Polaris® Community Profiles Guide

POLARIS
LIBRARY SYSTEMS
Count on us.

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Send any comments or questions about this guide to your Site Manager or to the Technical Communications Group: **TechComm@polarislibrary.com**.

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Contents

About This Guide

This guide contains information about setting up and maintaining Polaris Community Profiles functions. It provides instructions for library staff and administrators, as well as instructions for designated community representatives to maintain community records through their patron account in Polaris PowerPAC.

Polaris Community Profiles Topics

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

Getting Started with Polaris Community Profiles	Overview of Community Profiles features and functions.
Community Records in the Staff Client	Creating and editing organization and event records in the staff client; printing community records and reports.
Importing Events for Community Profiles	Importing library events information from Evanced Solutions or Plymouth Rocket - EventKeeper to create event records in Polaris.
Community Setup for PAC Display	Setting community information search options for PAC; configuring the PAC search results display; editing organization and event records in Polaris PowerPAC.
Editing Community Records in PAC	Editing Community Profiles in the PAC. Designated community representatives use these instructions to edit their organizations' Community Profiles. (These instructions may need to be revised depending on the library's PAC customization.)
Using ContentXChange	Incorporating features from the library or the organization's library record into the organization's own Web page; creating a simple organization page for Web searches.
CQL Access Points for Community Information	Reference list of the CQL (Common Query Language) access points you can use to construct custom search filters for Polaris PowerPAC community information searches.
Community Profiles Reference	Reference list of Community profiles as they appear in Polaris Administration.

Related Resources

- Polaris Administration Guides
    - *Polaris Public Access Administration Guide* - Contains information about setting up and customizing Polaris® PowerPAC™, Polaris® PowerPAC™ Children's Edition, and Polaris® Mobile PAC™.
- *Polaris Cataloging Guide*

  Contains information about creating and importing MARC records; searching for cataloging records; creating record sets; and creating Promotion records. It also contains information on Polaris Administration settings that affect Cataloging.
- *Polaris Basics Guide*

  Contains basic Polaris information, including procedures to start Polaris tasks and find, create, and display records. This guide also discusses how to use Polaris documentation, including online Help.
- *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.

Getting Started with Polaris Community Profiles

With Polaris Community Profiles, libraries can link, centralize, and promote resources by making community information easily accessible from Polaris PowerPAC or Mobile PAC. When combined with ContentXChange, Community Profiles can further extend the library's services by distributing targeted relevant information from the library to community Web sites.

Public libraries can use Community Profiles to distribute community information, promote and share resources, and advance local economic and educational initiatives. Academic libraries can use Community Profiles to provide a network for disseminating academic expertise within the university itself–encouraging communications among faculty in diverse fields–and linking that expertise with the greater community. The academic community can also benefit from an increased awareness of the resources, programs, and organizations in the greater community.

Polaris Community Profiles and ContentXChange are licensed separately from the Polaris ILS. Only one instance of Polaris is required because community records are stored in the same database as bibliographic records. Community records are stored in MARC Community Information (CI) Record format in separate tables from MARC bibliographic records. In addition to the fields defined in the MARC CI format, Polaris uses other fields for organizations and events. For more information about the MARC CI format, see:

http://www.loc.gov/marc/community/

Library staff members create community records using the Community Record workform in the Polaris Staff Client. Once a library staff member creates the community record with a minimum of three required fields, and designates an organizational representative, either the librarian or the organizational representative (or both) can take on the responsibility for modifying the record.

Staff members or community representatives specify the type of community record (organization or club etc.), and enter information about the organization, such as the address, target group, languages spoken, programs, and events. In addition, a visual "content carousel" of titles relevant to the community organization can be displayed in the Polaris PAC. This content carousel is derived from the first 50 titles in a title list or saved search that the organization representative shares, or from a record set that the staff member selects on the Community Record workform.

With Feature it, a separately licensed product, organizations can promote a set of resources relevant to a specific search. For more information on Feature It, see Polaris online Help.

With the optional ContentXChange feature, community organizations can incorporate features from their community record (content carousel, calendar of events, content drawers, library catalog search box, Ask-a-Librarian button, and a map) into their organization's Web page. If the organization does not have a Web presence, a librarian can help the organization create a personalized Web page using ContentXChange. The organization can submit the URL to Google™, Yahoo!®, and Bing™ for indexing so that it is searchable and accessible through the Web.

ContentXChange Installation

ContentXChange is an optional Web component of Polaris server software and must be selected when Polaris Web server software is installed. After installation, select the appropriate server in Polaris Administration and, in the server's PAC parameter **URL of the ContentXChange root**, specify the URL of the server where ContentXChange is installed:

http://<servername>/ContentXChange/

The location is typically your PAC server, and if so, you can simply copy the servername portion of the URL from the parameter **URL of the PAC's root**. For more information, see "Setting Web Server Parameters" in the *Polaris Administration Guide 4.1R2*.

Community Records in the Staff Client

Library staff members use a labeled editor in the Polaris staff client to create, edit, and delete community records. Community records are stored as MARC records in the same Polaris database as the bibliographic information, but in a separate set of tables. MARC community records are distinguished from all other types of MARC records by the presence of code q (Community information) in Leader/06, Type of record.

Tip:
If the library already has community records in MARC format, they can be imported by Polaris Conversion Services. The ability to import community records is not included in the Polaris staff client for release 4.1.

Note:
The full MARC 21 Format for Community Data is available online, including a concise version and a simple field list at:

www.loc.gov/marc/

If the library has a license for both Community Profiles and Feature It, staff members can use promotion records in the staff client to feature community organizations and events. When community records are featured, they appear when PAC users enter specific search terms. The promotion record specifies the library resources (bibliographic records, community records, or Web sites) to feature and the conditions under which the resources will display. For more information, see “Managing Promotions” in the *Polaris Cataloging Guide 4.1R2* or the equivalent topic in Polaris online Help.

In the Polaris staff client, the Community Record stores and displays information about the community organization. Event records, created automatically when events are added to a Community Record, store and display information about community events, programs, or services.

Types of Community Organization Records

- **Individual** - An individual with a particular expertise, such as a teacher, interpreter, storyteller, or civic leader.
- **Organization or Club** - An organization or any group, such as an association, club, or agency.
- **Other** - Any community record that does not belong to these types, such as a planetarium on a university campus.
- **Sponsor or Donor** - An individual or group sponsor or donor.

Types of Community Event Records

- **Event** - A scheduled social activity, such as a lecture, play, concert series, sporting contest, festival, annual celebration, or regularly scheduled meeting. Event records can be created manually by entering information in the Community Record workform, or they can be imported from Evanced Solutions or Plymouth Rocket. Depending on how the events are labeled, they may be a program/service or an event.
- **Program or service** - An offering or activity of a group or institution which carries out the purposes of that group or institution, such as driver education, day care placement, toy collection drive, or blood bank.

The library staff member can create a "stub" community record with a minimum of three required fields: organization name, organization description, and primary address. Or, the staff member can create a fuller record. After creating and saving a community record in the Polaris staff client, the staff member designates an organization representative by selecting a registered patron. Then, that patron can edit the community record using a Web-based editor in the PAC.

See the following topics:

- "Creating or Editing a Community Record in the Staff Client" on page 7
- "Printing Community Records in the Staff Client" on page 25
- "Community Reports & Notice" on page 31

Creating or Editing a Community Record in the Staff Client

Staff members use the tabbed Community Record workform to create or edit community records in Polaris Cataloging. The workform consists of the following tabbed pages: Profile, More info, Events, Social, Services, Subjects, Organization Rep, Preview, and Statistics. When an event is associated with a community record, an event record is created that is linked to that community record.

Depending on your library's preferences, the staff member can create a minimal community record with only three required fields (organization name, organization description, and primary address) and then designate an organization representative who can finish the record via the PAC. Or, the staff member can create a fuller community record before designating the organization representative.

Note:
Community records are governed by the following permissions: **Community records: Access, Create, Modify, Delete.**

See the following topics:

- "Search for a community record in the staff client" on page 8
- "Create a new community record in the staff client" on page 9
- "Enter basic community information in the staff client" on page 10
- "Enter more community information in the staff client" on page 12
- "Enter a community event in the staff client" on page 13
- "Enter community social links in the staff client" on page 16
- "Enter community services in the staff client" on page 18
- "Enter community subjects in the staff client" on page 19
- "Designate a community representative" on page 20
- "Preview the community record from the staff client" on page 23

Search for a community record in the staff client

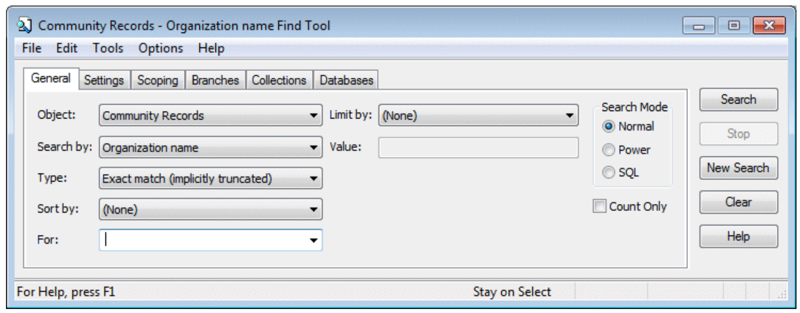
Follow these steps to find existing community records in the Polaris Staff Client.

Tip:
For more information, see "Finding Polaris Records" in the *Polaris Basics Guide 4.1R2*.

1. Select **Cataloging, Community records**.

   The Find Tool appears with **Community Records** selected in the **Object** box.

   Note:
   You can search and limit by the following criteria in the Find Tool: **Address and contact person**, **All keyword fields**, **Control number**, **Display in PAC - Yes/No** (Limit by only), **Event expiration date**, **Event name**, **Event start date**, **Language**, **Notes**, **Organization name**, **Postal code**, **Record owner**, **Record status**, **Services available**, **Subject**, and **Type of organization.**



2. Select the access point in the **Search by** box.
3. Select the search type in the **Type** box.
4. To sort the search results, select an option in the **Sort by** box.

   Note:
   You can sort Community Records in the Find Tool results list by the following options: **Control Number**, **Event Date** (**Earliest first**), **Event Date (latest first), Event Expiration Date**, **Event Name**, **Organization Name**, **Postal Code**, **Relevance**, or **Type of Organization.**

5. To filter the results list, select an option in the **Limit by** box, and select or type a value in the **Value** box.
6. Type a search term in the **For** box, and click **Search**.

   The community or event records appear in the results list.

7. Double-click the record to open it in the Community Record workform.

Create a new community record in the staff client

Follow these steps to create a new community record in the Polaris staff client.

1. Create a new community record using one of the following methods:
   - Select **File, New**, press **CTRL+N**, or click from the Polaris Shortcut Bar to access the New dialog box. Then, select **Cataloging Objects**, and select **Community Record**.
   - Open an existing record in the Community Record workform, select **File, New**, and select **Copy workform** to copy all the information in the workform and give it a different name, or **Clear workform** to start with a blank workform.
2. Enter information in the Community Record workform using the instructions in the following sections:
   - "Enter basic community information in the staff client" on page 10
   - "Enter more community information in the staff client" on page 12
   - "Enter a community event in the staff client" on page 13
   - "Enter community social links in the staff client" on page 16
   - "Enter community services in the staff client" on page 18
   - "Enter community subjects in the staff client" on page 19
   - "Designate a community representative" on page 20
3. Preview the PAC display of the community record. See "Preview the community record from the staff client" on page 23.
4. Save the community record.

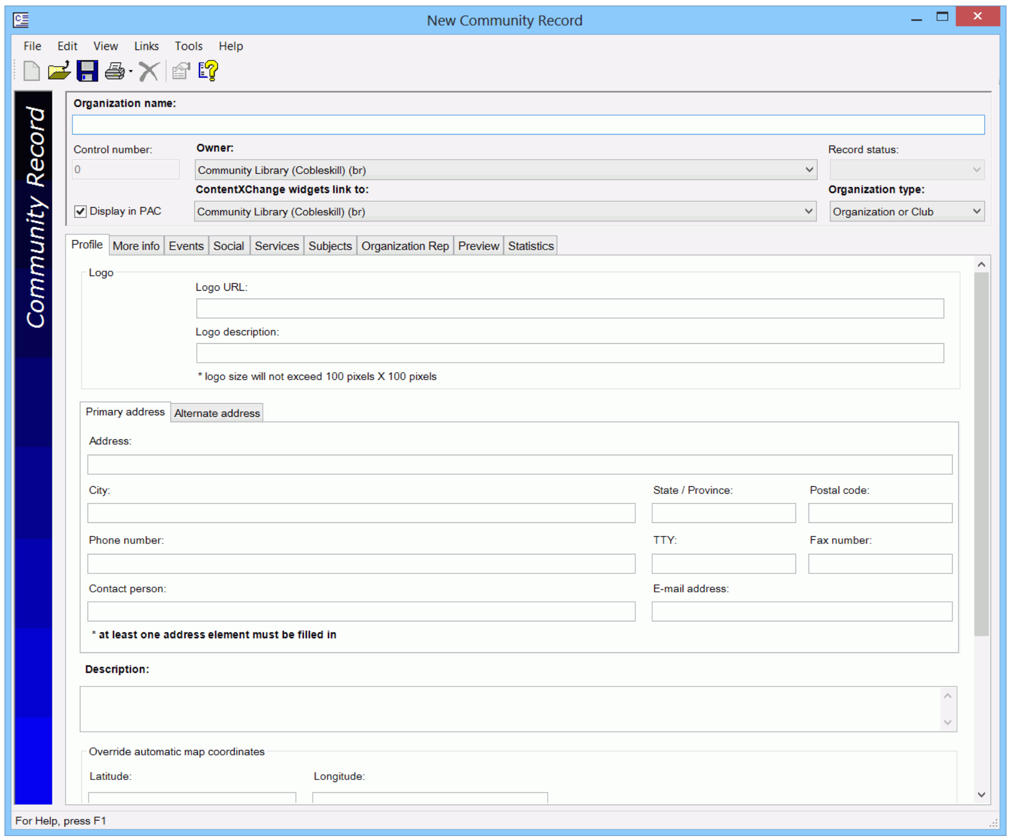
1-2-3

Enter basic community information in the staff client

Follow these steps to enter or edit the basic information on the Profile tabbed page of the Community Record workform.

Note:
The Community Record workform must have information in the **Organization name**, **Primary address**, and **Description** fields before it can be saved.

1. Open the Community Record workform. See "Search for a community record in the staff client" on page 8 or "Create a new community record in the staff client" on page 9.



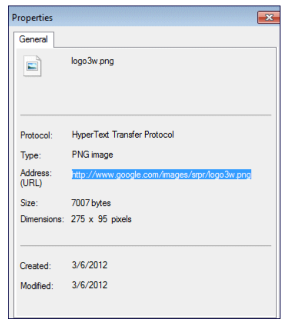
2. To change the library that owns the record, select it in the **Owner** box.
3. (Optional) If your library offers ContentXChange, select the system or branch in the **ContentXChange widgets link to:** box. You can select a library level organization, but the setting defaults to the system level since the PAC connection is either at the system or branch level. For more information, see "Using ContentXChange" on page 122.

Note:
If a branch is selected, the PAC will open to that branch when someone clicks a ContentXChange link on an organization Web page. If you change the branch, existing ContentXChange widgets will continue to work at the System level. If you want the older widgets to use the branch setting, these widgets will need to be recreated on the ContentXChange tab in PAC, and the new iframe embed code should be used to replace the old code on the web site where the widget is being used.

4. (Required) Type the community organization's name in the **Organization name** box.

5. To display the community record in the PAC, select **Display in PAC**.

6. On the Profile tabbed page, enter the URL for the organization's graphic in the **Logo URL** box. The URL must point to an image file ending in .png, .jpg, gif etc. You cannot upload a logo from your desktop; it must be on a Web page. If your organization's logo is on a Web page, select it, right-click and select Properties to see the URL. Then, copy and paste the URL into the **Logo URL** box.



Tip:
The logo size will not exceed 100 x 100 pixels; if the logo is larger, it will be resized automatically.

7. Enter a description for the logo in the **Logo Description** box.

8. On the Primary address subtab, enter the organization's primary address in the **Address**, **City**, **State/Province** and **Postal Code** boxes. At least one address element is required.

Tip:
The Map It feature uses this address to create the map showing the location of the organization in the PAC. To see the map, you must first save and close the record. Then open it again, select the Preview tab, and expand the Map it section. If the location is not correct, you can override the automatic coordinates by typing them in the Latitude and Longitude boxes. Click the *What's this* link to get the coordinates.

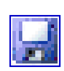
9. Enter the primary contact information in the **Phone number**, **Fax**, **Contact Person**, and **E-mail address** boxes.

10. If the organization has another address, click the Alternate address subtab, and enter the alternate address and contact information.

11. If the map showing the organization's location is not correct, click the **What's this** link to find the coordinates by entering the address. Then, manually enter the organization's coordinates in the **Latitude** and **Longitude** boxes.

12. (Required) Type a description in the **Description** box.

13. Type the organization's hours in the **Hours** box. To enter more information, start typing in the next blank line.

14. Select **File**, **Save**, click  or press **Ctrl+S**.

Viewing community information in the PAC

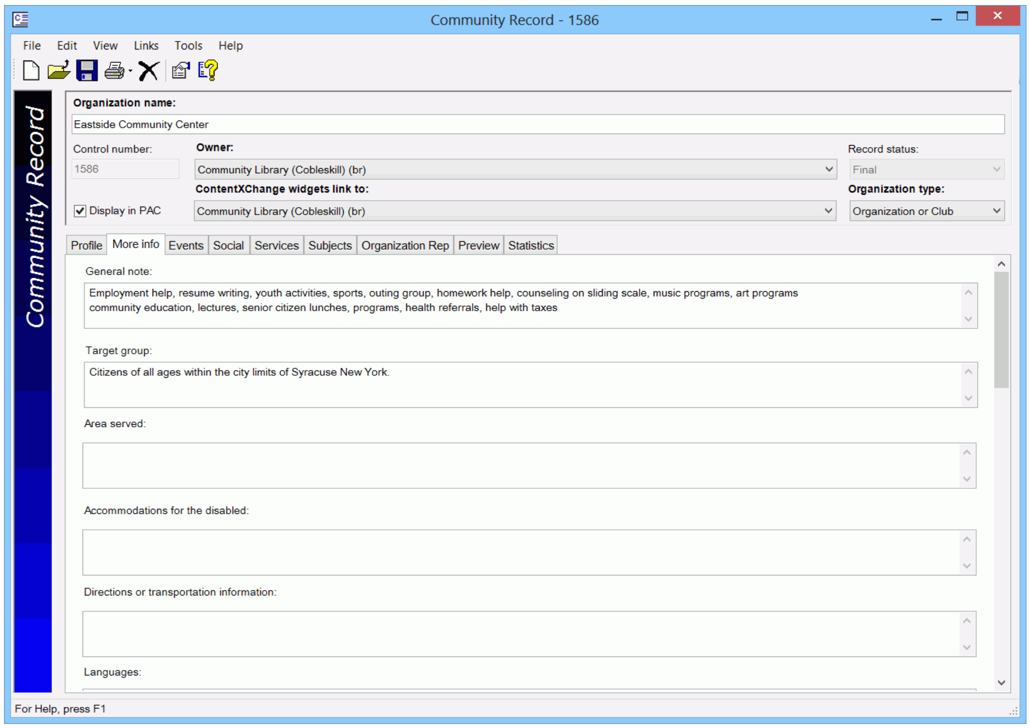
- "Preview the community record from the staff client" on page 23.
- "Example of basic community information displayed in the PAC" on page 109
- "Example of community map displayed in the PAC" on page 109

Enter more community information in the staff client

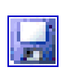
Follow these steps to enter or edit additional information on the **More info** tabbed page of the Community Record workform.

1. Open the Community Record workform.
2. Select the **More info** tab.

   The More info tabbed page is displayed.



3. Type additional information regarding the community organization in the following fields (as applicable): **General note**, **Target group**, **Area served**, **Accommodations for the disabled**, **Directions or transportation information**, **Languages**, **Volunteers note**, **Who is eligible to use services**, **Fees Affiliations**, **Licenses or accreditations held**, **Funding source**, **Public information about your budget**, **Information about persons who administer the organization**, **Historical or biographical information**, **Programs note**, **Publications that you issue**, and **Performer note**.

4. Select **File**, **Save**, click  or press **Ctrl+S**.

Viewing community information in the PAC

- "Preview the community record from the staff client" on page 23.
- "Example of additional information displayed in the PAC" on page 111

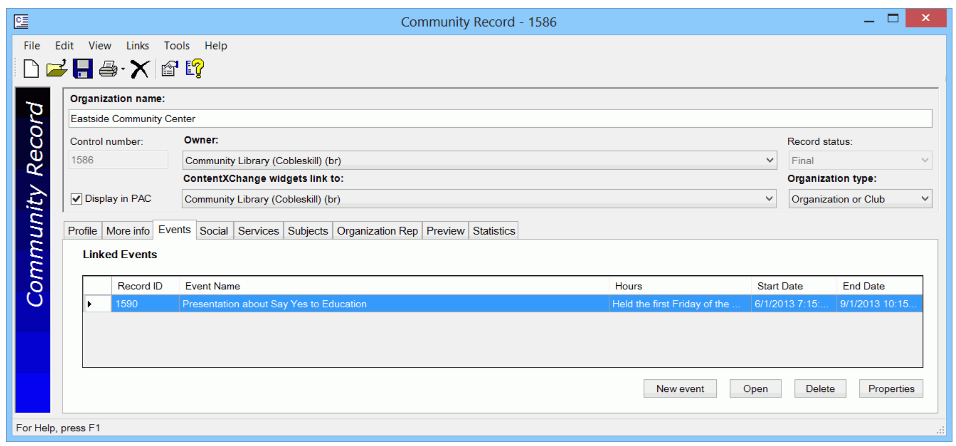
Enter a community event in the staff client

Follow these steps to enter or edit events for the community profile.

Note:
An event record is a type of community record. When you create an event for a community information record, the event is saved as a separate record that appears in searches for community records. You can create a new event record from an existing event record, but you cannot select **File, New** from the Polaris Shortcut Bar to create a new event record. See "Create an event record from the Event workform" on page 15. You can also import events. See "Importing Events for Community Profiles" on page 35.

1. Open the Community Record workform.
2. Select the **Events** tab.

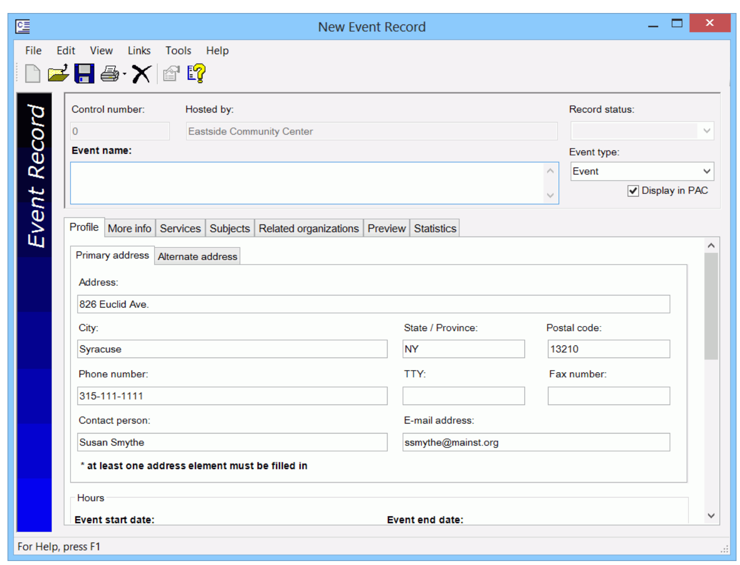
   The Events tabbed page is displayed.



3. Click **New Event** if you are entering an event, or select an event and click **Open** if you are editing an existing event.

   The Event Record workform appears.

Tip:
The information in the Profile, More info, Services, and Subjects tabbed pages in the Community Record workform is copied to the Events Record workform, but you can change the information without changing the information in the associated Community Record workform.



Tip:
To enter diacritics and non-Roman characters, select **Tools, Diacritics** or press **Alt+D**. Then, select the characters from the dialog box.

4. In the **Event name** box at the top of the workform, type a name for the event.
5. Select the event type in the **Event type** box.
6. Select the **Display in PAC** check box (if it is not already selected) to display the event in the PAC.
7. On the Profile tab, enter a different address and/or contact if the information for the event is different from the information on the Community Record workform. The Map it feature uses this address to create the event map.
8. Select the start and end dates/times in the **Event start date** and **Event end date** boxes.

    Note:
    The **End date** is used to automatically set the **Date to remove event from the library catalog** date. The default setting is 7 days, but this can be changed in the Polaris Administration Community profile **Days to continue showing event in PAC after event end date**. See "Setting Community Search Options for PAC" on page 65.

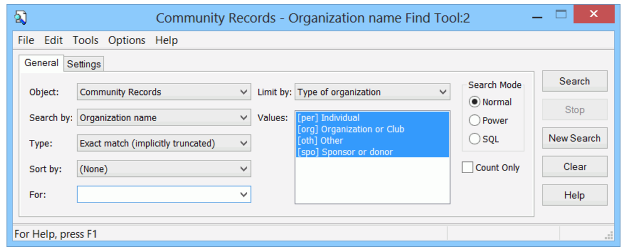
9. Type a description of the times/dates for the event in the **Event date as it appears in library catalog box**.
10. Enter or edit the event description in the **Event description** box.
11. If the automatic map for the event is not correct, enter the coordinates in the **Latitude** and **Longitude** boxes to override the automatic coordinates. Click the **What's this?** link to get the coordinates.
12. Type the location information for the event in the **Event location (room or meeting area)** box.
13. If the event has an associated Web site, type the URL for the Web site in the **Event website address** box and a description of the Web site in the **Website title/description** box.
14. Edit the information on the More info, Services, and Subjects tabs following the instructions for community records:
    - "Enter more community information in the staff client" on page 12
    - "Enter community services in the staff client" on page 18
    - "Enter community subjects in the staff client" on page 19

Tip:
Type of organization is selected in the **Limit by** box, and all organization types are selected in the **Values** box. To limit by an organization type, click the other types to de-select them.

15. To share this event with other community organizations, click the Related organizations tab and do the following:

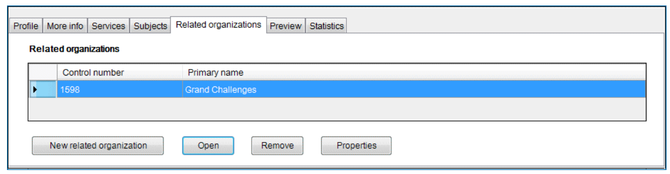
    a) Click the **New related organization** button.

    The Find Tool appears with Community Records selected.



b) Search for and select the related organization.

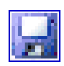
The organization appears in the Related organizations list in the Event workform.



16. Save the record.

17. To see how the event appears in the PAC, select the Preview tab.

18. To see statistics about the event record, select the Statistics tab.

19. Select **File**, **Save**, click  or press **Ctrl+S**.

Create an event record from the Event workform

You can also create an event from the Event workform by selecting **File**, **New**. The New Event Record dialog box appears. Select the option to clear the workform or copy it. If you selected **Clear event workform**, the information for the event, such as the Event name, Event date, Event description, Event location etc. are cleared. However, you cannot change the community organization in the **Hosted by** box, and the information from the hosted by organization is copied to the new record. If you select **Copy event workform**, all the information is copied to the new event record.

Create an event record by importing

Events information from Evanced Solutions or Plymouth Rocket can be imported to create event records in the Polaris Community database. See "Importing Events for Community Profiles" on page 35.

Viewing community events information in the PAC

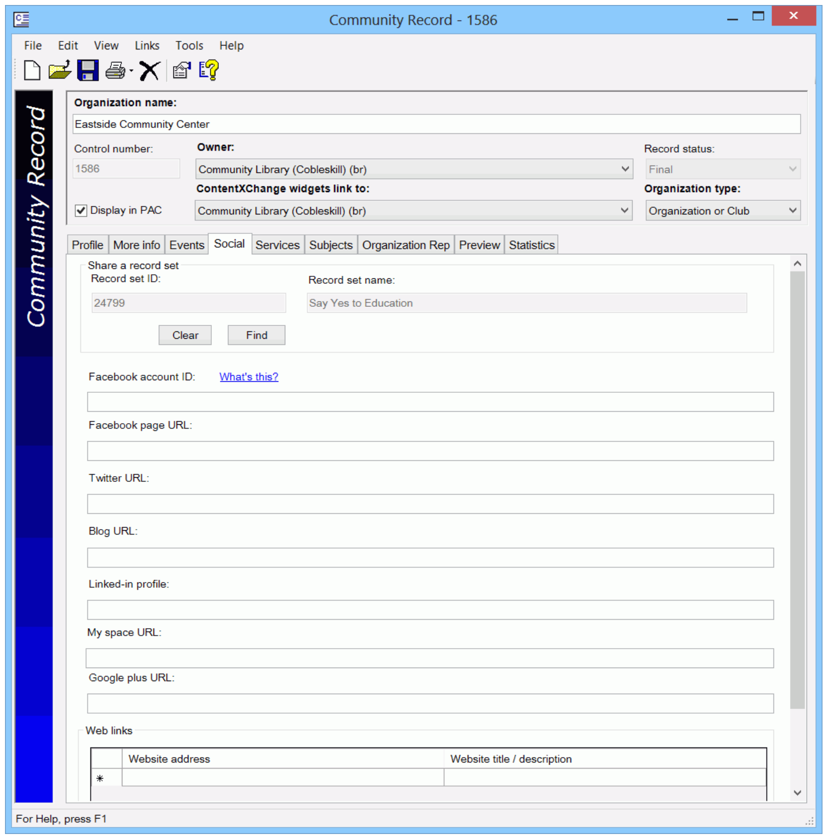
- "Preview the community record from the staff client" on page 23.
- "Example of events displayed in the PAC" on page 114

Enter community social links in the staff client

Social information, entered in either the staff client Community Record workform or the PAC community editor, appears in the PAC for the community record. Follow these steps to enter or edit social information on the Social tabbed page of the Community Record workform.

1. Open the Community Record workform.
2. Select the Social tab.

   The Social tabbed page appears.



3. To display a record set as a graphical “content carousel” in the PAC full display of the community record, click **Find** to search for the bibliographic record set.

   When you select a record set from the Find Tool results list, the record set’s name and ID display.

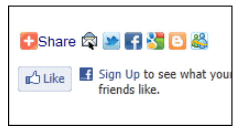
   Note:
   Up to 50 of the titles in the record set display in a graphical “content carousel” in the PAC.

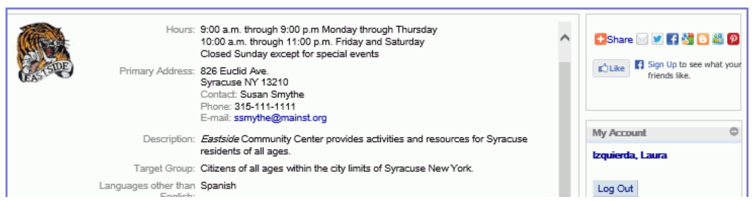
Tip:
Hover over the *What's this* link to see instructions on how to find the Facebook account ID.

4. To provide links to social media sites, enter the appropriate IDs or URLs in the following boxes:

- **Facebook account ID**
- **Facebook page URL**
- **Twitter URL**
- **Blog URL**
- **Linked-in profile**
- **My space URL**
- **Google plus URL**

The Facebook account ID is used to display the Like button, and the URLs are used for generating icons in the **Connect with us** content "drawer" in the PAC.





5. Enter additional URLs and descriptions in the **Web links** box.

After entering the first URL and description, a new blank line appears where you can enter another URL.

These links are displayed in a content "drawer" in the PAC full and brief display. For more information, see "Configuring the PowerPAC Title Display" in the *Polaris Public Access Administration Guide 4.1R2*.

6. Select **File**, **Save**, click or press **Ctrl+S**.

Viewing community social information in the PAC

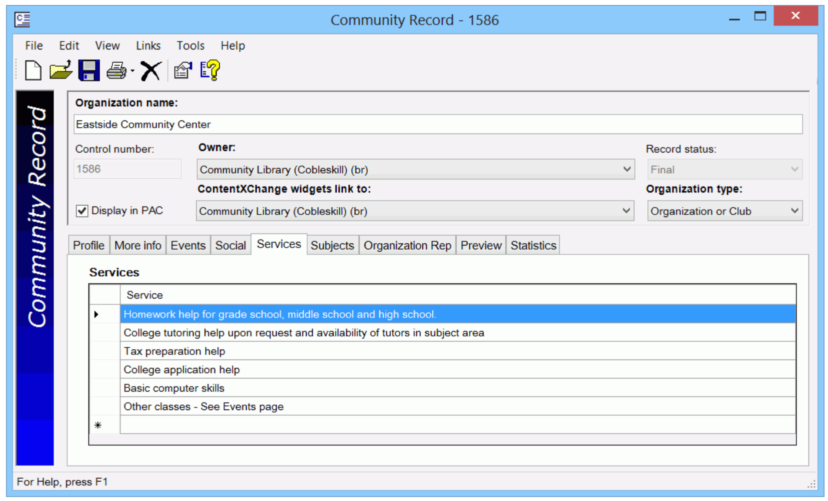
- "Preview the community record from the staff client" on page 23.
- "Examples of social information displayed in the PAC" on page 117

Enter community services in the staff client

Follow these steps to enter or edit information on the Services tabbed page of the Community Record workform.

