



PAC Customization Guide

6.5

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PAC Customization

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

Before you begin, keep in mind that you can customize many aspects of Polaris PowerPAC, Polaris PowerPAC Children's Edition, and Mobile PAC without any programming knowledge. Polaris Administration settings control many aspects of PAC function and appearance, and because these settings are stored in the database, they are retained at upgrade.

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

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

Important:

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

The following table shows features available for customization, the skills necessary to perform customization, and whether your changes persist through upgrade.

Feature	Skills/ Knowledge Required	5.2	5.5 & Later	Persists Through Upgrade	Notes
Innovative-designed standard themes (5)	Polaris System Administration	X	X	Yes	
Dashboard left or right	Polaris System Administration	X	X	Yes	
Custom header logo	Polaris System Administration	X	X	Yes	
Branch name display and alignment	Polaris System Administration	X	X	Yes	
Custom return link for header logo	Polaris System Administration	X	X	Yes	
Header background and text color	Polaris System Administration	X	X	Yes	
Overall color theme, font family and sizes, spacing, etc.	SCSS, CSS	X	X	See note.	See Customizing Layouts Typically changes and overrides to the SCSS files can be set once, but it is advisable to review those changes when upgrading.
Custom image files for format	PowerPAC file structure	X	X	Some	Back up custom images before

Feature	Skills/ Knowledge Required	5.2	5.5 & Later	Persists Through Upgrade	Notes
icons, etc.					upgrade to be sure.
Custom pages from a provided custom page template	HTML	X	X	Yes	Polaris 5.5: Custom pages from the provided template must use the Polaris 5.5 template moving forward.
Custom menu categories and options	XML	X	X	Yes	Format of HeaderData.xml for Polaris 5.5 has not changed.
URL deep links into the catalog for searches and titles	N/A	X	X	Yes	URL format and structures for PowerPAC 5.5 have not changed.
Custom display strings defined in WebAdmin	Polaris WebAdmin (Language Editor)	X	X	Yes	
XSLT template files for headers and footers	XML, XSLT, HTML	X		See note.	Not used in 5.5. See Customizing Layouts
Master Site Page (site.-master) modifications of	HTML, C#, .NET		X	See note.	See Customizing Layouts Edits to PowerPAC's

Feature	Skills/ Knowledge Required	5.2	5.5 & Later	Persists Through Upgrade	Notes
headers, dash-boards, and footers					site.master page in general can be used with minor edits in future versions, but Innovative reserves the right to modify the default site.master page.
Edit ASPX and ASCX files	HTML, C#, .NET	X	X	See note.	See Customizing Pages Innovative reserves the right to change the content area of each PowerPAC page between versions.

See also:

- [PowerPAC Directory Structure](#)
- [Customizing PAC Themes](#)
- [Customizing Layouts](#)
- [Customizing Pages](#)
- [Adding Menu and Submenu Options](#)
- [Customizing Search By and Sort By Options](#)
- [Customizing PowerPAC Help Links](#)
- [External Logon to PAC Patron Account](#)

- [Linking to the INN-Reach Central Catalog](#)
- [Customizing Mobile PAC](#)

PowerPAC Directory Structure

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

Note:

For a list of specific pages and their functions, see [Standard PAC Pages Reference](#).

Folder	Contents	Customization Notes
addons	Library Elf files	Do not alter
admin	PowerPAC administration utilities	Do not alter
admin\images	Images used in PowerPAC administration utilities	Do not alter
bin	DLL files for PowerPAC, business objects, and search engine	Do not alter
Children	Root directory for Children's PAC files	
Children\help	Children's PAC help files	Customizable (HTML); back up to protect from overwriting at upgrade
Children\themes	Images and CSS style sheets for Children's PAC themes	Customizable. See Creating a Custom Theme for Polaris PowerPAC Children's Edition
Children\themes\1033	1033 is the language ID for English. Theme directories contained in this folder	Customizable. See Creating a Custom Theme for Polaris PowerPAC Chil-

Folder	Contents	Customization Notes
	include the default themes antique , ocean , and treasure .	dren's Edition
Children\usercontrols	Source code for components of Children's PAC, including search results, availability, and full title display.	Customizable. See Customizing Pages
config	Configuration files for Polaris Phone Sttendant (inbound telephony)	See "Setting Up Inbound Telephony" in Polaris staff client help.
custom	Root folder for user-developed custom pages.	Custom files stored in this folder are not overwritten at upgrade.
custom\App_Data	See Customizing Search By and Sort By Options	
custom\themes	See Creating a Custom Theme for Polaris PowerPAC	
dashboards	Obsolete	N/A
HeaderData.xml	Includes definitions for section and menu options in the PowerPAC header.	Customizable; back up to protect from overwriting at upgrade. See Customizing Layouts
help	PowerPAC help files	Customizable. See Customizing PowerPAC Help Links
library	Pages used in the Library Info section of PowerPAC, including events and policies	Customizable; not overwritten at upgrade.
library\userdef	Template pages for user-defined Library Info pages	Customizable; custom files stored here are not

Folder	Contents	Customization Notes
		overwritten at upgrade.
patronaccount	Pages and web controls used in the Patron Account section of PowerPAC	Customizable at your own risk; back up to protect from overwriting at upgrade.
payments	Fields used in e-commerce	Do not alter
rss	Script files for rss feeds	You can add custom files. Custom files not overwritten at upgrade.
scripts	JavaScript files	Do not alter
search	Pages for the search section of PowerPAC	
search\components	Components of search results page	
search\misc	E-sources and ILL pages	Do not alter
search\usercontrols	Web controls for search pages. Includes search tool bars, search results lists, and others.	Customizable; not overwritten at upgrade.
services		Do not alter
themes	Contains directories for each of the five PowerPAC themes (Ocean, Mint, Black & Gold, Gray, Pomegranate) as well as themes/shared (see below)	You can create your own custom theme. See Creating a Custom Theme for Polaris PowerPAC
themes\shared	Contains default styles and images shared by all themes: \communityformats - Format icons for	Override shared values in your custom theme folder. See Creating a Custom Theme for Polaris PowerPAC

Folder	Contents	Customization Notes
	<p>Community Information organizations, events, etc.</p> <p>\fancybox - Images and CSS styling used in pop-up light boxes</p> <p>\formats - Bibliographic format icons (small) used on search results pages</p> <p>\largeformats - Large bibliographic format icons used in content carousels when there is no cover image available for a given title</p> <p>\maps - Icon used for pins on the Google "Map It!" feature</p> <p>\ratings - Starred ratings images used in content carousels</p> <p>\scss - Shared SCSS files used to generate theme site .css files</p> <p>\tabs - Images and CSS styling for the forms used in editing Community Information data in Patron Account</p>	
themes\<theme>	Images and style sheets for the specific theme that differ from the styles and images specified in	See Creating a Custom Theme for Polaris Power-PAC

Folder	Contents	Customization Notes
	themes\shared (see above)	
usercontrols	Generic Web controls used by most pages, including page headers, footers, and dashboards.	Customizable; back up to protect from overwriting at upgrade. See Customizing Pages
Xsl	Contains XSLT transform files	
Xsl\Syndetics	XSLT transform files for Syndetics content	Do not alter

Customizing PAC Themes

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

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

Note:

If you copy a theme, you must use a Polaris template for the new files to be defined properly.

