Polaris PAC Customization Guide 4.1

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This guide is written for Polaris 4.1.

Contents

About This Guide

This guide contains information about customizing Polaris® PowerPAC™, Polaris® PowerPAC™ Children's Edition, and Mobile PAC beyond the options available in Polaris® Administration.

PAC Customization Topics

Important:
For information about developments that may have occurred after this information was published, go to **www.polaristown.com**.

This guide covers the following topics:

Customizing Polaris PowerPAC   Going beyond Polaris Administration to customize Polaris PowerPAC and Polaris PowerPAC Children's Edition at the program level; for example, by creating custom themes, layouts or entire pages.

Customizing Polaris Mobile PAC   Mobile PAC advanced customization.

Related Resources

- Polaris Developer Network

  Provides resources, a forum, and a development sandbox for developers who use the Polaris API. Go to:
  http://developer.polarislibrary.com

- *Polaris Installation Guide*

  Installing and updating Polaris server and staff client software.

- Polaris Administration Guides
  - *Polaris Administration Guide* - Using the Polaris Administration interface; setting up organizations, servers, collections, workstations, and staff members; setting permissions, parameters, and profiles; working with tables; setting search tool characteristics, barcode formats, online document location, and transaction logging.
  - *Polaris Public Access Administration Guide* - Contains information about setting up and customizing Polaris® PowerPAC™, Polaris® PowerPAC™ Children's Edition, and Polaris® Mobile PAC™.
  - *Polaris Patron Services Administration Guide* - Setting up patron services and circulation functions, and granting permissions to your front desk staff and supervisors.

- *Polaris Technical Services Administration Guide* - Setting up Cataloging, Acquisitions, and Serials, and granting permissions to your technical services staff.
- *Polaris Telephony Administration Guide* - Setting up and customizing outbound and inbound telephony services.
- *Polaris ExpressCheck Administration Guide* - Setting up the Polaris ExpressCheck workstation, Polaris Administration settings for Polaris ExpressCheck circulation, and customizing the Polaris ExpressCheck interface.

- *Polaris Online Help*

  Polaris online Help is accessible from the Help menu on the Polaris Shortcut Bar or any Polaris workform, or by pressing **F1** with a Polaris window active.

- Polaris Library Systems Web Site

  For updated user and support information, go to **www.polaristown.com**. You can also contact your Site Manager at 1-877-857-1978.

Customizing Polaris PowerPAC

This unit summarizes some ways you can customize Polaris PowerPAC and Polaris PowerPAC Children's Edition at the program level, beyond the features offered through Polaris Administration; for example, by creating custom themes, layouts or entire pages. You need some knowledge of HTML for some techniques; others require more advanced programming skills.

Before you begin, keep in mind that you can customize many aspects of Polaris PowerPAC and Polaris PowerPAC Children's Edition without any programming knowledge. Polaris Administration settings control many aspects of PAC function and appearance, and because these settings are stored in the database, they are retained at upgrade. For more information about these settings, see the *Polaris Public Access Administration Guide* or the equivalent topics in staff client online Help.

Also, you can edit most page text and messages using Polaris Language Editor (WebAdmin). See the *Polaris Language Editor Guide* or Language Editor online Help for more information.

Finally, Polaris Library Systems offers several service-level options for libraries that want to customize Polaris PowerPAC beyond Polaris Administration or Polaris Language Editor settings, but do not have the staff resources to do so. Contact a Polaris Customer Account Manager for more information.

> **Important:**
> To see the effects of any changes, you may need to update page caches. Restart the Internet Information Server (IIS) to clear the cache and load any pages that have been changed, or use the Reload feature in the Polaris Language Editor (WebAdmin). This reloads Polaris PowerPAC Children's Edition at the same time. You may also need to close and re-open browsers.

This unit covers the following topics:

Polaris PowerPAC Directory Structure

The following table summarizes the Polaris PowerPAC directory structure and contents. The default root folder on your Polaris PowerPAC server is **C:\Program Files\Polaris\[version]\PowerPAC**

Note:
For a list of specific pages and their functions, see "Standard PAC Pages Reference" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

Folder	Contents	Customizing
addons	Library Elf files	Do not alter
admin	PowerPAC administration utilities	Do not alter
admin\images	Images used in PowerPAC administration utilities	Do not alter
bin	DLL files for PowerPAC, business objects, and search engine	Do not alter
Children	Root directory for Children's PAC files	
Children\help	Children's PAC help files	Customizable (HTML); back up to protect from overwriting at upgrade
Children\themes	Images and CSS style sheets for Children's PAC themes	Customizable. See "Customizing Themes" on page 6.
Children\themes\1033	1033 is the language ID for English. Theme directories contained in this folder include the default themes **antique**, **ocean**, and **treasure**	Customizable. See "Customizing Themes" on page 6.
Children\usercontrols	Source code for components of Children's PAC, including search results, availability, and full title display.	Customizable. See "Customizing Pages" on page 25.
config	Configuration files for Polaris Phone Attendant (inbound telephony)	See "Setting Up Inbound Telephony" (Patron Services Administration topics) in Polaris staff client online Help.
custom	Root folder for user-developed custom pages	Custom files stored here are not overwritten at upgrade.
custom\App_Data	See "Customizing Search By and Sort By Options" on page 28.	
custom\panels	See "Customizing Layouts" on page 13.	
custom\themes	See "Customizing Themes" on page 6.	
dashboards	Contains search.asp, used only for backward compatibility with Polaris PowerPAC version 3.1	N/A
HeaderData.xml	Includes definitions for section and menu options in the PowerPAC header.	Customizable; back up to protect from overwriting at upgrade. See "XML Schema for Polaris PowerPAC Page Header" on page 14.
help	PowerPAC help files	Customizable (HTML); see "Customizing PowerPAC Help Links" on page 30

Folder	Contents	Customizing
library	Pages used in the Library Info section of PowerPAC, including events and policies	Customizable; not overwritten at upgrade.
library\userdef	Template pages for user-defined Library Info pages	Customizable; custom files stored here are not overwritten at upgrade.
patronaccount	Pages and Web controls used in the Patron Account section of PowerPAC	Customizable at your own risk; back up to protect from overwriting at upgrade.
payments	Files used in e-commerce	Do not alter
rss	Script files for rss feeds	You can add custom files; not overwritten at upgrade.
scripts	Java scripts	Do not alter
search	Pages for the search section of PowerPAC	
search\components	Components of search results page	
search\misc	E-sources and ILL pages	Do not alter
search\usercontrols	Web controls for search pages. Includes search tool bars, search results lists, and others.	Customizable; not overwritten at upgrade.
services		Do not alter
themes	Contains directories for each of the five PowerPAC themes (Antique, Casual, Classic, Formal, Modern) as well as themes/shared (see below)	You can create your own custom theme. See "Customizing Themes" on page 6.
themes\shared	Contains default styles and images shared by all themes: •\communityformats - Format icons for Community Information organizations, events, etc. •\fancybox - Images and CSS styling used in pop-up light boxes •\formats - Bibliographic format icons (small) used on search results pages •\largeformats - Large bibliographic format icons used in content carousels when there is no cover image available for a given title •\maps - Icon used for pins on the Google "Map It!" feature •\ratings - Starred ratings images used in content carousels •\tabs - Images and CSS styling for the forms using in editing Community Information data in Patron Account	Override shared values in your custom theme folder. See "Customizing Themes" on page 6.
themes\<theme>	Images and style sheets for the specific theme that differ from the styles and images specified in themes\shared (see above)	See "Customizing Themes" on page 6.
usercontrols	Generic Web controls used by most pages, including page headers, footers, and dashboards.	Customizable; back up to protect from overwriting at upgrade. See "Customizing Pages" on page 25.
Xsl	Contains XSLT transform files	
Xsl\Syndetics	XSLT transform files for Syndetics content	Do not alter
Xsl\panels	XSLT transform files for the four main PowerPAC panels (header, left, right, footer)	Customizable. See "Customizing Layouts" on page 13.

Customizing Themes

Using page themes (skins), you can change the overall appearance of Polaris PowerPAC and Polaris PowerPAC Children's Edition quickly and easily, without extensive code editing. In Polaris Administration, you can assign themes at the system, library, or branch level. For more information about standard Polaris PowerPAC themes, see "Setting Polaris PowerPAC Themes" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help. For more information about defining and assigning children's themes, see "Polaris PowerPAC Children's Edition Basics" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

With knowledge of HTML and access to SQL, you can create a custom theme, then make your custom theme available for assignment in Polaris Administration. You must place your custom themes in a special custom folder to protect them from being overwritten during a Polaris reinstallation or upgrade.