1. Open the Community Record workform.
2. Select the Services tab.

   The Services tabbed page appears.



3. In the first available blank line, type a service the community organization offers.

   Another blank line is available.
4. Type additional services the community organization offers, if applicable.
5. Select **File**, **Save**, click  or press **Ctrl+S**.

Viewing community services information in the PAC

- “Preview the community record from the staff client” on page 23.
- “Example of services displayed in the PAC” on page 119

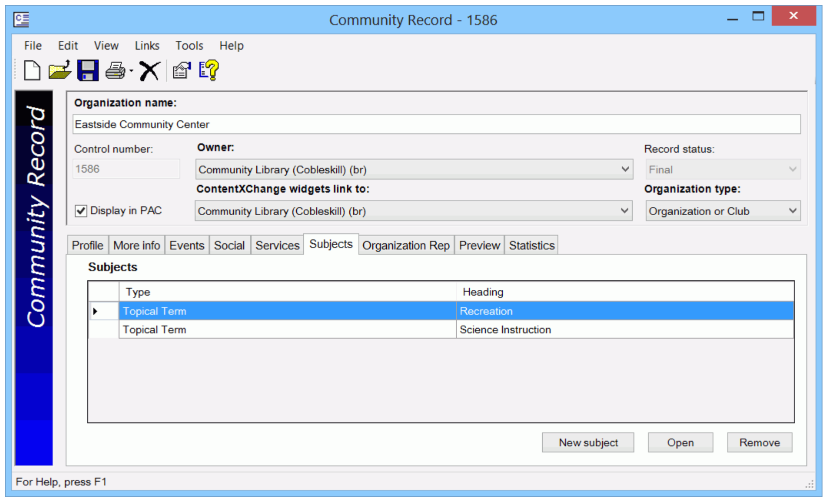
Enter community subjects in the staff client

Follow these steps to enter information on the Subjects tabbed page of the Community Record workform.

1. Open the Community Record workform.

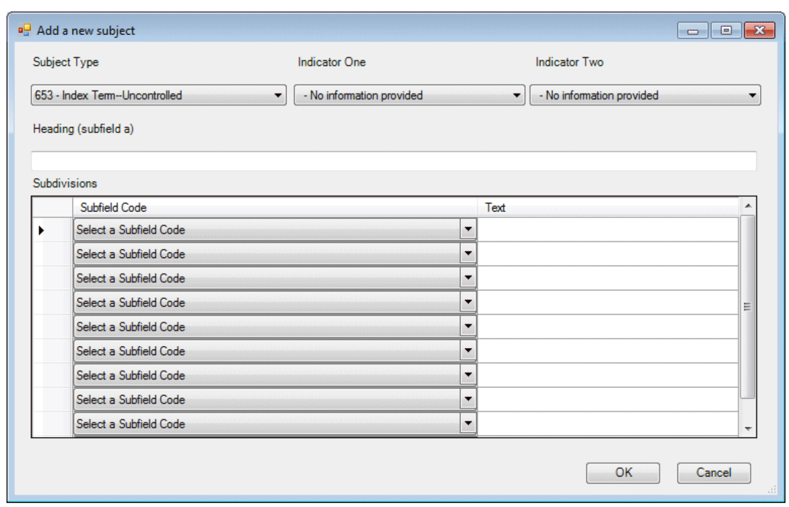
2. Select the Subjects tab.

The Subjects tabbed page appears.



3. Click the **New Subject** button to add a subject, or select a subject and click the **Open** button to edit an existing subject.

The Add a new subject or Edit subject dialog box appears.



Tip:
For more information about the MARC Community Information format, see:
http://www.loc.gov/marc/community/

4. Select a subject type in the **Subject type** box and indicators in the **Indicator One** and **Indicator Two** boxes, if applicable.

5. Type a heading in the **Heading** box.

6. Select the appropriate subfield codes, and type the text for the subfield.

   Note:
   Headings in community records (names and subjects) are not under authority control. The drop-down lists for indicator and subfield values are populated automatically depending on what tag was selected. If you select a value in the **Select a subfield code** box, enter text in the text entry box, but then select a different tag, the text you entered in the subfield text box remains, but the value in the drop-down may be "de-selected" if it is not valid for the new tag. If you then try to save the record, an error message tells you that a subfield code must be entered with subfield text.

7. Add more subjects as needed, and click **OK**.

   The dialog box closes.

8. Select **File**, **Save**, click or press **Ctrl+S**.

Viewing community subjects in the PAC

- "Preview the community record from the staff client" on page 23.
- "Example of subjects displayed in the PAC" on page 121

Designate a community representative

The organization's representative is a patron who can edit community records from the PAC.

Note:
Only one patron can be designated as a representative for an organization, but a single patron may be the representative for multiple organizations.

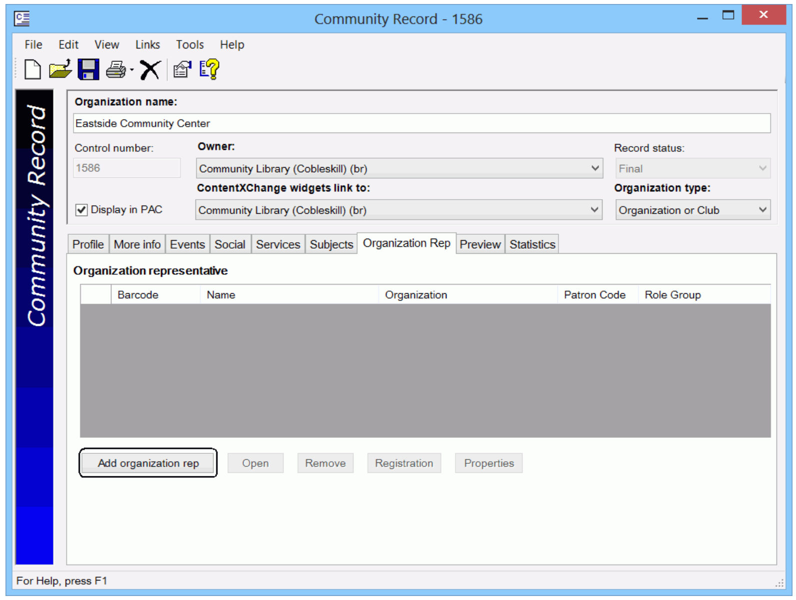
Follow these steps to enter information on the **Organization Rep** tabbed page of the Community Record workform.

1. Open the Community Record workform.
2. Enter at least the basic information for the community record and save it. See "Enter basic community information in the staff client" on page 10.

   Note:
   The community record must be saved before you can designate a community representative.

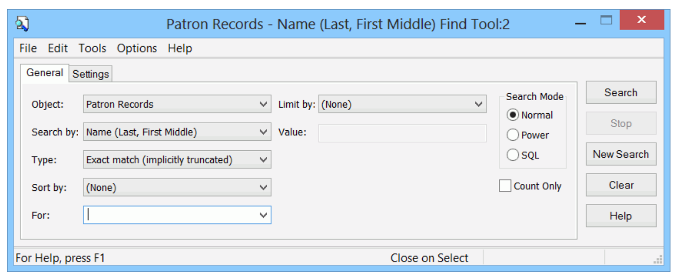
3. Select the Organization Rep tab on the Community Record workform.

   The Organization Representative tabbed page appears.



4. To add a new organization representative, click the **Add organization rep** button.

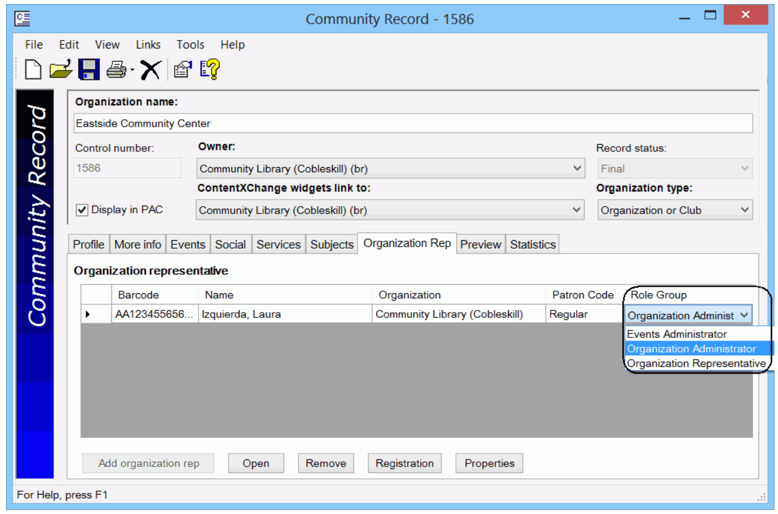
   The Find Tool appears with **Patron Records** selected in the **Object** box.



5. Search for and select the patron who is designated as an organization representative. The organization representative is able to edit a community record through the Polaris PowerPAC.

   The organization representative's information appears in the workform.

6. Under the **Role Group** column heading, select the organization representative's role.



7. Select **File**, **Save**, click  or press **Ctrl+S**.

Linking to the patron record from a community record

- To open the Patron Status workform, select the representative, and click the **Open** button.
- To remove the organization representative, select the representative, and click the **Remove** button.
- To open the Patron Registration workform, select the organization representative, and click the **Registration** button.
- To see the patron record's properties, click the **Properties** button.

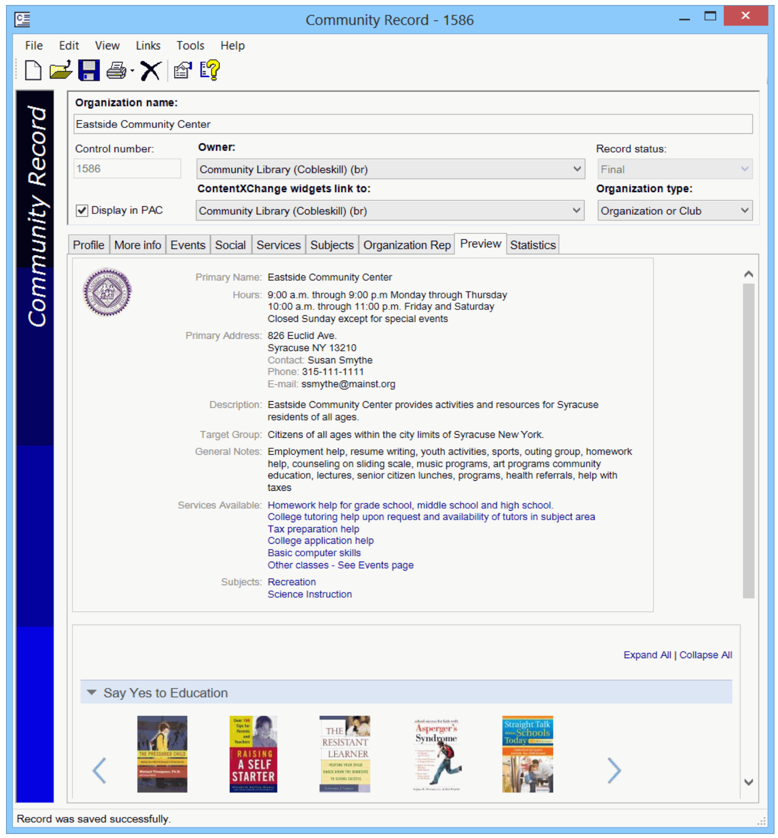
Preview the community record from the staff client

Follow these steps to preview the community record display in the PAC.

1. Open the Community Record workform.
2. If you make changes to the record, save it.
3. Select the Preview tab.

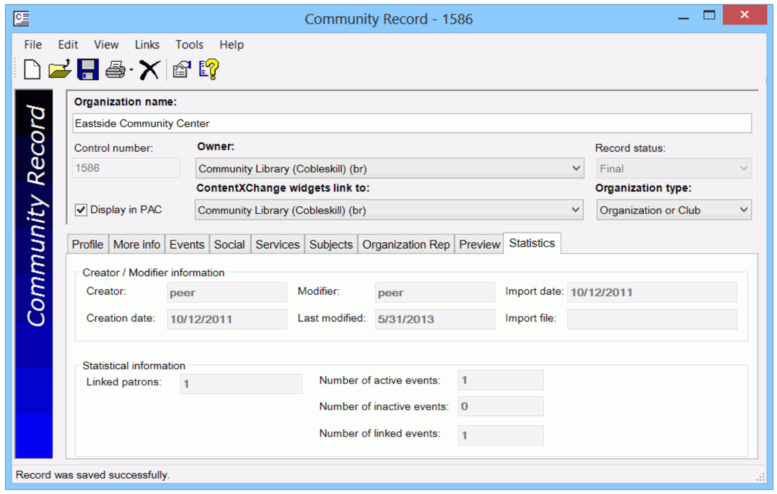
   The Preview page displays the community record as it appears in the Polaris PowerPAC.

Tip:
If you made any changes to the community record, you must save it, close it, and reopen it before you can preview the PAC display.



View community record statistics in the staff client

To view statistics for the community record, select the Statistics tab on the community record workform.



The Statistics tabbed page displays creation and modification information, and statistics regarding linked events.

Printing Community Records in the Staff Client

In the Polaris Staff Client, you can print community information from the Find Tool results list or from the Community Record or Event workforms. From the Find Tool results list, you can list multiple records in the results list, select the records, and print the list view. You can also select one or more records in the Find Tool results list and print a formatted brief or full report of all the selected records. From the Community Record or Event workform, you can print the current workform view, all workform views, or the brief or full formatted report. You can also print standard Cataloging reports to view information about new or modified community records, see "Community Reports & Notice" on page 31.

See the following topics:

- "Print community records from Find Tool results" on page 25
- "Print a community record from the workform" on page 26

Print community records from Find Tool results

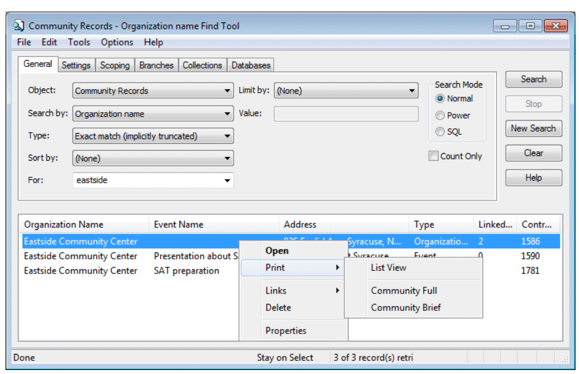
Follow these steps to print community records from Find Tool results.

1. Search for community records in the Find Tool. See "Search for a community record in the staff client" on page 8.

   The community records are listed in the Find Tool results.

2. Select the record or records you want to print.
3. Right-click and select **Print**, **List View**, **Community Brief** or **Community Full**.

   Note:
   If you selected both organizations and events, they will be printed in the format specified for that type of record. See "Printed Brief and Full Community Record" on page 28.



If you selected **List View**, the Print dialog box appears.

If you selected **Community Brief** or **Community Full**, a pdf appears in the Adobe Reader window with brief or full community information for all the records selected in the Find Tool results list (in the order in which the records are listed).

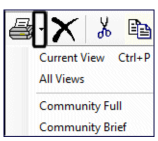
4. To print the community record(s), do one of the following:
   - If you selected **List View**, click the **Print** button on the Print dialog box. A list of the selected community records is printed.
   - If you selected **Community Full** or **Community Brief**, select **File, Print** or click the printer icon in the Adobe Reader window. You can also e-mail the full or brief report(s) by selecting **File, Attach to email** or by clicking the letter icon. See "Printed Brief and Full Community Record" on page 28.

Print a community record from the workform

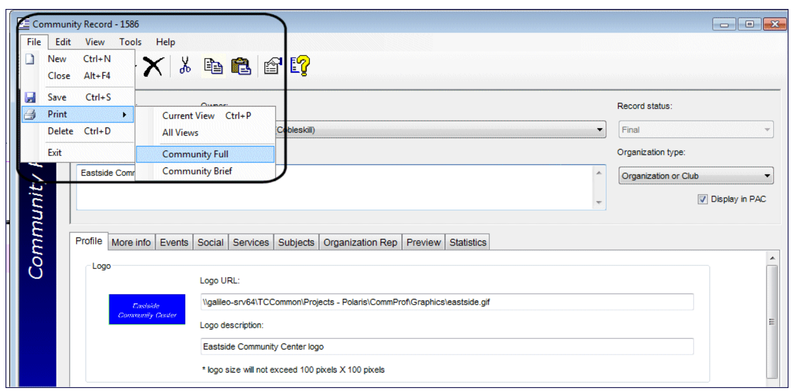
Follow these steps to print a community record from the Community Record workform.

1. Open the Community Record workform.

Tip:
You can also select the arrow in the printer icon to see the print options.



2. Select **File, Print** from the workform menu bar.



3. Select one of the following options from the list:
   - **Current View**
   - **All Views**
   - **Community Full**
   - **Community Brief**

   The Adobe Reader window displays a preview of the record printout.

4. Select **File, Print** or click the printer icon in the Adobe Reader window. You can also email the full or brief report by selecting **File, Attach to email** or by clicking the letter icon. See "Printed Brief and Full Community Record" on page 28.

Printed Current View or All Views

When you select **Current View** from the Community Record workform's print menu, the information contained in the open workform view is displayed in the preview window.

Control Number: 1586 **Owner:** Community Library (Cobleskill) (br) **Record status:** Final
Organization name: Eastside Community Center **Type:** Organization or Club
Displays in PAC

Description	Data
Logo:	Logo URL: C:\Users\Peer\Desktop\Research\eastside.gif Logo description: Eastside Logo
Primary address:	Address: 826 Euclid Ave. City: Syracuse State: NY Postal code: 13210 Phone number: 315-111-1111 TTY: FAX number: Contact person: Susan Smythe E-mail address: ssmythe@mainst.org
Alternate address:	No Alternate address information entered.
Description:	Eastside Community Center provides activities and resources for Syracuse residents of all ages.
Map coordinates:	
Hours:	9:00 a.m. through 9:00 p.m Monday through Thursday 10:00 a.m. through 11:00 p.m. Friday and Saturday Closed Sunday except for special events

When you select **All Views** from the Community Record workform's print menu, the information contained in all views of the workform is displayed in the preview window.

Control Number: 1586 **Owner:** Community Library (Cobleskill) (br) **Record status:** Final
Organization name: Eastside Community Center **Type:** Organization or Club
Displays in PAC

Description	Data
Logo:	Logo URL: C:\Users\Peer\Desktop\Research\eastside.gif Logo description: Eastside Logo
Primary address:	Address: 826 Euclid Ave. City: Syracuse State: NY Postal code: 13210 Phone number: 315-111-1111 TTY: FAX number: Contact person: Susan Smythe E-mail address: ssmythe@mainst.org
Alternate address:	No Alternate address information entered.
Description:	Eastside Community Center provides activities and resources for Syracuse residents of all ages.
Map coordinates:	
Hours:	9:00 a.m. through 9:00 p.m Monday through Thursday 10:00 a.m. through 11:00 p.m. Friday and Saturday Closed Sunday except for special events
General note:	Employment help, resume writing, youth activities, sports, outing group, homework help, counseling on sliding scale, music programs, art programs community education, lectures, senior citizen lunches, programs, health referrals, help with taxes
Target group:	Citizens of all ages within the city limits of Syracuse New York.
Area served:	
Accommodations for the disabled:	
Directions or transportation information:	
Languages:	
Volunteers note:	
Who is eligible to use services:	
Fees:	

Page 1 of 3 Report printed: 5/1/2012 12:25:43 PM

Description	Data
Affiliations:	
Licenses or accreditations held:	
Funding source:	
Public information about your budget:	
Information about persons who administer the organization:	
Historical or biographical information:	
Programs note:	
Publications that you issue:	
Performer note:	
Event	Record ID: 1590 Event Name: Presentation about Say Yes to Education Hours: Held the first Friday of the month at 7:15 PM at 1221 Main St. Start Date: 11/04/2011 7:15 PM End Date: 06/04/2012 10:15 PM
Event	Record ID: 1781 Event Name: SAT preparation Hours: Monday through Friday - 4 pm to 5 pm Start Date: 04/02/2012 5:00 PM End Date: 04/02/2012 5:00 PM
Share a record set:	Record set ID: 24799 Record set name: Say Yes to Education
Facebook account ID:	
Facebook page URL:	
Twitter URL:	
Blog URL:	
Linked-in profile:	
My space URL:	
Google plus URL:	

Description	Data
Services:	Basic computer skills College application help College tutoring help upon request and availability of tutors in subject area Homework help for grade school, middle school and high school. Other classes - See Events page Tax preparation help
650 - Subject Added Entry--Topical Term	Recreation.
650 - Subject Added Entry--Topical Term	Science Instruction
Organization representitive:	Barcode: AA1234556565654 Name: Izquierda, Laura Organization: Community Library (Cobleskill) Role Group: Organization Administrator
PACURL	http://GRAHAME-SRV64/platopowerpacsearch/communityinformationfull.aspx?ctx=25.1033.0.8.1&type=Community&term=Eastside+Community+Center&by=CN&sort=RELEVANCE&limit=TOOID=*&pos=1&cn=1586
Creator / Modifier information:	Creator: peer Creation date: 10/12/2011 Modifier: peer Last modified: 03/06/2012 Import date: 10/12/2011 Import file:
Statistical information:	Linked patrons: 1 Number of active events: 1 Number of inactive events: 1 Number of linked events: 2

Printed Brief and Full Community Record

The information in the printed brief and full community record depends on the type of organization in the record. Organization information is printed for community records with a type of Individual, Organization or Club, Sponsor or Donor, or Other. Event information is printed for events, programs, or services.

- **Community Brief** - Includes the following information from the Community Record workform's Profile tab: Organization name, Control number, Owning library/branch, Display in PAC setting (Yes or No), record status, Primary address, type of Organization, phone number, email address, and contact person. It also includes the following information from the Community Record workform's Organization Rep tab: Organization representative's name, Barcode, Patron code, Role, and Branch.

Brief Community Organization Record

Organization Name: Eastside Community Center

Control Number: 1586

Owning Library/Branch:	Community Library (Cobleskill)
Display in PAC:	Yes
Status:	Final
Primary address:	826 Euclid Ave. Syracuse, NY 13210
Hours:	See individual event contact info
Type of Organization:	Organization or Club
Phone number:	315-111-1111
E-mail address:	ssmythe@mainst.org
Contact Person:	Susan Smythe
Organizational Representative:	Laura Izquierda
Barcode:	AA1234556565654
Patron Code:	Regular
Role:	Organization Administrator
Branch:	Community Library (Cobleskill)

- **Community Full** - Includes information from the Profile, More info, Organizational Representative, and Event tabs in the Community Record workform.

Full Community Organization Record

Organization Name: Eastside Community Center

Control Number: 1586

Profile Information

Owning Library/Branch:	Community Library (Cobleskill)	
Display In PAC:	Yes	
Record Status:	Final	
Primary address:	826 Euclid Ave. Syracuse, NY 13210	Latitude/Longitude:
Area served:		
Directions or transportation information:		
Phone number:	315-111-1111	
Fax number:		
TTY:		
E-mail address:	ssmythe@mainst.org	
Hours:	See individual event contact info	
Type of Organization:	Organization or Club	
Description:	Eastside Community Center provides activities and resources for Syracuse residents of all ages.	

Full Community Organization Record

Organization Name: Eastside Community Center

Control Number: 1586

General note:	Employment help, resume writing, youth activities, sports, outing group, homework help, counseling on sliding scale, music programs, art programs community education, lectures, senior citizen lunches, programs, health referrals, help with taxes
Target group:	Citizens of all ages within the city limits of Syracuse New York.
Accommodations for the disabled:	
Languages:	
Volunteers note:	
Who is eligible to use services:	
Fees:	
Affiliations:	
Licenses or accreditations held:	
Funding source:	
Public information about your budget:	
Information about persons who administer the organization:	
Historical or biographical information:	
Programs note:	
Publications that you issue:	
Performer note:	
Logo URL:	C:\Users\Peer\Desktop\Research\eastside.gif
Logo description:	Eastside Logo

Full Community Organization Record

Organization Name: Eastside Community Center

Control Number: 1586

Organizational Representative

Name: Laura Izquierda Barcode: AA1234556565654 Patron Code: Regular

Role: Organization Administrator

Branch: Community Library (Cobleskill)

Subjects

Recreation., Science Instruction

Services

Basic computer skills, College application help, College tutoring help upon request and availability of tutors in subject area, Homework help for grade school, middle school and high school., Other classes - See Events page, Tax preparation help

Related Websites

Social

Facebook account ID:

Facebook page URL:

Twitter URL:

Linked-in profile:

Google plus URL:

MySpace URL:

Full Community Organization Record

Organization Name: Eastside Community Center

Control Number: 1586

Events

Record ID	Event Name	Hours	Event Start Date	Event End Date
1590	Presentation about Say Yes to Education	Held the first Friday of the month at 7:15 PM at 1221 Main St.	11/4/2011 7:15:00 PM	6/4/2012 10:15:00 PM

Statistics

Creator:	peer	Creation Date:	10/12/2011	Expiration Date:
Modifier:	peer	Last Modified:	3/6/2012	
Import Date:	10/12/2011 5:21:05 PM			
Active Events:	1			
Inactive Events:	0			
Linked Events:	1			

Community Reports & Notice

The standard Community reports are designed to track actions taken on community records from the PAC, not from the staff client. Since community organization records cannot be created in the PAC, only community event records appear on the New Community Records report.

Once community organization records have been created in the staff client, organization representatives can update both types of community records: organization records and event records. The Updated Community Records report shows updates to any type of community records from the PAC.

The following standard Polaris Cataloging reports are available for Community Records:

- **New Community Records** - The report shows the community event records created from the PAC after a specified date for a selected branch or for all branches.
- **Updated Community Records** - The report shows the community records updated after a specified date for a selected branch or for all branches.

In addition, the library can generate the Stale Community Records notice, which shows community organization records (not events) that have not been updated since a specified date. These notices can be sent to the community organizations to alert them that they should update their records.

See the following topics:

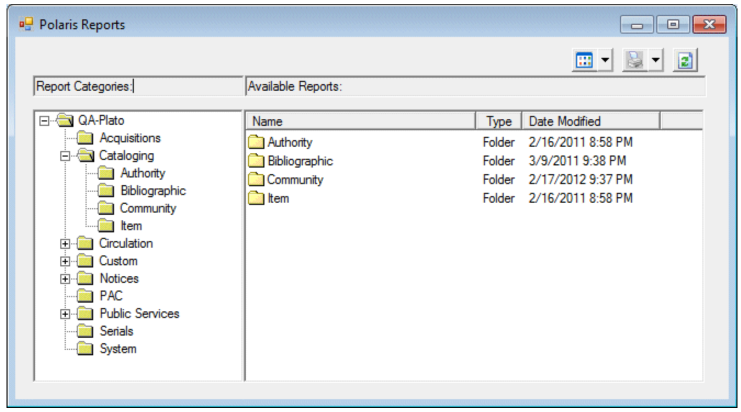
- "Generate a Community report" on page 31
- "Generate a Stale Community Records notice" on page 33

Generate a Community report

Follow these steps to generate a standard Community report from the Polaris Shortcut Bar.

1. On the Polaris Shortcut Bar, select **Utilities**, **Reports and Notices**.

   The Polaris Reports window appears.



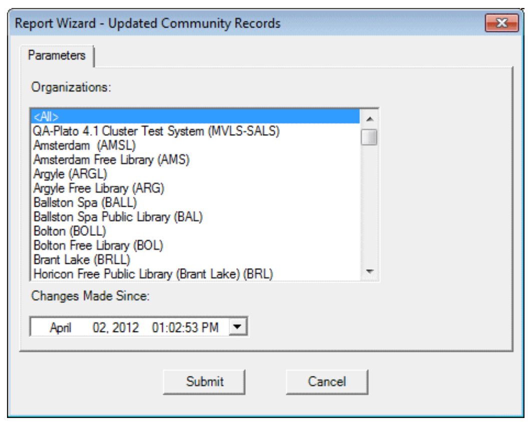
2. Select **Cataloging, Community** in the Report Categories list.

   The New Community Records and Updated Community Records are listed.

Tip:
For more information, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*, or the equivalent topic in Polaris online Help

3. Double-click a report to generate it.

   The Report Wizard opens.



4. Select the organization(s) for which you want to see the new or updated records or select **All** to generate the report for all branches.
5. Select a date in the **Changes Made Since** box (for an Updated Community Records report) or the **Records Created After** box (for a New Community Records report).
6. Click **Submit**.

   If **pdf** (the default) is selected as the report output type, the report appears as a pdf in the Adobe Reader window. The new or updated community records are grouped by the organizations selected in the Report Wizard. The report shows the library branch name, record ID, type, modification date (Updated Community Records) or creation date (New Community Records), the community organization's name and the community organization's address.

Updated Community Records

Community Library (Cobleskill)

Record ID: 1586 **Type:** Organization or Club **Modified:** 10/27/2011 5:35 PM

Name: Eastside Community Center

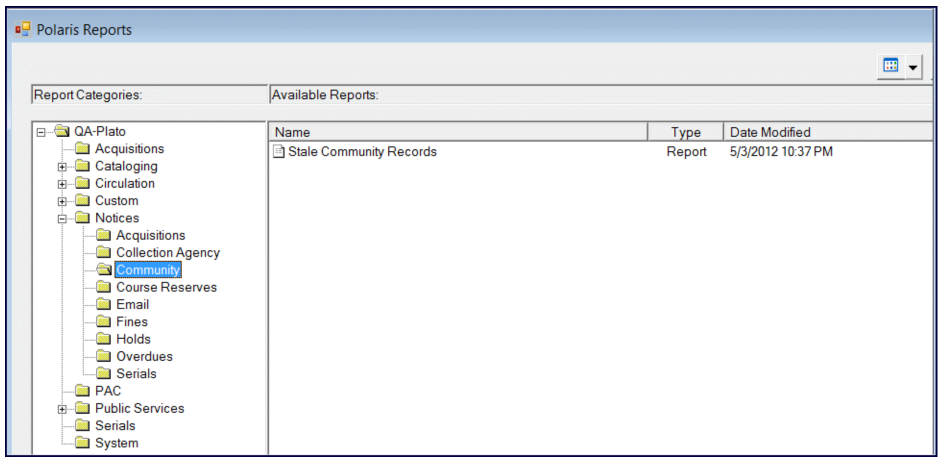
Address: 826 Euclid Ave. Syracuse, NY 13210

Generate a Stale Community Records notice

Follow these steps to generate a Stale Community Records notice.

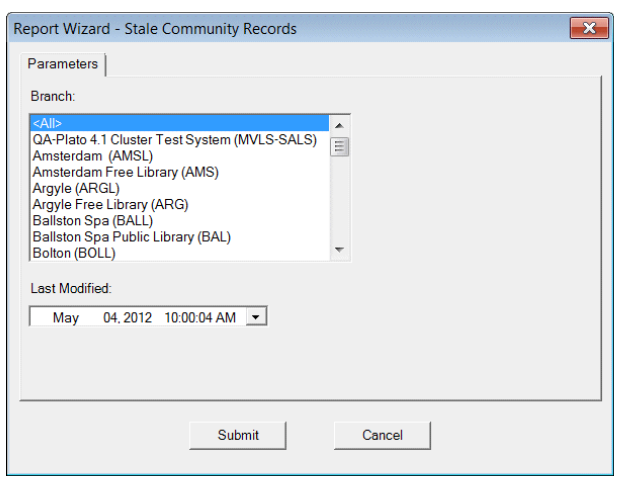
1. Select **Utilities, Reports and Notices, Notices, Community** to see the community notice.

   The Stale Community Records notice is listed.



2. Double-click **Stale Community Records.**

   The Report Wizard dialog box opens.



3. Select the branch(es) in the **Branch** list, or select **All** to select all branches.

4. Select a date in the **Last Modified** box.
5. Click **Submit**.

   The Stale Community Records notice pdf is displayed in the Adobe Reader. For each branch selected in the Report Wizard, the notice lists the community records that were last modified before the specified date. For general information about reports, see "Generating, Sending & Customizing Reports" in the *Polaris Basics Guide 4.1R2*.