See also:

- [Theme Structure](#)
- [Header Logo](#)
- [Creating a Custom Theme for Polaris PowerPAC](#)
- [Creating a Custom Theme for Polaris PowerPAC Children's Edition](#)
- [Creating Custom Mobile PAC Themes](#)

Theme Structure

In general, a theme consists of a style sheet (.css) file and a collection of images. The style sheet controls aspects of general page appearance—such as fonts, links, and colors—and defines classes. The **Themes\Shared** folder contains the default images for all themes. Each individual theme has a single site.css file that is generated from SCSS files contained in the **Themes\Shared\SCSS** folder. When creating a custom theme,

you will need to generate a site.css for your theme using the shared SCSS files (instructions below). See [Creating a Custom Theme for Polaris PowerPAC](#).

Important:

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

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

Header Logo

For your header logo, you can use a .jpg file or a .gif file. The default header logo image is .gif file (header_logo.gif.) However, custom themes can use either header_logo.jpg or header_logo.gif. Note that header_logo.gif supports header logo images that have a transparent background.

Creating a Custom Theme for Polaris PowerPAC

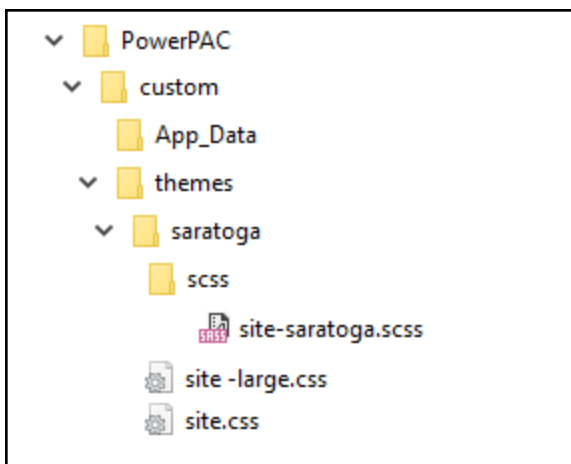
Polaris provides five standard themes for Polaris PowerPAC: Ocean (the default), Pomegranate, Mint, Black & Gold, and Gray. When a patron connects to Polaris PowerPAC, the connection branch's theme is displayed. If you allow patrons to switch branches, the theme changes according to the selected branch's theme setting. You create a custom theme by setting up a custom theme folder in **Polaris\[version]\PowerPAC\custom\themes\theme name**, and making it available for selection in Polaris Administration.

To create a custom theme for Polaris PowerPAC:

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

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

2. Working in your custom theme folder, create an **scss** sub folder and copy the file **style-template.scss** from the top-level custom folder into your custom theme's **scss** folder. Follow the naming convention of the standard themes; that is, include the name of your theme in that file name. For example, if your theme name is **Saratoga**, name the file **style-saratoga.scss**. You can override variables such as color, font size, etc. in this file. Place any custom classes or class overrides at the bottom of the file after the import line for **style.core**.



Note:

If you want to modify a standard theme, you may want to use the simple Gray theme as the basis for your changes.

Important:

If your library uses Polaris Social (licensed integrated ChiliFresh Connections features): In the Polaris **themes\shared** folder, ChiliFresh Connections has its own style sheet (chilifresh.css). If your PowerPAC has a custom theme and you wish to override some of the default chilifresh.css file, copy the chilifresh.css file from the

themes\shared folder to the custom theme folder and edit the custom version accordingly. Unlike the main **styles.css** page with overrides, the custom **chilifresh.css** page must contain all the CSS classes from the default version.

3. PowerPAC includes a utility to compile from your custom **site-<theme>.scss** file the **site.css** file that will reside in the top level of your custom theme folder. In order to create that custom **site.css** file, at a command prompt, cd to **c:\program files\polaris\<version>\powerpac\themes** and run the utility specifying your custom theme name. For example, if your custom theme name is **Saratoga**, run from the command line prompt:

> PowerShell -File ScssCompile.ps1 -Theme Saratoga

This will generate a **site.css** file in your custom theme folder.

Note:

Hosted customers without direct access to the PowerPAC server can compile custom CSS in the Polaris Web Admin Tool. See the Web Admin Tool help for instructions.

4. Assign the new theme to one or more branches by following these steps:
 - a. In the Polaris Administration Explorer, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.
 - b. Double-click **Theme selection**, and select the custom theme from the drop-down list.
 - c. Double-click **Theme dashboard position**, and select **Left** or **Right**.
 - d. Select **File > Save**.
5. Use the Reload feature in Polaris Language Editor (WebAdmin) or perform an IIS reset to see your changes.

Note:

Hosted customers should contact their Site Manager to perform an IIS reset.

Creating a Custom Theme for Polaris PowerPAC Children's Edition

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

For Polaris PowerPAC Children's Edition, the theme style sheet (.css) file and related image files are stored in each language-specific theme folder:

Polaris\[version]\PowerPAC\Children\themes\language code\theme name.

For example, files for the default Treasure theme (English) are located in the folder

Polaris\version\PowerPAC\children\themes\1033\treasure.

If you are creating a custom theme, set up a unique folder for your files on the Web server, in the **Polaris\version\PowerPAC\children\themes\language number** folder.

Note:

Each language is represented by a number. English is represented by 1033, so theme folders for the English version are stored in

Polaris\version\PowerPAC\children\themes\1033.

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

You create a custom theme for Children's Edition by copying an existing theme, then editing the style sheet and images as appropriate. You can make the custom theme available for use directly in Polaris System Administration. To create a custom theme for the Children's Edition:

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

folder] directory. File names and paths are case-sensitive.

2. Working in your custom theme folder, edit the .css style sheet and images as you wish. You must retain all classes in the .css file.
3. Make your custom theme available for organizations to use by following these steps:
 - a. In the Polaris Administration Explorer, open the **Profiles** folder *at the system level*, and select the **Children's PAC** tab in the details view.
 - b. Double-click **Theme construction**. The **Theme Construction** dialog box lists the default themes and any custom themes that have already been defined. You cannot edit the default themes.
 - c. Select the theme you copied as a basis for your custom theme in step 1, and click **Copy**. The copy is added to the list as **Copy of theme**.
 - d. Select the copy and click **Edit**. The **Edit Theme** dialog box opens.
 - e. Type a name for the theme in the **Display Name** box. The display name identifies the theme in Polaris Administration profiles and on the Polaris PowerPAC Children's Edition interface.

Note:

The **Cursor Type** field is not functional.

- f. In the appropriate **File Name** boxes, if you changed any filenames in the custom theme folder, type the new filenames for the page graphic elements and for the stylesheet. The system constructs the appropriate URL. Type only the new filename (case-sensitive).
 - g. Type the name of the theme folder you created in step 1 in the **Default Image Path** box. Type only the folder name (case-sensitive). The system constructs the appropriate URL for the theme files to **Polaris\[version]\PowerPAC\children\themes\language folder\your folder** on the server, based on the theme folder you specify.
 - h. Click **OK** on the dialog box. The dialog box closes, and your settings are saved.
4. Assign the custom theme to an organization by following these steps:
 - a. In the Polaris Administration Explorer, open the **Profiles** folder for the organization, and select the **Children's PAC** tab in the details view.
 - b. Double-click **Theme Assignment**.