Theme Structure

In general, a theme consists of a style sheet (.css) file and a collection of images. The style sheet controls aspects of general page appearance — such as fonts, links, and colors — and defines classes. The **Themes\Shared** folder contains the default style sheet and images for all themes. Each individual theme folder contains only those style overrides and images specific to that theme. Your custom .css file should contain only those attributes you wish to override from the default .css file located in **Themes\Shared**. Similarly, your custom theme folder should contain only those images you wish to override from the default images located in **Themes\Shared.** (Your custom folder is not overwritten at upgrade.)

> **Important:**
> The default style sheet (/themes/shared/styles.css) limits the size of image thumbnails (class=thumbnail) to a maximum height of 130 pixels and a maximum width of 100 pixels:
>
> *img.thumbnail*
>
> *{*
>
> *max-height: 130px;*
>
> *max-width: 100px;*
>
> *}*
>
> To change the default, define the override size in the custom .css file.

- For Polaris PowerPAC, the "override" style sheet is located in each theme folder: **Polaris/PowerPAC/themes/***theme name*. Each theme style sheet contains only those attributes that override those in the default .css file in **Themes\Shared.** An additional style sheet, **styles_lp.css,** contains only the attribute values for font size and other factors to accommodate large text pages, and is located in each theme folder. If you want to override any of these values, you may include **styles_lp.css** in your custom theme folder. Your version should contain only your overrides.

> **Important:**
> If your library uses Polaris Social (licensed integrated ChiliFresh Connections features): In the Polaris **themes\shared** folder, ChiliFresh Connections has its own style sheet (chilifresh.css). If your PowerPAC has a custom theme and you wish to override some of the default chilifresh.css file, copy the chilifresh.css file from the **themes\shared** folder to the custom theme folder and edit the custom version accordingly. Unlike the main styles.css page with overrides, the custom chilifresh.css page must contain *all* the CSS classes from the default version.

- For Polaris PowerPAC Children's Edition, the style sheet is located in each *language-specific* theme folder: **Polaris/PowerPAC/Children/themes/** *language code***/***theme name*.

Header Logo

For your header logo, you can use a .jpg file or a .gif file. In Polaris 4.1, the header logo image is now a .gif file (**header_logo.gif**.) However, custom themes can use either **header_logo.jpg** (as in previous versions) or **header_logo.gif**. Note that **header_logo.gif** supports header logo images that have a transparent background.

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Create a custom theme for Polaris PowerPAC

Polaris provides five standard themes for Polaris PowerPAC: Classic (the default), Antique, Casual, Formal, and Modern. When a patron connects to Polaris PowerPAC, the connection branch's theme is displayed. If you allow patrons to switch branches, the theme changes according to the selected branch's theme setting. You create a custom theme by setting up a custom theme folder in **Polaris\[version]\PowerPAC\custom\themes***theme name*, and making it available for selection in Polaris Administration with an SQL command. Follow these steps to create a custom theme for Polaris PowerPAC.

> **Note:**
> The procedures for customizing themes and making them available differ for Polaris PowerPAC and Polaris PowerPAC Children's Edition (see). For Mobile PAC instructions, see .

1. Create and name a custom theme folder in **Polaris\[version]\PowerPAC\custom\themes\{theme name}**. *The name is case-sensitive.*

Alternatively, your file folder can reside on any remote server. You then define a full-qualified URL directory path in the **path** column of the SQL table **SA_PowerPAC_Themes** (see step 3). If the **path** column value in **SA_PowerPAC_Themes** begins with **http:** or **https:**, PowerPAC treats that as a fully-qualified domain path. Any other values are assumed to be relative paths within the root of the PowerPAC web application.

2. Working in your custom theme folder, add your .css style sheet file and any custom images as you wish.

   - The only images that should be in the custom theme folder are ones that differ from those provided in the **/Themes/Shared/** folder.

   - Your custom **styles.css** file should only contain attributes that you wish to override from the default **styles.css** in the shared folder. PowerPAC automatically includes the **styles.css** from the shared directory, and then any additional styles in the custom theme version of **styles.css**.

     > **Important:**
     > If your library uses Polaris Social (licensed integrated ChiliFresh Connections features): In the Polaris **themes\shared** folder, ChiliFresh Connections has its own style sheet (chilifresh.css). If your PowerPAC has a custom theme and you wish to override some of the default chilifresh.css file, copy the chilifresh.css file from the **themes\shared** folder to the custom theme folder and edit the custom version accordingly. Unlike the main styles.css page with overrides, the custom chilifresh.css page must contain *all* the CSS classes from the default version.

3. Add the custom theme as an entry in the **Polaris.SA_PowerPAC_Themes** table in the Polaris database with an SQL insert command. The following command is an example:

   insert into SA_PowerPAC_Themes (DisplayName,Path,UserDefined) select 'Saratoga', 'Custom/themes/pug/', 1

   Saratoga is the theme name as it will be listed in Polaris Administration, **custom/themes/pug** is the custom folder, and **1** indicates the theme is user-defined (**0** in this column would indicate Polaris-defined). If your custom folder is on a remote server, use the fully-qualified URL directory path in the **path** column (see step 1).

4. Highlight the command and click **Execute**.

5. Assign the new theme to one or more branches by following these steps:

   a) In the Polaris Administration Explorer, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.

   b) Double-click **Theme selection**, and select the custom theme from the drop-down list.

   c) Double-click **Theme dashboard position**, and select **Left** or **Right**.

   d) Select **File, Save**.

6. Use the Reload feature in Polaris Language Editor (WebAdmin) or perform an IIS reset to see your changes.

1-2-3

Create a custom theme for Polaris PowerPAC Children's Edition

When you enable Children's Edition themes in Polaris Administration for an organization, children can choose a theme from the options you specify. Polaris provides three standard Children's Edition themes: Treasure, Antique, and Ocean. You can offer some or all of these as well as your custom themes. Themes are developed at the system level, but you can assign them at the system, library, or branch level, so that each branch can control which (if any) theme options are available. The default theme—the theme that is displayed when users first connect to Polaris PowerPAC Children's Edition—can also be set at the system, library, or branch level.

For Polaris PowerPAC Children's Edition, the theme style sheet (.css) file and related image files are stored in each *language-specific* theme folder: **Polaris\[version]\PowerPAC\Children\themes*language code**theme name***. For example, files for the default Treasure theme (English) are located in the folder **Polaris\version\PowerPAC\children\themes\1033\treasure.** If you are creating a custom theme, set up a unique folder for your files on the Web server, in **Polaris\version\PowerPAC\children\themes*language number folder*.**

> **Note:**
> Each language is represented by a number. English is represented by 1033, so theme folders for the English version are stored in **Polaris\version\PowerPAC\children\themes\1033**.

Theme folders also contain the image files specified for format icons and categories, since these images can change when a different theme is chosen. As in Polaris PowerPAC, format icons identify the medium of a title listed in search results, such as a book or a musical sound recording. "Categories" are specific to the Children's Edition and contain predefined targets, such as searches or Web site URLs.

> **Note:**
> For more information about setting up categories, see "Managing Search Categories" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

You create a custom theme for Children's Edition by copying an existing theme, then editing the style sheet and images as appropriate. However, you do not need to do an SQL insert command to make the custom theme available for use, since you can do this step directly in Polaris Administration.

Follow these steps to create a custom theme for the Children's Edition.

1. In the **Polaris\[version]\PowerPAC\children\themes*language folder*** directory, copy a theme folder and rename it for your custom theme. Keep your new custom theme folder in the **Polaris\[version]\PowerPAC\children\themes*language folder*** directory.

> **Important:**
> File names and paths are case-sensitive.

2. Working in your custom theme folder, edit the .css style sheet and images as you wish. You must retain all classes in the .css file.

3. Make your custom theme available for organizations to use by following these steps:

   a) In the Polaris Administration Explorer, open the **Profiles** folder at the *system level*, and select the **Children's PAC** tab in the details view.

   b) Double-click **Theme Construction**.

   The Theme Construction dialog box is displayed.
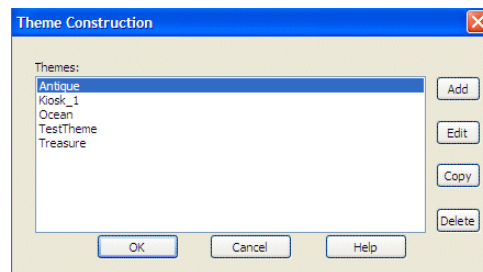
> **Note:**
> The Theme Construction dialog box lists the default themes that are shipped with Polaris (**Antique**, **Ocean**, and **Treasure)**, and any custom themes that have already been defined. You cannot edit the default themes.

   c) Select the theme you copied as a basis for your custom theme in step 1, and click **Copy**.

   The copy is added to the list as **Copy of *theme***.

   d) Select the copy and click **Edit**.