May 4, 2012

From: COMMUNITY LIBRARY (COBLESKILL)
PO BOX 219
147 BARNERVILLE ROAD
COBLESKILL, NY 12043-0219
518-234-7897

Your organization's information may be out of date: Eastside Community Center. Telephone: 315-111-1111

According to our records, your organization's information has not changed since 4/1/2012 12:28:28 PM. Please verify that the information contained in the library's online catalog is correct and contact us if you have any questions.

Organization or Club: Eastside Community Center

Contact:	Susan Smythe	**Phone Number:**	315-111-1111
Email:	ssmythe@mainst.org	**Last Update:**	3/6/2012
Target Group:	Citizens of all ages within the city limits of Syracuse New York.		
Address:	826 Euclid Ave. Syracuse, NY 13210		
URL:			
Summary:	Eastside Community Center provides activities and resources for Syracuse residents of all ages.		

To: EASTSIDE COMMUNITY CENTER
SUSAN SMYTHE
826 EUCLID AVE.
SYRACUSE, NY 13210

Related Information

You can edit the Stale Community Records notice text in Polaris WebAdmin. The language strings are as follows:

- **NT-COMM_M_HEADER** - Default: **Your organization's information may be out of date.**
- **NT_COMM_M_TEXT** - Default: **According to our records, your organization's information has not changed since [DATE]. Please verify that the information contained in the library's online catalog is correct and contact us if you have any questions.**

Importing Events for Community Profiles

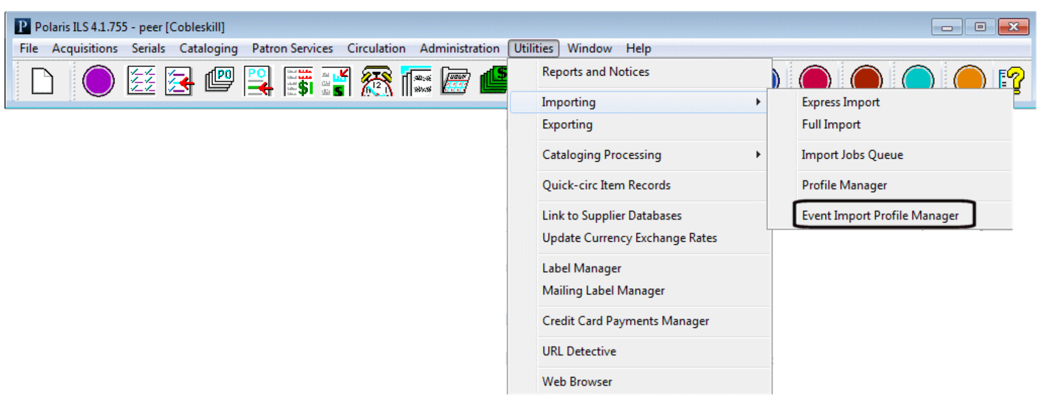
You can import library events information from Evanced Solutions or Plymouth Rocket - EventKeeper to create event records in the Polaris database. The events import runs once every night as an executable from the Polaris API consumer service.

Once an event is imported into Polaris, the library can use all the features of Polaris Event records, such as: displaying a carousel of related books from the full display of an event; promoting the event using Feature It; or displaying the event in an exportable calendar widget that can be embedded on any web page or social media page.

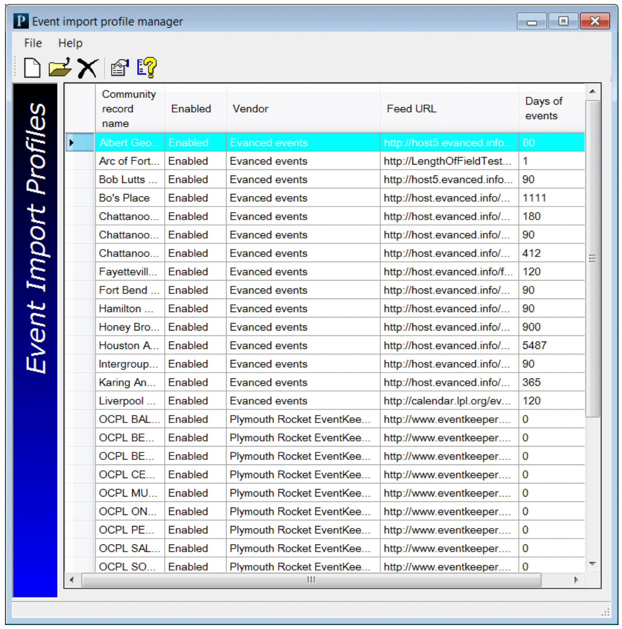
The following new system-level Cataloging permissions are assigned to the Administrator's permission group by default: **Event import profile: Access, Create, Modify**

Access the event import profile manager

To access the Event import profile manager, select **Utilities, Importing, Event Import Profile Manager**.



The Events Import Profile Manager opens displaying the import jobs, if any, in the following columns: **Community record name**, **Enabled**, **Vender**, **Feed URL** and **Days of events**. The default sort for the import jobs is by Community record name, but you can click any column heading to sort the list.



You can right-click anywhere in the Event Import Profile Manager window and select one of the following options:

- **New** - See "Create a new events import profile" on page 37.
- **Open** - See "Edit an events import profile" on page 40.
- **Delete** - See "Delete an events import profile" on page 42.
- **Properties** - See "View the Events Import Profile Manager properties" on page 42.

Create a new events import profile

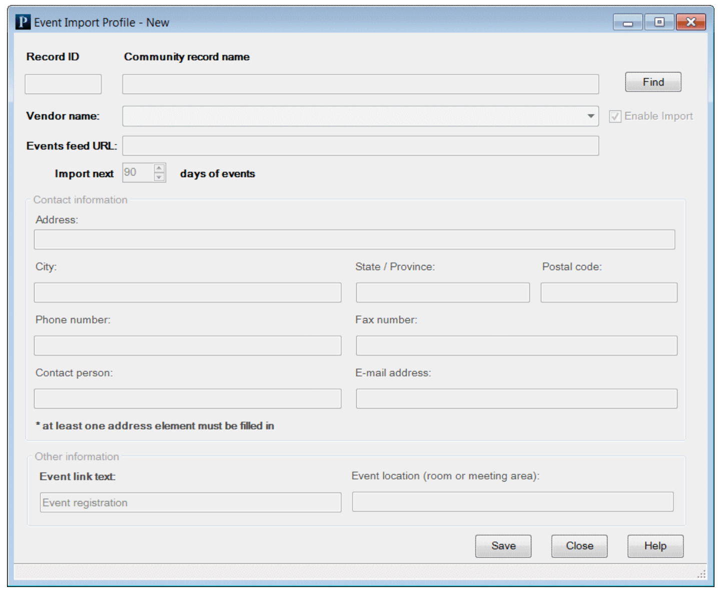
Follow these steps to create a new events import profile for an import job.

1. Open the Events Import Manager. See "Access the event import profile manager" on page 35.

2. Select **File**, **New**, click , or right-click and select **New**.

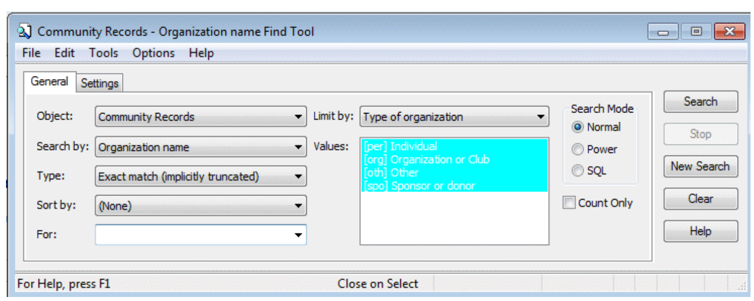
   The Event Import Profile New window opens.

   Note:
   All fields are disabled until you select a Community record.



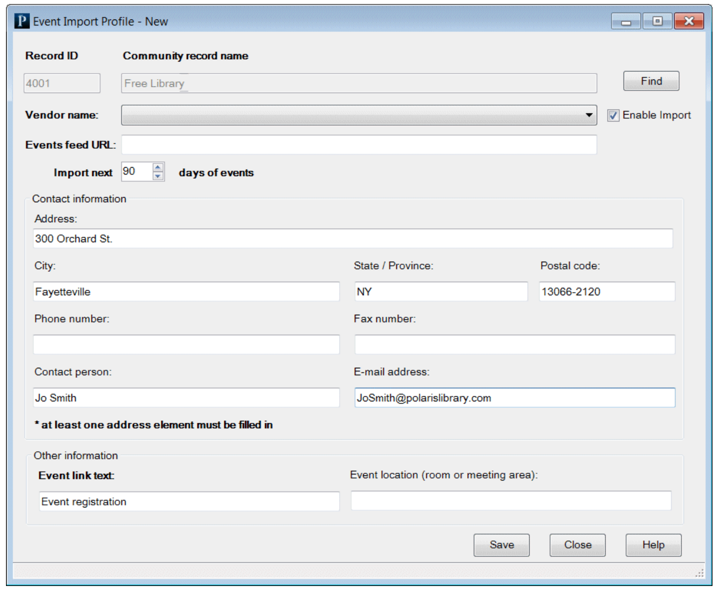
3. Click **Find** to open the Community Record Find Tool.

Tip:
Type of organization is selected in the **Limit** by box with all types selected in the **Values** box. If you want to limit by a specific type of organization, click on the types you do not want to limit by so that they are not highlighted, and enter the other search criteria.



4. Search for and select the community record for which you want to import events.

   The organization name and contact information are copied to the Events Import Profile window.



Note:
The **Enable Import** check box is selected by default.

5. In the **Vendor name** box, select the vendor (**Evanced events** or **Plymouth Rocket EventKeeper events**).

Note:
If you selected Plymouth Rocket EventKeeper, you must get the Events Feed URL from the Admin page of the EventKeeper. You must also enter the number of days of events to import in EventKeeper.

6. Get the correctly-formatted URL for the vendor:

a) If you selected **Evanced events** in the **Vendor name** box:

- Add the following string to the end of the hostname base path of your calendar URL: **eventsxml.asp?dm=exml&lib=*YourLibraryNumber***

Tip:
If your library was not assigned a library number, just use the same URL without the library number: **http://host5.evanced.info/libraryname/evanced/eventsxml.asp?dm=exml**

Example:
http://host5.evanced.info/libraryname/evanced/eventsxml.asp?dm=exml&lib=6

In this example, the hostname is: **http://host5.evanced.info**,

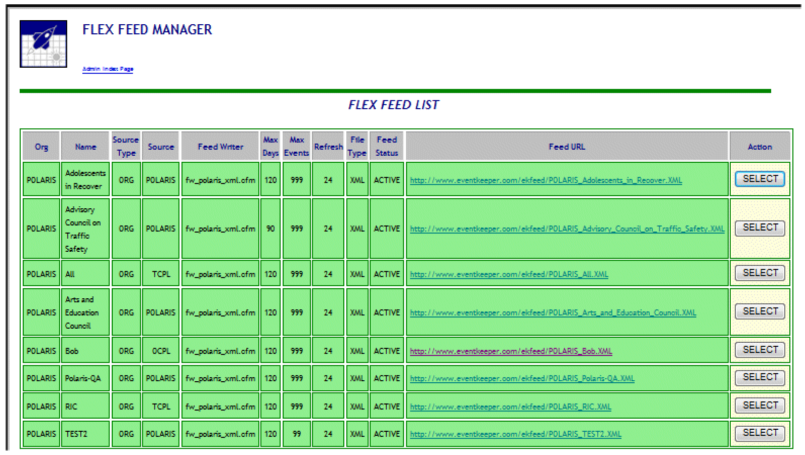
the base path is: **/libraryname/evanced/**,

and the library number is: **6.**

b) If you selected **Plymouth Rocket EventKeeper** in the **Vendor Name** box:

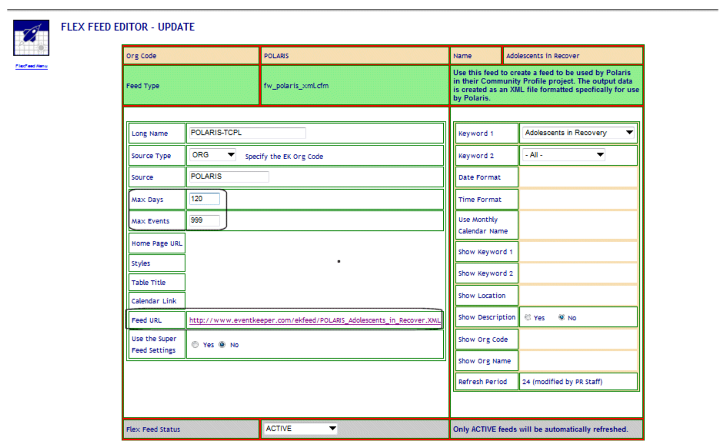
- Contact Plymouth Rocket and request the XML feeds for import into Polaris. Plymouth Rocket confirms the request and creates the feeds.
- After Plymouth Rocket creates the feeds, log in to Plymouth Rocket, and select the **Admin Page** button.
- On the Admin Page, select the **Edit Flex Feeds** button.

The Flex Feed Manager window opens.



- Click the **Select** button next to the feed.

  The Flex Feed Editor - Update window opens.



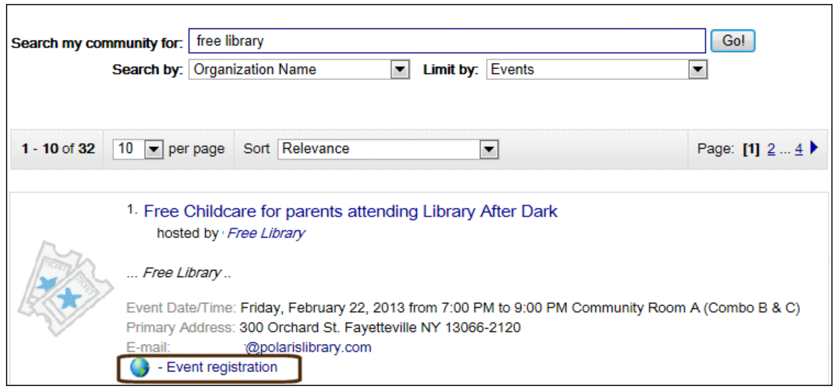
- Copy the feed URL.
- If you want to change the maximum number of future events to import, type the numbers in the **Max Days** and **Max Events** boxes.

7. Paste or type the correctly-formatted URL for the vendor in the **Events feed URL** box.

8. If you selected **Evanced events** in the **Vendor name** box, select the number of days of future events to import in the **Import next [X-Number] days of events** box in the Polaris Event Import Profile dialog box. The default value is 90, and you can enter up to 9999.

9. (Optional) In the Event Import Profile window, edit the contact information that was copied from the selected community record. This is the contact information that will be copied to each imported event.

10. Enter the text for the event registration link in **Event registration link text** box. This is the link text that will appear with the event in the PAC, for example, **Event registration** or **Event calendar**. This is the direct URL to the event in the Evanced or Event Keeper interface.



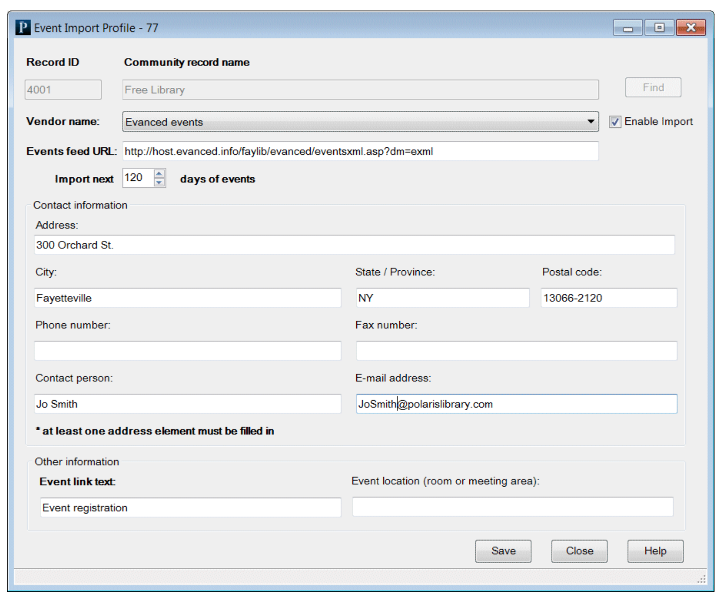
11. If the events are located in a specific room, enter the location in the **Event location (room or meeting area)** box.
12. Select **File**, **Save** or click the **Save** button.

Edit an events import profile

Follow these steps to edit an existing events import profile.

1. Open the Events Import Manager dialog box. See "Access the event import profile manager" on page 35.
2. Double-click the existing event import profile.

   The Events Import Profile Editor window opens.



3. Edit the import profile following the instructions in "Create a new events import profile" on page 37.

   Note:
   You cannot search for and select a different organization for the event import.

4. Click one of these buttons:
   - **Save** - Saves the changes to the event import profile,
   - **Close** - A message box asks if you want to save the changes. Click **Yes** to save the changes, click **No** to close the window without saving, or click **Cancel** to return to the Event Import Profile window.

   If you saved the import profile, the next time the API consumer service runs, the system applies the changes to the new events imported for this profile.

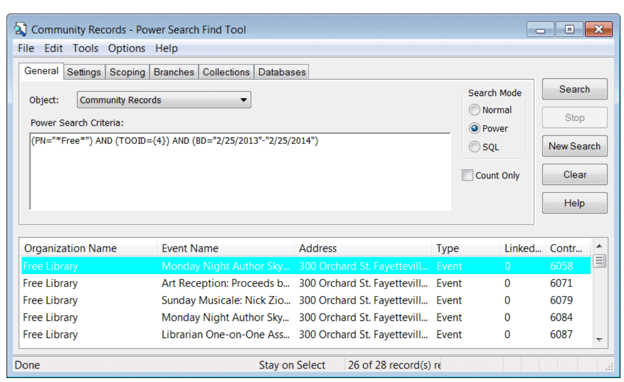
   Note:
   If a single event is updated in Evanced or Plymouth Rocket - EventKeeper, the corresponding Polaris Event record must be deleted and re-imported, or updated manually.

Delete previously imported events for a modified profile

If you want to delete unwanted events that were imported before you changed the events import profile, you can search for the events in the Find Tool and delete them. For example, if the profile previously specified 365 days of events to import, and you changed the profile to import only 30 days of events, you can delete the previously-imported events scheduled to be held beyond the 30 days. To delete the unwanted events, do the following steps.

1. Select **Cataloging, Community** from the Polaris Shortcut Bar to open the Find Tool with **Community** selected in the **Object** box.
2. Select **Power** to open the **Power Search Criteria** box.
3. Enter the following power search string: **(PN="*Organization Name**") AND (TOOID={4}) AND (BD="Date-1"-"Date 2")**
4. Click **Search**.

   The events are listed in the Find Tool results.



5. Multi-select the events, right-click and select **Delete**.

   The selected events are deleted.

Delete an events import profile

Follow these steps to delete an existing events import profile.

1. Open the Events Import Manager dialog box. See "Access the event import profile manager" on page 35.
2. Select an events import profile in the list.
3. Select **File, Delete** or click .

   A confirmation message box appears.
4. Click **Yes** to confirm that you want to delete the profile.

   A message box asks: **Do you wish to remove all previously imported events for this organization?**
5. Click **Yes or No**.
   - If you select **Yes**, all events imported for the organization using this profile are deleted.
   - If you select **No**, the import profile is deleted, but no previously imported events are deleted.

View the Events Import Profile Manager properties

Follow these steps to view the Events Import Profile Manager properties.

1. Open the Events Import Manager dialog box. See "Access the event import profile manager" on page 35.
2. Select **File, Properties** or press **F8**.

   The Properties window opens with the General tab displaying the following information:
   - **Profile ID**
   - **Community record name**
   - **Record ID**
   - **Vendor Name**
   - **Days of events**
   - **Feed URL**
   - **Number of events created**
   - **Last import date**
   - **Last import result**
3. Click **About** to view the About tab, which displays the following information:
   - **Creation date**
   - **Creator**
   - **Last modified** (date)
   - **Last modifier**
4. Click **Close** to close the Properties window.

Appendix A: Evanced Mapping to Polaris

Important:
When the contact information, (contact's name, phone number, and/or email address) is specified in Evanced or Plymouth Rocket - Events Keeper, that contact information takes precedence over the organization contact information specified in Polaris.

Field in Evanced Client	Evanced XML Tag	Data element in Polaris Staff Client	Data element in PolarisPAC
Event Title	<title>	Event name	Title
Event Date	<date>	Event date as it appears in catalog	Event Date / time
Event Time - Start Time	<time>	Event start date (time only)	Determines sort order when sorting by Event Date
Event Date Range End (Ongoing Events Only)	<enddate>	NA	NA
Event Description	<description>	Event description	Description
Location (Room or Space)	<location>	Event location (room or meeting area)	Event Date/Time (appears at end of string)
Branch (or Library as displayed on Patron/Public Calendar View) – Multi Branch Systems Only	<library>	NA	NA
Does not Display in Web Interface – URL of Event Details/Registration Page (http://...Path of Evanced Events System..../ eventsignup.asp?ID=X), where X is the event's ID	<link>	Event website address	In brief display: link text next to Globe icon In full display: *Connect with us* drawer
Does not Display in Web Interface - Event's ID (In database and URL only)	<id>	Internal (use for deduping)	Does not display
Recurring Options - Recurrence: ONE TIME Event	<recordtype> *[when value = 0, single event]*	Event Type = Event	Tickets icon, Event type of Event in facets dashboard and limit-by selections
Ongoing Event (for a range of dates)	<recordtype> *[when value = 1, ongoing event]*	Event Type = Program/Service	Briefcase icon, Event type of Program or Service in facets / limit-by
Recurring Options - Recurrence: (Daily, Weekly, Monthly, Additional Dates)	<recordtype> *[when value = 2, recurring event]*	Event Type = Program/Service	Briefcase icon, Event type of Program or Service in facets / limit-by

Field in Evanced Client	Evanced XML Tag	Data element in Polaris Staff Client	Data element in PolarisPAC
Does not Display in Web Interface – Recurring Event ID (In database and URL Only)	<RCID/>	NA	NA
Alternate Event Date format	<date1/>	Event start date	Determines sort order when sorting by Event Date
Another Alternate Event Date format	<date2/>	NA	NA
Alternate Event Date Range End (Ongoing Events Only)	<enddate1/>	NA	NA
Event Length (in minutes)	<length/>	Event end date (time only)	Determines sort order when sorting by Event Date
Not Used	<status/>	NA	NA
End Time (Displays on Patron/Public Calendar View)	<endtime>	NA	NA
Event Type - Primary	<prieventtype>	NA	NA
All Three Event Types comma separated	<eventtypes>	NA	NA
Event Type - Primary	<eventtype1/>	Subjects (653$a MARC field)	Subjects (653$a MARC field)
Event Type Option 2	<eventtype2>	Subjects (653$a MARC field)	Subjects (653$a MARC field)
Event Type Option 3	<eventtype3>	Subjects (653$a MARC field)	Subjects (653$a MARC field)
All Three Age Groups comma separated	<agegroups>	NA	NA
Age Group - Primary	<agegroup1>	Subjects (653$a MARC field)	Target Group
Age Group - Option 2	<agegroup2>	Subjects (653$a MARC field)	Does not display
Age Group - Option 3	<agegroup3>	Subjects (653$a MARC field)	Does not display
Other Info (or Other Information on public/ patron View)	<otherinfo>	General Notes	General Notes
Feature Event	<featuredevent>	NA	NA
Presenter	<presenter>	Facilitator or presenter note (More info tab)	Facilitator or presenter note
Registration (Values: 0= No Registration,1= Patron & Staff Registration, 2= Staff Only Registration)	<signup>	NA	NA
Starting Registration Date and Time	<signupstarts>	NA	NA
Ending Registration Date and Time	<signupends>	NA	NA
Contact Name - Name	<contactname>	Contact person	Contact
Contact Name - Email	<contactphone>	Phone number	Telephone Number
Contact Name - Phone	<contactemail>	E-mail address	E-mail Address
Link Text	<linktext>	NA	NA

Field in Evanced Client	Evanced XML Tag	Data element in Polaris Staff Client	Data element in PolarisPAC
Link Address (Used to provide event supporting URL)	<linkaddress>	NA	NA
Optional Image Display Path (Image displays on event's page)	<imagepath>	NA	NA
Optional Image Display Path - Alternate Text	<imagetext>	NA	NA
Optional Image Display Path - Height	<imageheight>	NA	NA
Optional Image Display Path -Width	<imagewidth>	NA	NA
Last Modified (Staff Side Only)	<lastupdated>	Internal use	Does not display
Not Used	<extratag>	NA	NA

Appendix B: Plymouth Rocket - EventKeeper mapping to Polaris

Field in Plymouth Rocket - EventKeeper Client	XML Tag	Data element in Polaris Staff Client	Data element in Polaris PAC
Total number of events in feed (does not display)	<ek_num_events>	Does not display	Does not display
Event Name	<title>	Event name	Title
Description	<description>	Event description	Description
Start Date, End Date, Event Start Time	<date>	Event date as it appears in catalog, Start date	Event Date / time
Event Start Time, Event End Time	<length>	Event date as it appears in catalog; Event end date	Event Date / time
Editor info -- ID	<id>	Does not display	Does not display
Not Available	<presenter>	Facilitator or presenter note (More info tab)	Facilitator or presenter note (More info tab)
Does not display	<link>	Event website address	In brief display: link text next to Globe icon In full display: *Connect with us* drawer
Does not display	<ek_link_text>	Does not display	Does not display
Contact Name	<Contactname>	Contact person	Contact
Contact Phone	<contactphone>	Phone number	Telephone Number
Contact Email	<contactemail>	E-mail address	E-mail Address
Location	<location>	Does not display	Does not display
Event Link [Complete URL] (e.g. http://www.sample.com)	<ek_evturl_link>	Does not display	Does not display
Event Link [Text]	<ek_evturl_text>	Does not display	Does not display
Keyword 1	<eventtype1>	Subjects (653 $a in MARC)	Subjects (653 $a in MARC)

Field in Plymouth Rocket - EventKeeper Client	XML Tag	Data element in Polaris Staff Client	Data element in Polaris PAC
Keyword 2	<eventtype2>	Subjects (653 $a in MARC)	Subjects (653 $a in MARC)
Not Available	<eventtype3>	Subjects (653 $a in MARC)	Subjects (653 $a in MARC)
Not Available	<agegroup1>	Subjects (653 $a in MARC)	Subjects (653 $a in MARC)
Not Available	<agegroup2>	Subjects (653 $a in MARC)	Subjects (653 $a in MARC)
Not Available	<agegroup3>	Subjects (653 $a in MARC)	Subjects (653 $a in MARC)
Modified date	<lastupdated>	Does not display	Does not display

Campaigns for Community Promotions

To use Polaris Campaigns, your library must have licenses for Polaris Community Profiles and Polaris Feature It, as well as the separately licensed Polaris Campaigns. With Polaris Campaigns, libraries can automatically create promotions for existing community or event records, based on terms in the keyword indexed fields in these records. See "Keyword Indexed Fields in Community Records" on page 61.

The Campaign workform is used to specify the campaign's duration; the organization(s) whose community records will be included in the campaign; and the type of community records (organizations, events, or programs/services) promoted in the campaign. It also provides a source of data for the promotions it will create. For example, promotions created by a campaign inherit the activation/expiration date and the owner fields from the Campaign workform. When the **Enabled** check box is selected on the Campaign workform, a nightly SQL job creates promotions automatically using the information entered in the workform.

To create trigger terms for each promotion, the system uses a logarithmic keyword-weighting ratio (based on the total number of terms to the term frequency in the Community information database) to determine the default keyword index weight "threshold." The threshold is a minimum weight value that a given keyword term in a community record must contain in order to be included in promotion trigger terms. Any community record keywords with a keyword index weight above the system-calculated threshold are included in the trigger terms on a given system-generated promotion for that record.

The SQL job for campaigns runs every night before the nightly promotions indexing job, so that new promotions are indexed. Successive runs of the SQL job for campaigns delete all existing campaign-generated promotions created by and linked to the campaign, and create new promotions according to any settings saved to the Campaign workform.

Note that deleting a campaign-generated promotion does not prevent the system from recreating the promotion during the next overnight run of the SQL job. If you want to prevent a Campaign from creating (or recreating) a promotion for a given community record(s), you can create a promotion manually and include community record(s) you wish to exclude from the campaign.

Automatic promotions are not created if:

- An event is expired
- An event or community record does not display in PAC.
- A community or event record is already linked to a manually-created promotion record.

Campaigns Administration

Libraries with Polaris Campaigns can use a Cataloging profile in Polaris Administration to specify a character limit for the headline, midline, and footline fields of Campaign-generated Promotion records.

Set truncation for Campaign-generated promotions

Follow these steps to set truncation for Campaign-generated promotions.

1. Select **Administration, Explorer, System** and select the organization (system, library, or branch) in the tree view.

   The organization folder expands.

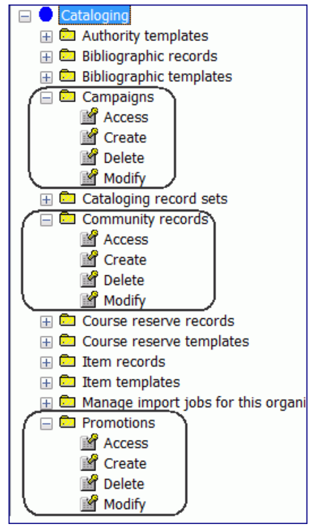
2. Select **Profiles** to display the profiles for the organization in the details view.
3. Select the **Cataloging** tab to display the Cataloging profiles.
4. Double-click **Campaigns truncation options**.

   The Campaign truncation option dialog box opens.

5. To limit the number of characters in the headline, midline, and footline fields, type a number less than 255 characters (the default and the maximum) in the appropriate box.

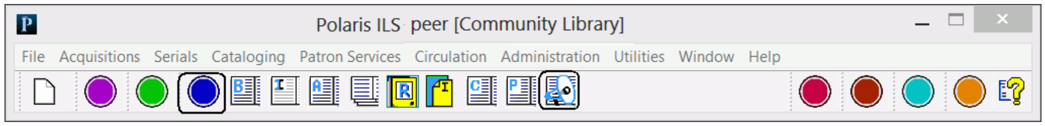
Grant staff members permissions to work with Campaigns

To enable staff members to work with Campaign records, grant them permissions for Community Profiles, Promotions, and Campaigns.

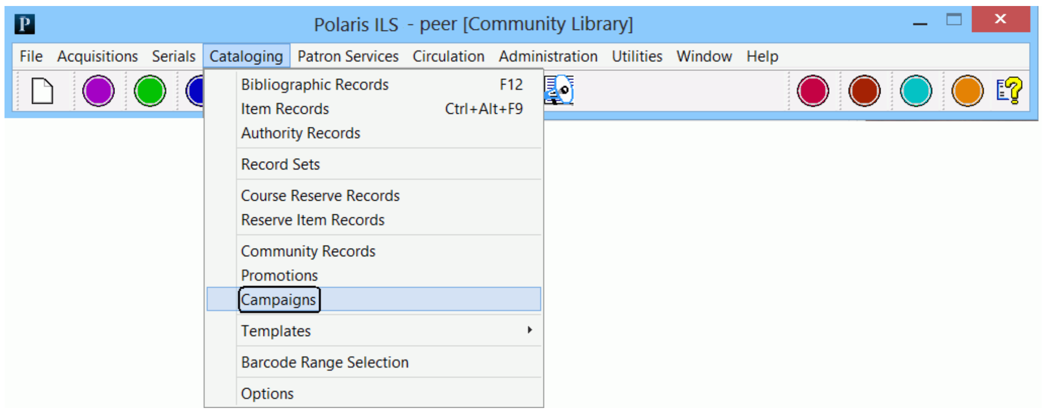


Campaign Records

If your library has the required licenses, the Polaris Shortcut Bar displays the Campaigns icon when you select the blue Cataloging orb.

