is just as easy in Vega Discover. The user can enter any terms and the relevance-based search algorithms will bring back the best matching results, regardless of whether the terms entered are an author, subject, title, serial title, or various secondary fields (editionStatement, genreForm, tableOfContents, supplementaryContent, and other note fields) or some combination of the above. Vega also automatically applies stemming so that searches for words like 'history' will also return results for 'histories'.

For open-ended searches Vega also gives users results that ONLY contain all specified terms when queries contain 3 or less terms. Vega provides fuzzier search results when a user enters 4 or more terms, first displaying results that contain all search terms and then returning additional results that contain some but not all search terms and indicating which terms from the query are missing from each result. You can get more exact matching for searches with 4+ terms by doing a phrase search using parenthesis or including AND between the terms.

There are a variety of factors that affect relevancy in Vega Discover:

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- If a term is found in a highly prioritized field like Title or Author, the relevance score will be higher than if that term were found in a secondary field, such as description.
- If a term is found multiple times within a work, then the score is higher.
- If a term is used infrequently in the field where it was found, it is assigned a higher score.
- If there are more matched terms in a work, a higher score will be assigned. That said, due to the previous points, a record with only one match doesn't mean automatically mean that that record will have a lower score than a record with two matches that occur in other fields.
- When a work has many copies it is also assigned a higher score.

Below you will find the metadata fields that we boost for search in the boosting priority order. This order may change as we continue to improve our relevancy based on customer feedback and user testing.

| Priority | Description | MARC | Notes | BibFrame Field |
|----------|------------------------|--|--|----------------|
| 1 | Primary Agent Name | <ul style="list-style-type: none"> • 100 \$abcdjq • 110 \$abcdng • 111\$acdengq • Linked 880s | Agent from 1xx is indexed as primary agent no matter what their relator field says 880 for agent is indexed | agent:label |
| 2 | Work & Instance Titles | <ul style="list-style-type: none"> • 130 \$anp • 240 \$anp • 243 \$anp • 245 (when no 130 or 240 title present) \$abnp • 246 • 730 | Each unique title is indexed | title |

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| | | | | |
|---|-----------------------------------|---|-----------------|---------------|
| | | <ul style="list-style-type: none"> • 740 \$ap • Linked 880s | | |
| 3 | Work Summary | <ul style="list-style-type: none"> • 520 | | summary |
| 4 | Concept | <ul style="list-style-type: none"> • 648 \$avxyz • 650 \$abcdvxyz • 651 \$abvxyz • 653 \$a • 656 \$akvxyz • 662 \$abcdfgh • 630 \$adnpvxyz • 69x \$axyz | | concept:label |
| 5 | Contributor/Secondary Agent Names | <ul style="list-style-type: none"> • 600 \$abcdjq • 610 \$abcdng • 611 \$acdengq • 700 \$abcdjq • 710 \$abcdng • 711 \$acdengq • 880 Linked Agents | | agent:label |
| 6 | Series Title | <ul style="list-style-type: none"> • 490 \$a • 830 \$a • 800 \$t | | hasSeries |
| 7 | Identifiers | <ul style="list-style-type: none"> • ISBN = 020, type = ISBN • ISSN <ul style="list-style-type: none"> ○ 022\$a,z,y ○ 490\$x,y,z ○ 700/710/730 \$x ○ 760/762/765/770/772-777/780/785-787 \$wxy ○ 800/810/811/830 \$wx • NLB Legal Deposit = 015\$a,z • ISMN = 024\$a,z • OCLC = 035\$a,z | | identifiedBy |
| 8 | Secondary Fields | <ul style="list-style-type: none"> • 245 \$h • 250 \$ab | Lowest relevant | genreForm |

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| | | | | |
|--|--|--|-------------|--|
| | | <ul style="list-style-type: none"> • 260 \$ab • 264 (2nd indicator 1) \$ab • 500 \$a • 505 \$agrt • 586 \$a • 59X \$a • 655 \$a | cy boost | editionStatement ent provisionActivity notes genreform |
|--|--|--|-------------|--|

- If a patron is using a library's local catalog (either by custom URL or is logged in), is there a way to display local items separately/at the top of the list of items in the bib record display of the Discovery Layer? Is there a way to highlight records with local items on the search results page?

INNOVATIVE

Each library can have their own catalog with their local items as preferred.

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Acquisitions

For Acquisitions, we would like to schedule a follow-up webinar to review these questions and to finish checklists that were unable to be completed during the in-person demo.

INNOVATIVE

These items will be demonstrated during the webinar.

Display

- Could you review the options for customizing the display?

Vendors

- Can you delete or archive Vendors that have been used in the past but are no longer in use?

Orders

- Could you review the order templates/defaults options for when you are using a vendor that does not use EDI?
- Could you review the following workflow?

- Order a title from a non-EDI vendor, such as Amazon.
- After completing the order (or during the order process), search for a matching bib record and connect the bib to the order.
- Send the item's information to the bib record so the item displays as "on order" to the public and other staff.
- When you receive the item from Amazon, you have to manually receive it, upon receipt, how are you prompted to update this on order item? For example, you will have to assign a barcode, change the item status, add price information, etc.

- Could you demo how to un-cancel an order?
- Are there customization options for the order types, and could you demo how to customize order types?
- Could you demo how to search and display orders based on the status, such as received, canceled, backordered?

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Checklists to complete

- Checklist 5 – Review Invoicing and Credit Memos
- Checklist 6 – Searching and Reports, Downloading and Printing
- Checklist 7 – Permissions, Year-End, and Purging data