- c. Select the custom theme in the Unassigned Themes list, and click **Assign**.
The theme is added to the Assigned themes list.
- d. To designate an assigned theme as the default theme, select the theme in the Assigned Themes list, and click **Assign Default Theme**.
- e. Click **OK** on the dialog box. The dialog box closes, and your settings are automatically saved.

Note:

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

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

Note:

Polaris Hosted customers should contact Polaris Customer Support to perform an IIS reset.

Important:

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

Customizing Layouts

Beyond the color and layout changes possible by overriding the PowerPAC CSS classes and styles, overall layout structure for the PowerPAC header, menu options, footer, and dashboards can be customized by editing the application primary master page.

PowerPAC pages share a common ASP.NET master page called **site.master** which resides in the root directory. With knowledge of HTML, ASP.NET, and C#, a customized version of this file can result in changes in the layout of the header, menu options, and footer that may not be possible through CSS changes.

The **site.master** file can be modified in place, but be sure to make a backup of the original file. Also, be aware that changes will be overwritten when PowerPAC is upgraded on your server. A better method is to create a custom theme and then create a copy of **site.master** in your custom theme folder. PowerPAC always looks for a **site.master** in the selected theme folder before defaulting to the version in the application's root directory.

Most of the dynamic data content for portions of PowerPAC pages that are rendered via the **site.master** file are contained in a C# object called PageData.

The following attributes of the PageData object are available for use in any customized PowerPAC master page:

ATTRIBUTE	C# DATA TYPE	DESCRIPTION
IsPatronAccountEnabled	bool	Patron account access link. Enabled - Boolean attribute indicating whether or not patron logons are allowed.
Banner.CustomBackgroundColor	string	Custom background color style for banner as specified in Polaris Administration
Banner.CustomForegroundColor	string	Custom font color style for organization name display as specified in Polaris

ATTRIBUTE	C# DATA TYPE	DESCRIPTION
		Administration
Banner.IsShowOrganizationName	bool	Whether to display organization name as specified in Polaris Administration
Banner.HeaderAlignment	string	HTML style attribute for horizontal alignment of header display data
Branches	list<>	List of branch (organization) links included in drop-down list used to switch branches
Branch.URL	string	URL used to switch to a given branch
Branch.Label	string	Branch (organization) display name
ChildrensPAC.IsEnabled	bool	Boolean attribute indicating whether or not Children's PAC logo/link displays
ChildrensPAC.LinkUrl	string	HREF link to Children's PAC main page
ChildrensPAC.Label	string	Display text of Children's PAC link
CopyrightText	string	Text of copyright statement
Languages	list<>	List of languages that this installation of PowerPAC supports
Language.Label	string	Label of the specific language option link
Language.URL	string	URL of the specified language option link

ATTRIBUTE	C# DATA TYPE	DESCRIPTION
CurrentLanguageID	int	<p>Currently selected language. Could be used to conditionally display static text in the site.master in different languages. Valid values include those licensed by the system. Possible values:</p> <p>1033 - English</p> <p>1042 - Korean</p> <p>1045 - Polish</p> <p>1049 - Russian</p> <p>1065 - Farsi - Persian</p> <p>1066 - Vietnamese</p> <p>1081 - Hindi</p> <p>1141 - Hawaiian - United States</p> <p>2052 - Chinese</p> <p>3082 - Spanish - Span (Modern Sort)</p> <p>3084 - French - Canada</p> <p>12289 - Arabic</p> <p>15372 - Haitian Creole</p>
HeaderLogo.ImageUrl	string	URL for image of main header
HeaderLogo.LinkUrl	string	HREF link for main header logo
HeaderLogo.AltText	string	ALT text for main header logo

ATTRIBUTE	C# DATA TYPE	DESCRIPTION
OrganizationName	string	Name of the currently selected organization
OrganizationID	int	ID for the currently selected organization. Could be used to key off of to conditionally display static text for specific organizations.
PageID	int	Web page ID for the page, typically used to determine which dashboards to display. Could also be used to key off of for any additional page-specific content.
IsPatronLoggedOn	bool	Boolean attribute indicating whether or not a patron is logged on
PatronName	string	Name of currently logged on patron
PolarisFooterLogo.ImageUrl	string	URL of the "Powered by Polaris" image logo
PolarisFooterLogo.AltText	string	ALT text for the "Powered by Polaris" image logo
MenuOptions	list<>	List of main menu categories and sub-options as defined in HeaderData.xml
MenuOption.ID	int	ID of main tab option
MenuOption.IsSelected	bool	Boolean indicating whether this is the currently selected option
MenuOption.Link.URL	string	URL for the option

ATTRIBUTE	C# DATA TYPE	DESCRIPTION
MenuOption.Link.Label	string	Text label for the option
MenuOption.MenuSubOptions	list<>	List of sub-options for this main category. An empty list indicates there are no sub-options.
MenuSubOption.ID	int	ID of sub-option
MenuSubOption.IsSelected	bool	Boolean attribute indicating whether this is the currently selected sub-option
MenuSubOption.Link.URL	string	URL for the sub-option
MenuSubOption.Link.Label	string	ext label for the sub-option
MobilePAC.IsShowLink	bool	Boolean attribute indicating whether the link to classic Mobile PAC appears in the page footer
MobilePAC.Label	string	Label of classic Mobile PAC link in footer
MobilePAC.LinkUrl	string	URL of classic Mobile PAC link in footer
SkipToMainContentLabel	string	Label of the link to skip to main content of page. Typically invisible, but used by screen readers for ADA compliance.
SkipToMainMenuLabel	string	Label of the link to skip to main menu of page. Typically invisible, but used by screen readers for ADA compliance.

ATTRIBUTE	C# DATA TYPE	DESCRIPTION
ThemePath	string	The web path of the images and style sheets for the currently active theme. Could be used as a prefix to any custom images contained in that directory.
VirtualReference.IsEnabled	bool	Boolean attribute indicating whether or not Virtual Reference is enabled
VirtualReference.LabelPre	string	Label text before the hyperlinked portion of the link
VirtualReference.Link.Label	string	Label of hyperlinked portion of the link.
VirtualReference.Link.URL	string	URL of hyperlinked position of the link
VirtualReference.LabelPost	string	Label text before the hyperlinked portion of the link

Section- and Page-Specific Customizations

For PowerPAC pages that inherit from **site.master**, the BODY HTML tag contains two classes that may be used as selectors for scoping of section- and page-specific CSS customizations. The page-specific class is of the format **page-{pagename}** in which **{pagename}** is the name of the ASPX page minus the .aspx file extension. The section-specific class is of the format **section-{sectionname}** where **{sectionname}** is the directory in which the page resides.

Example:

For the page /polaris/patronaccount/itemsout.aspx, the BODY tag would include the following classes:

```
<BODY class="section-patronaccount page-itemsout">
```

Navigation Menu Options

Navigation menu options are defined in the file **HeaderData.xml** in the root of the PowerPAC folder. If a single customized HeaderData.xml file will suffice for all branches, copy the **HeaderData.xml** file to the **/custom/** folder and customize the copied file. Polaris looks first for **HeaderData.xml** in the **/custom/** folder; if the file is not found there, Polaris uses the **HeaderData.xml** file in the root of the PowerPAC folder.