   The Edit Theme dialog box is displayed.
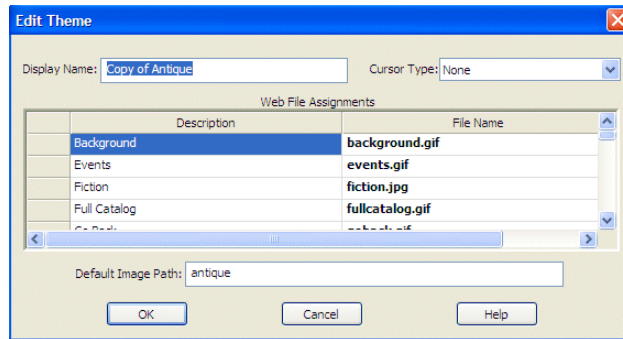
e) Type a name for the theme in the **Display Name** box.

The display name identifies the theme in Polaris Administration profiles and on the Polaris PowerPAC Children's Edition interface.

> **Note:**
> The **Cursor Type** field is not functional.

f) In the appropriate **File Name** boxes, if you changed any filenames in the custom theme folder, type the new filenames for the page graphic elements and for the stylesheet.

> **Note:**
> The system constructs the appropriate URL. Type only the new filename (case-sensitive).

g) Type the name of the theme folder you created in step 1 in the **Default Image Path** box.

> **Note:**
> Type only the folder name (case-sensitive). The system constructs the appropriate URL for the theme files to **Polaris\[version]\PowerPAC\children\themes*language folder**your folder*** on the server, based on the theme folder you specify.

h) Click **OK** on the dialog box.

The dialog box closes, and your settings are saved.

4. Assign the custom theme to an organization by following these steps:

a) In the Polaris Administration Explorer, open the **Profiles** folder for the organization, and select the **Children's PAC** tab in the details view.

b) Double-click **Theme assignment**.
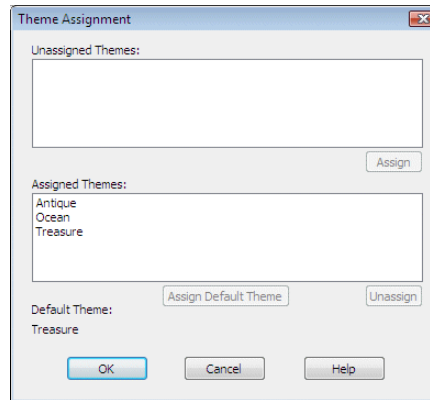
The Theme Assignment dialog box is displayed.

c) Select the custom theme in the Unassigned Themes list, and click
Assign.

The theme is added to the Assigned Themes list.

d) To designate an assigned theme as the default theme, select the theme
in the Assigned Themes list, and click **Assign Default Theme**.

e) Click **OK** on the dialog box.

The dialog box closes, and your settings are automatically saved.

> **Note:**
> To display the theme options in the Children's Edition, set the Children's
> PAC profiles **Select theme: Enable** and **Dashboards: Enable** to **Yes** for the
> organization.

5. Use the Reload feature in Polaris Language Editor (WebAdmin) or
perform an IIS reset to see your changes.

> **Important:**
> Back up your new theme folder to protect it from being overwritten when
> Polaris PowerPAC software is reinstalled or upgraded.
>
> Move the custom theme directory back to
> **Polaris\[version]\PowerPAC\children\themes***language folder* after the
> installation is complete.

Customizing Layouts

Using the PowerPAC profile **Layout selection** in Polaris Administration, you can specify the standard (classic) page layout or any custom layouts that you develop or that are developed for you. You can add your custom layouts as choices to this profile with SQL.

The layout of Polaris PowerPAC pages uses four sections (panels): top (two versions), bottom, left, and right. With knowledge of HTML and XSLT, and access to SQL, you can use these panels to create a custom layout. The directory **\Polaris\[version]\PowerPAC\xsl\panels\classic** contains the following panels as .xslt files: top.xslt, top_simple.xslt, right.xslt, left.xslt and bottom.xslt.

For example, the classic version of top.xslt is used in the default Polaris PowerPAC. The illustration shows the top of the portal page based on this panel.
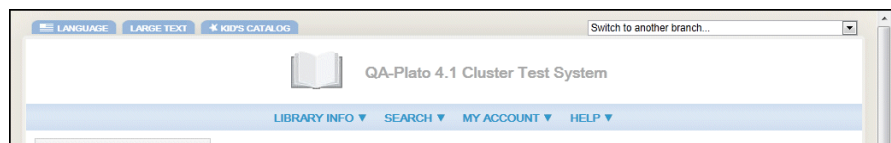
The classic version of top_simple.xslt is a less complicated version of top.xslt that is used in special cases; for example, when the patron places a hold request:
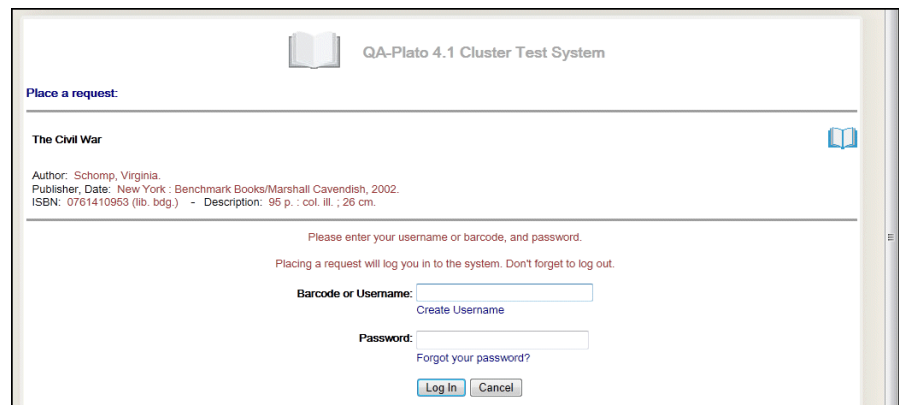
The header portion of each Polaris PowerPAC page is generated dynamically from an xsl transform using the markup in top.xslt and an XML document that is specific to each page request and created on the fly. For an example of the format of that XML and the defined tags that may be utilized in the xsl style sheet, see "XML Schema for Polaris PowerPAC Page Header" on page 14.

If you create a **panels** folder in **Polaris\[version]\PowerPAC\custom**, you can copy the xslt files, edit them, and place your custom layout files in **Polaris\[version]\PowerPAC\custom\panels**. This will protect your custom layout from being overwritten during a Polaris reinstallation or upgrade.

> **Important:**
> File names and paths are case-sensitive.

Disabling Caching of Custom Layout Panels During Development

For performance reasons in a production environment, PowerPAC caches any of the XSLT files used for common page header, footer and side panels (top.xslt, bottom.xslt, etc.). Because of the cache, whenever any of those template files are edited, PowerPAC must be reloaded or an IISRESET performed in order to use the updated files.

You can disable caching during development by adding a node to the **web.config** file in the root of the PowerPAC web site. The XSLT files used for the common page panels are not cached but accessed every time a PowerPAC page is generated. With this setting enabled, a web site reload is no longer required to view changes to the panel XSLT files.

> **Important:**
> You should disable caching only in a test or development environment. For performance reasons, do not disable caching in the production environment.

To disable caching of layout panel XSLT files, add the following to the **<appSettings>** node in the PowerPAC **web.config** file:

```
<add key="CacheLayoutPanels" value="0"/>
```

XML Schema for Polaris PowerPAC Page Header

The header portion of each page in Polaris PowerPAC is generated dynamically from an xsl transform using the markup in xsl/panels/classic/top.xslt and an XML document that is specific to each page request and created on the fly. The XML associated with a page is not a file that is stored on disk, and it cannot be viewed; it is created in memory while generating the page, and only the resultant HTML from the xsl transform of top.xslt is sent to the browser.

> **Note:**
> This same XML document is used in transforms for the footer and the two optional side panels of each PowerPAC page as well. Use Polaris Language Editor (WebAdmin) to reload Polaris PowerPAC and clear the xslt file cache if you make changes.

Navigation menu options are defined in the file **HeaderData.xml** in the root of the PowerPAC folder. In Polaris versions prior to 4.1, a customized version of that file could reside in the **PowerPAC /custom/** folder, but only one system-wide file wa s supported. In Polaris 4.1, multiple **HeaderData.xml** files can be created in the **/custom/** folder, and each can be assigned to one or more branches.

After creating the multiple **HeaderData.xml** files, create a file called **HeaderDataIndex.xml** in the **/custom/** folder. This allows PowerPAC to associate specific header data files with specific branches. See the sample file in the **/custom/** folder called **HeaderDataIndex-template-xml**; use this file as an example or starting point.