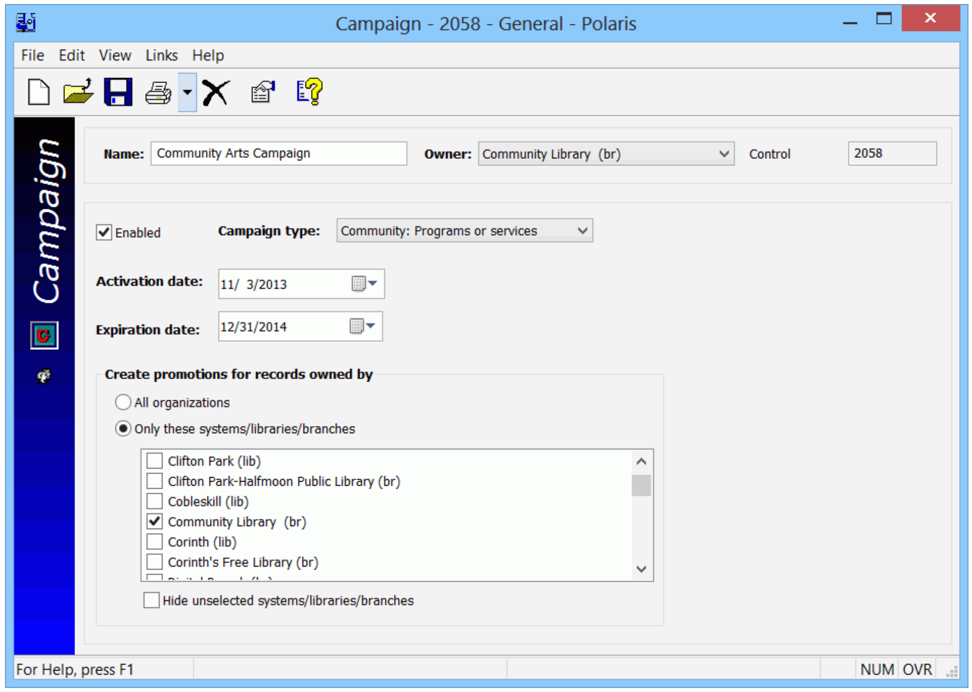


And, the Cataloging menu lists a the **Campaigns** record type.

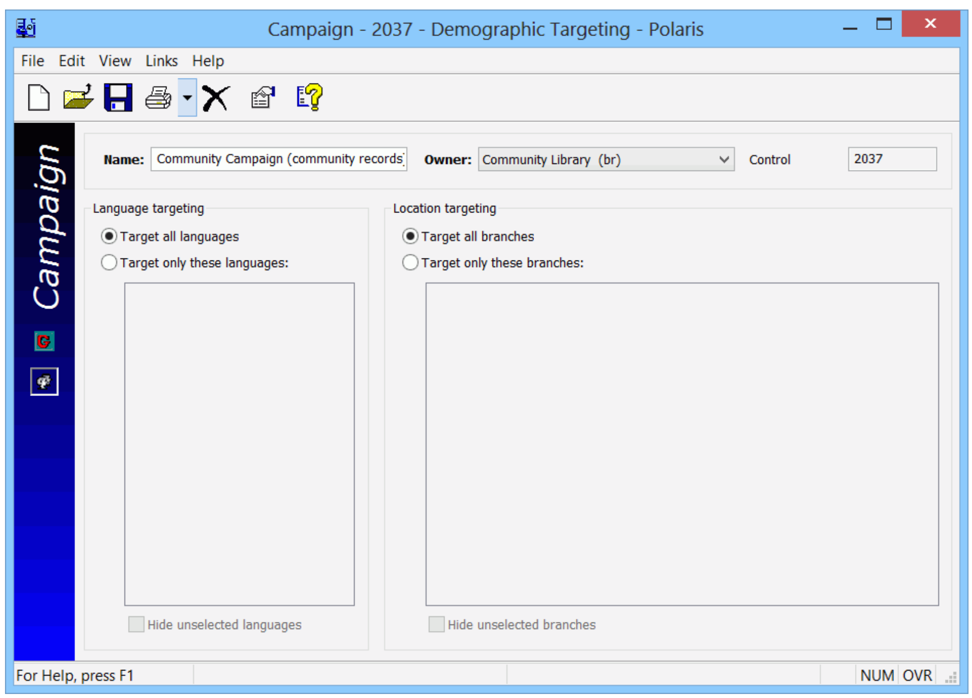


The following permissions are required to work with campaign records: **Campaigns: Create**, **Access**, **Modify**, and **Delete**.

The General view of the Campaign workform displays identifying information about the campaign and the period for which it is active.



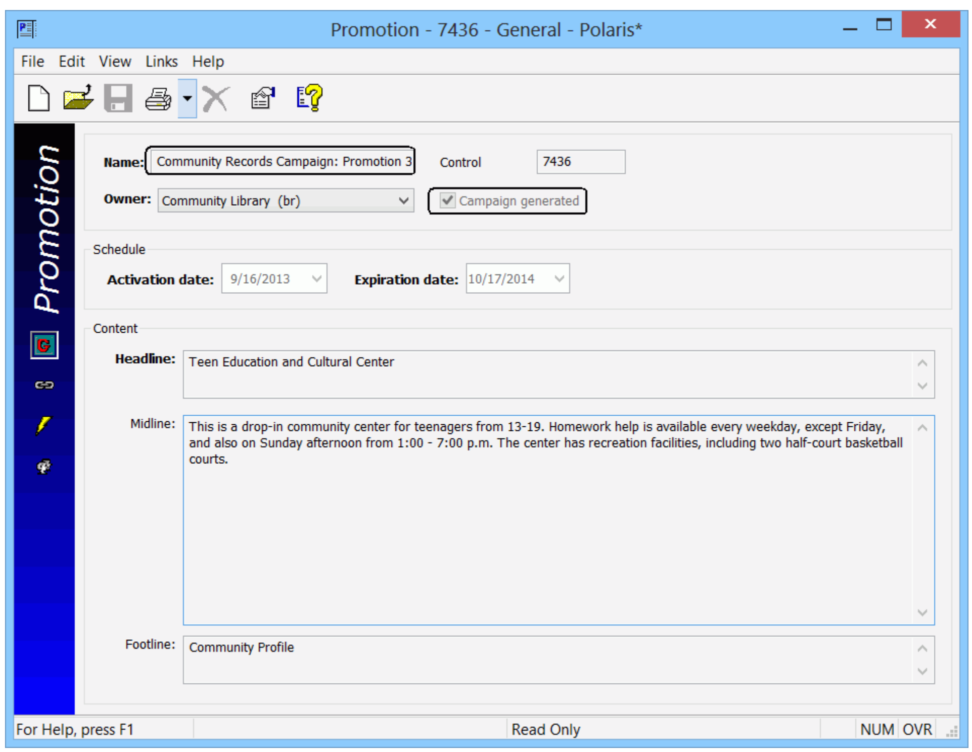
In addition to the General view, shown above, the Campaign workform has a Demographic Targeting view where you can select languages or locations to target. If this view is set to target specific languages and/or branches, the promotions created by the campaign will have the same languages and/or branches selected.



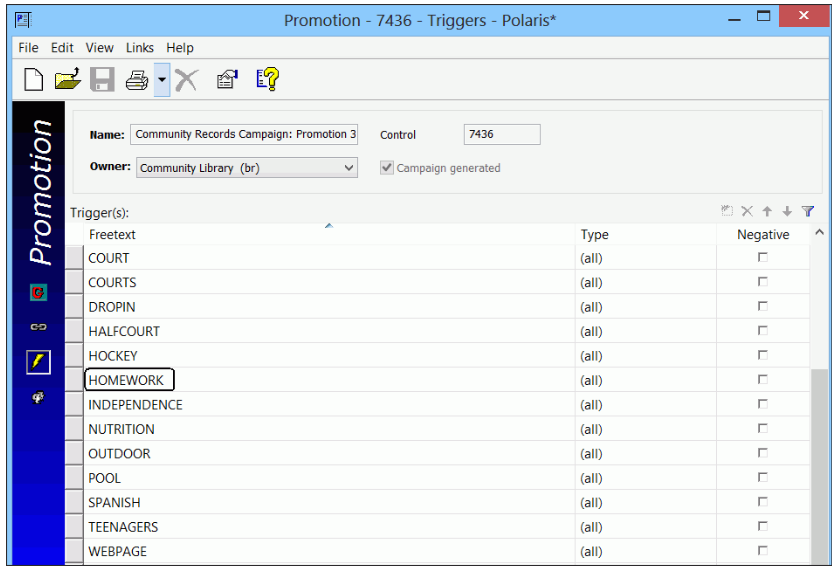
Campaign-Created Promotions

Promotions created by campaigns use a combination of data from the Campaigns workform and community records to generate the required information for the promotion:

- The **Name** field of the promotion includes the campaign type and a unique ID for the promotion.
- The owner is inherited from the **Owner** field on the Campaigns workform.
- The Headline comes from the **Organization Name** field in the Community Record workform or the **Event Name** in the Event Record workform.
- The Midline comes from the **Description** field in the Community Record workform or the Event Record workform.
- The Footline displays the default text for the promotion. If the promotion is for an event, the event type (**Event** or **Program**), is displayed. If the promotion type is for a community record, **Community Profile** is displayed.
- The **Campaign generated** box is checked.

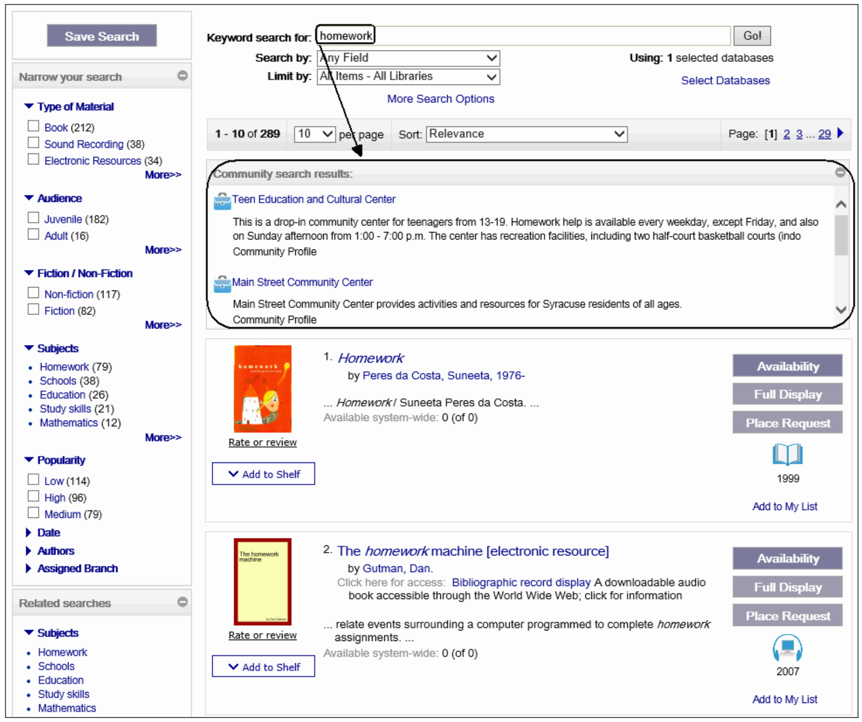


The trigger terms displayed on the Triggers view of the Promotion workform are generated automatically based on the calculated importance of the terms in keyword-indexed fields.



Campaign-Created Promotions in Polaris PowerPAC

Once a promotion is generated by the system, it appears in the PowerPAC search results when one of the trigger terms is searched. In the example below, the community records are featured because the auto-promotions created for these community records have automatically-generated trigger terms that include **homework**.



If the library has chosen to display promotions, the promotions (campaign-generated and manually-created) that match the search criteria appear even if the user's search retrieved zero bibliographic or community results.

Create a campaign record

Follow these steps to create a new campaign record that will automatically generate promotions for community records (organizations), community events, or community programs.

Note:
The **Campaigns: Create** permission is required to create a new Campaign record.

1. Select **File**, **New**, **Cataloging**, **Campaign**.

   Note:
   You can also copy an existing Campaign workform.

Tip:
An enabled campaign record cannot be saved with the same name and owner as an existing enabled campaign.

2. Enter the campaign name in the **Name** box.

   Select the owner in the **Owner** box.

   Note:
   The **Enabled** check box is checked by default, but you can clear the check box to disable the campaign.

3. Select the type of campaign in the **Campaign type** box.
4. Select the date when the campaign begins in the **Activation date** box.
5. Select the date when the campaign ends in the **Expiration date** box.

6. Specify the community record owners (library organizations) for whom the promotions will be automatically created by selecting **All organizations** or **Only these systems/libraries/branches**.

   If you selected **Only these systems/libraries/branches**, a list of organizations is displayed. Select the organization(s).

7. If you want the campaign-created promotions to be targeted to specific languages or branches, select **View, Demographic Targeting** or click , and do the following steps:

   Note:
   If you do not select an option on the Demographic Targeting view, the automatic promotion records created from this campaign will have **Target all languages** and **Target all branches** selected.

   a) Select one or both of the following options to display the lists:

   - **Target only these languages**
   - **Target only these branches**

   Note:
   The list of languages contains only those languages for which the library has a license from Polaris.

b) Select the languages and/or branches that you want to target.

- If languages are selected, the featured community records/events appear only when the PAC user has switched the PowerPAC interface to a targeted language (from the **Languages** tab at the top of the PowerPAC window).
- If branches are selected, the featured resources appear only when the PAC user is connected to one of the targeted branches in PowerPAC.

8. Save the campaign record.

Duplicate Detection

Duplicate detection is performed only on enabled campaigns (the **Enabled** box is checked on the Campaigns workform). When you attempt to save the new enabled campaign record, the following error message appears if the new record's name and organization match an existing enabled campaign record with the same name and organization: **Campaign name/ owner combination already used**.

Find a campaign record

Follow these steps to find an existing Campaign record.

> **Note:**
> The Campaigns option is displayed in the Cataloging menu only if the library has the Campaigns license enabled.

1. Select **Cataloging, Campaigns.**

The Find Tool opens with **Campaigns** selected.

2. Enter the search criteria, and click **Search**.

- You can search by all keyword fields, campaign name, type, owner or control number.
- You can limit by all keyword indexed fields, campaign name, owner, or type. When you select **Campaign type** in the **Limit by** box, you can select from the following options in the **Values** box: **Community: Organizations**, **Community: Events**, or **Community: Programs or services**.

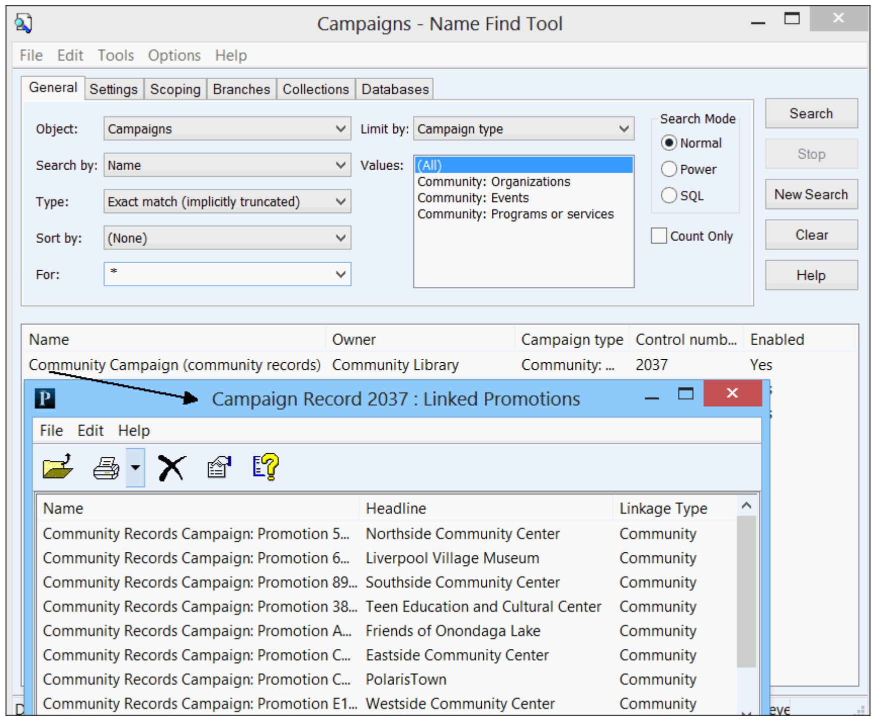
The campaign records are displayed in the Find Tool results list.

3. Double-click the campaign record in the list to open the Campaign workform.

View Promotions Linked to a Campaign

- From the Find Tool, right-click a campaign and select **Links, Promotions.**
- From the Campaign workform, select **Links, Promotions.**

A list box opens showing the linked promotions. Double-click to open the campaign-generated promotion.



If you do not like a campaign-created promotion, or want to add or remove trigger terms, copy the Promotion workform, manually create a new promotion, and delete the campaign-generated one. The next night the Campaigns job runs, it will not create a promotion for that record because the manual promotion always takes precedence.

Modify a campaign record

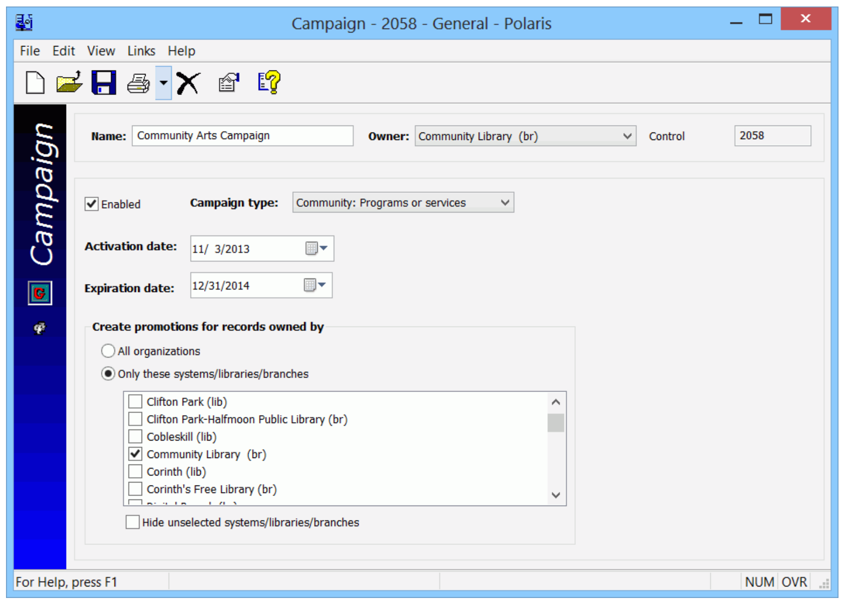
When a campaign record is modified, the changes are applied to the campaign-generated promotions the next time the overnight SQL job runs. Each night the Campaigns job deletes all existing campaign-created promotions and then recreates them.

Follow these steps to modify a campaign record.

Note:
To modify the campaign record, you must have the permission, **Campaigns: Modify** for the organization that owns the campaign record.

1. Use the Find Tool to locate and open the campaign record. See “Find a campaign record” on page 57.

   The record opens in the Campaign workform.



2. Modify the fields in the workform following the instructions in “Create a campaign record” on page 55.
3. Save the campaign record.

Delete a campaign record

When a campaign record is deleted, all the linked campaign-created promotions are deleted.

Follow these steps to delete a campaign record.

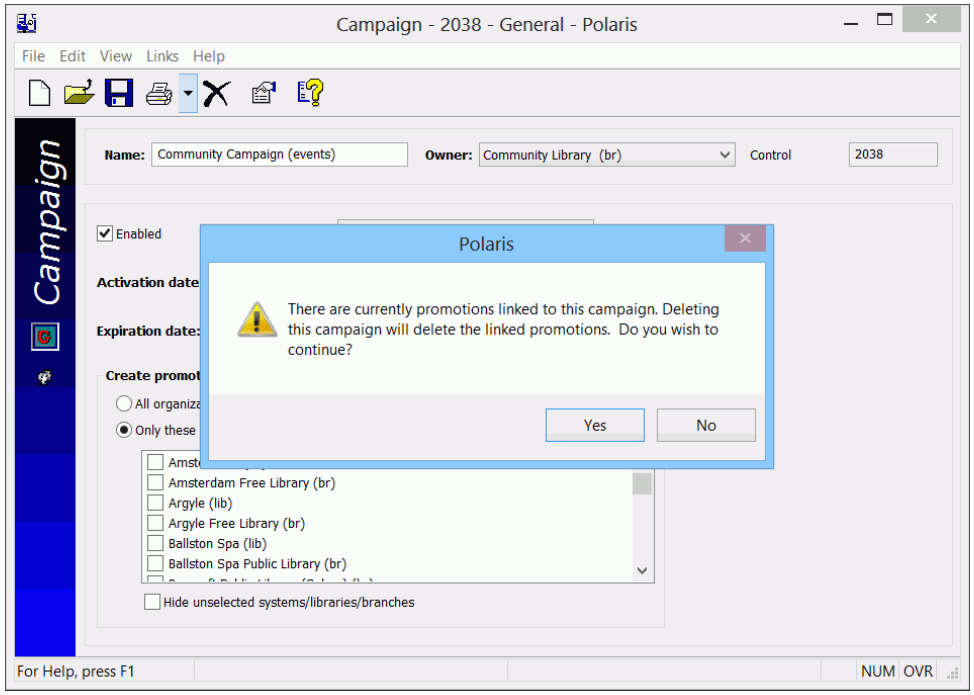
Note:
To delete the campaign record, you must have the permission, **Campaigns: Delete** for the organization that owns the campaign record.

1. Use the Find Tool to locate and open the campaign record. See “Find a campaign record” on page 57.

The record opens in the Campaign workform.

2. Select **File, Delete**.

   If the campaign is linked to promotions, a message informs you that the linked promotions will be deleted.



3. Click **Yes** to delete the campaign.

   All existing linked promotions created by this campaign are deleted.

Keyword Indexed Fields in Community Records

For more information on MARC 21 Format for Community Information, go to http://www.loc.gov/marc/community/eccihome.html

Primary Name Index - Keyword	
100 - Primary Name - Personal	a, b, c, d, e, g, j, q, u
110 - Primary Name - Corporate	a, b, c, d, e, g, n, u
111 - Primary Name - Meeting	a, b, c, d, e, g, j, n, q, u
270 - Address	g, h, p, q
271 - Additional Addresses	g, h, p, q
303 - Subordinate Entities	p
311 - Meeting Rooms and Facilities Available	p
511 - Participant or Performer Note	a
570 - Personnel Note	a
572 - Affiliation and Other Relationships Note	a, b
600 - Subject Added Entry - Personal Name	a, b, c, d, e, g, j, q, u
610 - Subject Added Entry - Corporate Name	a, b, c, d, e, g, n, u
611 - Subject Added Entry - Meeting Name	a, b, c, d, e, g, j, n, q, u
700 - Added Entry - Personal Name	a, b, c, d, e, g, j, q, u
710 - Added Entry - Corporate Name	a, b, c, d, e, g, n, u
711 - Added Entry - Meeting Name	a, b, c, d, e, g, j, n, q, u

Event or Program Index - Keyword	
245 - Title	a, b, c, h, n, p
246 - Varying Form of Title	a, b, f, g, h, n, p
247 - Former Title	a, b, f, g, h, n, p
303 - Subordinate Entities	a, b, c
307 - Hours Etc.	a, b
311 - Meeting Rooms and Facilities Available	a, b, c, d, e, f, g, h, m, p
505 - Programs Note	a
511 - Participant or Performer Note	a

Subject Index - Keyword	
600 - Subject Added Entry - Personal Name	a, b, c, d, e, f, g, j, n, p, q, s, t, u, v, x, y, z
610 - Subject Added Entry - Corporate Name	a, b, c, d, e, f, g, j, n, p, q, s, t, u, v, x, y, z
611 - Subject Added Entry - Meeting Name	a, b, c, d, e, f, g, j, n, p, q, s, t, u, v, x, y, z
630 - Subject Added Entry - Uniform Title	a, f, n, p, s, v, x, y, z
648 - Subject Added Entry - Chronological Term	a, v, x, y, z
650 - Subject Added Entry - Topical Term	a, b, v, x, y, z
651 - Subject Added Entry - Geographic Name	a, v, x, y, z
653 - Index Term - Uncontrolled	a
654 - Subject Added Entry - Faceted Topical Terms	a, b, c, v, y, z
656 - Index Term - Occupation	a, v, x, y, z
657 - Index Term - Function	a, v, x, y, z
658 - Index Term - Curriculum Objective	a, b, c, d

Notes Index - Keyword	
500 - General Note	a
505 - Programs Note	a
520 - Description Note	a
521 - Target Group Note	a, b, c, d, e, f
531 - Eligibility, Fees, Procedures Note	a
536 - Funding Source Note	a
545 - Biographical or Historical Note	a
546 - Language Note	a
551 - Budget Note	a
573 - Credentials Note	a
574 - Transportation and Directions Note	a
581 - Publications Note	a
587 - Other Information Available Note	a

Address and Contact Persons - Keyword	
270 - Address	a, b, c, d, e, g, I, j, k, l, m, n, p, q, z
271 - Additional Addresses	a, b, c, d, e, g, I, j, k, l, m, n, p, q, z
303 - Subordinate Entities	p
311 - Meeting Rooms and Facilities Available	b, p
522 - Geographic Coverage Note	a
570 - Personnel Note	a

Services Available - Keyword	
576 - Services Available Note	a
521 - Target Group Note	a

Community Setup for PAC Display

Polaris Administration settings control how Community information records are displayed in the Polaris PACs (PowerPAC and Mobile PAC); the default display of community events; the search options available for library users to find community information; and the search facets available for filtering community information. When a staff member creates a community record in the Polaris staff client and the record is set to **Display in PAC**, the community information will display in the Polaris PowerPAC and Mobile PAC according to these administration settings. Your library can also customize PAC text and messages related to Community Profiles using Polaris Language Editor (WebAdmin). For instructions, see the *Polaris Language Editor Guid*e or Language Editor online Help.

After creating a Community Information record, the staff member can designate anyone with a patron account as the community representative. Then, that designated representative can log into their account in Polaris PowerPAC and edit the organization record. See "Designate a community representative" on page 20.

The section "Editing Community Records in PAC" on page 104 provides instructions for organization representatives to follow as they edit their community information. Since these instructions are based on the default PAC interface, they may require modifications if your PAC interface is customized.

If your library also offers the Polaris ContentXChange feature, see "Administering ContentXChange" on page 101 for information regarding the library setup and "Using ContentXChange" on page 122 for instructions the organization representative uses to incorporate ContentXChange features into their organization's Web site.

This unit covers the following topics:

Setting Community Search Options for PAC

You can use Polaris Administration settings to specify the search types, filters, and sort order for community information. In addition, you can specify which community search transactions are logged for statistical purposes.

Community Keyword searches are available in Polaris PowerPAC and Mobile PAC, and Community Browse searches are available in Polaris PowerPAC. Like bibliographic PAC searches, you can set up default values for Community Keyword and Community Browse search settings.

Users can also select a **Limit by** option to filter Community Keyword searches, similar to other types of PAC searches. In Polaris Administration, you can enable specific Community Keyword search filters, specify custom **Limit by** filters, and specify the display order of **Limit by** options.

See the following topics:

- "Set PAC community information search options" on page 66
- "Specify Community Keyword search filters" on page 69
- "Community Information Search Statistics" on page 72

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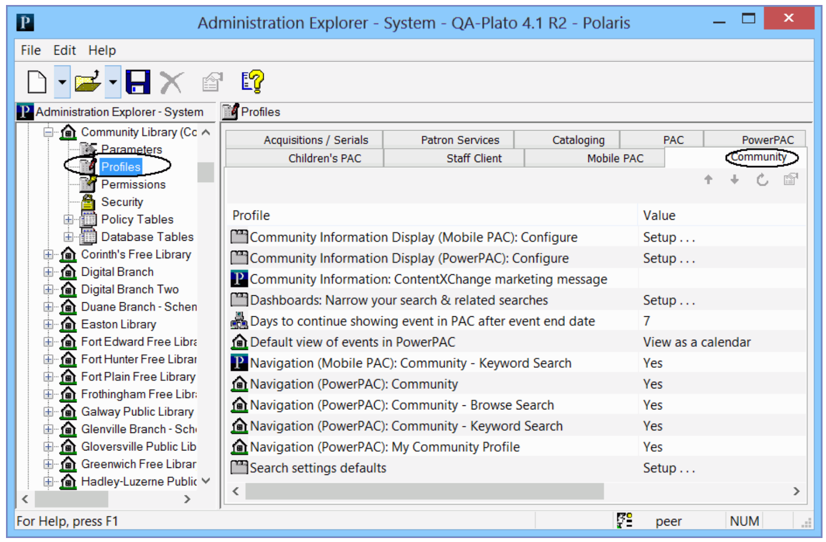
Set PAC community information search options

All these options are available at the system, library, or branch level. The system uses the settings of the PAC connection organization; that is, the system, library, or branch specified in the PowerPAC **Switch branches** list or the Mobile PAC preferences page.

Follow these steps to set the PAC navigation and search options for community records.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Community** tab in the details view.

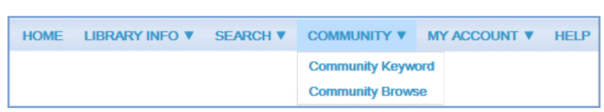


2. To display the **Community** option on the Polaris PowerPAC menu bar, set **Navigation (PowerPAC): Community** to **Yes**.

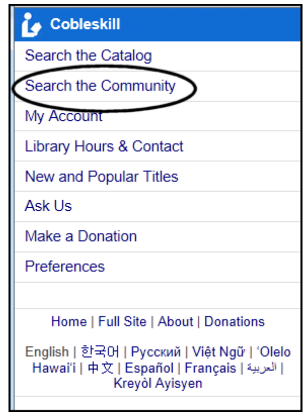
3. Set Community search options:

   a) To display the **Community Browse** search option on the Polaris PowerPAC **Community** menu, set **Navigation (PowerPAC): Community - Browse Search** to **Yes**.

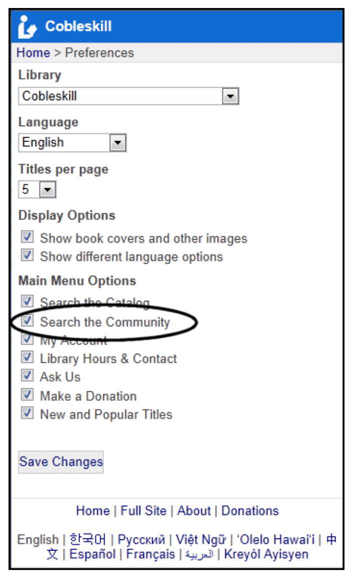
   b) To display the **Community Keyword** search option on the Polaris PowerPAC **Community** menu, set **Navigation (PowerPAC): Community - Keyword Search** to **Yes**.



c) To display the **Community Keyword** search option in Mobile PAC, set **Navigation (Mobile PAC): Community - Keyword Search** to **Yes**.



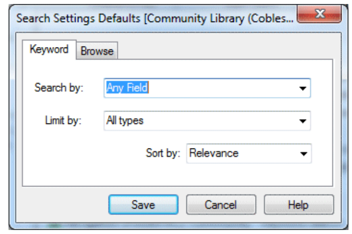
This setting also displays the option on the Mobile PAC Preferences page.



4. If you have enabled Community Keyword searches, double-click **Search Settings Defaults** to specify the default keyword search settings:

> **Note:**
> Your keyword search settings also apply to Mobile PAC.

a) On the Keyword tabbed page, set the default **Search by** (access point) option. Users can keyword-search community information by **Any Field, Organization Name, Event Name, Services, Subject, Address and contact person, Postal code**, or **Notes**. These options look for information in the corresponding fields of community records. Your setting simply determines the default choice.



b) Set the default **Limit by** (search filter) option. Users can limit their keyword community searches by **All types** (no filter), **Organizations or Clubs**, **Events**, **Programs or services**, **People**, **Sponsor or donor**, **Other**.

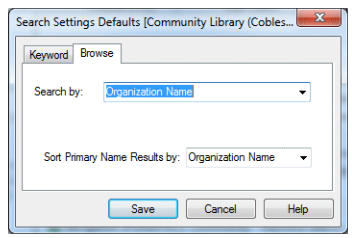
Tip:
You can change the display names of **Limit by** options, set their display order, suppress them from display, and set your own custom filters. See "Specify Community Keyword search filters" on page 69.

Tip:
Browse searches are not available in Mobile PAC.

c) Set the default **Sort by** option. Users can sort their keyword community search results by **Relevance**, **Organization Name**, **Type of Organization**, **Event Name**, **Event Date (earliest first)**, or **Event Date (latest first)**.

5. If you have enabled Community Browse searches, double-click **Search Settings Defaults** to specify the default browse search settings:

a) On the Browse tabbed page, set the default **Search by** option. Users can browse-search community information indexes by **Organization Name**, **Event Name**, **Services**, or **Subject**.



b) Select a sort option for Primary Name (heading) results. The options are **Relevance**, **Organization Name**, **Event Name**, **Event date (earliest first)**, and **Event date (latest first)**. These options are not displayed to PAC users, so your choice applies to all community browse searches.

6. To allow designated patrons to access specific organization records for editing, set **Navigation (PowerPAC): My Community Profile** to **Yes**.

This setting displays a **Community** option on the **My Account** menu when the authorized patron is logged in.