If you need different custom **HeaderData.xml** files for various branches, you can create them in the **/custom/** folder, and each can be assigned to one or more branches:

- After creating the multiple **HeaderData.xml** files, create a file called **HeaderDataIndex.xml** in the **/custom/** folder. This allows PowerPAC to associate specific header data files with specific branches. See the sample file in the **/custom/** folder called **HeaderDataIndex-template.xml**; use this file as an example or starting point.
- In the index file, each branch ID is assigned to the custom versions of **HeaderData.xml**. For example:

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

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

Perform a PowerPAC reload or IISRESET after creating the **HeaderDataIndex.xml** file. Polaris Hosted customers should contact Polaris Customer Support to perform an IIS reset.

Menu Classes for PAC Usage Statistics

Library administrators who analyze PAC usage statistics using a third-party analytics tool can gather data regarding usage of menus in the header. To enable the usage statistics, an individual class identifies each menu and sub-menu option in the headerdata.xml file.

Note:

The class is not for the following menus: **More**, **Language**, and **Branches**.

The class name format is as follows: **menu-[menuID]-[submenuID]**

Example:

```
<li class="nav__item-level-1 dropdown">
  <a href="#" class="nav__link-level-1 menu-1 dropdown-toggle" data-toggle="dropdown" role="button" aria-haspopup="true" aria-
expanded="false">Library Info <span class="caret"></span></a>
  <ul class="nav__list-level-2 dropdown-menu">
    <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/default.aspx?ctx=90.1033.0.0.2" class="nav__link-
level-2 menu-1-1">Portal</a></li>
    <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/library/hours.aspx?ctx=90.1033.0.0.2"
class="nav__link-level-2 menu-1-2">Hours</a></li>
    <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/library/events.aspx?ctx=90.1033.0.0.2"
class="nav__link-level-2 menu-1-3">Events</a></li>
    <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/library/policies.aspx?ctx=90.1033.0.0.2"
class="nav__link-level-2 menu-1-4">Policies</a></li>
    <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/library/website.aspx?ctx=90.1033.0.0.2"
class="nav__link-level-2 menu-1-5">Web Site</a></li>
    <li class="nav__item-level-2"><a href="https://QA-Polaris.polarislibrary.com/polaris/library/askus.aspx?ctx=90.1033.0.0.2"
class="nav__link-level-2 menu-1-6">Ask Us</a></li>
  </ul>
</li>
```

These classes also allow for CSS style customization of individual menu options and sub-options.

Customizing Pages

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

For Polaris PowerPAC, the files are located in **Polaris/PowerPAC/library**. See [Polaris PowerPAC Pages Reference](#) for a list of pages and how they are used.

For Polaris PowerPAC Children's Edition, the files are located in **Polaris/PowerPAC/children**. See [Polaris PowerPAC Children's Edition Pages Reference](#) for a list of pages and how they are used.

Important:

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

Site Master Page

Beginning with Polaris 5.2, PowerPAC uses an ASP.NET master page called **site.master** which resides in the PowerPAC application root directory. All common <HEAD> elements from the individual *.ASPX PowerPAC pages are now in this shared master page. This shared master page ensures consistency in style and layout across pages, and prepares PowerPAC for future updates. You do not need to customize the <HEAD> element on individual pages.

Note:

You can include a custom version of **site.master** in the **/custom directory**. See [Customizing Layouts](#).

CSS and JavaScript References

Beginning with Polaris 5.2, all references to external style sheet and static JavaScript files are located in user control files called **/usercontrols/headassets.ascx** and **/usercontrols/footerassets.ascx**. Alternate versions of these files are used by pages associated with PowerPAC Community features; they are called **/usercontrols/headassetscommunity.ascx** and **/usercontrols/footerassetscommunity.ascx**. The list of style sheets and JavaScript files can be edited in place.

Polaris PowerPAC Accessibility Tags

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

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

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

User-Defined Templates

For Polaris PowerPAC, you can use a template to construct your custom pages. Custom pages based on the template can reside in any PowerPAC folder, and the page directive (first line of the custom ASPX page) does not need to be updated whenever PowerPAC is upgraded.

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

Note:

Beginning with Polaris 5.2, the **CustomPage-template.aspx** file uses the

master page design. If you have created custom *.ASPX files in previous version of Polaris, they should still work as is, but Polaris encourages you to switch to the master page design. See [Customizing Layouts](#). When you upgrade to Polaris 5.5, update your custom pages to follow the Polaris 5.5 version of the template.

Note:

Certain pages in **the library\userdef** directory are intended for direct editing so that you can easily insert your library's custom information. These include **ud_events.ascx** and **ud_policies.ascx**. You can add upcoming events and library policies to these pages just by inserting the appropriate text and formatting your text with basic HTML tags. Be sure your additions are responsive. For more information, search the Polaris online help for "Add text to the Events page" and see the Public Access Administration PDF Guide, Add text to the Policies page.

Adding Web Parts to Custom Pages

If you create a custom page from the template, you may want to set the PageID value so that the appropriate web parts are displayed in the dashboard. For a list of PageID values, see [Standard PAC Pages Reference](#).

Adding Menu and Submenu Options

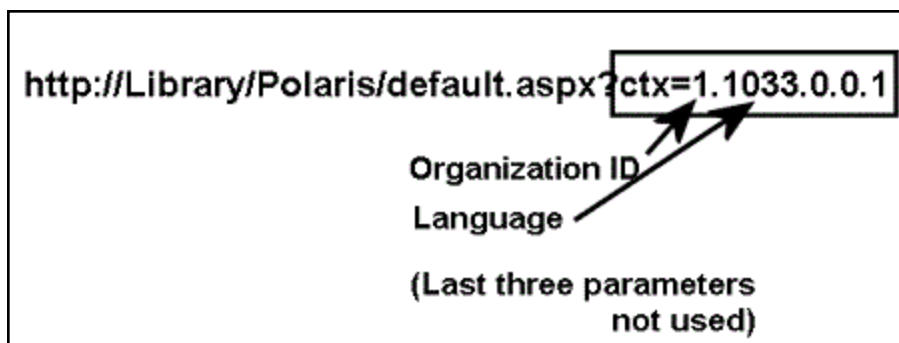
You can add menu and submenu options (tabs) and provide links for your custom options in the file **HeaderData.xml**, located in **Polaris\[version]\PowerPAC**. See [Navigation Menu Options](#). Each tab is identified by a unique number in the TabID field. Polaris-provided tabs are identified by single-digit numbers. Start at a higher number for custom tabs, such as 100, in case Innovative adds more default tabs in later versions.

Important:

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

Suppressing Context

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



For each of the nodes in the primary and secondary navigation links defined in **HeaderData.xml**, you can specify a **SuppressCTX** node for custom tabs and secondary menu options. Set **SuppressCTX** to **Y** for any custom tab or menu option in the header for which the link is going to some page other than a PowerPAC page. For example, a library adds additional custom tabs for **Visual Search** and **Digital Catalog**, applications outside Polaris PowerPAC that the library wants patrons to be able to use. By including

the node **<SuppressCTX>Y</SuppressCTX>** in the tab definition, the ctx=9.9999.9.9.9 query parameter values will not be automatically appended to the link.