In the index file, each branch ID is assigned to the custom versions of **HeaderData.xml**. For example:

```xml
<?xml version="1.0" encoding="utf-8" ?>
<HeaderDataFiles>
  <HeaderDataFile OrganizationIDs="3,4,5"    FileName="HeaderData_city.xml"/>
  <HeaderDataFile OrganizationIDs="7,8,9,10" FileName="HeaderData_county.xml"/>
  <HeaderDataFile OrganizationIDs="12"       FileName="HeaderData_12.xml"/>
</HeaderDataFiles>
```

Any branch not listed in **HeaderDataIndex.xml** will use the default **HeaderData.xml**.

Perform a PowerPAC reload or IISRESET after creating the **HeaderDataIndex.xml** file.

XML Document Format

The following XML is a sample that is typical of what is generated and used in the transform:

<?xml version="1.0" encoding="utf-8" ?>

<PowerPAC>

    <PolarisVersion>4.1.508</PolarisVersion> *(Polaris version and build number)*

    <PageID>**1**</PageID>

    <LanguageID>**1033**</LanguageID>

    <ThemePath>**http://mylibrary.com/polaris/themes/classic/**</ThemePath>

    <NoCookieRedirectURL>**http://mylibrary.com/polaris/nocookies.htm**</NoCookieRedirectURL> *(URL of page that PowerPAC redirects to if the client browser does not have cookie support enabled)*

    <WelcomeLabel>**Welcome**</WelcomeLabel>

    <TextSizeLink>

<Label>**Large Text**</Label>

<URL>**http://mylibrary.com/polaris/ default.aspx?ctx=1.1033.0.0.1&lp=1**</URL>

</TextSizeLink> *(Link for adjusting page font size)*

<MobileVersionLink Enabled="**true**">

   <Label>**Mobile Site**</Label>

   <URL>**http://rubenau-w7.gisinfosystems.com/plato/mobilesite.aspx**</ URL>

</MobileVersionLink> *(Mobile PAC link)*

<Patron LoggedOn="**false**" />

<AccountAccess Enabled="**true**">

   <Label>**Log In**</Label>

   <URL>**https://mylibrary.com/polaris/logon.aspx?Header=1**</URL>

</AccountAccess>

<Logo>

   <ImageURL>**http://mylibrary.com/polaris/themes/classic/ header_logo.jpg**</ImageURL>

   <Link>**http://mylibrary.com/polaris/default.aspx**</Link>

   <AltText>**Polaris**</AltText>

</Logo>

<Banner>

   <Style /> *(CSS styles for the background of header banner)*

   <FontColor /> *(Color of Branch name in header)*

   <ShowOrganizationName>**True**</ShowOrganizationName> *(Show branch name)*

   <Align>**center**</Align> *(Alignment of branch name in header)*

</Banner>

<VirtualReference Enabled="**true**">

   <URL>**http://mylibrary.com/polaris/Library/ vrquestion.aspx?ctx=1.1033.0.0.1**</URL>

   <LabelPre>**Need Help? Click**</LabelPre>

   <LabelLink>**here**</LabelLink>

   <LabelPost>**to talk to a LIVE Reference Librarian.**</LabelPost>

</VirtualReference>

<ChildrensPAC Enabled="**true**">

   <ImageURL>**http://mylibrary.com/polaris/themes/classic/ childrenspac.gif**</ImageURL>

   <Link>**http://mylibrary.com/polaris/Children/default.aspx?ctx=1**</Link>

   <AltText>**Click here to go to the Children's PAC!**</AltText>

   <Label>**Kid's Catalog**</Label>

<HeaderIconURL>**http://mylibrary.com/polaris/themes/shared/ cpac_icon.gif** </HeaderIconURL>
(Label of the Children's Catalog in PowerPAC header and small icon)

</ChildrensPAC>

<SkipToMainContentLabel>**Skip to main content**</ SkipToMainContentLabel>

<SkipToMainMenuLabel>**Skip to main menu**</ SkipToMainMenuLabel>

(Labels for hidden links for screen readers used as navigation aids to skip to main content and main menu options. ADA compliance)

<CopyrightText>**Copyright © 2012 Polaris Library Systems**</ CopyrightText>

<PolarisBranding>

   <ImageURL>**http://mylibrary.com/polaris/themes/classic/powered.jpg**</ ImageURL>
   <AltText>**Polaris**</AltText>

</PolarisBranding>

<OrganizationName>**Polaris County Library Services**</ OrganizationName>

<OrganizationID>**1**</OrganizationID>

<ChangeOrganizationLabel>**Switch to another branch…**</ ChangeOrganizationLabel>

<Organizations>

   <Organization ID="**1**" Name="**Polaris County Library Services**" />
   <Organization ID="**3**" Name="**Cooperative Administrative Office**" />
   <Organization ID="**4**" Name="**External Loans (Staff Only)**" />
   <Organization ID="**5**" Name="**Library Outreach Services**" />
   <Organization ID="**7**" Name="**Banks Public Library**" />
   <Organization ID="**9**" Name="**Beaverton City Library**" />
   <Organization ID="**11**" Name="**Cedar Mill Community Library**" />

</Organizations>

<PrimaryNavigation SelectedID="**1**" SelectedPosition="**1**">

   <Option ID="**1**" Selected="**true**">
   Label>**Library Info**</Label>
   URL>**http://mylibrary.com/polaris/ default.aspx?ctx=1.1033.0.0.1&Header=1**</URL>
   <UD_SAMPLE>**UD Sample**</UD_SAMPLE>
   </Option>
   Option ID="**2**" Selected="**false**">
   <Label>**Search**</Label>
   <URL>**http://mylibrary.com/polaris/search/default.aspx**</URL>
   </Option>

```
<Option ID="3" Selected="false" HasSubOptions="true">
<Label>Community</Label>
<URL>http://mylibrary.com/polaris/search/
communityinformation.aspx?ctx=1.1033.0.0.1</URL>
```
(Community Information main menu option)
```
<Option ID="4" Selected="false">
<Label>Patron Account</Label>
<URL>https://mylibrary.com/polaris/patronaccount/default.aspx</
URL>
</Option>
<Option ID="99" Selected="false">
<Label>Help</Label>
URL>http://mylibrary.com/polaris/help/default.aspx</URL>
</Option>

</PrimaryNavigation>

<SecondaryNavigation SelectedID="1" SelectedPosition="1">
    <Option Selected="true">
    <Label>Portal</Label>
    <URL>http://mylibrary.com/polaris/default.aspx?ctx=1.1033.0.0.1</
    URL>
    <UD_SAMPLE>UD Sample</UD_SAMPLE>
    </Option>
    <Option Selected="false">
    <Label>Hours</Label>
    <URL>http://mylibrary.com/polaris/library/
    hours.aspx?ctx=1.1033.0.0.1</URL>
    </Option>
    <Option Selected="false">
    <Label>Events</Label>
    <URL>http://mylibrary.com/polaris/library/
    events.aspx?ctx=1.1033.0.0.1</URL>
    </Option>
    <Option Selected="false">
    <Label>Policies</Label>
    <URL>http://mylibrary.com/polaris/library/
    policies.aspx?ctx=1.1033.0.0.1</URL>
    </Option>
    <Option Selected="false">
    <Label>Ask Us</Label>
    <URL>http://mylibrary.com/polaris/library/
    askus.aspx?ctx=1.1033.0.0.1</URL>
    </Option>
</SecondaryNavigation>

<FullSecondaryNavigation>
    <Option ID="1" ParentID="1" Selected="false">
     <Label>Portal</Label>
      <URL>http://mylibrary.com/polaris/default.aspx?ctx=1.1033.0.0.1<
    /URL>
```

```
        </Option>
        <Option ID="2" ParentID="1" Selected="false">
        <Label>Hours</Label>
        <URL>http://mylibrary.com/polaris/library/
        hours.aspx?ctx=1.1033.0.0.1</URL>
        </Option>
        …
        …

    </FullSecondaryNavigation>  (Complete list of all secondary navigation
    options for all main menu options.  This allows for JavaScript style dropdown
    menu lists.)

    <Languages>

        <Language>
        <Label>English</Label>
        <URL>http://mylibrary.com/polaris/default.aspx?ctx=1.1033.0.0.1</
        URL>
        </Language>
        <Language>
        <Label>Español</Label>
        <URL>http://mylibrary.com/polaris/default.aspx?ctx=1.3082.0.0.1</
        URL>
        </Language>
        <Language>
        <Label>Français</Label>
        <URL>http://mylibrary.com/polaris/default.aspx?ctx=1.3084.0.0.1</
        URL>
        </Language>

    </Languages>

</PowerPAC>
```

XML Nodes

Polaris 4.1 supports custom layouts created before the 4.1 release, and provides new nodes. The table lists supported nodes; those new in Polaris 4.1 are indicated. These nodes appear in the XML that is created dynamically for each page rendering and against which the layout panels (top.xslt, bottom.xslt, etc.) are transformed.