Related Information

- **Number of days to display an event after end date** - Use the Community profile **Days to continue showing event in PAC after event end date** to specify a default number of days for how long an event should continue to appear in a user's search results after the event end date. (Your default setting can be edited in the staff client or PAC editor for a specific event.)
- **Community records in the staff client** - See "Creating or Editing a Community Record in the Staff Client" on page 7.
- **Designating organization representatives** - Designated patrons can edit information for their organizations in Polaris PowerPAC. See "Designate a community representative" on page 20.
- **Community record updates in PAC** - See "Editing Community Records in PAC" on page 104.

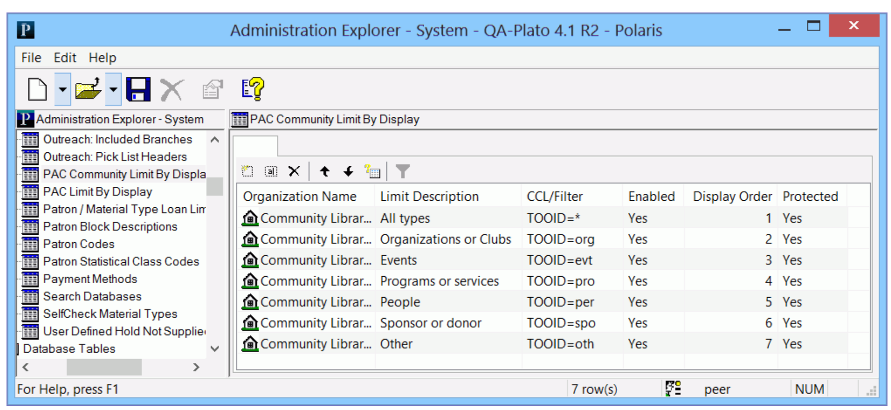
Specify Community Keyword search filters

Follow these steps to enable system-supplied filters for the Community Keyword **Limit by** list in Polaris PowerPAC, set up custom filters, and order the options in the Community Keyword **Limit by** list.

> **Note:**
> You need the System Administration permission **Modify PAC Community limit by display table: Allow** to do this procedure.

1. In the Administration Explorer tree view, open the Policy Tables folder for the organization, and select **PAC Community Limit by Display**.

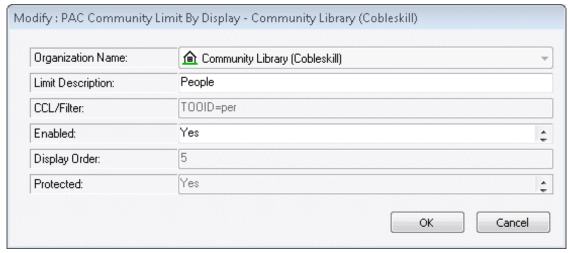
The PAC Community Limit by Display table appears in the details view.



2. To work with a standard Limit by option, follow these steps:

a) Select the option and click .

The Modify PAC Community Limit by Display dialog box appears.



b) To change the name of the option as it is displayed in PAC, type the new name in the **Description** box.

> **Note:**
> This setting affects only the names as listed in the PAC Community Keyword **Limit by** list. The underlying filter does not change.

c) To display or suppress the filter in the PAC Community Keyword **Limit by** list, select **Yes** (display) or **No** (suppress) in the **Enabled** box.

Set *all* the table entries to **No** to suppress the **Limit by** list from display.

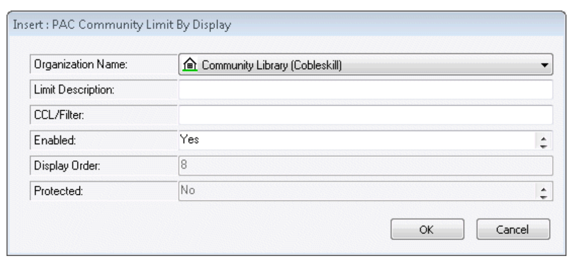
d) Click **OK**.

The Modify PAC Community Limit by Display dialog box closes, and the table displays your changes.

3. To set up a custom filter, follow these steps:

a) Click [icon] in the PAC Community Limit By Display table.

The Insert PAC Community Limit By Display dialog box appears.



b) Type the filter name in the **Description** box. This name will appear in the **Limit by** list in PAC.

c) Type the CQL search command for the filter in the **CCL Filter** box.

You can type any valid CQL command. For more information about constructing CQL commands, refer to "PAC CQL Commands & Access Points" in the *Polaris Public Access Administration Guide 4.1R2*. (If the command is not valid, the PAC search will return no results.)

For a list of Community access points, see "CQL Access Points for Community Information" on page 133.

d) Click **OK**.

The Insert PAC Community Limit by Display dialog box closes, and the table displays your changes.

4. To set the order of options in the **Limit by** list, select a filter in the table and click or . Repeat this step until the list is ordered the way you want it.

   The higher an enabled item is positioned in the table (the lower the **Display Order** number), the closer to the top the item appears in the **Limit by** list. The first enabled item in the table is the top item in the **Limit by** list.

5. Select **File**, **Save**.

Related Information

- **Setting the default Community Keyword Limit by option** - See "Set PAC community information search options" on page 66.
- **Deleting a search filter** - Select a custom filter in the PAC Community Limit by Display policy table, and click . You cannot delete the standard filters. The **Protected** column indicates whether a filter can be deleted. If the value is **Yes**, you cannot delete the filter.
- **Modifying a search filter** - Select the filter in the PAC Community Limit by Display policy table, and click . You can modify the description, CQL command, and the **Enabled** setting for a custom filter. You can modify only the description and the **Enabled** setting for standard filters. The **Protected** column indicates whether the CQL command can be edited for a filter. If the value is **Yes**, you cannot edit it.

Community Information Search Statistics

PowerPAC community information search statistics are available for logging and reporting. The table lists the available transaction types. For more information about logging transactions and the Polaris Transactions database, see "Collecting Transaction Statistics" in the *Polaris Administration Guide 4.1R2*

Transaction Type ID	*Transcription Description*
1201	Search community browse organization name
1202	Search community browse event name
1203	Search community browse subject
1204	Search community browse services
1205	Search community keyword
1206	Search community keyword organization name
1207	Search community keyword event name
1208	Search community keyword subject
1209	Search community keyword services
1210	Search community keyword address
1211	Search community keyword postal code
1212	Search community keyword notes
1213	Search community keyword control number

Configuring the PAC Community Results Display

You can specify the information displayed for entries in community search results in the brief and full display for Polaris PowerPAC and Mobile PAC, much as you configure the title display for bibliographic searches in these applications. The community information display is configured separately for Polaris PowePAC and Mobile PAC, but the procedure is the same for both profiles.

In addition, you can specify the default display for community events in the PAC, provided the Web server is set up for ContentXChange.

See the following topics:

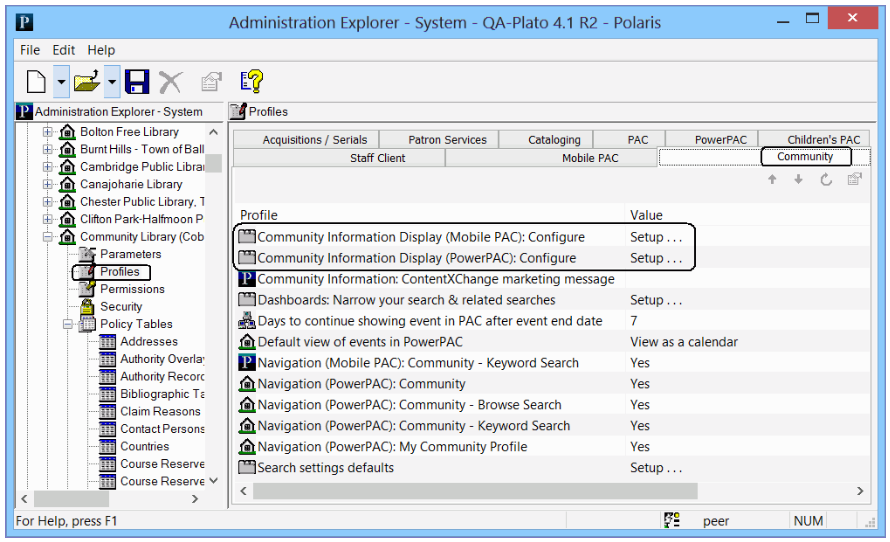
- "Select community elements for display in PAC" on page 74
- "Edit community information display order" on page 80
- "Share a community information display configuration" on page 81
- "Edit a community information entity definition" on page 82
- "PowerPAC Results Displays - Community Information" on page 85
- "Mobile PAC Results Displays - Community Information" on page 89

Select community elements for display in PAC

Follow these steps to select elements (entities) for display and edit their labels for PowerPAC or Mobile PAC community information search results.

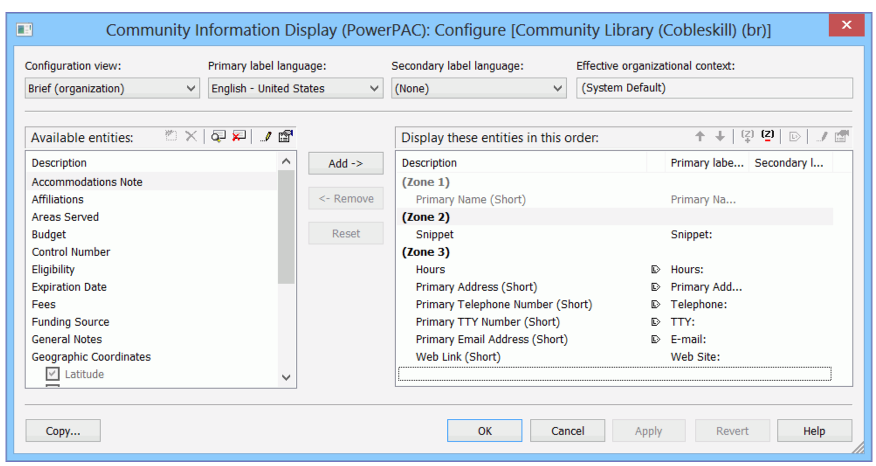
Note:
You need the System Administration permission **Modify community record title displays: Allow** to do this procedure.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **Community** tab in the details view.



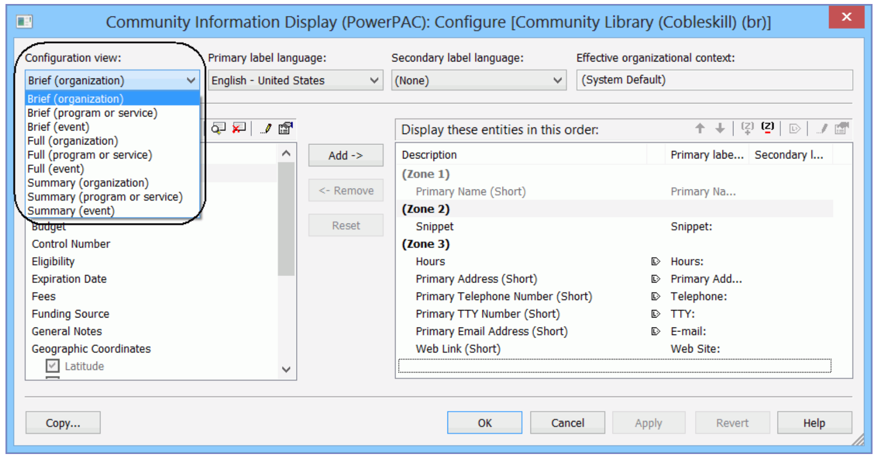
2. Double-click **Community Information Display (PowerPAC): Configure** or **Community Information Display (Mobile PAC): Configure.**

   The Community Information Display: Configure dialog box opens.



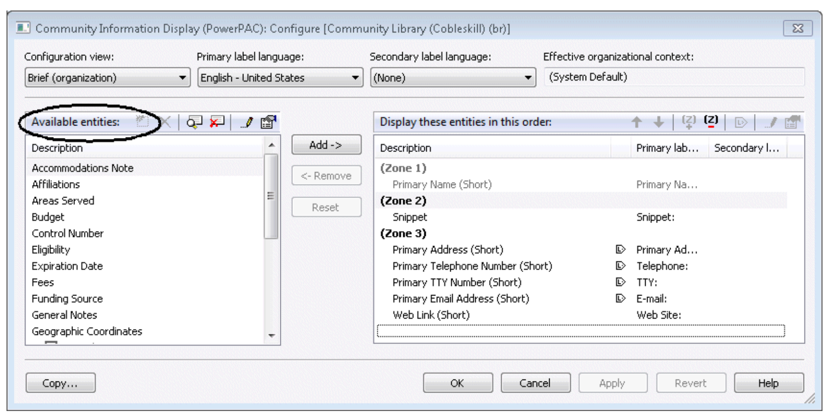
3. Select the view you want to configure from the **Configuration view** menu.

You can configure separate displays for organizations, programs or services, and events. For descriptions of brief, summary, and full views, see “PowerPAC Results Displays - Community Information” on page 85 and “Mobile PAC Results Displays - Community Information” on page 89.

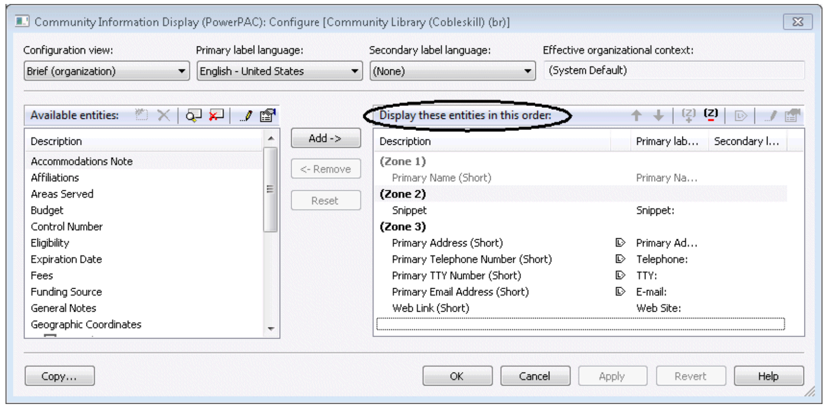


The **Available entities** list on the left side of the dialog box displays the elements that can be added to a view.

> **Note:**
> WIth the appropriate permission, you can edit the definition of an entity (system level only). See “Edit a community information entity definition” on page 82.



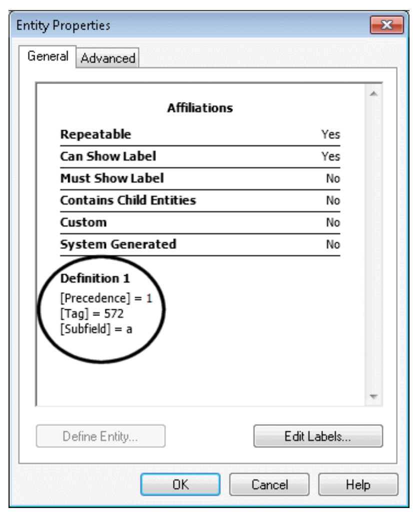
The **Display these entities** list on the right side of the dialog box lists those elements that are currently selected for the configuration view.



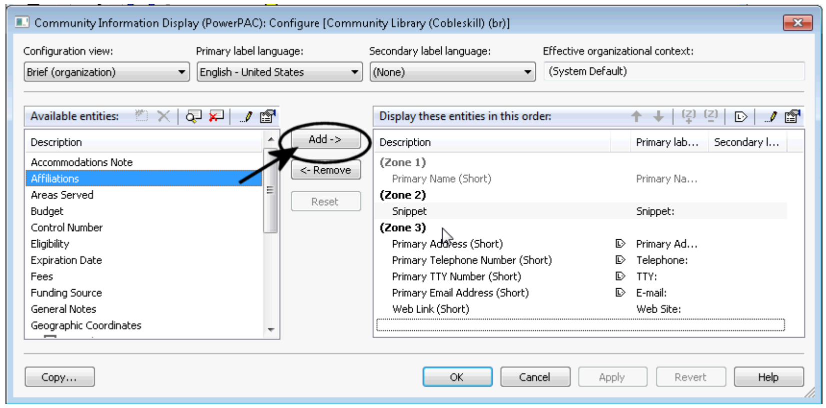
"Short" entities are not repeatable for a single view. "Long" entities are repeatable within a single view. You can double-click the edge of a column header to expand the column and display the full text if necessary.

4. To see the tags, indicators and subfields that are included in an entity, use one of these methods:
   - Hover the cursor over the entity for a quick read-only display.
   - Right-click the entity and select **Properties** on the context menu.
   - Select the entity and click the Properties icon above the list.

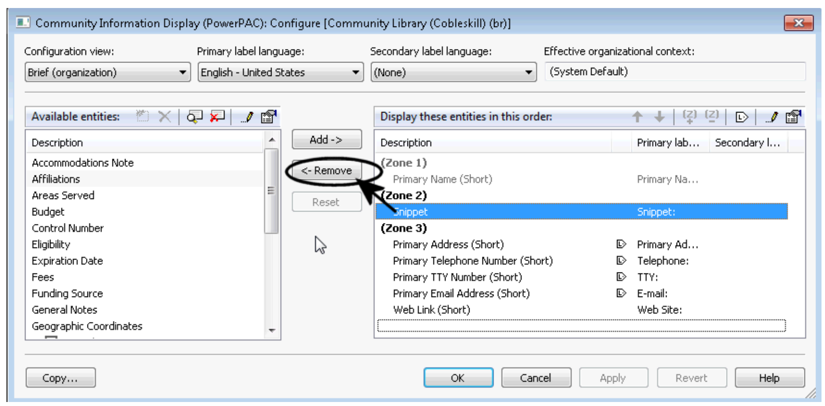
   The Entity Properties dialog box opens.



5. To add a data element to the view, click the data element in the **Available entities** list, then click **Add**.



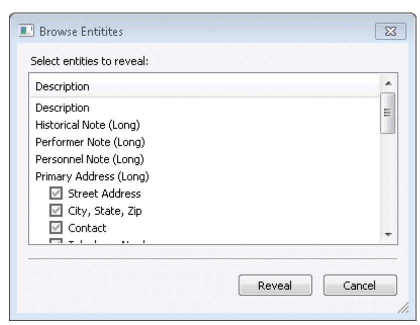
6. To remove a data element from the view, click the data element in the **Display these entities** list, then click **Remove**.



7. If the **Available Entities** or **Display these entities** list does not include the data element you want to display, follow these steps:

a) Click the Browse icon  at the top of the **Available entities** list.

The Browse Entities dialog box opens.



b) In the Browse Entities dialog box, select the element you want to add to the **Available entities** list.

You can hover the cursor over an entity to see its properties.

c) Click **Reveal**.

The element now appears in the **Available entities** list and can be selected for display.

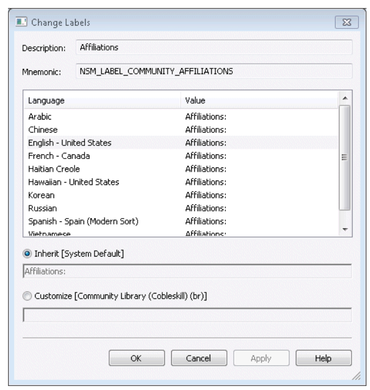
Note:
You can shorten the **Available entries** list to reduce scrolling. Select the entity that you want to remove, right-click and select **Suppress** from the context menu, or click the Suppress icon at the top of the **Available entities** list. To add an entry back to the list, repeat steps a-c.

8. To edit the default English label for an entity, and to enter or change the labels for other languages, follow these steps:

Tip:
You can also edit the labels using Polaris Language Editor (WebAdmin). The **Mnemonic** field at the top of the Change Labels dialog box displays the language string ID for the entity's label. In Polaris Language Editor, select the **ERMSPortal** "product" to edit entity labels. For more information about using Polaris Language Editor, see the *Polaris Language Editor (WebAdmin) Guide* or online Help for Polaris Language Editor.

a) Right-click the entity in the **Available entities** or the **Display these entities** list, and select **Labels** from the context menu, select **Edit Labels** from the Entity Properties dialog box, or click the Change Labels icon at the top of the **Available entities** or **Display these entities** list.

The Change Labels dialog opens for the entity you selected.



b) On the Change Labels dialog box, click the language you want to edit.

c) To customize the label, click the **Customize** option and then enter your text.

Tip:
To enter diacritics or non-Latin characters, press and hold **ALT** while typing the code on the numeric keypad.

- To permanently save your changes and keep the dialog box open, click **Apply**.
- To permanently save your changes and close the dialog box, click **OK**.
- To remove any changes that have not been applied and close the dialog box, click **Cancel**.

9. Save or cancel your work in the Community Information Display Configure dialog box:
   - To remove any changes that have not been applied and close the Community Information Configure dialog box, click **Cancel**.
   - To remove any changes that have not been applied and keep the Community Information Configure dialog box open, click **Reset**.
   - To permanently save changes and keep the Community Information Display Configure dialog box open, click **Apply**. See these topics for further information:

     "Edit community information display order" on page 80

     "Share a community information display configuration" on page 81

     "Edit a community information entity definition" on page 82 (system level only)
   - To permanently save changes and close the Community Information Configure dialog box, click **OK**.

     Important:
     After saving your changes, use Polaris Language Editor (WebAdmin) to reload PowerPAC or Mobile PAC. Users may also need to clear their browser caches.

Related Information

- **Revert to parent organization settings** - After making changes to the Community Information Configure dialog box at the branch or library level, you can revert to the parent-level settings. Click **Revert** on the Community Information Configure dialog box. Only the currently-selected configuration view is inherited from the parent organization. If you make changes after clicking **Revert**, then inheritance is broken and you will no longer inherit settings from the higher organization.

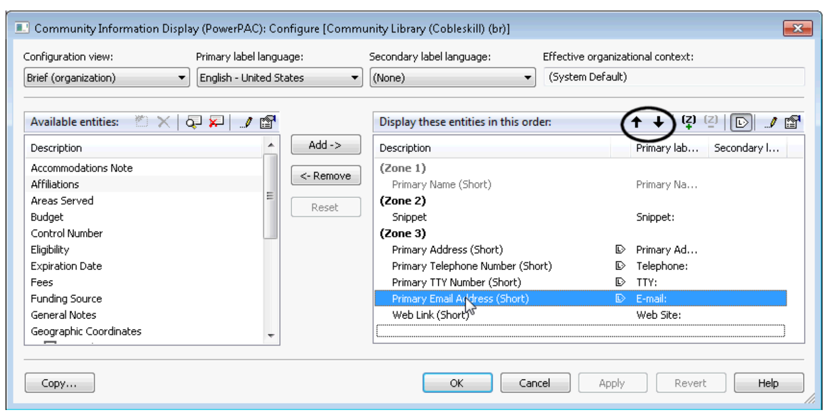
  Important:
  When you click **Revert**, all branch-level configuration settings are lost. The action cannot be undone.
- **Copy a display configuration** - See "Share a community information display configuration" on page 81

1-2-3

Edit community information display order

The data elements that have been selected for display in the current configuration view can be organized into logical visual “zones” by inserting zone separators (white space). You can also set the display order for the selected entities. Follow these steps:

1. Open the appropriate Community Information Display Configure dialog box if it not already open, and select the view you want to arrange. See “Select community elements for display in PAC” on page 74.
2. To insert a zone separator:
   a) In the **Display these entities** list, select the entity that should appear just below the new zone separator.
   b) Right-click and select **Create Zone** from the context menu, or click the Create Zone icon at the top of the **Display these entities** list.
3. To remove an existing zone separator, select it, right- click and select **Drop Zone** from the context menu, or click the Drop Zone icon.
4. To change the order in which the entities and zone separators are displayed, select the entity or zone separator and click the up or down arrow buttons at the top of the **Display these entities** list.



5. To suppress the field label (but not the data element itself) from the PAC display, select the data element in the Display these entities list, right-click, and select **Show/Hide Label** from the context menu.

   In the **Display these entities** list, the label icon indicates that the label is currently set to be shown.
6. Save or cancel your work in the Community Information Display Configure dialog box:
   - To remove any changes that have not been applied and close the Community Information Configure dialog box, click **Cancel**.
   - To remove any changes that have not been applied and keep the Community Information Configure dialog box open, click **Reset**.

- To permanently save changes and keep the Community Information Display Configure dialog box open, click **Apply**.
- To permanently save changes and close the Community Information Configure dialog box, click **OK**.

Important:
After saving your changes, use Polaris Language Editor (WebAdmin) to reload PowerPAC or Mobile PAC. Users may also need to clear their browser caches.

Share a community information display configuration

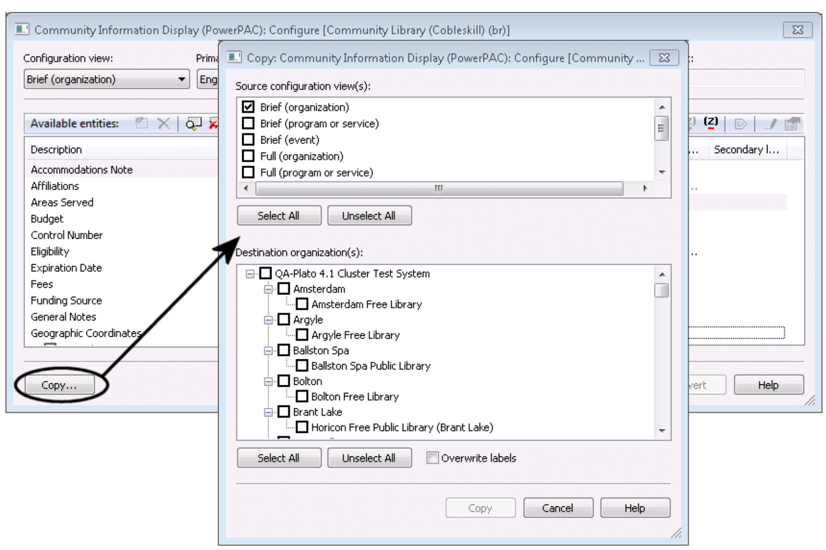
After you have configured community information display views, you can copy your settings to other organizations. Follow these steps.

1. Open the appropriate Community Information Display Configure dialog box if it not already open, and select the view you want to copy. See "Select community elements for display in PAC" on page 74.

   If the Open the appropriate Community Information Display Configure dialog box is already open and you have been making changes, click **Apply** to save your changes.

2. Click **Copy**.

   The Copy: Community Information Display dialog box opens.



3. Select the configuration views you want to copy.
4. Select the organizations that should receive your settings.
5. Click **Copy**.

Important:
The copy action takes place immediately. The action cannot be undone.

Edit a community information entity definition

At the system level, you can edit the definitions (tags, indicators, subfields) of certain community information display entities. The following entities *cannot* be edited:

- Primary Name (Short)
- Snippet
- Control Number
- Expiration Date
- Geographic Coordinates (sub-entities can be edited)
- Primary Address (Long) (sub-entities can be edited)
- Secondary Address (Long) (sub-entities can be edited)
- Type of Organization

Follow these steps to edit entities for display in PAC search results.

Note:
You need the permission **Modify and create display entities: Allow** to do this procedure.

1. In the Administration Explorer tree view, open the **Profiles** folder for the system organization, and click the **Community** tab in the details view.
2. Double-click **Community Information (PowerPAC): Configure** or **Community Information (Mobile PAC): Configure.**

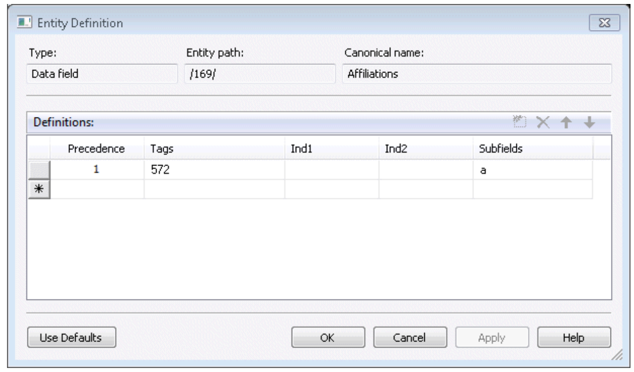
   Important:
   Regardless of which profile you choose, your edited definition will be applied system-wide for both PAC applications.

   The Community Information Display: Configure dialog box opens.
3. Right-click the entity in the **Available entities** list and select **Properties** from the context menu.

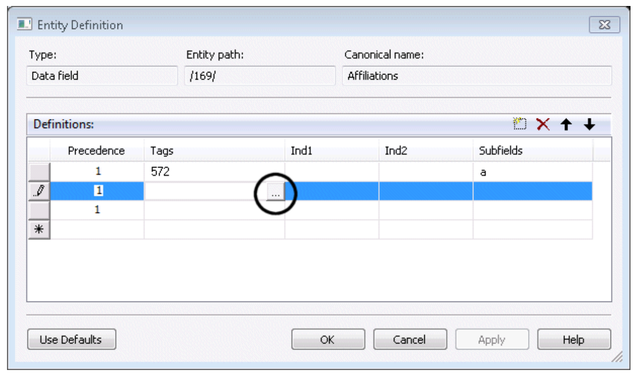
   Note:
   To display an entity for selection, you may need to click the Browse icon  at the top of the **Available entities** list. Select the entity in the Browse Entities dialog box and click **Reveal** to add the entity to the **Available entities** list.

   The Entity Properties dialog box opens.
4. On the Entity Properties dialog box, click **Define Entity**.

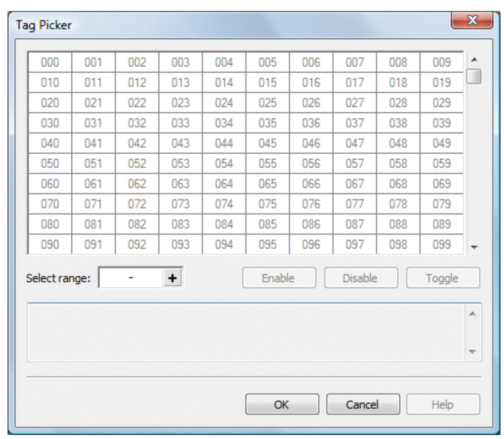
   The Entity Definition dialog box opens.



5. To add a new tag to the entity, click the ellipsis button in the Tags column.



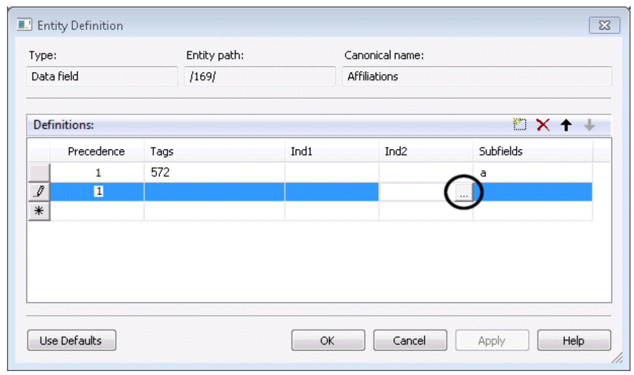
The Tag Picker dialog box opens.



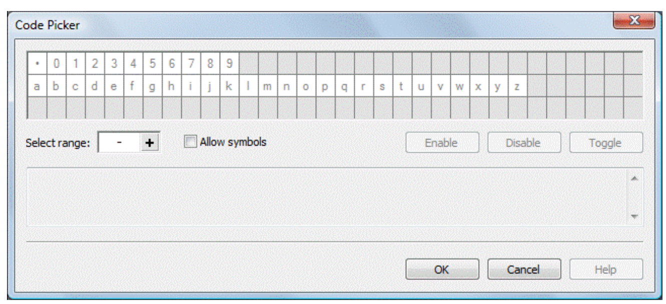
6. Select a tag or multiple tags:
   - To select one tag, click it in the grid, and then click **Enable**.
   - To select a contiguous range of tags, enter the beginning and ending tags in the **Select range** box, and click the **+** button to highlight the tags in the grid. Then click **Enable**.
   - To select a non-contiguous set of tags, press **CTRL+click** to select the tags in the grid, and then click **Enable**.
   - To save your changes and close the Tag Picker dialog box, click **OK**.

   The Entity Definition dialog box is displayed.

7. To select indicator values, click the ellipsis button in the Ind1 or Ind2 column.



   The Code Picker dialog box opens.



8. Select an indicator value or multiple indicator values:
   - To select an indicator value, click it in the grid, and then click **Enable**.
   - To select a contiguous range of indicator values, enter the beginning and ending values in the **Select range** box, and click the **+** button to highlight the values in the grid. Then click **Enable**.
   - To select a non-contiguous set of values, press **CTRL+click** to select the values in the grid, and then click **Enable**.
   - To save your changes and close the Code Picker dialog box, click **OK**.

Tip:
The dot character in the upper left corner of the Code Picker grid indicates a space.

The Entity Definition dialog box is displayed.