Customizing Search By and Sort By Options

You can edit PowerPAC Search by and Sort by options as described below. If you choose to remove options, be sure to coordinate your default settings in the PAC profile **Search settings defaults** if appropriate. See the Public Access Administration PDF Guide, Specifying Default Search Settings.

Search By Options

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

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

Note:

Perform a PowerPAC reload or IISRESET after creating the custom version of this file.

You can edit and translate labels for **Search by** options using Polaris Language Editor (WebAdmin). **Search by** string IDs begin with PACML_SEARCHBARS. For more information, see WebAdmin online help.

Sort By Options

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

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

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

Note:

Perform a PowerPAC reload or IISRESET after creating the custom version of this file.

You can edit and translate labels for **Sort** options using Polaris Language Editor (WebAdmin). **Sort** string IDs begin with PACML_SORT. For more information, see WebAdmin online help.

Customizing PowerPAC Help Links

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

Important:

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

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

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

```

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

```

Removing Help Links

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

Rearranging the Order of Help Links

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

Adding Help Links

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

The newly added node should contain the following:

- 'TabID' of 99. (<TabID>99</TabID>)
- A unique 'SubTabID' that is not currently being used. (<SubTabID>1000</SubTabID>)
- 'Name' to identify the link. This will be used as the link's label if an <LS_Name> node is not defined. (<Name>Our Custom Help Link</Name>)
- 'URL' of the link to the help file content. (<URL>custom/help/ourhelp.htm</URL>)
- To create a multi-lingual label for the custom help link, add a custom string in Web Admin and include that string's mnemonic in an 'LS_Name' node. This is optional. (<LS_Name>CUSTOM_HELP_LINK_1</LS_Name>)
- Include a 'SuppressCTX' node with a value of 'Y' to indicate that Polaris-specific URL data should not be included in the URL Link. (<SuppressCTX>Y</SuppressCTX>)

External Logon to PAC Patron Account

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

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

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


Linking to the INN-Reach Central Catalog

If your library participates in an INN-Reach consortium, you can provide two types of links on PowerPAC pages to the INN-Reach central catalog:

Simple link to the INN-Reach central catalog web site - You can provide a simple link to the INN-Reach central catalog web site. For example, you may want to provide the link on the library's PowerPAC portal page, in a PowerPAC dashboard, and/or on the "No Hits" search results page. The patron clicks the link and enters or re-enters the search term on the INN-Reach central catalog web site. See [Customizing Pages](#).

Deep link to INN-Reach central catalog search - You can provide a custom link that allows the patron to search the INN-Reach central catalog without re-entering the search term. For example, if a patron searches for **global warming** in PowerPAC and doesn't find anything suitable, the patron can click a link to search the INN-Reach catalog and go directly to the INN-Reach central catalog search results page for **global warming**. With this method, a JavaScript .js file extracts the search term from the URL of the patron's brief results page and passes it in the referring URL to the INN-Reach catalog.

Note:

The deep link method described here works only on the PowerPAC brief search results page because the PAC URL for this page contains the search term (**term=**). If the patron has navigated to the full display for a title in the search results, the URL no longer contains the search term; therefore, the INN-Reach link goes to the INN-Reach catalog's home page.

For details about this method, see:

- [Create deep links to the INN-Reach central catalog](#)
- [Sample JavaScript for INN-Reach Central Catalog, Encore Discovery Platform](#)
- [Sample JavaScript for INN-Reach Central Catalog, WebPAC Discovery Platform](#)

As with other Polaris PAC customizations, you need some knowledge of HTML and other techniques to do this procedure. You must implement the script as explained here. Polaris Support can provide basic troubleshooting if you run into problems, but cannot implement it for you. If your customizations break the code, Polaris Support can help you revert back to the original.

Create deep links to the INN-Reach central catalog

Use the **C:\Program Files\Polaris\[version]\PowerPAC\custom** folder for your customizations to prevent them from being overwritten at upgrade. If you have a custom theme, you can create and name a subfolder for your custom theme, and then create appropriate subfolders within that folder. For details, see [PowerPAC Directory Structure](#).

Step 1: Add a JavaScript file to your PowerPAC server

1. Create a text file and name it **inn-reach-pac-link.js**. The script format differs depending on the INN-Reach central catalog discovery platform:
 - **Encore example** - See [Sample JavaScript for INN-Reach Central Catalog, Encore Discovery Platform](#)
 - **WebPAC example** - See [Sample JavaScript for INN-Reach Central Catalog, WebPAC Discovery Platform](#)
2. Change the second line of the script so that it represents the URL of your INN-Reach central catalog.
3. Place the script file in your PowerPAC custom folder or subfolder.

Step 2: Modify your custom PowerPAC theme

Working in your custom **site-{theme}.scss** file, add the following so that your INN-Reach links look and behave like traditional hyperlinks.

```
.irLink {  
    cursor:pointer;  
    cursor:hand;  
    text-decoration: none;  
    color: navy;  
}  
.irLink:hover {  
    text-decoration: underline;  
    color: red;  
}
```

Note:

You must assign a unique class (**irLink**) and in your CSS provide some rules that make your links look and behave like hyperlinks. The example above assumes your hyperlinks work like the PowerPAC default links. If you customize the default styles for how links look and work, be sure the rules for the **irLink** class mimic your styles for conventionally linked items.

Step 3: Create (if necessary) and modify your custom PowerPAC site.master

1. Create a custom site.master file in your custom theme folder. See [Customizing Layouts](#).
2. Open the custom site.master file and locate the </body> tag near the bottom.
3. Open a line before the closing body tag and provide the link to your JavaScript file in this format:

```
<script type="text/javascript" src="{FILE PATH}"></script>
```

where FILE PATH is the path and filename of your JavaScript file; for example:

```
//testdriveprod.polarislibrary.com/polaris/custom/testdrive/scripts/inn-reach-pac-link.js
```

The path for your site depends on how you have structured the custom subfolders and your servername, if you do not use a relative path.

Step 4: Create the links to the INN-Reach central catalog

The links will look and work like normal web hyperlinks, but the HTML is different. The JavaScript method of linking to the INN-Reach central catalog invokes the script every time the user clicks on the link. The script looks for search terms in the PowerPAC URL and if they exist, passes them on to the INN-Reach catalog. (The link is interactive and dynamic rather than static.)

For example, a conventional HTML link that says Click here to search Prospector looks like this:

```
<a href="http://iii.com" target="_blank">Click here to search Prospector</a>
```

The link using the JavaScript looks like this:

```
<span class="irLink" onclick="gotoIRCat();">Click here to search Prospector</span>
```

Step 5: Place your link on PowerPAC pages

You can place the link anywhere in PowerPAC that allows you to place HTML. For example:

Important:

If the PowerPAC URL contains a search term from the patron's search results page, the link will launch a search in the INN-Reach central catalog. If no search term is present in the URL, the link takes the patron to the INN-Reach central catalog home page.

- **On the dashboard** - Select **Free Text** (not **URL**) in the PowerPAC profile **Dashboards: Web part construction** and enter your link. See "Create a custom Web part" in Polaris staff client help.
- **On the "No Titles Found" page** - Use the Polaris Language Editor (WebAdmin) to edit the No Titles Found page to include your link. The string ID is **PACML_INSTRUCTIONS_XSL_1603**. See Polaris WebAdmin online help for details.
- **In the banner/menu area** - Modify the custom site.master file. See [Customizing Layouts](#).