Node	Description
AccountAccess	Patron account access link. Enabled - Boolean attribute indicating whether or not patron logins are allowed.
AccountAccess/Label	Label for the patron login link
AccountAccess/URL	URL for the patron login link
Banner/Style	*New in 4.1*. Custom alignment style for banner logo as specified in Polaris Administration custom header options.
Banner/FontColor	*New in 4.1*. Custom font color style for organization name display as specified in Polaris Administration custom header options.
Banner/ShowOrganizationName	*New in 4.1*. Whether to display organization name (specified in Polaris Administration custom header options). Valid values: **True** or **False**
ChangeOrganizationLabel	Text to be used as the default option in the organizations dropdown list
ChildrensPAC	Children's PAC footer image configuration. Enabled - Boolean attribute indicating whether or not Children's PAC logo/link displays
ChildrensPAC/ImageURL	URL of the Children's PAC image logo
ChildrensPAC/Link	HREF link for Children's PAC image logo
ChildrensPAC/AltText	ALT text for Children's PAC image logo
CopyrightText	Text of the copyright statement
FullSecondaryNavigation	*New in 4.1*. Similar to the existing <SecondaryNavigation> node but contains all secondary navigation options for all main tabs. Allows all secondary menu options to be included in JavaScript styled pull-down type menus.
Languages	List of languages that this installation of PowerPAC supports
Language	Language instance
LanguageID	Currently selected language. Could be used to conditionally display static text in the xsl file in different languages.
Language/Label	Label of the specific language option link

Node	Description
Language/URL	URL of the specific language option link
LanguagesIconURL	*New in 4.1*. URL of icon next to Languages menu option.
Languages/Language/ID	*New in 4.1*. ID of currently selected Language ID. Valid values include those licensed by the system. Possible values: 1033 - English 1042 - Korean 1049 - Russian 1066 - Vietnamese 1141 - Hawaiian - United States 2052 - Chinese 3082 - Spanish - Spain (Modern Sort) 3084 - French - Canada 12289 - Arabic 15372 - Haitian Creole
Logo	Main header logo definition
Logo/ImageURL	URL for image of main header
Logo/Link	HREF link for main header logo
Logo/AltText	ALT text for main header logo
OrganizationName	Name of the currently selected organization
OrganizationID	ID for the currently selected organization. Could be used to key off of to conditionally display static text for specific organizations.
Organizations	List of organizations to include in the dropdown list
Organization	Individual organization included in dropdown list. ID - Organization internal ID Name - Organization name
PageID	Web page ID for the page (typically used to determine which dashboards to display). Could also be used to key off of for any additional page-specific content.
Patron	Information related to the currently logged on patron. LoggedOn - Boolean attribute indicating whether or not a patron is logged in. Name - Name of currently logged on patron.
PolarisBranding	Polaris Library Systems logo image
PolarisBranding/ImageURL	URL of the "Powered by Polaris" image logo
PolarisBranding/AltText	ALT text for the '"Powered by Polaris" image logo
PowerPAC	Root tag for document

Node	*Description*
PrimaryNavigation	List of main tabs options in header. SelectedID - ID of selected tab SelectedPosition - Position of selected tab
PrimaryNavigation/HasSubOptions	Whether a given main menu option has sub-menu options. Allows for different styling of main menu options that have sub-menu options. Valid values: **True** or **False**
PrimaryNavigation/MenuDownArrow	*New in 4.1*. URL of down arrow image placed next to main menu options in default PowerPAC theme.
PrimaryNavigation/Option	Main tab option in header. ID - ID of main tab option Selected - Boolean indicating whether this is the currently selected option
PrimaryNavigation/Option/Label	Text label for option
PrimaryNavigation/Option/URL	URL for option link
PrimaryNavigation/Option/UD_*	User-defined name value pairs as specified in HeaderData.xml. Any node with a prefix of UD_ in a <PrimaryNavigation/Option> node will be included.
SecondaryNavigation	List of sub-menu options in header. SelectedID - ID of selected option SelectedPosition - Position of selected option
SecondaryNavigation/Option	Sub-option in header. ID - ID of sub-option Selected - Boolean indicating whether this is the currently selected option
SecondaryNavigation/Option/Label	Text label for option
SecondaryNavigation/Option/URL	URL for option link
SecondaryNavigation/Option/UD_*	User-defined name value pairs as specified in HeaderData.xml. Any node with a prefix of UD_ in a <SecondaryNavigation/Option> node will be included.
SkipToMainContentLabel	*New in 4.1*. Label of the link to skip to main content of page. Typically invisible, but used by screen readers for ADA compliance.
SkipToMainMenuLabel	*New in 4.1*. Label of the link to skip to main menu of page. Typically invisible, but used by screen readers for ADA compliance.
TextSizeLink/URL	*New in 4.1*. URL to change to/from large text mode.
TextSizeLink/Label	*New in 4.1*. Display label for large text mode link.

Node	Description
ThemePath	The Web path to the images and style sheets for the currently active theme. Could be used as a prefix to any custom images contained in that directory.
VirtualReference	Virtual Reference link. Enabled - Boolean attribute indicating whether or not Virtual Reference is enabled.
VirtualReference/URL	URL for Virtual Reference link
VirtualReference/LabelPre	Label text before the hyperlinked portion of link
VirtualReference/LabelLink	Hyperlinked portion of the label
VirtualReference/LabelPost	Label text after the hyperlinked portion of link
WelcomeLabel	The label displayed in the upper left of the header

Add a custom layout to Polaris Administration with SQL

Follow these steps to add your custom layout to Polaris Administration and assign it to an organization.

1. Add the custom layout as an entry in the **Polaris.SA_PowerPAC_Layouts** table in the Polaris database with an SQL insert command. The following command is an example:

    insert into SA_PowerPAC_Layouts (DisplayName,Path,UserDefined) select 'River', 'custom/panels/MyLayout', 1

    River is the layout name as it will be listed in Polaris Administration, **custom/panels/MyLayout** is the custom layout folder, and **1** indicates the layout is user-defined (**0** in this column would indicate Polaris-defined).

    You can place your custom layout folder on any server by defining a full-qualified URL directory path in the **path** column. If the **path** column value in **SA_PowerPAC_Layouts** SQL table begins with **http:** or **https:**, PowerPAC treats that as a fully-qualified domain path. Any other values are assumed to be relative paths within the root of the PowerPAC web application.

2. Highlight the command and click **Execute**.

3. Assign the new layout to one or more branches by following these steps:

    a) In the Polaris Administration Explorer, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.

    b) Double-click **Layout selection**, and select the custom layout from the drop-down list.

    > **Note:**
    > You can specify the dashboard position (left or right) on your pages with the PowerPAc profile **Theme dashboard position**.

    c) Select **File, Save**.

    > **Important:**
    > When you change Polaris PowerPAC settings, you may need to update page caches to see the effects of your changes. Restart the Internet Information Server (IIS) to clear the cache and load any pages that have been changed, or use the reload function in the Polaris Language Editor (WebAdmin). You may also need to close and re-open browsers.

Customizing Pages

Polaris PowerPAC and Polaris PowerPAC Children's Edition are based on ASP.NET programming. All .aspx and .ascx files are directly editable, but you should back up your changes to preserve them from being overwritten when the application is updated and reinstalled. You should be familiar with and have coded ASP.NET in C#.

- For Polaris PowerPAC, the files are located in **Polaris/PowerPAC/library**. See "Polaris PowerPAC Pages" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help for a list of pages and how they are used.
- For Polaris PowerPAC Children's Edition, the files are located in **Polaris/PowerPAC/children**. See "Polaris PowerPAC Children's Edition Pages" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help for a list of pages and how they are used.

You can use a variety of tools, such as server-side includes to insert a page within a page, HTML, Java, or Visual Basic. You can also insert supplementary programs such as a book submission utility.

> **Important:**
> Back up your changes to preserve them from being overwritten when the application is reinstalled or upgraded.

Polaris PowerPAC Accessibility Tags

Polaris PowerPAC pages include tags to improve accessibility in the following ways:

- ALT tags provide text equivalents for inline images.
- "Skip navigation" links are included at the top of each PowerPAC page.
- Table header <TH> tags distinguish column headers for data tables, such as those displayed on patron account pages.

Although these features are not generally visible when the pages are displayed, they improve the experience of patrons who use screen readers. If you customize PowerPAC pages, you will likely want to retain these features.

User-Defined Templates

For Polaris PowerPAC, you can use a template to construct your custom pages. Polaris 4.1 supports the custom page template **/library/userdef/ ud_template.aspx** available in previous versions, but a new custom page template is the preferred template on which to base custom PowerPAC pages. Custom pages based on the new template can reside in any PowerPAC folder, and, unlike those based on the legacy template, the page directive (first line of the custom ASPX page) does not need to be updated whenever PowerPAC is upgraded.