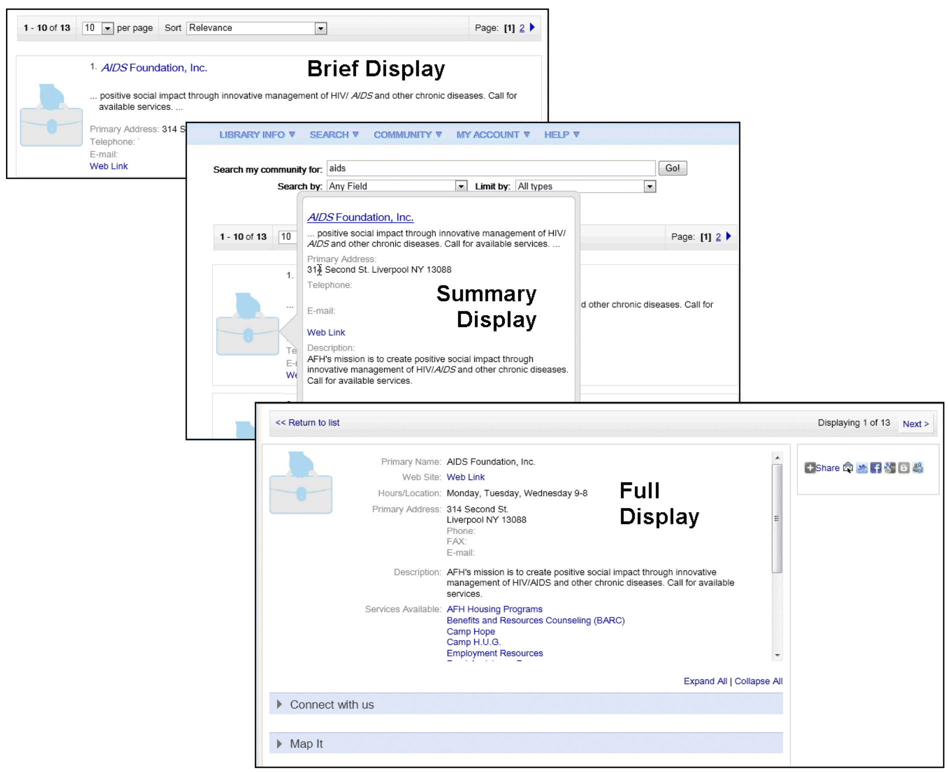
9. To select subfields, click the ellipsis button in the Subfields column to display the Code Picker dialog box, and follow the same steps you used to select the indicator values. See step 8.

10. When all the tags, indicators and subfields are defined for the entity, click **Apply** to permanently save your work and keep the Entity Definition dialog open, or click **OK** to permanently save your work and close the dialog box.

Use the Change Labels dialog box to edit labels. See "Select community elements for display in PAC" on page 74.

PowerPAC Results Displays - Community Information

You can configure community information for the brief, full, and summary displays. The brief display is the information shown in the initial search results. The user hovers the cursor over the logo image to see the summary display, and clicks the name to see the full display for the entry.



The tables show the default community information display configuration for PowerPAC search results.

PowerPAC Brief Display - Event			*PowerPAC Brief Display - Organization*			*PowerPAC Brief Display - Program or Service*		
Entity	***Display Order***	***Label***	***Entity***	***Display Order***	***Label***	***Event***	***Display Order***	***Label***
Primary Name (Short)	1	Primary Name:	Primary Name (Short)	1	Primary Name:	Primary Name (Short)	1	Primary Name:
Snippet	2	Snippet:	Snippet	2	Snippet:	Snippet	2	Snippet:
Hours	3	Hours:	Hours	3	Hours:	Hours	3	Hours:
Primary Address (Short)	4	Primary Address:	Primary Address (Short)	4	Primary Address:	Primary Address (Short)	4	Primary Address:
Primary Telephone Number (Short)	5	Telephone:	Primary Telephone Number (Short)	5	Telephone:	Primary Telephone Number (Short)	5	Telephone:
Primary TTY Number (Short)	6	TTY:	Primary TTY Number (Short)	6	TTY:	Primary TTY Number (Short)	6	TTY:
Primary Email Address (Short)	7	E-mail:	Primary Email Address (Short)	7	E-mail:	Primary Email Address (Short)	7	E-mail:
Web Link (Short)	8	Web Site:	Web Link (Short)	8	Web Site:	Web Link (Short)	8	Web Site:

PowerPAC Summary Display - Event			*PowerPAC Summary Display - Organization*			*PowerPAC Summary Display - Program or Service*		
Entity	***Display Order***	***Label***	***Entity***	***Display Order***	***Label***	***Event***	***Display Order***	***Label***
Primary Name (Short)	1	Primary Name:	Primary Name (Short)	1	Primary Name:	Primary Name (Short)	1	Primary Name:
Snippet	2	Snippet:	Snippet	2	Snippet:	Snippet	2	Snippet:
Hours	3	Hours:	Hours	3	Hours:	Hours	3	Hours:
Primary Address (Short)	4	Primary Address:	Primary Address (Short)	4	Primary Address:	Primary Address (Short)	4	Primary Address:
Primary Telephone Number (Short)	5	Telephone:	Primary Telephone Number (Short)	5	Telephone:	Primary Telephone Number (Short)	5	Telephone:

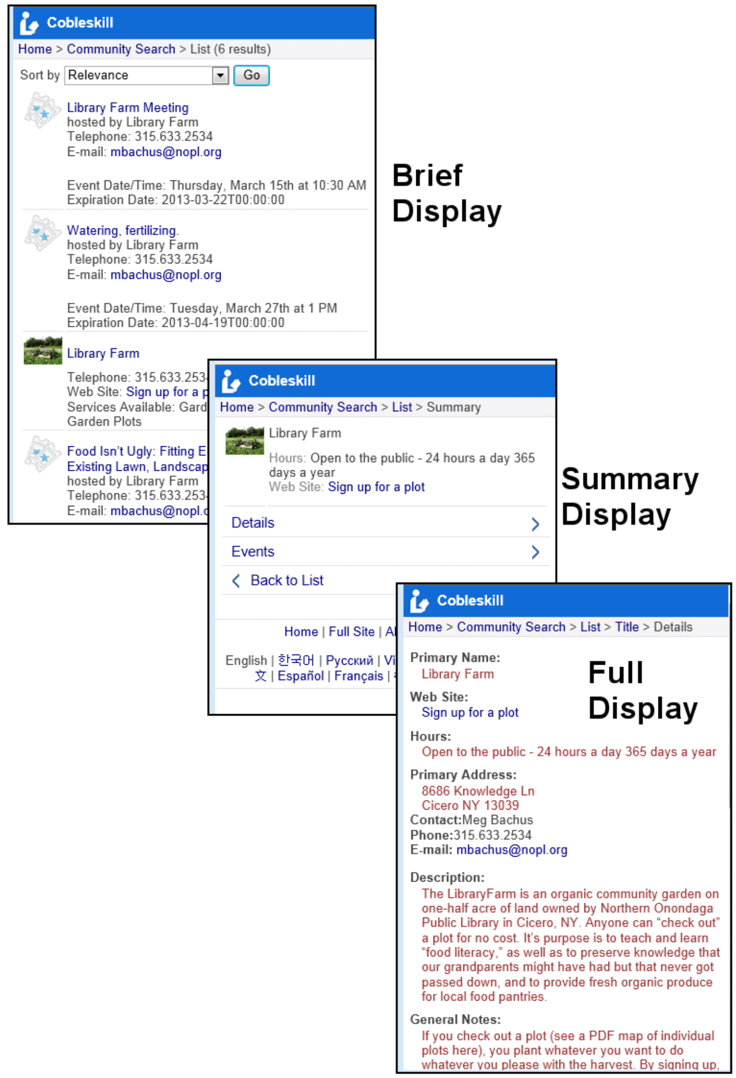
PowerPAC Summary Display - Event			*PowerPAC Summary Display - Organization*			*PowerPAC Summary Display - Program or Service*		
Primary TTY Number (Short)	6	TTY:	Primary TTY Number (Short)	6	TTY:	Primary TTY Number (Short)	6	TTY:
Primary Email Address (Short)	7	E-mail:	Primary Email Address (Short)	7	E-mail:	Primary Email Address (Short)	7	E-mail:
Web Link (Short)	8	Web Site:	Web Link (Short)	8	Web Site:	Web Link (Short)	8	Web Site:
Description	9	Description:	Description	9	Description:	Description	9	Description:

PowerPAC Full Display - Event			*PowerPAC Full Display - Organization*			*PowerPAC Full Display - Program or Service*		
Entity	***Display Order***	***Label***	***Entity***	***Display Order***	***Label***	***Event***	***Display Order***	***Label***
Primary Name (Short)	1	Primary Name:	Primary Name (Short)	1	Primary Name:	Primary Name (Short)	1	Primary Name:
Hours	2	Hours:	Hours	2	Hours:	Hours	2	Hours:
Primary Address (Long)	3	Primary Address:	Primary Address (Long)	3	Primary Address:	Primary Address (Long)	3	Primary Address:
Street Address	4	Street Address:	Street Address	4	Street Address:	Street Address	4	Street Address:
City, State, Zip	5	City, State, Zip:	City, State, Zip	5	City, State, Zip:	City, State, Zip	5	City, State, Zip:
Contact	6	Contact:	Contact	6	Contact:	Contact	6	Contact:
Telephone Number	7	Phone:	Telephone Number	7	Phone:	Telephone Number	7	Phone:
TTY Number	8	TTY:	TTY Number	8	TTY:	TTY Number	8	TTY:
FAX Number	9	FAX:	FAX Number	9	FAX:	FAX Number	9	FAX:
Email Address	10	E-mail:	Email Address	10	E-mail:	Email Address	10	E-mail:
Secondary Address (Long)	11	Secondary Address:	Secondary Address (Long)	11	Secondary Address:	Secondary Address (Long)	11	Secondary Address:
Street Address	12	Street Address:	Street Address	12	Street Address:	Street Address	12	Street Address:
City, State, Zip	13	City, State, Zip:	City, State, Zip	13	City, State, Zip:	City, State, Zip	13	City, State, Zip:
Contact	14	Contact:	Contact	14	Contact:	Contact	14	Contact:
Telephone Number	15	Phone:	Telephone Number	15	Phone:	Telephone Number	15	Phone:

PowerPAC Full Display - Event			*PowerPAC Full Display - Organization*			*PowerPAC Full Display - Program or Service*		
TTY Number	16	TTY:	TTY Number	16	TTY:	TTY Number	16	TTY:
FAX Number	17	FAX:	FAX Number	17	FAX:	FAX Number	17	FAX:
Email Address	18	E-mail:	Email Address	18	E-mail:	Email Address	18	E-mail:
Description	19	Description:	Description	19	Description:	Description	19	Description:
Target Group	20	Target Group:	Target Group	20	Target Group:	Target Group	20	Target Group:
Facilitator or Presenter Note	21	Facilitator or Presenter Note:	Facilitator or Presenter Note	21	Facilitator or Presenter Note:	Facilitator or Presenter Note	21	Facilitator or Presenter Note:
Programs Note	22	Programs:	Programs Note	22	Programs:	Programs Note	22	Programs:
Language Note	23	Languages other than English:	Language Note	23	Languages other than English:	Language Note	23	Languages other than English:
Accommodations Note	24	Accommodations for Disabled:	Accommodations Note	24	Accommodations for Disabled:	Accommodations Note	24	Accommodations for Disabled:
Transportation Note	25	Transportation and Directions:	Transportation Note	25	Transportation and Directions:	Transportation Note	25	Transportation and Directions:
Eligibility	26	Eligibility:	Eligibility	26	Eligibility:	Eligibility	26	Eligibility:
Fees	27	Fees:	Fees	27	Fees:	Fees	27	Fees:
Areas Served	28	Areas Served:	Areas Served	28	Areas Served:	Areas Served	28	Areas Served:
Budget	29	Budget:	Budget	29	Budget:	Budget	29	Budget:
Affiliations	30	Affiliations:	Affiliations	30	Affiliations:	Affiliations	30	Affiliations:
Licenses or Accreditations Held	31	Licenses or Accreditations Held:	Licenses or Accreditations Held	31	Licenses or Accreditations Held:	Licenses or Accreditations Held	31	Licenses or Accreditations Held:
General Notes	32	General Notes:	General Notes	32	General Notes:	General Notes	32	General Notes:
Services Available	33	Services Available:	Services Available	33	Services Available:	Services Available	33	Services Available:
Subjects	34	Subjects:	Subjects	34	Subjects:	Subjects	34	Subjects:
Related Organizations	35	Related Organizations:	Related Organizations	35	Related Organizations:	Related Organizations	35	Related Organizations:
Volunteers Note	36	Volunteers Note:	Volunteers Note	36	Volunteers Note:	Volunteers Note	36	Volunteers Note:
Publications Note	37	Publications Note:	Publications Note	37	Publications Note:	Publications Note	37	Publications Note:

Mobile PAC Results Displays - Community Information

Like PowerPAC, you can configure community information for the brief, full, and summary displays in Mobile PAC. The brief display is the information shown in the initial search results. The summary view is displayed on the Mobile PAC product page for the entry, and the full view is displayed when the user clicks **Details** on the product page.



The tables show the default community information display configuration for Mobile PAC search results.

Mobile PAC Brief Display - Event			*Mobile PAC Brief Display - Organization*			*Mobile PAC Brief Display - Program or Service*		
Entity	***Display Order***	***Label***	***Entity***	***Display Order***	***Label***	***Event***	***Display Order***	***Label***
Primary Name (Short)	1	Primary Name:	Primary Name (Short)	1	Primary Name:	Primary Name (Short)	1	Primary Name:
Hours	2	Hours:	Hours	2	Hours:	Hours	2	Hours:
Web Link (Short)	3	Web Site:	Web Link (Short)	3	Web Site:	Web Link (Short)	3	Web Site:

Mobile PAC Summary Display - Event			*Mobile PAC Summary Display - Organization*			*Mobile PAC Summary Display - Program or Service*		
Entity	***Display Order***	***Label***	***Entity***	***Display Order***	***Label***	***Event***	***Display Order***	***Label***
Primary Name (Short)	1	Primary Name:	Primary Name (Short)	1	Primary Name:	Primary Name (Short)	1	Primary Name:
Hours	2	Hours:	Hours	2	Hours:	Hours	2	Hours:
Web Link (Short)	3	Web Site:	Web Link (Short)	3	Web Site:	Web Link (Short)	3	Web Site:

Mobile PAC Full Display - Event			*Mobile PAC Full Display - Organization*			*Mobile PAC Full Display - Program or Service*		
Entity	***Display Order***	***Label***	***Entity***	***Display Order***	***Label***	***Event***	***Display Order***	***Label***
Primary Name (Short)	1	Primary Name:	Primary Name (Short)	1	Primary Name:	Primary Name (Short)	1	Primary Name:
Hours	2	Hours:	Hours	2	Hours:	Hours	2	Hours:
Primary Address (Long)	3	Primary Address:	Primary Address (Long)	3	Primary Address:	Primary Address (Long)	3	Primary Address:
Street Address	4	Street Address:	Street Address	4	Street Address:	Street Address	4	Street Address:
City, State, Zip	5	City, State, Zip:	City, State, Zip	5	City, State, Zip:	City, State, Zip	5	City, State, Zip:
Contact	6	Contact:	Contact	6	Contact:	Contact	6	Contact:
Telephone Number	7	Phone:	Telephone Number	7	Phone:	Telephone Number	7	Phone:
TTY Number	8	TTY:	TTY Number	8	TTY:	TTY Number	8	TTY:

Mobile PAC Full Display - Event			*Mobile PAC Full Display - Organization*			*Mobile PAC Full Display - Program or Service*		
FAX Number	9	FAX:	FAX Number	9	FAX:	FAX Number	9	FAX:
Email Address	10	E-mail:	Email Address	10	E-mail:	Email Address	10	E-mail:
Secondary Address (Long)	11	Secondary Address:	Secondary Address (Long)	11	Secondary Address:	Secondary Address (Long)	11	Secondary Address:
Street Address	12	Street Address:	Street Address	12	Street Address:	Street Address	12	Street Address:
City, State, Zip	13	City, State, Zip:	City, State, Zip	13	City, State, Zip:	City, State, Zip	13	City, State, Zip:
Contact	14	Contact:	Contact	14	Contact:	Contact	14	Contact:
Telephone Number	15	Phone:	Telephone Number	15	Phone:	Telephone Number	15	Phone:
TTY Number	16	TTY:	TTY Number	16	TTY:	TTY Number	16	TTY:
FAX Number	17	FAX:	FAX Number	17	FAX:	FAX Number	17	FAX:
Email Address	18	E-mail:	Email Address	18	E-mail:	Email Address	18	E-mail:
Description	19	Description:	Description	19	Description:	Description	19	Description:
Target Group	20	Target Group:	Target Group	20	Target Group:	Target Group	20	Target Group:
Facilitator or Presenter Note	21	Facilitator or Presenter Note:	Facilitator or Presenter Note	21	Facilitator or Presenter Note:	Facilitator or Presenter Note	21	Facilitator or Presenter Note:
Programs Note	22	Programs:	Programs Note	22	Programs:	Programs Note	22	Programs:
Language Note	23	Languages other than English:	Language Note	23	Languages other than English:	Language Note	23	Languages other than English:
Accommoda-tions Note	24	Accommoda-tions for Disabled:	Accommo-dations Note	24	Accommo-dations for Disabled:	Accommo-dations Note	24	Accommo-dations for Disabled:
Transporta-tion Note	25	Transporta-tion and Directions:	Transporta-tion Note	25	Transporta-tion and Directions:	Transporta-tion Note	25	Transporta-tion and Directions:
Eligibility	26	Eligibility:	Eligibility	26	Eligibility:	Eligibility	26	Eligibility:
Fees	27	Fees:	Fees	27	Fees:	Fees	27	Fees:
Areas Served	28	Areas Served:	Areas Served	28	Areas Served:	Areas Served	28	Areas Served:
Budget	29	Budget:	Budget	29	Budget:	Budget	29	Budget:
Affiliations	30	Affiliations:	Affiliations	30	Affiliations:	Affiliations	30	Affiliations:
Licenses or Accredita-tions Held	31	Licenses or Accredita-tions Held:	Licenses or Accredita-tions Held	31	Licenses or Accredita-tions Held:	Licenses or Accredita-tions Held	31	Licenses or Accredita-tions Held:

Mobile PAC Full Display - Event			*Mobile PAC Full Display - Organization*			*Mobile PAC Full Display - Program or Service*		
General Notes	32	General Notes:	General Notes	32	General Notes:	General Notes	32	General Notes:
Services Available	33	Services Available:	Services Available	33	Services Available:	Services Available	33	Services Available:
Subjects	34	Subjects:	Subjects	34	Subjects:	Subjects	34	Subjects:
Related Organizations	35	Related Organizations:	Related Organizations	35	Related Organizations:	Related Organizations	35	Related Organizations:
Volunteers Note	36	Volunteers Note:	Volunteers Note	36	Volunteers Note:	Volunteers Note	36	Volunteers Note:
Publications Note	37	Publications Note:	Publications Note	37	Publications Note:	Publications Note	37	Publications Note:

Related Information

For information about configuring PAC bibliographic search results, see these topics:

- "Configuring the PowerPAC Title Display" in the *Polaris Public Access Administration Guide 4.1R2*
- "Configuring the Mobile PAC Title Display" on page 346

Set the default display of Community Events

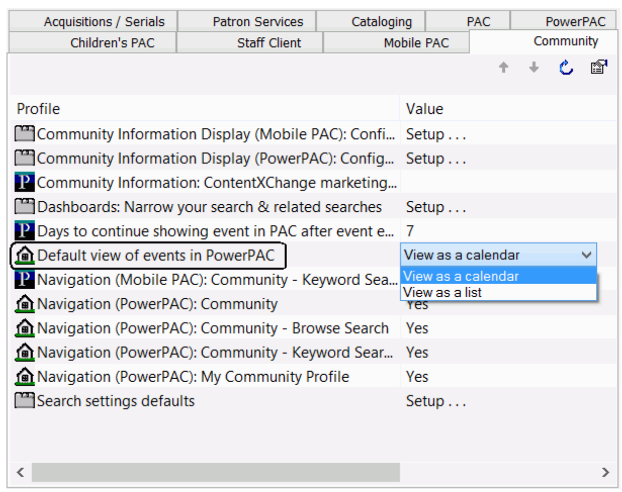
If the ContentXChange URL is defined in the server parameter **URL of the ContentXChange root**, you can specify the default display of Community events as a calendar or a list view. See "Set up the Web Server for ContentXChange" on page 101. If ContentXChange is not defined in the server parameter, events are displayed in a list. PAC users can change the default setting by selecting **View as a list** or **View as a calendar**.

Follow these steps to set the default display of community events in the PAC.

> **Note:**
> This setting does not affect ContentXChange calendar widgets, which always display community events in a calendar view.

1. In the Administration Explorer tree view, open the **Profiles** folder for the system, library, or branch and click the **Community** tab in the details view.

   Select Default view of events in PowerPAC, and select **View as a calendar** or **View as a list**.



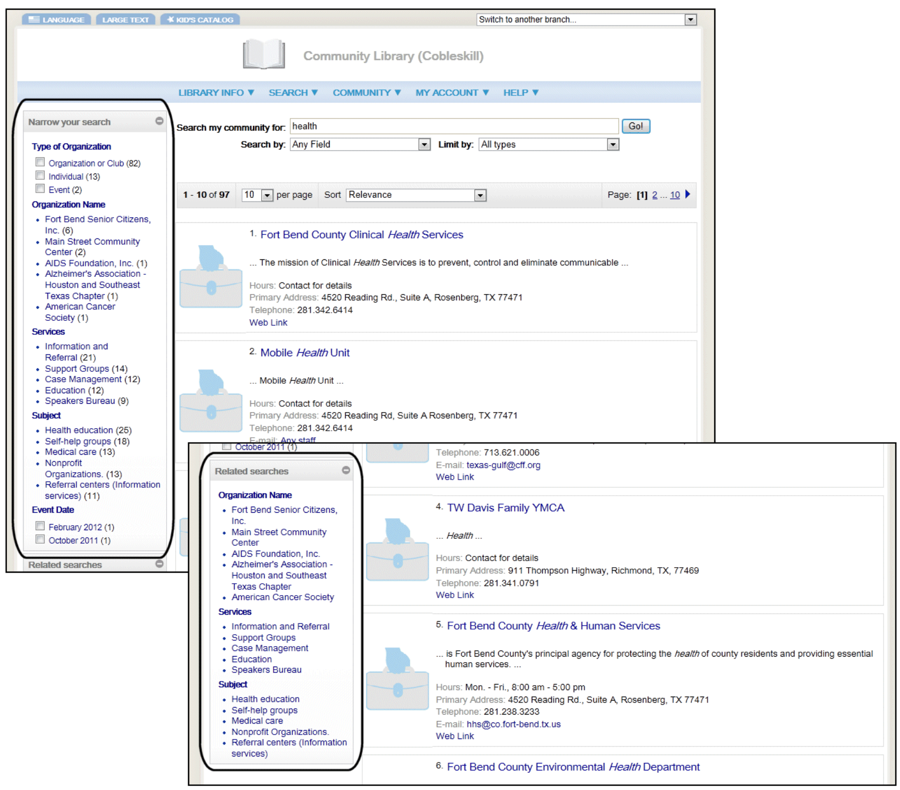
2. Select **File, Save**.

   PAC users can change the default setting by selecting **View as a list** or **View as a calendar**. See "Example of events displayed in the PAC" on page 114.

Community Search Results Facets in Polaris PowerPAC

Using the Community profile **Dashboards: Narrow your search & related searches**, you can configure the facets displayed in the dashboard with community information search results. The profile is similar to the PowerPAC profile available for PowerPAC bibliographic search results (see "Setting PowerPAC Narrow/Related Search Options" in the *Polaris Public Access Administration Guide 4.1R2*), but the available elements apply specifically to community information records.

As with PowerPAC bibliographic search results, the **Narrow your search** Web part offers links to filter the current search results; the **Related searches** Web part offers links to launch other, related searches.



The following elements are available for narrowing community information search results and for related searches:

- Type of Organization (**Narrow your search** only)
- Organization Name
- Services
- Subject
- Event Date (**Narrow your search** only)

See the following topics:

- "Set Up the Narrow Your Search Web Part" on page 95
- "Set Up the Related Searches Web Part" on page 97
- "Translate Labels for Narrow/Related Web Parts" on page 99

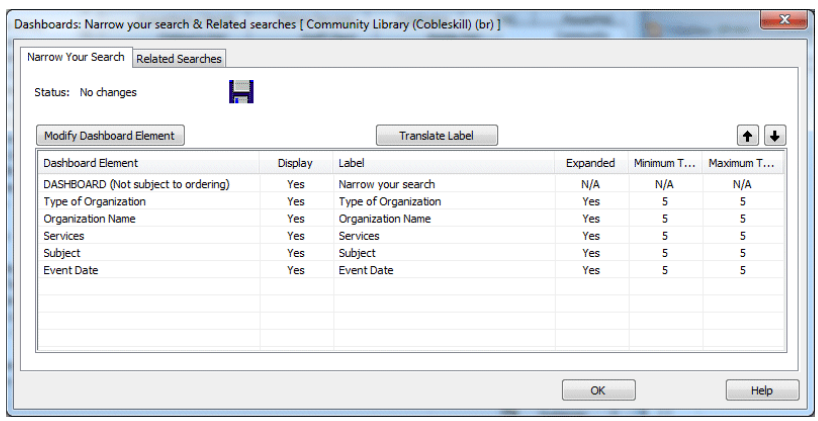
Set Up the Narrow Your Search Web Part

Follow these steps to set up the Narrow Your Search Web Part for community information search results.

> **Note:**
> You save your settings separately for the **Narrow your search** and **Related** Web parts, and they are inherited separately. For example, your branch may set its own elements for the Narrow part, but inherit the system settings for the Related Web part. Once you change the settings at the branch level, the branch no longer inherits the system settings.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **Community** tab in the details view.
2. Double-click **Dashboards: Narrow your search & Related searches.**

   The Dashboards: Narrow your search & Related searches dialog box opens to the Narrow Your Search tabbed page.

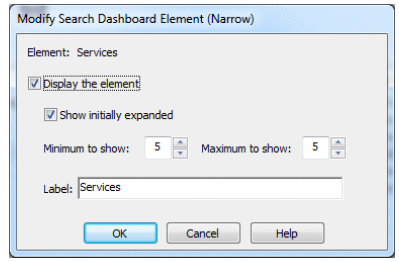


   Settings on this tabbed page control whether the **Narrow your search** Web part is displayed, and what elements will be available for filtering search results. If at least one element is set to display (set to **Yes**), the **Narrow your search** Web part label can be displayed in the dashboard.

> **Note:**
> Confirm that the first element in the list, **DASHBOARD**, is set to **Yes** in the Display column. This element represents the Web part itself, and if it is set to **No**, the entire Narrow Web part is suppressed. To set the display, see step 3.

3. To modify the display of a Narrow element, select the element and click **Modify Dashboard Element**.

The Modify Search Dashboard Element (Narrow) dialog box appears.



4. To display the element in the **Narrow your search** Web part, select (check) **Display the element**.

5. To display the element's links when the search results page appears, select (check) **Show initially expanded**.

By default, all elements are set to display as initially expanded.

> **Note:**
> To minimize the need to scroll the PAC search results page, you may want to consider displaying some or all elements as initially unexpanded. The user can choose to expand any element that is unexpanded.

6. To change the minimum and maximum number of links that can be displayed for the element, select or type the numbers in the **Minimum to show** and **Maximum to show** boxes.

The default values are 5 minimum, 5 maximum.The maximum number of links that can be displayed for one element is 99.

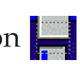
7. If you want to change the default English label for the element, type the text in the **Label** box. The maximum number of characters is 50.

8. Click **OK**.

The Modify Search Dashboard Element (Narrow) dialog box closes.

9. To change the order in which elements are displayed, select each element and click the up or down arrow icon until these elements are listed in the order you want them.

Tips:
Elements toward the top of the list are displayed before elements lower in the list. The Web part label is always displayed at the top of the list, before the individual elements.

10. Click the Save icon  to save your settings on the Narrow Your Search tabbed page.

If you have set **DASHBOARD** (the first element in the list) to be displayed without setting any other elements to be displayed, you see an error message. At least one element within the Narrow Web part must be set for display in order to display the Web part itself.

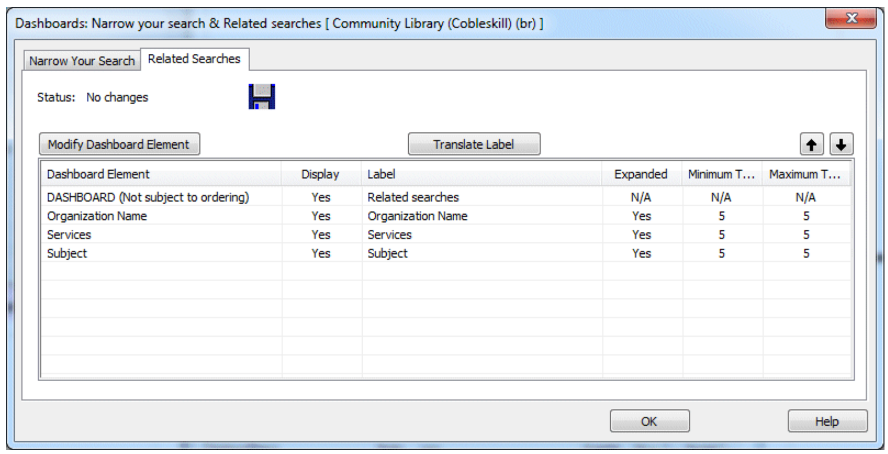
> **Note:**
> To see your changes in PowerPAC, use the Polaris Language Editor (WebAdmin) **Reload** tool to reload PowerPAC.

Set Up the Related Searches Web Part

Follow these steps to set up the Related Searches Web part for community information search results.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **Community** tab in the details view.
2. Double-click **Dashboards: Narrow your search & Related searches.**

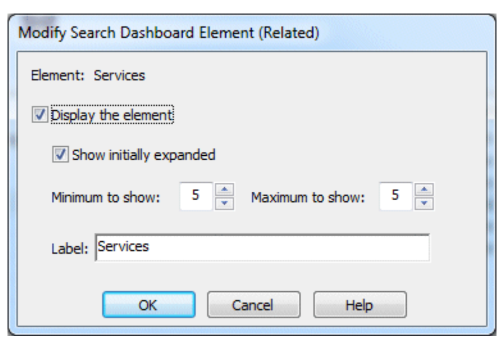
   The Dashboards: Narrow your search & Related searches dialog box opens.
3. Click the **Related Searches** tab.



Note:
Confirm that the first element in the list, **DASHBOARD**, is set to **Yes** in the Display column. This element represents the Web part itself, and if it is set to **No**, the entire Related Searches Web part is suppressed. To set the display, see step 3.

4. To modify the display of a Related element, select the element and click **Modify Dashboard Element**.

   The Modify Search Dashboard Element (Related) dialog box appears.



5. To display the element in the **Related searches** Web part, select (check) **Display the element**.

6. To display the element's links when the search results page appears, select (check) **Show initially expanded**.

   By default, all elements are set to display as initially expanded.

7. To change the minimum and maximum number of links that can be displayed for the element, select or type the numbers in the **Minimum to show** and **Maximum to show** boxes.

   The default values are 5 minimum, 5 maximum. The maximum number of links that can be displayed for one element is 99.

8. If you want to change the default English label for the element, type the text in the **Label** box. The maximum number of characters is 50.

9. Click **OK**.

   The Modify Search Dashboard Element (Related) dialog box closes.

10. To change the order in which elements are displayed, select each element and click the up or down arrow icon until these elements are listed in the order you want them.

    Note:
    Elements toward the top of the list are displayed before elements lower in the list. The Web part label is always displayed at the top of the list, before the individual elements.

11. Click the Save icon to save your settings on the Related Searches tabbed page.

    If you have set **DASHBOARD** (the first element in the list) to be displayed without setting any other elements to be displayed, you see a message. At least one element within the Related Web part must be set for display in order to display the Web part itself.

Tip:
To see your changes in PowerPAC, use the Polaris Language Editor (WebAdmin) **Reload** tool to reload PowerPAC.