Sample JavaScript for INN-Reach Central Catalog, Encore Discovery Platform

If you are linking to an INN-Reach central catalog with an Encore discovery platform, the following is an example of the entire contents of your inn-reach-pac-link.js file (not including the table):

```
function gotoIRCat() {
    var irURL = '//encorecalstate.iii.com/iii/encore';
    function getParameterByName(name) {
        name = name.replace(/[\\]/g, "\\$&");
        var regex = new RegExp("[?&]" + name + "(=([^\&#]*)|&|#|$)", results = regex.exec(
            window.location.href);
        if (!results) return "";
        if (!results[2]) return "";
        return decodeURIComponent(results[2].replace(/\+/g, " "));
    }
}
```

```

var searchTerm=getParameterByName("term");
if ((getParameterByName("by") != "CN") && (searchTerm != "")) {
    irURL += '/search/C__S' + getParameterByName("term") + '__Orightresult';
}
window.open(irURL);
}

```

Sample JavaScript for INN-Reach Central Catalog, WebPAC Discovery Platform

If you are linking to an INN-Reach central catalog with a WebPAC discovery platform, the following is an example of the entire contents of your inn-reach-pac-link.js file (not including the table):

```

function gotoIRCat() {
    var irURL = '//albert.rit.edu';
    function getParameterByName(name) {
        name = name.replace(/\[\]/g, "\\$&");
        var regex = new RegExp("[?&]" + name + "([^\&#]*)|&|#|$)", results = regex.exec(window.location.href);
        if (!results) return "";
        if (!results[2]) return "";
        return decodeURIComponent(results[2].replace(/\+/g, " "));
    }
    var searchTerm=getParameterByName("term");
    if ((getParameterByName("by") != "CN") && (searchTerm != "")) {
        irURL += '/search/X?SEARCH=' + getParameterByName("term") ;
    }
    window.open(irURL);
}

```

Public Access Administration Overview

Your library organization can use the settings in Polaris Administration to manage how your public access catalog appears and functions. In addition to the options available in Polaris Administration, Polaris provides customization features. See [PAC Customization](#).

See the following topics for information on the options for managing your PAC:

Note:

If your library uses Polaris Community Profiles, you can specify how these records are displayed in the PAC. See [Community Setup for PAC Display](#).

[Setting Public Access Profiles and Parameters](#)

General instructions for setting the profiles and parameters that control public access features.

[Setting Up Polaris PowerPAC - Overview](#)

Updating page caches; privacy; accessibility; use analysis; basic set-up; banner graphics; branch switching; themes (skins); portal page features; content carousels; dashboards; RSS feeds; virtual reference; online help; editing language strings.

[Setting Search Options for Polaris PowerPAC](#)

Default settings for PAC searches; setting up search filters; setting available search types for Polaris PowerPAC; record set searches for Polaris PowerPAC; setting up the search agent (saved searches); automatic search suggestions; "Did You Mean" search term suggestions.

[Displaying PAC Search Results](#)

Specifying search results data and display options; setting up the title (product) page for individual titles; recently viewed titles; settings for Feature It promotions; narrow and related searches options; suppressing request and availability options for specific types of material; cross-reference display; local and system availability; call numbers by text message; item-specific display settings; shelf locations; highlighting titles with local items (Polaris PowerPAC); mapping item availability in Polaris PowerPAC; Google Preview for search results; title lists in Polaris PowerPAC; social bookmarking and sharing in Polaris PowerPAC.

[Managing Integrated EContent in the PAC](#)

Managing patron access to integrated eContent; specifying availability display; controlling patron-initiated circulation of eContent from the PAC.

[Enabling Online Book Purchases](#)

Setting up links to online bookstores for titles in Polaris PowerPAC search results; Polaris Bookstore.

[Editing Messages and Labels](#)

Editing and translating standard messages for Polaris PowerPAC in Polaris Administration; reference list of messages and labels.

[Customizing Language Strings](#)

Using Polaris WebAdmin (Language Editor) to customize English and other licensed language strings in all the parts of Polaris that support multiple languages (overview).

[Polaris PowerPAC Children's Edition](#)

Setting up and customizing Polaris PowerPAC Children's Edition; for example: themes; dashboards; search filters; "canned" searches (categories); results display.

[Setting Up Mobile PAC](#)

Mobile PAC set-up basics; settings for searches and results; patron registration, log-in and account features; credit card payments.

[Polaris Social with ChiliFresh Connections](#)

Integrated social features in Polaris PowerPAC: exporting records; log-on; patron account features; search results features; setup.

[PAC Profiles Reference](#)

Reference list of general PAC profiles as they appear in Polaris Administration.

[Polaris PowerPAC Profiles Reference](#)

Reference list of Polaris PowerPAC profiles as they appear in Polaris Administration.

[Children's PAC Profiles Reference](#)

Reference list of Polaris PowerPAC Children's Edition profiles as they appear in Polaris Administration.

[Mobile PAC Profiles Reference](#)

Reference list of Mobile PAC profiles as they appear in Polaris Administration.

[Standard PAC Pages Reference](#)

Reference list of standard pages for Polaris PowerPAC and Polaris PowerPAC Children's Edition.

See also the following topics in the Public Access Administration Guide:

Setting Up Polaris PowerPAC - Overview

Many Polaris Administration settings control the features and behavior of the PAC in general and affect both Polaris PowerPAC and Mobile PAC. However, specific Polaris PowerPAC settings control the appearance and available features of Polaris PowerPAC. You can also choose the overall appearance of Polaris PowerPAC pages from several ready-made themes. In addition, you can customize most of the text that appears on Polaris PowerPAC pages by editing the text strings in Polaris WebAdmin (Language Editor).

Note:

For instructions on programmatic-level customization techniques, see the Public Access Administration PDF Guide, PAC Customization.

You can customize Polaris PowerPAC to suit your library's needs, from the home page start-up to the features you choose to offer to patrons. For the home page, you can use the Polaris PowerPAC portal page, including the dashboard lists, rotating book jackets or content carousels, and custom content. Alternatively, you can use your own home page. You can also offer events and hours pages. In general, you control what features are available in Polaris PowerPAC with Polaris Administration settings that display or suppress options.

Polaris PowerPAC settings for the organization to which the patron is connected typically control the features and functions the patron sees. You can choose to allow patrons to switch branches after they have connected to Polaris PowerPAC, by selecting a branch in the **Switch to another branch** list. When the patron selects a different branch, the settings for that branch become effective.

However, the system-level settings for the Patron Services parameter **Consortium Circulation** determine what branch's policies govern due date calculation, loan and request limits, and fine calculation for renewals. Also, settings for the patron's registered branch control many patron account functions.

For general information about PowerPAC, see:

- [Updating Page Caches](#)
- [Patron Privacy in the Library - Tips](#)
- [Polaris PowerPAC and JavaScript™](#)
- [Polaris PowerPAC Accessibility](#)
- [Analyzing Polaris PowerPAC Use](#)

For instructions on setting PowerPAC profiles that control basic features, see:

- the Public Access Administration PDF Guide, Set up basic operating features for Polaris PowerPAC.