To create a custom PowerPAC page from the 4.1 template, copy **/Custom/ CustomPage-template.aspx** to any file name with an *.aspx extension in any folder within PowerPAC, typically in the **/Custom/** folder. Then add any custom HTML in the commented area of the page.

For customers using legacy (pre-4.1) Polaris themes or custom themes in which the currently selected main and subtabs on the header menu are highlighted, the values for MainTabID and SubTabID in the custom page need to be set to the corresponding IDs from HeaderData.xml. For most situations, these two values can be set within the custom page itself. But if multiple HeaderData.xml configuration files are being used for separate header menu options by branch and different IDs for the same custom page are defined (see "XML Schema for Polaris PowerPAC Page Header" on page 14), those numeric IDs may be passed in as query string parameters to the page.

Example:
MyCustomPage.aspx?MainTabID=2&SubTabID=12

Note:
Certain pages in the **library\userdef** directory are intended for direct editing so that you can easily insert your library's custom information. These include **ud_events.ascx** and **ud_policies.ascx**. You can add upcoming events and library policies to these pages just by inserting the appropriate text and formatting your text with basic HTML tags. See "Add text to the Events page" and "Add text to the Policies page" in the *Polaris Public Access Administration Guide* or the equivalent topics in staff client online Help.

Adding Web Parts to Custom Pages

If you create a custom page from the template, you may want to set the PageID value so that the appropriate Web parts are displayed in the dashboard. For a list of PageID values, see "Standard PAC Pages Reference" in the *Polaris Public Access Administration Guide* or the equivalent topic in staff client online Help.

Adding Menu and Submenu Options

You can add menu and submenu options (tabs) and provide links for your custom options in the file **HeaderData.xml**, located in **Polaris\[version]\PowerPAC**. See "XML Schema for Polaris PowerPAC Page Header" on page 14. Each tab is identified by a unique number in the TabID field. Polaris-provided tabs are identified by single-digit numbers. Start at a higher number for custom tabs, such as 100, in case Polaris Library Systems adds more default tabs in later versions.

> **Important:**
> Copy **HeaderData.xml** to the custom folder, then make your changes. This protects your changes from being overwritten at reinstallation or upgrade.

Suppressing Context

Standard query parameters are appended to most PowerPAC URLS. They identify the relevant organization and the appropriate language file. An example is shown below.

For each of the nodes in the primary and secondary navigation links defined in **HeaderData.xml**, you can specify a **SuppressCTX** node for custom tabs and secondary menu options. Set **SuppressCTX** to **Y** for any custom tab or menu option in the header for which the link is going to some page other than a PowerPAC page. For example, a library adds additional custom tabs for **Visual Search** and **Digital Catalog**, applications outside Polaris PowerPAC that the library wants patrons to be able to use. By including the node **<SuppressCTX>Y</SuppressCTX>** in the tab definition, the ctx=9.9999.9.9.9 query parameter values will not be automatically appended to the link.

Customizing Search By and Sort By Options

You can edit PowerPAC **Search by** and **Sort by** options as described below. If you choose to remove options, be sure to coordinate your default settings in the PAC profile **Search settings defaults** if appropriate.

Search By Options

PowerPAC users can select a search access point in the **Search by** drop-down list.
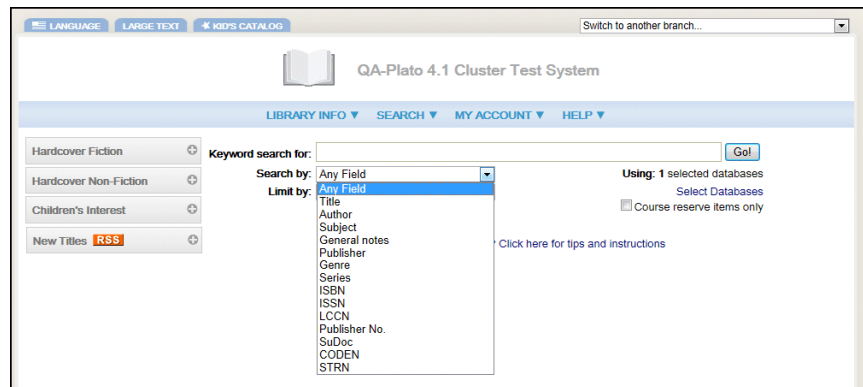
The values for the fields in the **Search by** drop-down lists are contained in a customizable XML configuration file. To edit the list of fields, copy **/App_Data/SearchByOptions.xml** and place your copy in **/Custom/App_Data/SearchByOptions.xml**.

You can delete nodes in the file, and you can change the order. Your custom file must contain at least one node. As this is a system-defined list of options, the addition of other search options is not supported.

> **Note:**
> Perform a PowerPAC reload or IISRESET after creating the custom version of this file.

Related Information

You can edit and translate labels for **Search by** options using Polaris Language Editor (WebAdmin). **Search by** string IDs begin with PACML_SEARCHBARS.

Sort By Options

When PowerPAC search results are returned, the user can select a Sort option for the results.
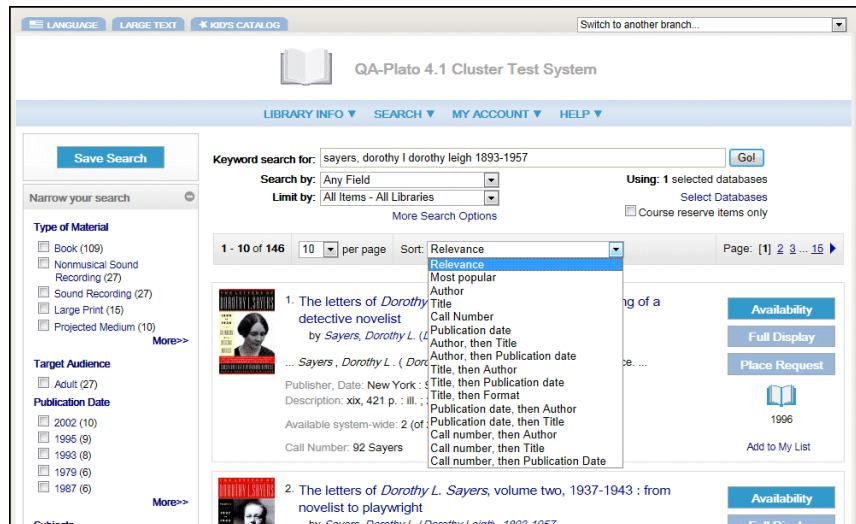
Like the values for the fields in the **Search by** drop-down lists, the values for the fields in the **Sort** drop-down lists are contained in a customizable XML configuration file. To edit the list of fields, copy **/App_Data/SortByOptions.xml** and place your copy in **/Custom/App_Data/SortByOptions.xml**.

Since sort options are different for searches containing results from the local database only and searches that include at least one remote database, separate nodes control these options: **<LocalOnly>** and **<Remote>**.

You can delete nodes in the file, and you can change the order. Your custom file must contain at least one node. As this is a system-defined list of options, the addition of other sort options is not supported.

> **Note:**
> Perform a PowerPAC reload or IISRESET after creating the custom version of this file.

Related Information

You can edit and translate labels for **Sort** options using Polaris Language Editor (WebAdmin). **Sort** string IDs begin with PACML_SORT.

Customizing PowerPAC Help Links

In addition to the standard set of help pages supplied with PowerPAC, custom pages and links may be added and the existing list of default pages can be modified and rearranged.

Important:
After completing your changes, use the Reload tool in Polaris Language Editor (WebAdmin) to see your changes in PowerPAC.

The list of help page links is managed in the file **HeaderData.xml**, which resides in the top level of the PowerPAC web folder. Edits can be made directly to this file or a copy of the file can be placed in the PowerPAC **Custom** folder. The advantage of creating a copy in the custom folder is that any changes you make to **HeaderData.xml** will not have to be reapplied whenever the Polaris system is upgraded.

Each help file link is a <SubTab> node under the <MainTab> identified as TabID 99. The illustration shows an example:

```xml
<MainTab>
   <TabID>99</TabID>
   <Name>Help</Name>
   <URL>help/default.aspx?Header=1</URL>
   <LS_Name>PACML_HEADER_1008</LS_Name>
   <SA_Enable>PACPROF_HTML_NAV_PACHELP</SA_Enable>
   <SubTab>
      <TabID>99</TabID>
      <SubTabID>1</SubTabID>
      <Name>Getting Started</Name>
      <URL>help/content/{LANG_ID}/overview.htm</URL>
      <LS_Name>PACML_HELP_INTRO</LS_Name>
      <SA_Enable></SA_Enable>
      <SuppressCTX>Y</SuppressCTX>
   </SubTab>
   <SubTab>
      <TabID>99</TabID>
      <SubTabID>2</SubTabID>
      <Name>Quick Search</Name>
      <URL>help/content/{LANG_ID}/quicksearch.htm</URL>
```

Removing Help Links

To remove any Polaris-supplied help links, simply remove the <SubTab> node for that link from HeaderData.xml.