Related Information

"Translate Labels for Narrow/Related Web Parts" on page 99

Translate Labels for Narrow/Related Web Parts

If your library system has purchased other language versions of Polaris PowerPAC, you can translate the labels for the **Narrow your search** and **Related searches** Web parts and the labels for the elements displayed under them.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **Community** tab in the details view.
2. Double-click **Dashboards: Narrow your search & Related searches.**

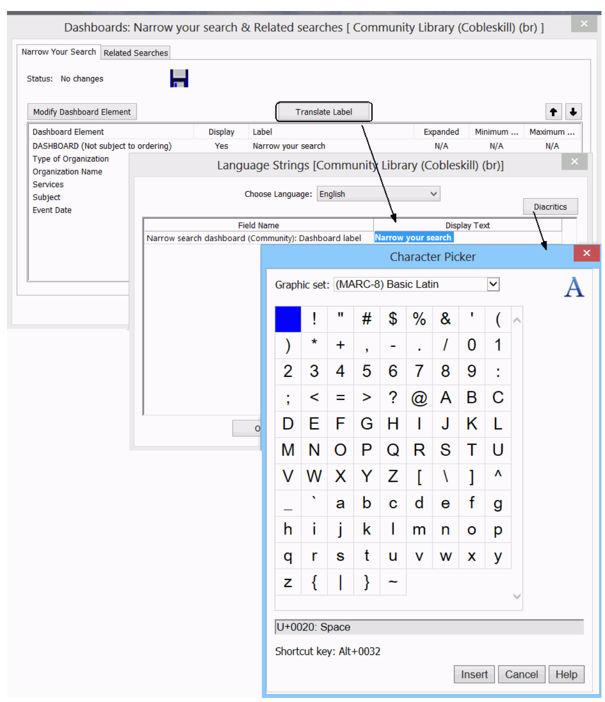
   The Dashboards: Narrow your search & Related searches dialog box opens.
3. Click the appropriate tab (**Narrow Your Search** or **Related Searches**) for the labels you want to translate.
4. Select the appropriate data element, and click **Translate Label**.

   The Language Strings dialog box opens.
5. Select a language from the **Choose Language** box.

   The options are determined by the language versions of Polaris PowerPAC licensed for your library system.
6. Double-click the box in the Display Text column next to the label name you want to translate, and type the translated text in the box. The maximum number of characters is 50.
7. To insert a diacritic character in your text, follow these steps:

   a) Click **Diacritics**.

   The Character Picker dialog box opens.



b) Select a graphic character set.

For details on choosing diacritic characters, see "Choose characters/ diacritics from a chart" in the *Polaris Cataloging Guide 4.1R2*.

c) Select the character, and click **Insert**.

The Character Picker dialog box closes.

8. Click **OK** on the Language Strings dialog box.

The Language Strings dialog box closes.

9. Click the Save icon to save your settings on the current page.

Note:
To see your changes in PowerPAC, use the Polaris Language Editor (WebAdmin) **Reload** tool to reload PowerPAC.

Administering ContentXChange

With ContentXChange, a designated community organization representative can incorporate pieces of code or “widgets” into their organization’s Web site to enable the following: a graphical display of selected titles in the library’s catalog; a search box to search the library’s catalog; a box to submit questions to a librarian; a calendar of events for the organization; and content from the community information record.

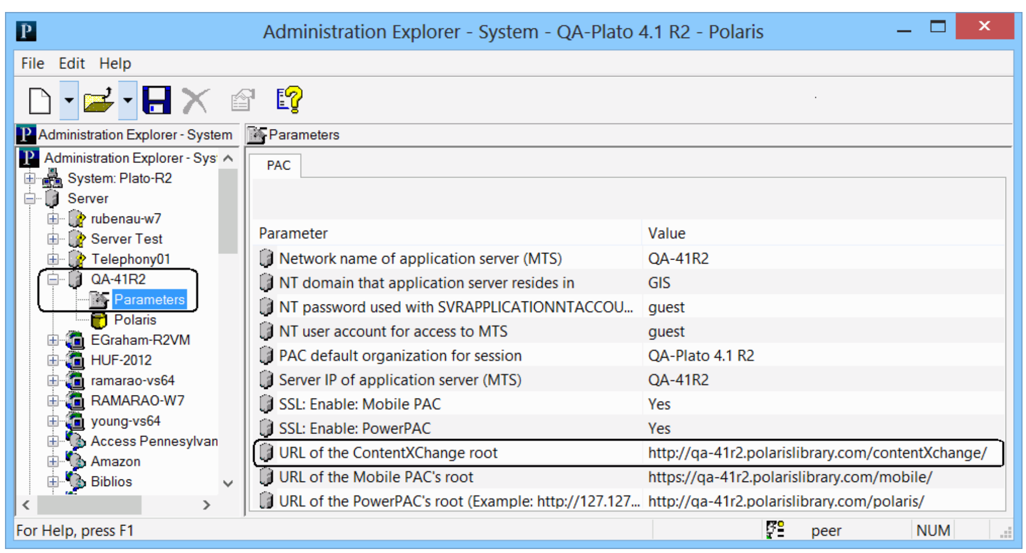
If the community organization does not have a Web site, the **Create a personalized page** widget offers a way for the organization to establish a web presence so that information about their community organization can be found via an internet search engine. For more information on how designated community organization representatives use these widgets, see “Using ContentXChange” on page 122.

Set up the Web Server for ContentXChange

Follow these steps to set up the Web server for ContentXChange.

> **Note:**
> The ContentXChange component must be selected when the Polaris Web server software is installed. For details, see “Review and change Web server parameters” in the *Polaris Administration Guide 4.1R2*.

1. Select the appropriate server in Polaris Administration, and select **Parameters**.
2. In the URL of the ContentXChange root server parameter, enter the URL of the server where ContentXChange is installed: **http://<servername>/ContentXChange/**



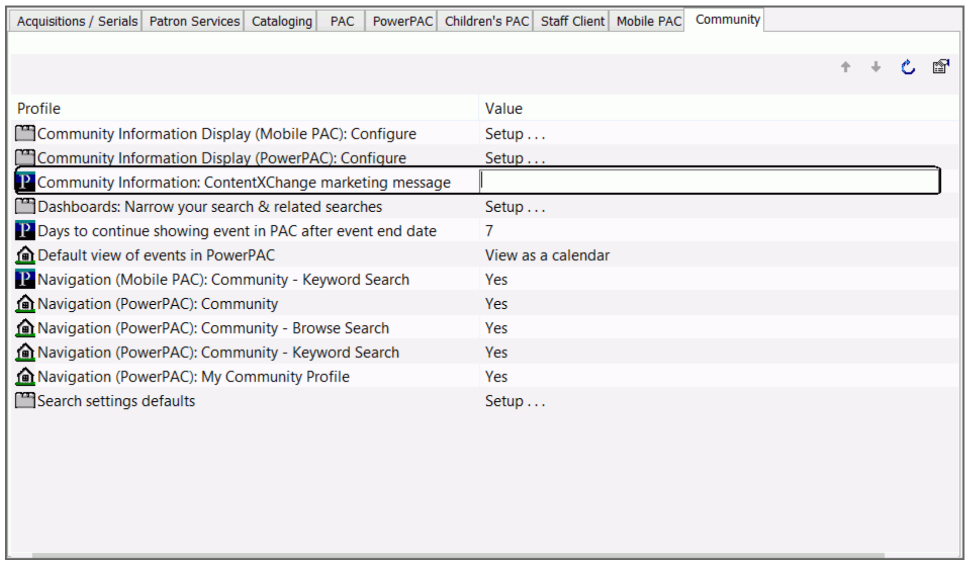
3. Select **File, Save**.

Specify an optional marketing message

Your library may set a brief (255 character maximum) library marketing message that displays on the organization's Web page along with any features added using ContentXChange.

Follow these steps to add a marketing message that displays when ContentXChange widgets are used on an organization's Web site.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **Community** tab in the details view.
2. Select the Community tab in Polaris Administration profiles.



3. Double-click the **Community Information: ContentXChange marketing message** profile.
4. Type a marketing message in the blank box.
5. Select **File, Save**.

Set up *Ask Us* without a log in requirement

If the organization includes the *Ask Us* feature on their Web site, a visitor to the Web site can send a question to the library. The visitor may or may not be a library patron; therefore, the *Ask Us* feature should be set up without requiring a patron log in.

> **Note:**
> For complete instructions on setting up Ask Us, see "Set up and start Ask Us" in the *Polaris Public Access Administration Guide 4.1R2*.

1. After enabling the *Ask Us* feature, double-click **Ask Us: Require Login** profile on the PowerPAC or Mobile PAC tab, and set the value to **No**.

2. Select **File**, **Save**.

Editing Community Records in PAC

Only library staff members can create or delete community records, and assign patrons as community representatives. Once a staff member has created a community record and designated you as the organization representative, you can edit your organization's community record in the PAC (Public Access Catalog).

These instructions start with a basic community organization record where the staff member has created the record with the minimum three required fields: organization name, organization description, and primary address. However, the library staff member may have entered more community information in your organization's record before turning it over to you. In addition, your library may have customized the PAC user interface (UI), so it may be slightly different from the UI shown or described in these instructions.

If your library offers ContentXChange, you can incorporate features from the library or the organization's library record into your organization's own Web site. If your organization does not have a Web site, you can also create a personalized page based on your organization's library record that allows users to find your organization information using Web search engines. See "Using ContentXChange" on page 122.

See the following topics:

- "Access your organization's record" on page 105
- "Enter your organization's basic information" on page 106
- "Enter additional organization information" on page 110
- "Enter your organization's events" on page 112
- "Enter your organization's social information" on page 115
- "Enter information about your organization's services" on page 118
- "Enter subjects related to your organization" on page 120

Access your organization's record

Follow these steps to log in to the patron account and access the information for the organizations that you represent.

1. Click **Log in/Register** on the **My Account** menu.

   The log-in form is displayed.

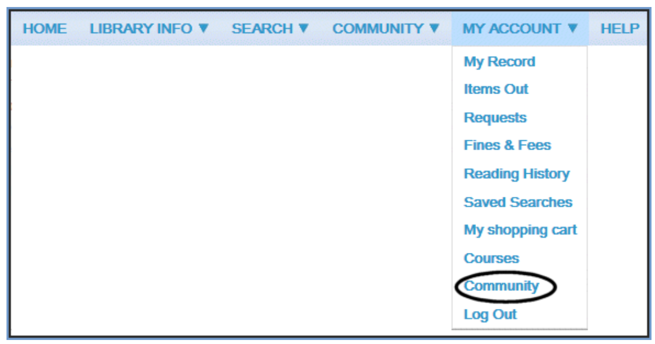
2. Type your library account number (barcode number) in the **Barcode Number** box. Your library may require all or only part of the number.

   Your library may accept a user name instead of the barcode. To set up a user name, click **Create username**.

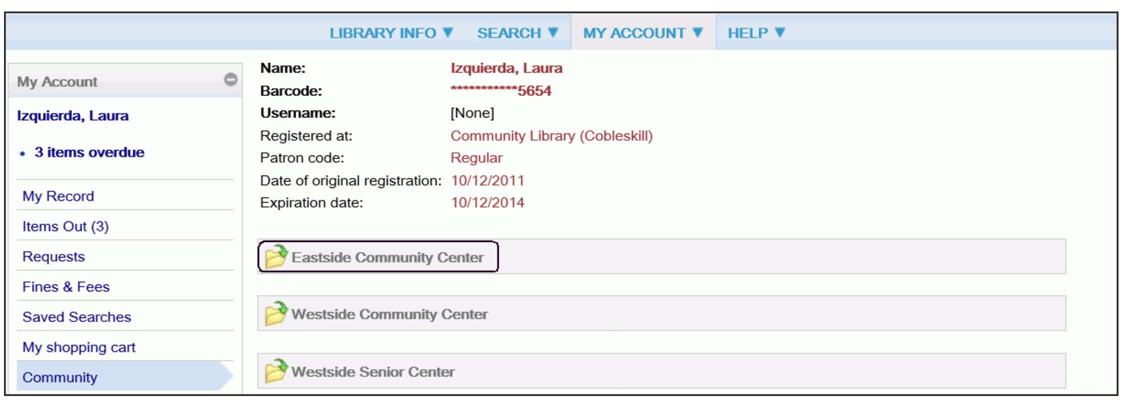
3. Type your account password in the **Password** box, and click **Log in**.

   Your library record page is displayed.

4. Click **Community** on the **My Account** menu.



The organizations for which you are the designated community representative are listed below your account information.



5. Click the organization to display the tabbed pages for the organization record. The information entered on these tabbed pages will be displayed to the public when users search the catalog for community information.

6. Follow the steps in "Enter your organization's basic information" on page 106.

Enter your organization’s basic information

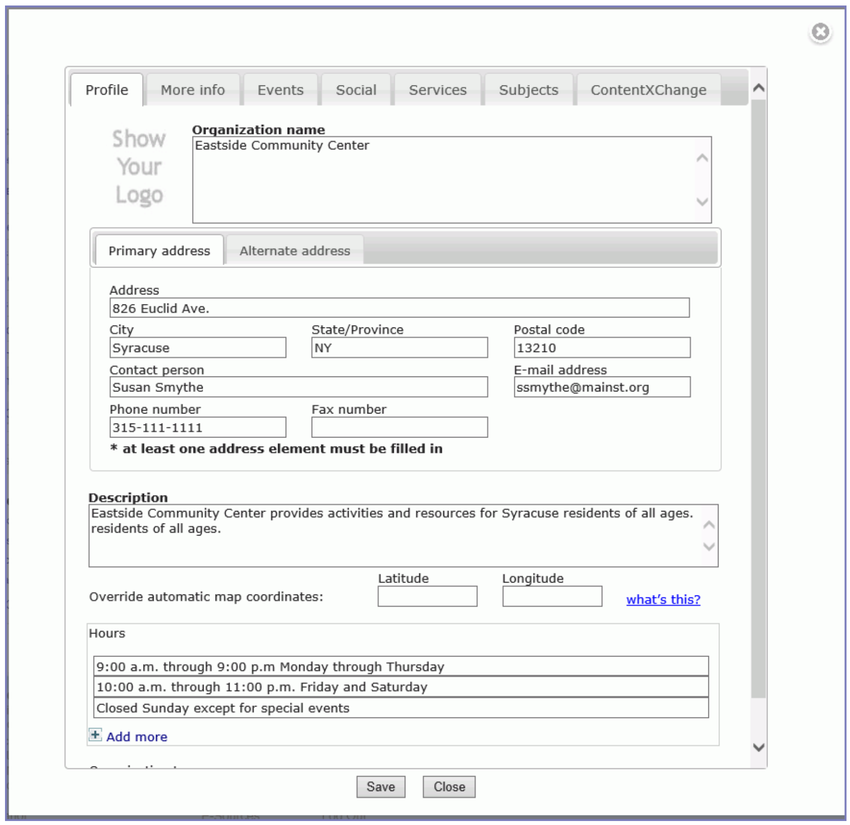
When users search for community information in the PAC, they can search by the organization’s name, address, contact persons, services, event or program title, subject, or notes.

Follow these steps to enter basic information about your organization and add your organization’s logo.

> **Note:**
> Do not include HTML markup in any text fields.

1. Open the organization’s record. See “Access your organization’s record” on page 105 for details.

   The organization editor opens to the Profile tabbed page if this is the first time you have logged in to work with this organization.

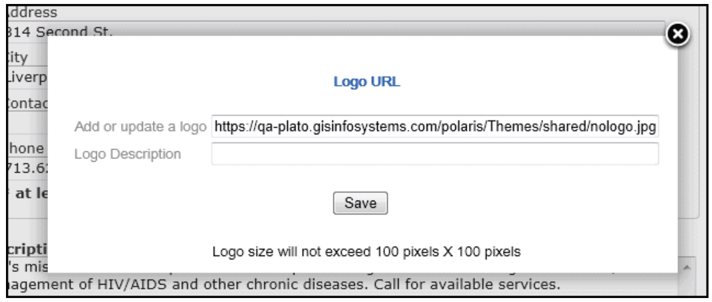


2. To edit the organization name, type the new name in the **Organization Name** box. The organization name is required.

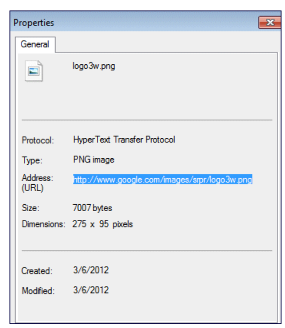
3. To add a logo image to your organization record:

a) Click **Show Your Logo**.

The Logo URL dialog box opens.



b) In the **Add or update a logo** box, enter the URL for the organization's graphic in the **Logo URL** box. The URL must point to an image file ending in .png, .jpg, .gif etc. You cannot upload a logo from your desktop; it must be on a Web page. If your organization's logo is on a Web page, select it, right-click and select **Properties** to see the URL. Then, copy and paste the URL into the **Logo URL** box. If your image is not already on a Web site, you can upload the image to Facebook™, flickr®, or another picture-sharing service.



Note:
The logo size will not exceed 100 x 100 pixels; if the logo is larger, it will be resized automatically.

c) In the **Logo Description** box, type a very brief identifier for the image.

Your description text is displayed when the user places the cursor over the image in the search results.

d) Click **Save** on the **Logo URL** dialog box.

4. To edit primary address and contact information, simply type the new information in the appropriate boxes.

Note:
Click the Alternate Address tab to enter alternate address and contact information.

5. **Latitude and longitude** - These coordinates are used to provide a map (Google MapIt) to your location in a catalog user's search results. They are automatically supplied from your Primary Address information. If the MapIt location is incorrect and you want to change the coordinates, follow these steps:

   a) Click **what's this?** for **Override automatic map coordinates**.

      An information box opens.

   b) Click the link in the information box.

      A map opens.

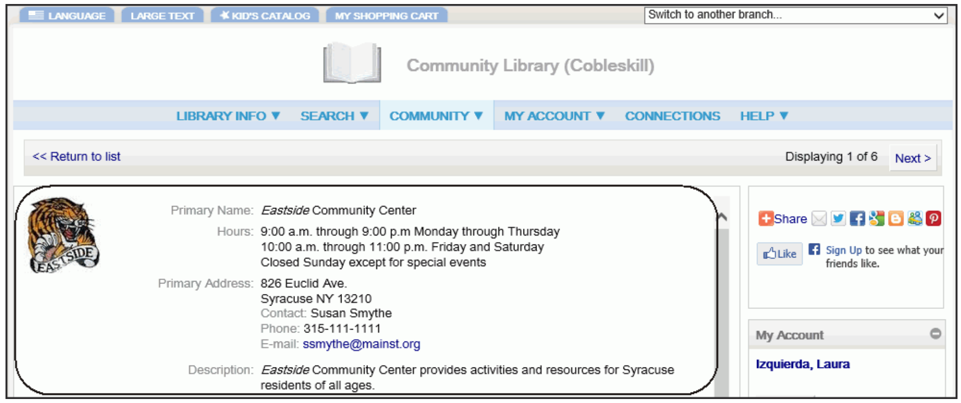
   c) Type your address or navigate and zoom in until your location is displayed, then copy the latitude and longitude numbers below the map into the **Latitude** and **Longitude** boxes on the organization record.

6. To add or edit the organization's scheduled hours, type the information in the **Hours** box. Click **Add more** to add more lines as needed.
7. To edit the description of your organization, type the new information in the **Description** box. The description is required, and it will be displayed when people search for community information in the library's catalog.
8. To change the type of record, select an option from the **Organization type** list:
   - **Individual**
   - **Organization or club**
   - **Other**
   - **Sponsor or donor**
9. Click **Save**.
10. Click **Close**, or click another tab to continue to edit this record.

    To enter additional organization information, select the More Info tab, enter information in the appropriate fields, and save the record.

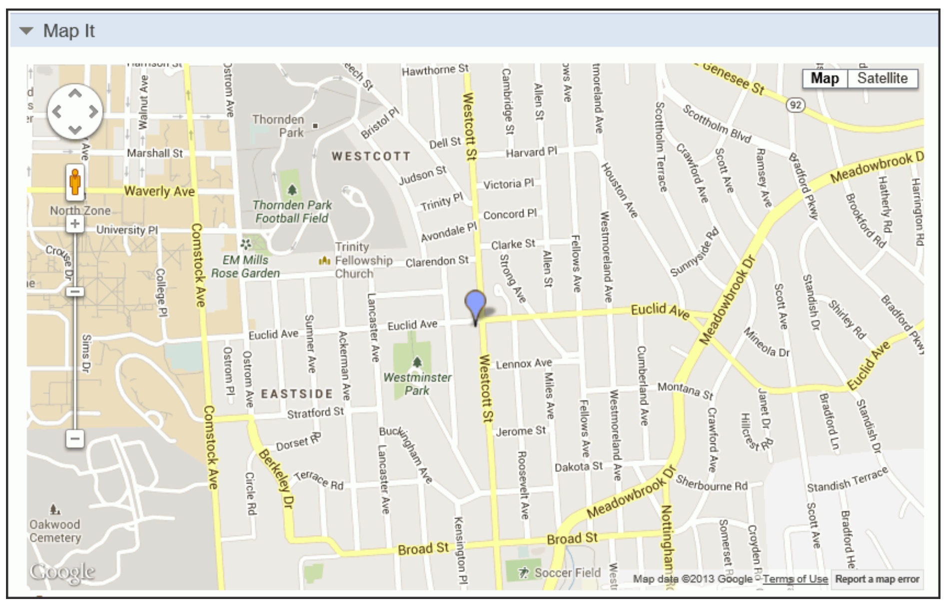
Example of basic community information displayed in the PAC

The information and logo entered in the Profile tab displays in the PAC as shown below.



Example of community map displayed in the PAC

The map information entered in the Profiles tab displays in a content drawer under the basic information.



Enter additional organization information

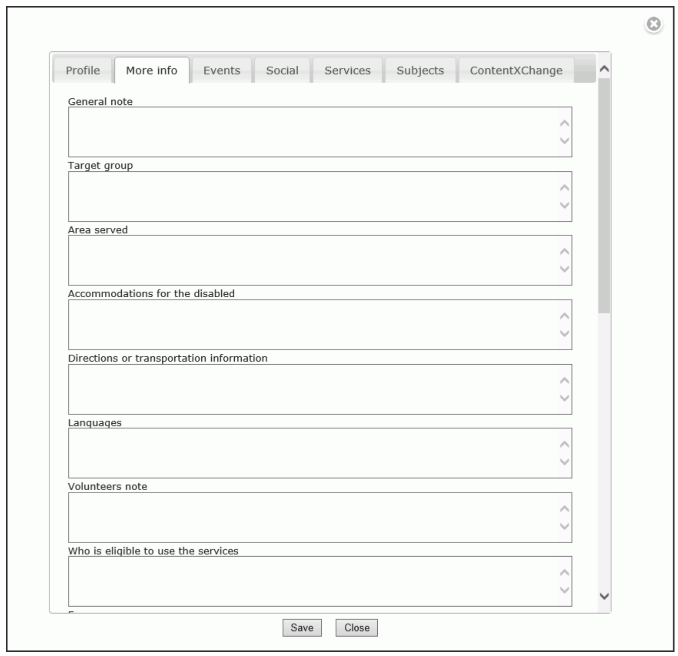
When users search for community information in the PAC, they can search by the organization's name, address, contact persons, services, event or program title, subject, or notes.

Follow these steps to enter more information about your organization.

Note:
Do not include HTML markup in any text fields.

1. Open the organization's record. See "Access your organization's record" on page 105 for details.
2. Click the More Info tab.

   The More Info tabbed page opens.



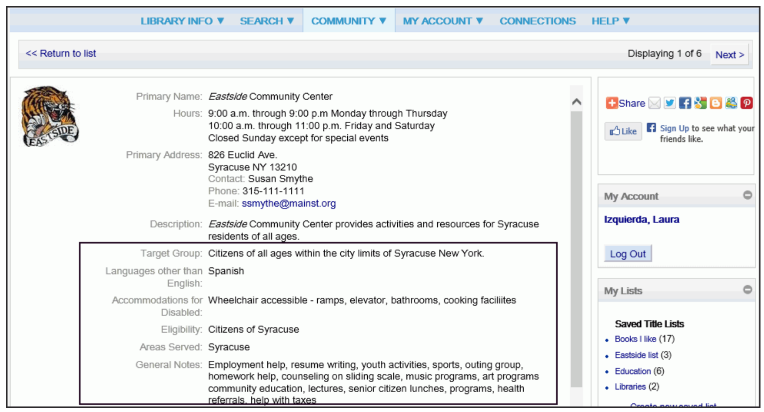
3. Type information in any of the following fields
   - General note
   - Target group
   - Area served
   - Accommodations for the disabled
   - Directions or transportation information
   - Languages
   - Volunteers note - Since all the text you type is displayed with your organization information, you can type an introductory line to head your information, such as Volunteer Opportunities.
   - Who is eligible to use the services
   - Fees
   - Affiliations
   - Licenses or accreditations held
   - Funding source (for example, Nonprofit)
   - Public information about your budget

- Information about persons who administer the organization
- Historical or biographical information
- Programs note
- Publications that you issue
- Performer note

4. Click **Save**.

Example of additional information displayed in the PAC

The additional community information entered in the More Info tab displays below the general information. Fields without information in the More Info tab do not display in the PAC.



Enter your organization's events

When users search for community information in the PAC, they can search by the organization's name, address, contact persons, services, event or program title, subject, or notes.

Follow these steps to enter your organization's events.

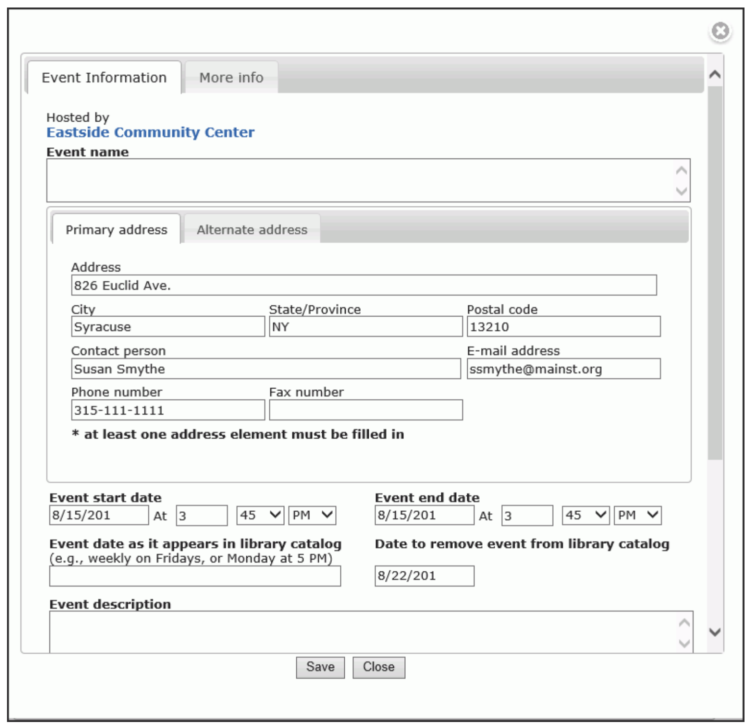
1. Select the organization you want to update. See "Access your organization's record" on page 105 for details.

   The organization editor opens to the Profile tabbed page.

2. Click the **Events** tab.

3. Click **Add a new event.**

   The Event Information window opens.



4. Type a name for the event in the **Event name** box to identify the event in the user's search results.

5. Edit the primary and alternate address information, if necessary.

   The information is taken from your organization record, but you can change it for this specific event or program without affecting the address you entered in the Profile tabbed page.

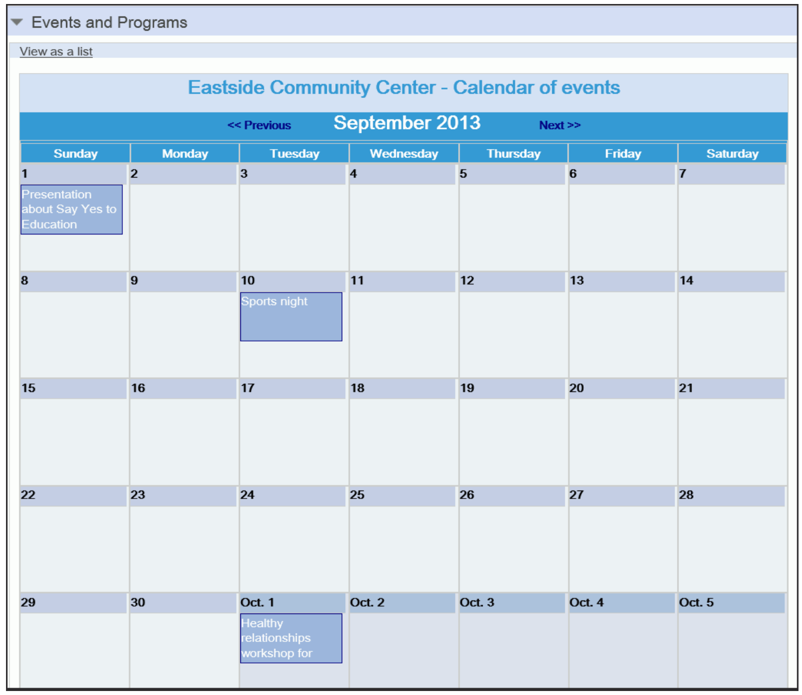
6. Set the dates for this event:
   - **Event start date** - Type the date and time for when the event starts.
   - **Event end date** - Type the actual date and time the event ends.
   - **Event date as it appears in the library catalog** - Type the date information that users should see when they find your event in the library catalog.
   - **Date to remove event from library catalog** - If necessary, type the date when the event should no longer appear in a user's catalog search results. The library sets a value based on the event's end date, but you can change the date if necessary. If the date is later then the **Event end** date, the event will be displayed in search results after the event has actually ended.
7. In the **Event description** box, type a description of the event or program.

Tip:
Scroll the Event Information box to see these additional options.

8. **Latitude and longitude** - These coordinates are used to provide a map (Google MapIt) to your event in a catalog user's search results. See "Enter your organization's basic information" on page 106.
9. (Optional) - Type the room, meeting area, or additional location information in the **Event location** box.
10. If you offer online registration or more information about the event online, type the URL for event or program sign-up. The URL must begin with **http://**. Then type descriptive text for the URL in the **What is it?** box.
11. In the **Event Type** box, select **Event** or **Program or service**.
12. To display a "content carousel" of titles related to the event, see "Enter your organization's social information" on page 115. You can share title lists or saved searches in a content carousel for the event or for the organization.
13. Edit the information on the More Info tab, if necessary.
14. Click **Save** and click **Close**, or click another tab to continue to edit this organization record.

Example of events displayed in the PAC

If your library offers this option, the Events and Programs drawer in the PowerPAC full display includes an option to display the events in a calendar or a list view. If the event is displayed in a calendar, the PowerPAC user can select **View as a list**. If the events display in a list, the PowerPAC user can select **View as a calendar**.



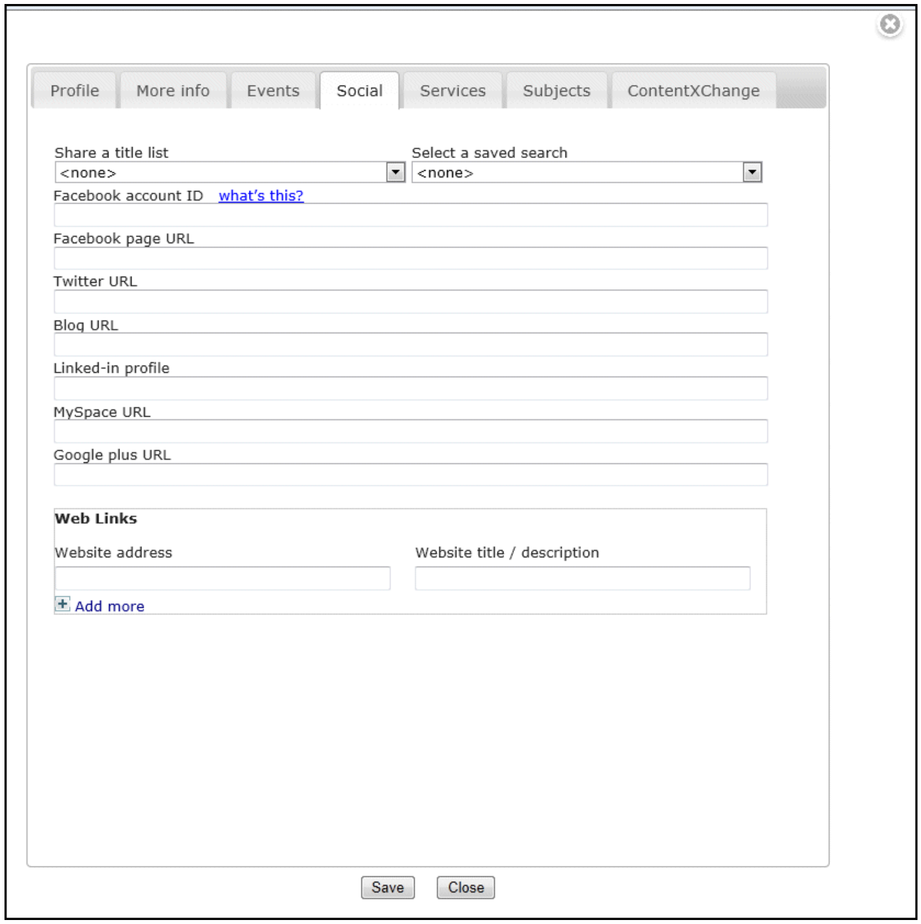
Enter your organization's social information

Follow these steps to share social media information, share a graphical "content carousel" of titles, and provide other Web links.