For information about options for displaying, managing, and circulating eContent, see:

- [Managing EContent in the PAC.](#)

For information about display and feature options for PowerPAC, see:

- The Public Administration PDF Guide, Set Polaris PowerPAC features on the menu bar
- [Customize the page header](#)
- See the Public Access Administration PDF Guide, Add text to the Events page
- See the Public Access Administration PDF Guide, Add text to the Policies page
- [Setting Polaris PowerPAC Themes](#)
- [Customizing Portal Page Features](#)
- [Content Carousels on the PowerPAC Portal Page](#)
- [Defining Web Parts for Dashboards](#)
- [Setting Up RSS Feeds](#)
- [Setting Up Live Virtual Reference Services](#)
- [Polaris PowerPAC Help](#)
- [Customizing Language Strings](#)

Updating Page Caches

When you change Polaris PowerPAC, Mobile PAC, and PowerPAC Children's Edition settings, you might need to update page caches to see the effects of your changes. Most cached information is stored at the application level on the Web server. You can update that information with the **Reload** tool in Polaris WebAdmin (Language Editor). For more information, see WebAdmin online help. Some information is stored at the session level (one session for each currently connected client browser), and you cannot reload each session's cached data for security reasons. In these cases, restart the Internet Information Server (IIS) to clear the cache and load any pages that have changed. Polaris Hosted customers should contact Polaris Customer Support to perform an IIS reset. You might also need to close and re-open browsers. You might want to organize changes to Polaris PowerPAC or Mobile PAC so that you do much of your planned work in one session.

Patron Privacy in the Library - Tips

In Polaris PowerPAC, the browser **Back** button does not work past the log-in screen. For example, if the patron does a search, then logs in to the patron account, then logs out, the next patron cannot use the **Back** button to see the previous patron's account pages or search results.

You can also set an inactivity timeout for logged-in patrons working in the library. The patron is automatically logged out after a specified period. See [Set an inactivity timeout for in-house workstations](#).

"Autocomplete" is the browser feature that automatically supplies information on forms, based on past entries. You should disable the Autocomplete feature in public workstation browsers. In Internet Explorer, for example, select **Tools, Internet Options**. On the Content tabbed page, select **AutoComplete**. Clear **Usernames and passwords on forms**. This prevents previous usernames and passwords from being exposed when the next patron logs in to use a feature.

Polaris PowerPAC and JavaScript™

Polaris PowerPAC uses JavaScript, and displays a warning message at the top of the page when JavaScript is disabled in the user's browser.

The default message is

JavaScript has been disabled in your browser. Please enable JavaScript to enjoy all features of this site.

You can customize the message in Polaris Language Editor (WebAdmin). For more information about editing messages, see [Customizing Language Strings](#).

Polaris PowerPAC Accessibility

Polaris PowerPAC pages include features to facilitate accessibility in the following ways:

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

Although these features are not generally visible when the pages are displayed, they improve the experience of patrons who use screen readers.

Note:

If you customize PowerPAC pages, you will likely want to retain these features. For more information about code-level customization, see the Polaris Developer Network.

In addition, the footer of the page displays a text-only site index.

LANGUAGE	LIBRARY INFO	SEARCH	MY ACCOUNT	HELP
English	Portal	Keyword	My Record	
한국어	Hours	Browse	Items Out	
Polish	Ask Us	Phrase	Requests	
Русский		Exact	Fines & Fees	
فارسی		Advanced	Saved	
Việt Ngữ		Boolean	Searches	
Hindi		Course	Log In /	
'Ōlelo Hawai'i		Reserves	Register	
中文		E-Sources		
Español		My Lists		
Français				
العربية				
Kreyòl Ayisyen				

The available links depend on the features you have enabled in Polaris Administration. For example, if you have suppressed Boolean searching from the menu bar, it is also suppressed from the site index.

Analyzing Polaris PowerPAC Use

Google™ Analytics is a free tool from Google that allows Web site administrators to record and analyze traffic on their sites. Polaris PowerPAC includes the JavaScript code for Google Analytics in the page footer. To use this feature, open the Polaris Administration PowerPAC profile **PowerPAC Analytics**. The profile is available at the system, library, and branch levels. On the Google tabbed page, check **Enable** and supply your Google Analytics tracking code. For more information about Google Analytics, and to obtain a tracking code, go to:

<http://www.google.com/analytics/>

Alternatively, you can supply your own JavaScript for site analysis. Open the **PowerPAC Analytics** profile, Custom tabbed page, check **Enable**, and type your JavaScript code in the field provided.

Note:

This profile also applies to Polaris PowerPAC Children's Edition. A separate profile applies to Mobile PAC. See [Analyzing Polaris Mobile PAC Use](#).

Note:

If the PAC browser session is run directly on the PAC server, the following domain must be open for Google Analytics to work properly:
Port 80/443: google-analytics.com

Setting Public Access Profiles and Parameters

Public access parameters and profiles control general aspects of public access, and specific functions related to Polaris PowerPAC, Polaris PowerPAC Children's Edition, and Polaris Mobile PAC. You can make most settings at the system, library, or branch level. You can view and set public access profiles and parameters from the Administration Explorer or an administration workflow.

Note:

These System Administration permissions are required to modify profiles and parameters: **Access Administration: Allow, Libraries: Access, Branches: Access, Modify parameters: Allow, Modify profiles: Allow, System: Access, System: Modify.**

Your library may use multiple Polaris public access applications:

- Polaris® PowerPAC™ provides responsive Web-based access to library searches and services from remote computers, tablets, and smartphones, and from devices in the library.
- Polaris® PowerPAC™ Children's Edition is the Web-based application designed specifically for children's use.
- Polaris Mobile PAC is the Web-based PAC application designed for mobile devices.

Note:

The Statistical Summary report provides detailed information about system activity, including PAC activity such as patron logins, patron self-registration, holds placed from PAC, and holds cancelled from PAC. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System** in the Polaris Reports dialog box.

See also:

- [Review and set public access profiles and parameters](#)
- The PAC Customization PDF Guide, PAC Administration Profiles Reference topic.

Standard PAC Pages Reference

This topic lists the Polaris PowerPAC and Children's Edition pages and when they are displayed. You can use this information to decide which, if any, Web parts should be assigned to the dashboard for a specific page (see the Public Access Administration PDF Guide, Defining Web Parts for Dashboards - Overview), or to edit the pages as part of customizing Polaris PowerPAC for your library.

See also:

- [Polaris PowerPAC Pages Reference](#)
- [Polaris PowerPAC Children's Edition Pages Reference](#)

Web Page IDs for User-Defined Pages

Polaris PowerPAC and Polaris PowerPAC Children's Edition are based on ASP.NET programming. All .aspx and .ascx files are directly editable, but you should back up your changes to preserve them from being overwritten when the application is updated and reinstalled. For more information, see [PAC Customization](#).

If you create a custom page with the user-defined template /Custom/CustomPage-template.aspx, you may want to set the PageID value so that the appropriate Web parts are displayed in the dashboard. The default value is 1, which means that your custom page will display the same Web parts as the default PowerPAC portal page (default.aspx). To get a different set of Web parts on your custom page, you change the default PageID value to that of an existing standard page. Simply search your custom file for PageID and change the value at each occurrence.

Example:

You have created a new Web page for a patron account function. If you want the Web parts that normally display on the default patron account page to be displayed on your new custom page, change the webpageid value to 9.