Rearranging the Order of Help Links

The <SubTab> nodes may be rearranged within the <MainTab> parent node. The values for <SubTabID> in each node do not need to be reassigned when reordering the nodes. The list of help links will display in the order that they are listed in the **HeaderData.xml** file.

Adding Help Links

To create additional help links, add a new <SubTab> node within the <MainTab> node (<TabID> of 99). The newly added node can be placed anywhere within the list of other <SubTab> nodes for <MainTab> 99.

The newly added node should contain the following:

- 'TabID' of 99. (<TabID>99</TabID>)

- A unique 'SubTabID' that is not currently being used. (<SubTabID>1000</SubTabID>)

- 'Name' to identify the link. This will be used as the link's label if an <LS_Name> node is not defined. (<Name>Our Custom Help Link</Name>)

- 'URL' of the link to the help file content. (<URL>custom/help/ourhelp.htm</URL>)

- To create a multi-lingual label for the custom help link, add a custom string in Web Admin and include that string's mnemonic in an 'LS_Name' node. This is optional. (<LS_Name>CUSTOM_HELP_LINK_1</LS_Name>)

- Include a 'SuppressCTX' node with a value of 'Y' to indicate that Polaris-specific URL data should not be included in the URL Link. (<SuppressCTX>Y</SuppressCTX>)

External Log-On to PAC Patron Account

You can allow patrons to log on to the main patron account page in the PAC from an external page, bypassing the Polaris PowerPAC main page. The POST method requires a user name or barcode and the patron's password. (If there is a problem with these entries, a PowerPAC error message is displayed and the patron is returned to the normal PowerPAC log-on screen.)

The external log-on uses the page **logon_ext.aspx**. The two form values supported are **userid**, which can be either the patron account barcode or user name, and **password**, which is the patron's password. The following example HTML page shows how to include a log-on feature on an external page:

```html
<html>
    <body>
        <form method="post" action="http://mylibrary.com/polaris/logon_ext.aspx">
            Barcode or Username:<br />
            <input type="text" id="userid" name="userid"/><br />
            Password:<br />
            <input type="password" id="password" name="password"/><br />
            <input type="submit" value="Log In" />
        </form>
    </body>
</html>
```

Customizing Polaris Mobile PAC

Polaris® Mobile PAC™ is the Web-based public access catalog that has been optimized for mobile devices, providing simplified access to most of the features available in Polaris® PowerPAC™. As with Polaris PowerPAC customization, you need some knowledge of HTML for some techniques; others require more advanced programming skills. Other PAC customization methods also apply to Mobile PAC:

- Polaris Administration settings control many aspects of Mobile PAC function and appearance. For more information about these settings, see the *Polaris Public Access Administration Guide* or the equivalent topics in staff client online Help.

- You can edit most page text and messages using Polaris Language Editor (WebAdmin). Select **Mobile PAC** in the Language Editor **Product** list. See the *Polaris Language Editor Guide* or Language Editor online Help for more information.

- Polaris Library Systems offers custom services for libraries that want to customize Mobile PAC beyond Polaris Administration or Polaris Language Editor settings, but do not have the staff resources to do so. Contact a Polaris Customer Account Manager for more information.

    Important:
    To see the effects of any changes, you may need to update page caches. Restart the Internet Information Server (IIS) to clear the cache and load any pages that have been changed, or use the Reload feature in the Polaris Language Editor (WebAdmin).

This unit covers the following topics:

Protecting Your Changes

Mobile PAC server software includes a **Custom** folder where you can preserve most customizations from being overwritten at upgrade. You should back up the **Custom** folder as a precaution, but you will not have to recreate your changes for each upgrade.

In general, the folder structure in the **Custom** folder mirrors the Mobile PAC folder structure. The Mobile PAC application checks for the existence of specific files in the **Custom** folder to be used as overrides for the default versions of those files. The illustration shows the **Custom** folder structure as delivered with Mobile PAC.
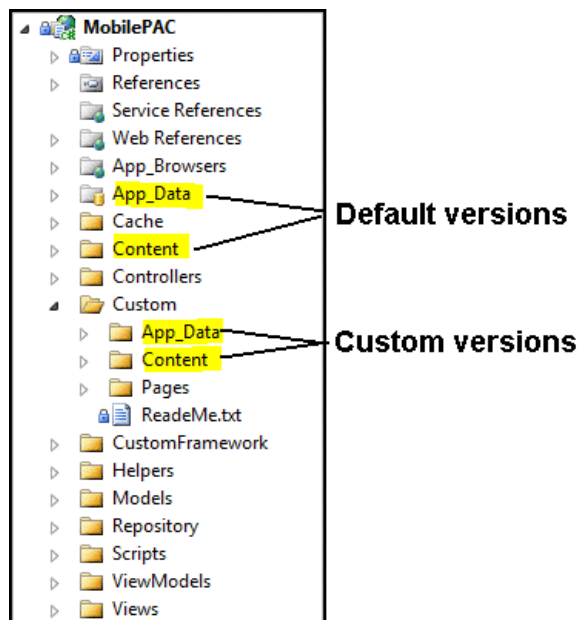
The following topics describe some specific customizations you can make:

- "Search By and Sort By Options - Mobile PAC" on page 35
- "Custom Links" on page 37
- "Pages of Custom Links" on page 37
- "Other Custom Pages" on page 39
- "Custom Themes - Mobile PAC" on page 41

Search By and Sort By Options - Mobile PAC

Search By Options

The list of options available in the **Search by** drop-down list can be modified.
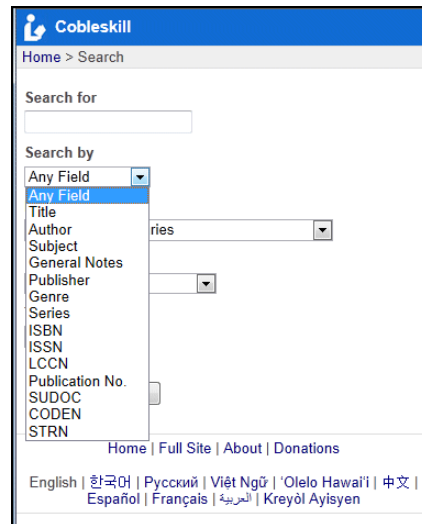
The list is defined in the file **/App_Data/SearchByOptions.xml**. To modify the list:

1. Copy **/App_Data/SearchByOptions.xml** to **/Custom/App_Data/SearchByOptions.xml.**

2. Working in **Custom/App_Data/SearchByOptions.xml,** remove any of the **<SearchByOption>** XML nodes that you do not want to display in the drop-down list.

3. Perform a reload of the Mobile PAC Web site in Polaris Language Editor (WebAdmin), or perform an IISRESET.

Sort By Options

The list of **Sort by** options can also be modified.
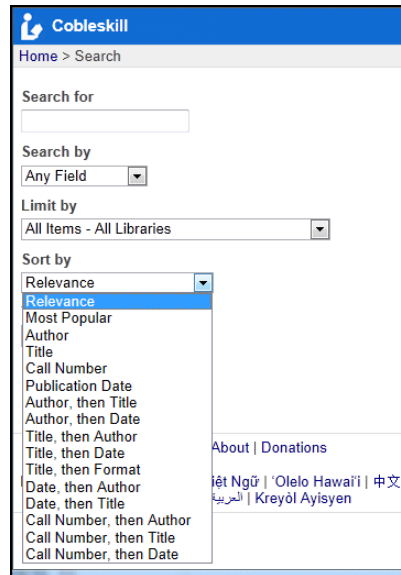
The list is defined in the file **/App_Data/SortByOptions.xml**. To modify the list:

1. Copy **/App_Data/SortByOptions.xml** to **/Custom/App_Data/SortByOptions.xml.**

2. Working in **Custom/App_Data/SortByOptions.xml,** remove any of the **<SortByOption>** XML nodes that you do not want to display in the drop-down list.

3. Perform a reload of the Mobile PAC Web site in Polaris Language Editor (WebAdmin), or perform an IISRESET.

Custom Links

Custom links can be added to the Mobile PAC Home, Hours & Contact, and New & Popular pages. They can be displayed below or above the Polaris-defined links. The illustration shows examples on the Home page.

To create custom links, follow these general steps:

1. Copy **/CustomFramework/Links-template.xml** to **/Custom/Links.xml**.

2. Working in **Links.xml**, define the custom links.

   The template file **/Custom/Links-template.xml** includes detailed step-by-step instructions for setting up a **/Custom/Links.xml file**.