1. Select the organization you want to update. See "Access your organization's record" on page 105 for details.

   The organization editor opens to the Profile tabbed page.

2. Click the **Social** tab.



3. To share titles from a saved title list or a saved search, and display the titles in a rotating graphical "content carousel," do one of the following steps:

   a) Click the **Share a title list** arrow and select a list from those you have saved in your library account. For information on creating a title list, see the PAC online Help.

   b) Click the **Select a saved search** arrow and select a search from those you have saved in your patron account. For information on saving a search, see the PAC online Help.

4. To show social media buttons with your information in a patron's search results, enter the appropriate IDs or URLs in the following boxes:
   - **Facebook account ID** - This entry will display a **Like** button, so a patron can like your organization from the library catalog. Enter your organization's ID, not your personal ID. For more information about finding the ID, click **what's this**.
   - **Facebook page URL**
   - **Twitter URL**
   - **Blog URL**
   - **Linked-In Profile**
   - **Google plus URL**

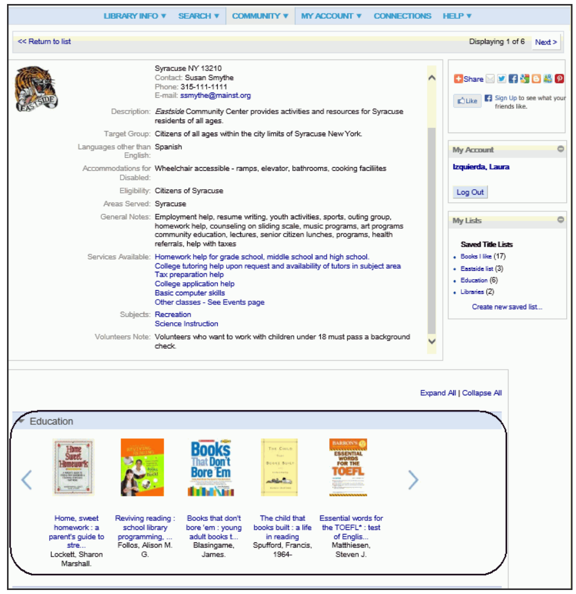
   These entries are displayed as buttons in a **Connect with us** section for your organization in a patron's search results.
5. To provide a Web link in the **Connect with us** section for your organization:
   a) Type the URL in the **Website URL** box. The URL must begin with **http://**.
   b) Type brief descriptive text for the URL in the **Web site title/description** box.

   Important:
   The first Web site you enter is displayed as your organization's home Web site in a user's search results.

   To add more links, click **Add more** in the Web Links box.
6. Click **Save**, and click **Close**, or click another tab to continue to edit this record.

Examples of social information displayed in the PAC

Content carousel from a title list or saved search



Social media links

Enter information about your organization's services

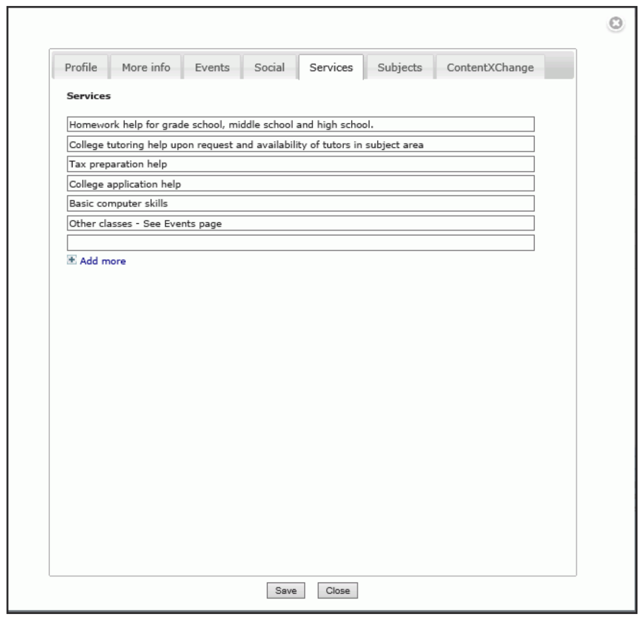
When users search for community information in the PAC, they can search by the organization's name, address, contact persons, services, event or program title, subject, or notes.

Follow these steps to enter your organization's services.

1. In your library record Community page, click the organization you want to update. See "Access your organization's record" on page 105 for details.

   The organization editor opens to the Profile tabbed page.

2. Click the **Services** tab.

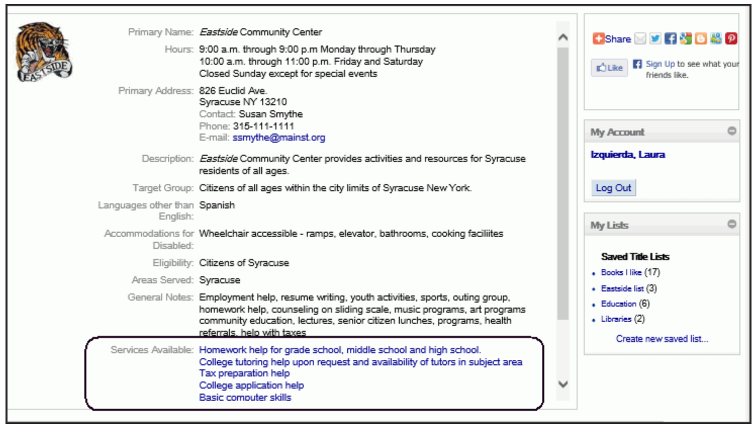


3. Type the first service entry in the text box, and click **Add more** to add another service.

4. Click **Save**, and click **Close**, or click another tab.

Example of services displayed in the PAC

The organization's services entered on the Services tab are displayed in the PAC.



Enter subjects related to your organization

When users search for community information in the PAC, they can search by the organization's name, address, contact persons, services, event or program title, subject, or notes.

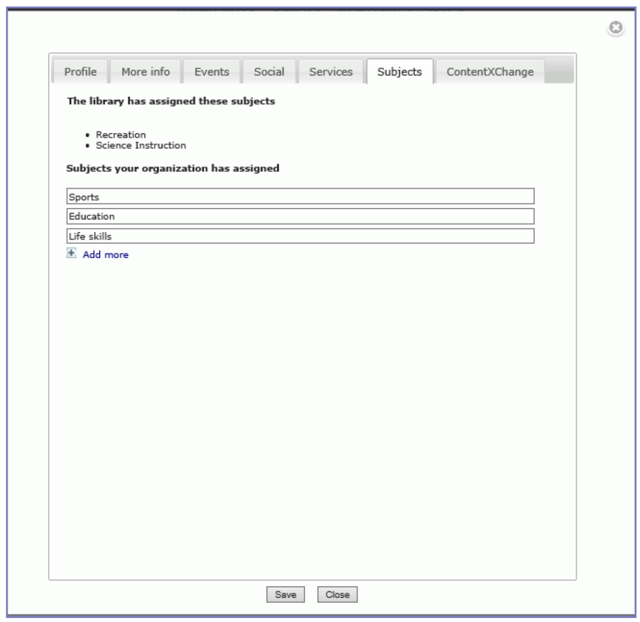
Follow these steps to add subjects that will help users find your organization in community search results.

1. Select the organization you want to update. See "Access your organization's record" on page 105 for details.

   The organization editor opens to the Profile tabbed page.

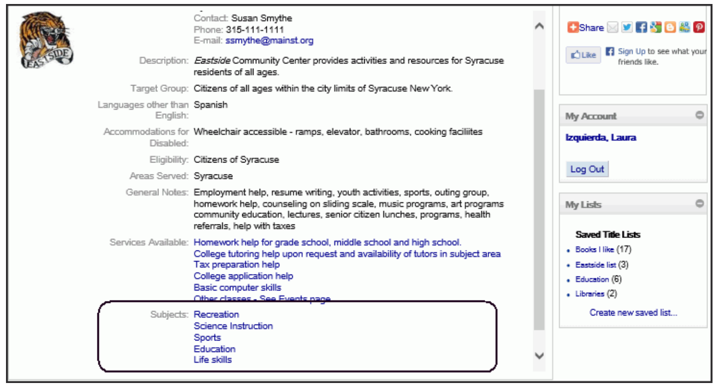
2. Click the **Subjects** tab.

   The subjects that the library staff member entered, if any, are displayed. Click **Add more** to add another subject. You can continue to click **Add more** as needed.



3. Click **Save**, and click **Close**, or click another tab.

Example of subjects displayed in the PAC



Using ContentXChange

ContentXChange provides snippets of code that you can easily embed into your organization's Web page to provide the following:

- A content carousel from a title list or saved search on the Social tab of your organization's community record in the library's catalog.
- A calendar of events from the Events tab of your organization's community record in the library's catalog.
- Web links and social media connections from the Social tab of your organization's community record in the library's catalog.
- A **Search** box to search the library's catalog.
- An **Ask Us** link to send a question to a librarian.

If your organization does not have a Web page, you can create a personalized page based on your organization's library record so that people can find your organization information using Web search engines such as Google™, Bing™, or Yahoo®.

You will be pasting code into your organization's Web page (Web site, Facebook page, blog, Web site, or other online tool where you can embed an iframe). In a separate browser window, log on to your library account in Polaris PowerPAC.

See the following topics:

- "Access ContentXChange" on page 123
- "Embed a content carousel in a Web page" on page 124
- "Embed an events calendar in a Web page" on page 126
- "Embed a social connections drawer in a Web page" on page 127
- "Embed a search box in a Web page" on page 128
- "Embed an ask-a-librarian link in a Web page" on page 129
- "Create a personalized page" on page 130

Access ContentXChange

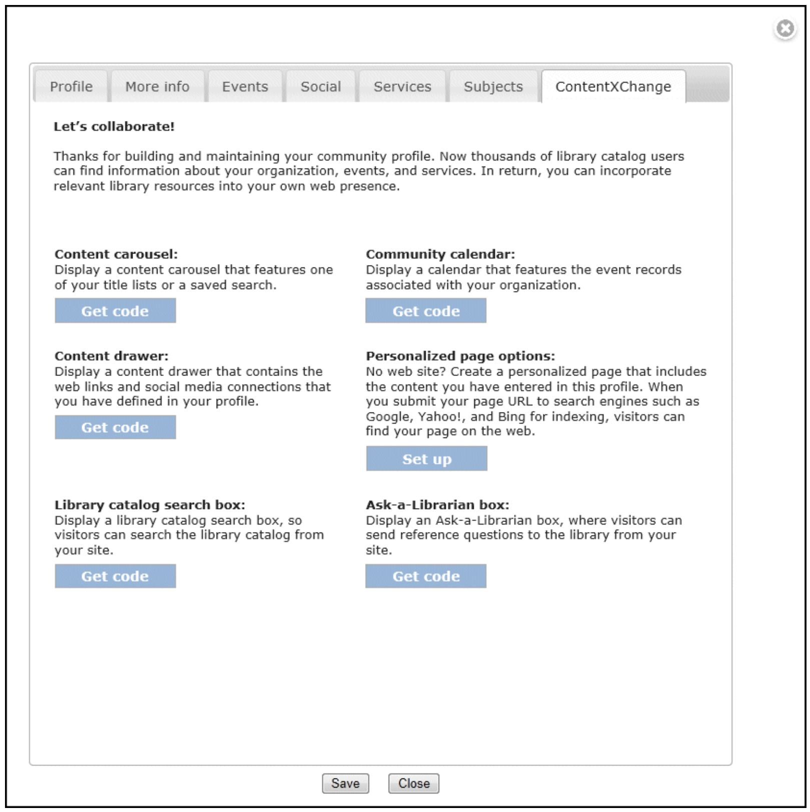
Follow these steps to access the ContentXChange tabbed page of your organization's community record in your library account.

1. Go to your library catalog, and log into your account.

   Select **My account**, **Community**, and select the community record.

2. The selected community record opens.

3. Select the ContentXChange tabbed page.



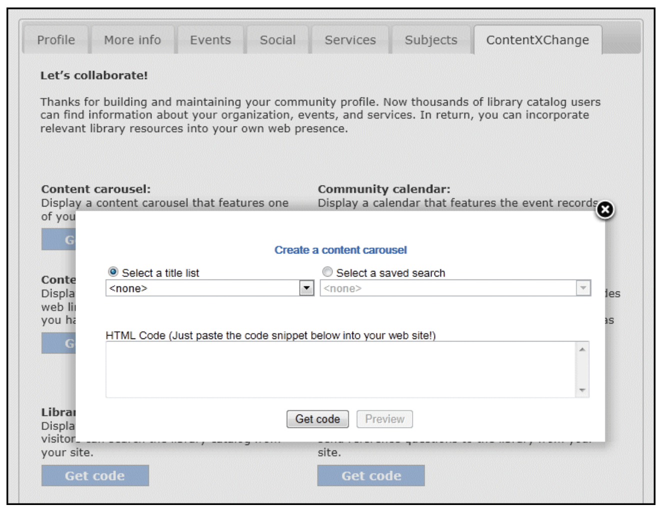
Embed a content carousel in a Web page

You can embed code for a “content carousel,” a rotating graphical representation of selected titles in the library catalog, in your organization’s Web page. Before you can create a content carousel, a saved title list or search must be associated with your patron account. For more information on saved searches or title list, see PowerPAC online Help. When a visitor to your organization’s Web page clicks on a title in the content carousel, the selected title information is displayed in a separate browser window.

Follow these steps to add a content carousel to your organization’s Web page.

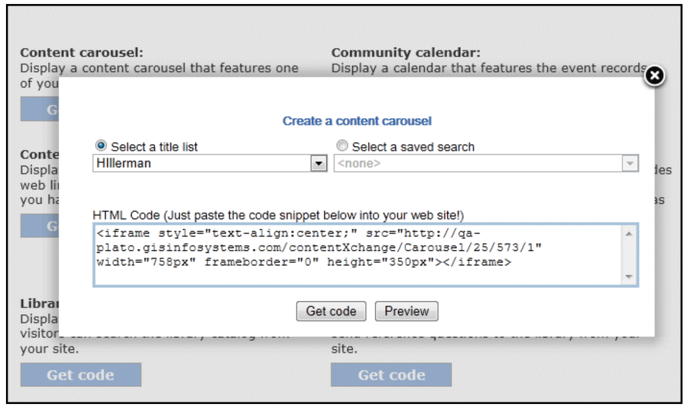
1. Go to the ContentXChange page of the organization’s community record. See “Access ContentXChange” on page 123.
2. On the ContentXChange tabbed page, under **Content Carousel**, click **Get Code**.

   The **Create a content carousel** dialog box opens.



3. On the **Create a content carousel** dialog box, select one of the following options:
   a) Click the **Select a title list** arrow and select a list from those you have saved in your library account.
   b) Click **Select a saved search** and select a search from those you have saved in your patron account.
4. Click **Get code** on the dialog box.

   The code snippet is displayed in the HTML code box.



You can click **Preview** to see how the carousel will look.

Tip:
You can change the size of the carousel by altering the **width** and **height** dimensions in the code.

5. Copy the code and paste it in your Web page.
6. Click **X** in the upper right corner of the **Create a content carousel** dialog box to close it.

Example of a content carousel on a Web page

A user can click a title to go to that title in the library's catalog.

Changes to title lists and saved searches

- **Automatic updates to carousels** - If a title is added to or deleted from a saved title list, the carousel is automatically updated. Carousels for saved searches are automatically updated when the library adds relevant materials to the catalog. The changes are made when the catalog page cache is refreshed. If the user clicks a title that has been deleted from a saved title list, but the catalog page cache has not been refreshed, the search may return 0 results.
- **Deleted title lists or saved searches** - If the entire saved title list or saved search is deleted, the carousel will not appear on your page.

Embed an events calendar in a Web page

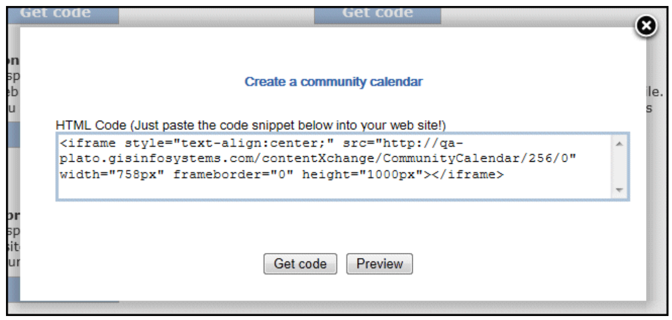
Follow these steps to display a calendar of events on your organization's Web page.

Note:
For information about adding events, see "Enter your organization's events" on page 112.

1. Go to the ContentXChange page of the organization's community record. See "Access ContentXChange" on page 123.
2. Under **Community Calendar**, click **Get Code**.

   The **Create a community calendar** dialog box opens.
3. Click **Get code** on the dialog box.

   The code snippet is displayed in the HTML code box.



   You can click **Preview** to see how the calendar will look.

Tip:
You can change the size of the calendar by altering the **width** and **height** dimensions in the code.

4. Copy the code and paste in your Web page.
5. Click **X** in the upper right corner of the **Create a community calendar** dialog box to close it.

Example of an events calendar on a Web page

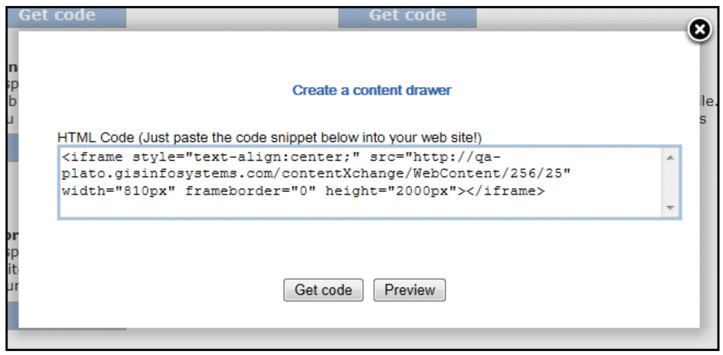
Embed a social connections drawer in a Web page

Follow these steps to display a “drawer” on the organization’s Web site containing the Web links and social media connections you set up on the Social tab of your organization’s profile.

1. Go to the ContentXChange page of the organization’s community record. See “Access ContentXChange” on page 123.
2. On the ContentXChange tabbed page, under **Content drawer**, click **Get Code**.

   The Content drawer dialog box opens.
3. Click **Get code** on the dialog box.

   The code snippet is displayed in the HTML code box.

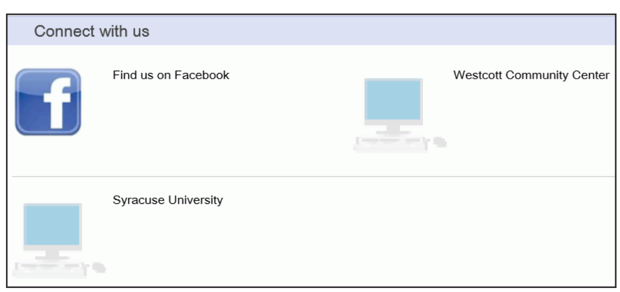


   You can click **Preview** to see how the drawer will look.

   Note:
   You can change the size of the drawer by altering the **width** and **height** dimensions in the code.
4. Copy the code and paste in your Web page.
5. Click **X** in the upper right corner of the dialog box.

   You can set up another ContentXChange feature, or click another tab to continue to work with this organization record.

Example of a social connections drawer on a Web page



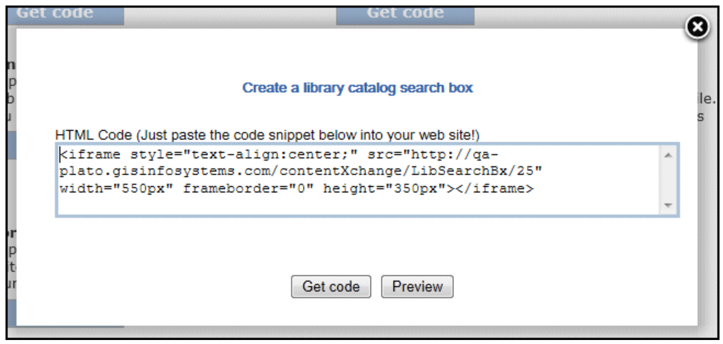
Embed a search box in a Web page

Follow these steps to embed a search box in your organization's Web page.

1. Go to the ContentXChange page of the organization's community record. See "Access ContentXChange" on page 123.
2. On the ContentXChange tabbed page, under **Library catalog search box**, click **Get Code**.

   The **Create a library catalog search box** dialog box opens.
3. Click **Get code** on the dialog box.

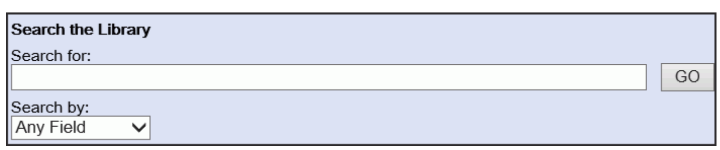
   The code snippet is displayed in the HTML code box.

   You can click **Preview** to see how the search box will look.

   Note:
   You can change the size of the search box by altering the **width** and **height** dimensions in the code.
4. Copy the code and paste in your Web page.
5. Click **X** in the upper right corner of the **Create a library search box** dialog box to close it.

Example of a search box on a Web page



Embed an ask-a-librarian link in a Web page

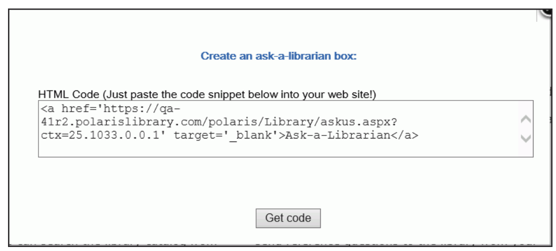
If you embed an Ask-a-Librarian link in your organization's Web page, a visitor to your Web page can click the link to send a reference question to the library. Follow these steps to place an "Ask a Librarian" link on your organization's Web page.

> **Note:**
> This feature is available only if the library has enabled it and does not require the user to log in to submit a question.

1. Go to the ContentXChange page of the organization's community record. See "Access ContentXChange" on page 123.
2. On the ContentXChange tabbed page, under **Ask-a-Librarian box**, click **Get Code**.

   The **Create an ask-a-librarian box** dialog box opens.
3. Click **Get code** on the dialog box.

   The code snippet is displayed in the HTML code box.



4. Copy the code and paste it into your Web page.
5. Click **X** in the upper right corner of the **Create an ask a librarian box** dialog box to close it.

Example of a link on the Web page and a question box

Visitors to your organization's Web page can click the Ask-a-Librarian link.

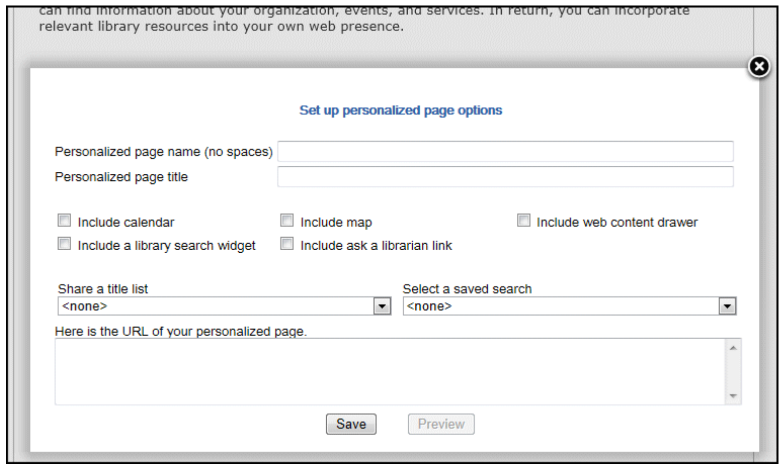
The visitor can then submit a question to the librarian using the Ask Us box.

Create a personalized page

Use this feature if your organization does not have a Web site. Follow these steps to create a page from the information you have entered in your organization's profile, and then submit the page to common search engines so that people can find information about your organization when they search the Web.

1. Go to the ContentXChange page of the organization's community record. See "Access ContentXChange" on page 123.
2. On the ContentXChange tabbed page, under **Personalized page options**, click **Set Up**.

   The Set up personalized page options dialog box opens.



3. Type a page name in the **Personalized page name** box.

   This name becomes part of the unique URL (Web address) for your page.
4. Type a page title in the **Personalized page title** dialog box.

   This title is displayed on the browser tab when a Web user visits your personalized page.
5. Check the features to include on your personalized page:
   - **Calendar** - Displays a calendar of the events you have set up for your organization. See "Embed an events calendar in a Web page" on page 126.
   - **Library search widget** - Places a search box on your personalized page. The visitor to your page enters a search term and a search is launched in the library catalog. See "Embed a search box in a Web page" on page 128.
   - **Map** - Provides a map to your organization's location.

- **Ask a librarian link** - The visitor to your page uses this link to send a reference question to the library from your page. See "Embed an ask-a-librarian link in a Web page" on page 129.

  Note:
  This feature is available only if the library has enabled Ask Us (PowerPAC profile **Navigation: Ask Us** set to **Yes**) and does not require the user to log in (PowerPAC profile **Ask us: Require login** set to **No**).

- **Web content drawer** - Displays a "drawer" on your personalized page containing the Web links and social media connections you set up on the Social tab of your organization's profile. See "Embed a social connections drawer in a Web page" on page 127.

Tip:
To embed a content carousel in your organization's Web page, a title list or saved search must already be associated with your library account. For information on creating a title list or a saved search associated with your patron account, see PAC online Help.

6. Do one of the following steps to embed a content carousel in your organization's Web page:

   a) Select a title list from the **Share a title list** box.

   b) Select a saved search from the **Select a saved search** box.

7. Click **Save**.

   The page URL (Web address) is displayed in the code box.

8. Copy the URL for submission to the search engine or engines, such as Google, Yahoo, or Bing. See "Submitting a ContentXChange page to Web searches" on page 131.

9. Click **X** in the upper right corner of **Set up personalized page options** dialog box to close it.

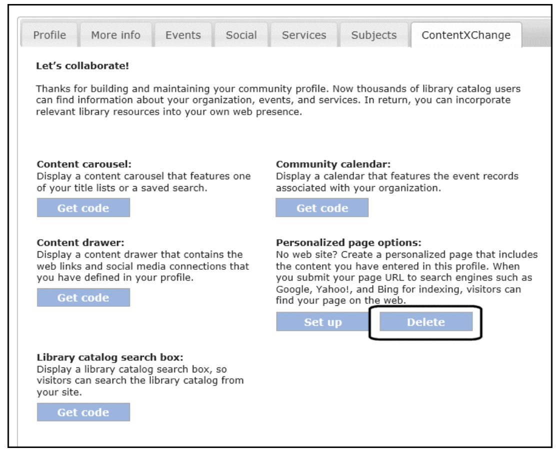
10. Click **Save** on the ContentXChange tabbed page.

Submitting a ContentXChange page to Web searches

- **Submitting your page URL to Google** - Google uses "spiders" to crawl the Web and automatically add sites to Google's index, so you may not need to submit your page URL. To ask Google to crawl your page URL, go to **https://www.google.com/webmasters/tools/submit-url/**
- **Submitting your page URL to Yahoo** - Yahoo also regularly crawls the Web to update the Yahoo search index. Yahoo also offers several ways to submit Web pages and content directly to the Yahoo! Search index and the Yahoo! Directory. For more information, go to **http://www.search.yahoo.com/info/submit.html**
- **Submitting your page URL to Bing** - To ensure your Web site is included in Bing's index, you can sign up for a free Bing Webmaster Tools account. For more information, go to **https://ssl.bing.com/webmaster/SubmitSitePage.aspx**

Deleting a ContentXChange personalized page

Click **Delete** on the ContentXChange page, under **Personalized page options**.



CQL Access Points for Community Information

This section lists the CQL (Common Query Language) access points you can use to construct custom search filters for Polaris PowerPAC community information searches. For more information about this procedure, see "Specify Community Keyword search filters" on page 69. The CQL search command can include the following parts:

- The text for which you are searching
- The access points (fields) you want to search; for example, organization name or event name (see "Search Access Point (Field) Codes - Community Information" on page 134)
- Operators (connectors) that link one part of the search with another. See "Boolean Operators" on page 133 and "Relative Operators" on page 134.

Boolean Operators

The Boolean operators And, Or, and Not combine search terms:

- **And** - A record must match both the term before and the term after the operator to be included in the search results.
- **Or** - A record can match either the term before or the term after the operator, or both, to be included in the search results.

  Example:
  KW=term1 OR KW=term2
  If you have a number of terms to combine with OR, type the command this way:
  KW={list}term1, term2, term3, term4{/list}
  You can insert as many terms as you need between **{list}** and **{/list}**
- **Not** - A record must match the term before the operator, but not the term after the operator, to be included in the search results.

If you use multiple operators in the same search command, use parentheses to group the operations to be performed.

Search Text That Includes Operators or Special Characters

To search for text that includes an operator or special characters as part of the search text, put the entire search text in double quotation marks.

Relative Operators

Relative operators are symbols that compare search terms:

Symbol	*Relative Operation*
=	Equal to search term
<>	Not equal to a single search term: **ED <> date1** For a range of dates, use NOT: **NOT ED = date1-date2**.
>=	Greater than or equal to search term
>	Greater than search term
<=	Less than or equal to search term
<	Less than search term

Search Access Point (Field) Codes - Community Information

Access Point	*Description*
ADR	Address and contact person
CN	Control number
KW	All keyword fields
NOTE	Notes
PC	Postal code
PN	Organization name
SA	Services available
SU	Subject
TI	Event name
TOOID	Type of organization (TOOID=): EVT - Event PER - Individual ORG - Organization or Club OTH - Other PRO - Program or service SPO - Sponsor or donor

Community Profiles Reference

These profiles control PAC navigation and search options for community information. The profiles are available on the Profiles, Community tabbed page on the Administration Explorer, at the listed organizational levels. For more information about searching for and editing community information in PAC, see "Community Setup for PAC Display" on page 64.

Community Information Display (Mobile PAC): Configure (System, Library, Branch)

Specify the data elements that appear in the brief, full, and summary displays for community information in Mobile PAC search results. See "Configuring the PAC Community Results Display" on page 73.

Community Information Display (PowerPAC): Configure (System, Library, Branch)

Specify the data elements that appear in the brief, full, and summary displays for community information in PowerPAC search results. See "Configuring the PAC Community Results Display" on page 73.

Community Information: ContentXChange marketing message (System, Library, Branch)

Specifies a brief (255 character maximum) marketing message that displays on an organization's Web site with any features the organization representative has added to the site using ContentXChange: **Powered by <library name> <marketing message>**, where **<marketing message>** is the text you specify with this profile. See "Using ContentXChange" on page 122. You can edit the **Powered by** portion of the message in WebAdmin; the string ID is **CXC_POWEREDBY**.

- **Default**: Blank (no message)

Dashboards: Narrow your search & related searches (System, Library, Branch)

Specifies the facets that appear for the Narrow Your Search and related Searches Web parts in the dashboard for community information search results. See "Community Search Results Facets in Polaris PowerPAC" on page 94.

Days to continue showing event in PAC after event end date (System, Library, Branch)

Sets the default number of days to display an event in a PAC user's search results after the event end date, as specified in the staff client or PAC editor. The default setting is 7. The number of days can be manually edited in the staff client or PAC editor.

Default view of events in PowerPAC System, Library, Branch

Sets the default view of community events in the PAC: **View as a list** or **View as a calendar**.

Navigation (Mobile PAC): Community - Keyword Search (System, Library, Branch)

Displays the **Community Keyword** search option on the Mobile PAC **Community** menu.

- **Default**: No

Navigation (PowerPAC): Community (System, Library, Branch)

Displays the **Community** option on the Polaris PowerPAC menu bar.

- **Default**: No

Navigation (PowerPAC): Community - Browse Search (System, Library, Branch)
Displays the **Community Browse** search option on the Polaris PowerPAC **Community** menu.

- **Default**: No

Navigation (PowerPAC): Community - Keyword Search (System, Library, Branch)
Displays the **Community Keyword** search option on the Polaris PowerPAC **Community** menu.

- **Default**: No

Navigation (PowerPAC): My Community Profile (System, Library, Branch)
Displays the **Community** option on the Polaris PowerPAC **My Record** menu for logged-in patrons who have been designated as organization representatives.

- **Default**: No

Search Settings Defaults (System, Library, Branch)
Specifies default search settings for Community Browse and Community Keyword searches in PAC.

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