3. Perform a reload of the Mobile PAC Web site in Polaris Language Editor (WebAdmin), or perform an IISRESET.

Pages of Custom Links

Polaris also provides a template to create a custom page of links:

1. Copy and rename **/CustomFramework/PageLinks-template.aspx** to a file in the **/Custom/Pages/** folder.

   > **Example:**
   > **/Custom/Pages/BookClubs.aspx**

2. Edit the custom page, changing the **{title}** and **{breadcrumb}** strings to the display title for your custom page.

3. Follow the examples in the template for creating links in the custom section of the page.

```
<!------ CUSTOM HTML BEGINS HERE ------>

    <div class="menu-option-level-1">
        <a href="http://polarislibrary.com">{Sample Link 1}</a>
    </div>

    <div class="menu-option-level-1">
        <a href="http://polarislibrary.com">{Sample Link 2}</a>
    </div>

    <div class="menu-option-level-2">
        <a href="http://polarislibrary.com">{Sample Link 3 with arrow}</a>
    </div>

    <div class="menu-option-level-2">
        <a href="http://polarislibrary.com">{Sample Link 4 with arrow}</a>
    </div>

<!------ CUSTOM HTML ENDS HERE -------->
```

Custom Links in the Footer

You can add your own links to the Mobile PAC page footer using standard html markup. *However, you must re-do your edit each time you upgrade.*

To add links to the footer, edit **MobilePAC/Views/Shared/Site.Master** in the section of code shown below:

```
<div id="footer">

    <%= Html.ActionLink(SessionCache.ShowText("MP_FOOTER_HOME"), "Index", "Home") %> |

    <%= Html.ActionLink(SessionCache.ShowText("MP_FOOTER_FULLSITE"), "Index", "FullSite") %> |

    <%= Html.ActionLink(SessionCache.ShowText("MP_FOOTER_ABOUT"), "Index", "About") %>
    <% if (SessionCache.Org.IsDonationsEnabled == true)
        { %>|
        <%= Html.ActionLink(SessionCache.ShowText("MP_FOOTER_DONATION"), "ProcessDonation", "FinesAndFees")%>
     <%} %>
```
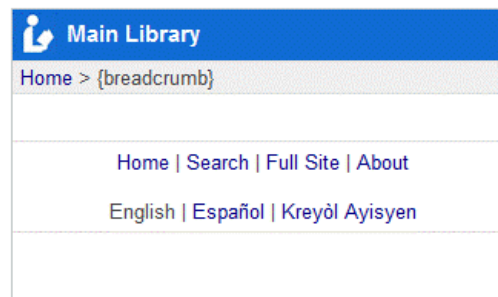
Other Custom Pages

A template for creating other custom Mobile PAC pages is located in the **CustomFramework/Templates** folder. The template can be used as a starting point for custom pages that include standard Mobile PAC headers and footers and a section for custom HTML code. To create a custom page in Mobile PAC:

1. Copy **/CustomFramework/Templates/Page-template.aspx** to the **/Custom/Pages** folder.

2. Rename the copied file to the desired file name. The file must have an **.aspx** file extension.

    Example:
    /Custom/Pages/CommunityLinks.aspx

    Without making any changes, the custom page will look like the illustration:

3. Edit the custom page, changing the **{title}** and **{breadcrumb}** strings to the display title for your custom page.

4. Add your custom HTML where noted:

```
1    <%@ Page Language="C#" MasterPageFile="~/CustomFramework/Custom.Master" %>
2    <%@ Import Namespace="Polaris.MobilePAC.Cache" %>
3
4    <asp:Content ContentPlaceHolderID="TitleContent" runat="server">
5        {title}
6    </asp:Content>
7
8    <asp:Content ContentPlaceHolderID="BreadcrumbsContent" runat="server">
9
10       <div id="breadcrumbs">
11           <a href="<%# AppCache.SiteRootUrl %>"><%# CacheUtil.GetSessionCache(HttpContext.Current).ShowText("MP_CRUMBS_HOME") %></a> &gt;
12           {breadcrumb}
13       </div>
14
15   </asp:Content>
16   Add
17   <asp:Content ContentPlaceHolderID="MainContent" runat="server">
18
19       <div id="main">
20
21   <!------ CUSTOM HTML BEGINS HERE ------>
22
23
24   <!------ CUSTOM HTML ENDS HERE -------->
25
26       </div>
27
28   </asp:Content>
```

Custom Themes - Mobile PAC

Mobile PAC allows multiple Polaris-defined and custom themes, but includes one Polaris-defined, default theme called **Classic**. Polaris theme files are contained in the **Content** folder.
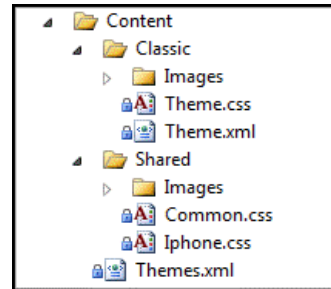
Custom themes should be placed in the **Custom/Content** folder. Any theme folders created in the **/Custom/Content/** folder will be available to users of Mobile PAC. If there are multiple custom themes, a drop-down list of themes will be available to the user in the Mobile PAC **Preferences** page.

Each theme (Polaris-defined and custom) inherits most of its styling and images from a shared folder: **Content/Shared**. This structure allows most styling and images such as format icons to be shared among themes, so that any changes between versions of Polaris can be automatically inherited by all themes. For instance, if Polaris adds a new icon for a Type of Material format, because that image is shared by all themes, it is not necessary to update that image in each of the individual theme folders.

Any CSS style information included in a specific theme supplies only the values that need to be overridden for that theme, not *every* style defined in the common files in **Content/Shared**.

Since custom themes are created in the **Custom** folder, the following steps should only have to be done once, as subsequent upgrades of Polaris Mobile PAC will not overwrite files in the **Custom** folder.

> **Important:**
> In Polaris versions earlier than 4.0.408, in the file **/MobilePAC/Content/Themes.xml**, you must edit the Classic theme node to Enabled = **False** to use your custom theme.
> <xml version="1.0" encoding="utf-8" ?>
> <Themes>
> <Theme Folder="Classic" Enabled="**False**" />
> </Themes>
> The node must be edited every time there is an upgrade.
>
> In Polaris 4.0.408 and later versions, the edit is no longer necessary. A new node in the Themes.xml file, **SuppressAllIfCustomDefined**, has a default value of True. If at least one custom theme is defined in the Custom folder, the standard theme cannot be viewed in Mobile PAC.

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Create a custom theme for Mobile PAC

Follow these steps to create a custom theme for Mobile PAC:

1. Place a copy of the **/Content/Classic** folder and its contents in the **/Custom/Content** folder.

2. Rename your copied folder to your own theme name.

3. Edit the **Theme.xml** file in your new custom theme folder.

```
Theme.xml  X
    <?xml version="1.0" encoding="utf-8" ?>
  <Theme>
        <Name LanguageID="1033">Classic</Name>
        <FormatIconsFolder>Content/Shared/Images/Formats/</FormatIconsFolder>
        <ImagesFolder>Content/Shared/Images</ImagesFolder>
  </Theme>
```

4. Working in your **Theme.xml** file, change the **Name** node to the name of your new custom theme.

> **Example:**
> **<Name LanguageID="1033">Old English</Name>**

If you have a multilingual PAC, you can define multilingual names for your theme:

> **Example:**
> **<Name LanguageID="1033">Old English</Name>**
> **<Name LanguageID="3082">Inglés Antiguo</Name>**
> **<Name LanguageID="3084">vieil anglais</Name>**

For additional language labels, add additional nodes using the following LanguageID values:

1033 - English

1042 - Korean

1049 - Russian

1066 - Vietnamese

1141 - Hawaiian

2052 - Chinese

3082 - Spanish

3084 - French

12289 - Arabic

15372 - Haitian Creole

5. If you do not need to override any of the Mobile PAC images (format icons or other images), leave the **<formatIconsFolder>** and **<imagesFolder>** nodes pointing to the shared folder; you do not have to make copies of all of those image files in your custom theme.

If you do wish to change format icons or other images, create folders in your custom theme for those image files, and set the **<formatIconsFolder>** and **<imagesFolder>** nodes to point to those new folders in your custom theme.

6. Edit the **Theme.css** file in your custom folder to begin your customization of your theme.

The only styles that you need to include in this file are styles you want to override from the shared theme. You can view all of the shared common styles that can be overridden in **/Content/Shared/Common.css**.

7. Perform a reload of the Mobile PAC Web site in Polaris Language Editor (WebAdmin), or perform an IISRESET, after you initially create a new custom theme.

Any subsequent changes to the **Theme.css** file or addition of image files do not require an application reload to see the changes.

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