Polaris PowerPAC Pages Reference

These files are located in the default root folder C:\Program Files\Polaris\[version]\PowerPAC on your Polaris PowerPAC server and in subfolders as noted.

Page	PageID	Function
bookrequest.aspx	49	Request page displayed when a rotating book jacket image is clicked on the portal page.
default.aspx	1	First page to appear when Polaris PowerPAC is accessed if the portal page is enabled. If you add custom html content to this page, be sure that it is responsive.
help\default.aspx	7	Displayed when All topics is selected on the Help menu.
help\tutorials.aspx	8	Obsolete
library\askus.aspx	2	Displayed when Ask Us on the

Page	Page ID	Function
		Library Info menu is selected and the patron logs on. The page allows patrons to send an e-mail message to the library staff.
library\events.aspx	3	Displayed when Events on the Library Info menu is selected. The Events page is where you can show information about upcoming library and community programs. If you add custom html content to this page, be sure that it is responsive. For information about editing the Events page, see Setting Public Access Profiles and Parameters
library\hours.aspx	4	Displayed when Hours on the Library Info menu is selected. The Hours page is where you can list the times when the library is open to the public.
library\policies.aspx	5	Displayed when Policies on the Library Info menu is selected. The Policies page is where you can list the lending and usage policies. If you add custom html content to this page, be sure that it is responsive. See Setting Public Access Profiles and Parameters
library\vrquestion.aspx	43	Displayed after a patron

Page	Page ID	Function
		selects the virtual reference link and logs on. This page allows the patron to send a question to the virtual reference service.
library\website.aspx	6	Displayed when Web Site on the Library Info menu is selected. The Web Site page is where you can list links to library-selected Web pages in the library or on the Internet. If you add custom html content to this page, be sure that it is responsive.
logon.aspx	17	Displayed when any function is selected that requires the patron to log in. Patrons use this page to supply the patron account number or username and password.
message.aspx	29	Notifies the patron that something has been done, such as changing a password or address, or displays a message when a problem occurs.
patronaccount\claimedandlost.aspx		Displayed when Claimed and Lost is selected on the My Account menu. This page displays the patrons claimed and lost items.
patronaccount\coursereserves.aspx	58	Displayed when Courses is selected on the My Account menu and the patron is an

Page	Page ID	Function
		instructor for an active course. The page reports circulation statistics for reserved course materials.
patronaccount\default.aspx	9	Displayed when the patron selects My Record on the My Account menu. This page displays the patron's basic registration information.
patronaccount\finestfees.aspx	14	Displayed when Fines & Fees is selected on the My Account menu. The Fines page lists the fines and fees the patron owes.
patronaccount\itemsout.aspx	16	Displayed when Items Out is selected on the My Account menu. The Items Out page shows the items currently checked out by the patron.
patronaccount\patroncommunity.aspx	64	Licensed feature. Displayed when an organization representative selects Community on the My Account menu.
patronaccount\readinghistory.aspx	31	Displayed when Reading History is selected on the My Account menu. The Reading History page displays a list of the items the patron has checked out since the reading history began.
patronaccount\registerconnections.aspx	67	Polaris Social. Displayed when a patron clicks the appropriate

Page	Page ID	Function
		link on the PowerPAC log-on page. This page provides options for setting up a new ChiliFresh account or linking an existing account to the patron's library account.
patronaccount\requests.aspx	18	Displayed when Requests is selected on the My Account menu. The Request page lists the hold and interlibrary loan requests the patron has made.
patronaccount\searchagent.aspx	40	Displayed when Saved Searches is selected on the My Account menu. The Saved Searches page lists information about saved (automatic) searches and provides links for editing and deleting the searches.
patronaccount\selfregister.aspx	20	patronaccount\selfregister.aspx 20 Displayed when click here to register on any log-on page is selected. The Self Register page allows patrons to register for a library card.
patronaccount\shoppingcart.aspx	57	Displayed when My Shopping Cart is selected on the My Account menu. This page displays a list of digital materials a patron has placed in the shopping cart for purchase.

Page	Page ID	Function
		Used with Polaris Fusion, a separately licensed product.
patronaccount\social.aspx	66	Polaris Social. Available to logged-in patrons from the PowerPAC patron account; displayed when the patron clicks Connections in the dashboard or the menu bar.
patronaccount\virtualreference.aspx	33	Displayed when Virtual Reference is selected on the My Account menu. The Virtual Reference page provides access to transcripts of the patron's interaction with a virtual reference service, if the service provides this feature.
search\browse.aspx	52	Displayed in response to a Browse search. This page allows patrons to browse the appropriate index headings.
search\changedatabases.aspx	50	50 Displayed when the Select Databases link is chosen on a search page. This is the Other Databases page, where patrons can select Z39.50 databases to search simultaneously with the library catalog.
search\communityinformation.aspx	61	Licensed feature. Displayed when the user selects Community Keyword on the Community menu.

Page	Page ID	Function
search\communityinformationbrowse.aspx	62	Licensed feature. Displayed when the user selects Community Browse on the Community menu.
search\communityinformationfull.aspx	63	Licensed feature. Displayed when the user selects a community entry in the community search results list.
search\communitylist.aspx	65	Licensed feature. The initial search results list for a community information search.
search\default.aspx?type=Advanced (before search)	24	Displayed when Advanced is selected from the Search menu. You set up and launch an advanced search from this page.
search\default.aspx?type=Boolean (before search)	25	Displayed when Boolean is selected from the Search menu. You set up and launch a Boolean (command) search from this page.
search\default.aspx?type=Browse (before search)	22	Displayed when Browse is selected from the Search menu. You set up and launch a browse search from this page.
search\default.aspx?type=Course (before search)	48	Displayed when Course Reserves is selected from the Search menu. You set up and launch a search for course reserve records from this page.
search\default.aspx?type=Exact (before	30	Displayed when Exact is selec-

Page	Page ID	Function
search)		ted from the Search menu.
search\default.aspx?type=Keyword (before search)	21	Displayed when Keyword is selected from the Search menu. You set up and launch a keyword search from this page.
search\default.aspx?type=Phrase (before search)		Displayed when Phrase is selected from the Search menu. You set up and launch a phrase search from this page.
search\misc\dictionary.aspx	N/A	search\misc\dictionary.aspx
search\misc\esources.aspx	34	Displayed when E-Sources is selected from the Search menu. The e-Sources page provides links to the proprietary, non-Z39.50 databases available for patron searches.
search\misc\thesaurus.aspx	N/A	Obsolete
search\newreleases.aspx	35	Displayed when you click a category in the New Titles Web part on the dashboard. The page displays title links for new library acquisitions.
search\related.aspx	53	Displayed when you click More in the Related Web part on the dashboard for the search results page.
search\searchresults.aspx	51	Displays the initial bib search results list (brief information).
search\title.aspx	54	Displays the title product page

Page	PageID	Function
		when a title listed in search results is selected for full display.
search\titlelist.aspx	56	Title list page, displayed when you click My Lists in the Search menu.
social\profile.aspx	68	Read-only page that displays the public profile of any of the "social" users in PowerPAC (as opposed to the patronaccount/social.aspx page which is the patron's own profile page).

Polaris PowerPAC Children's Edition Pages Reference

These files are located in the default root folder C:\Program Files\Polaris\[version]\PowerPAC on your Polaris PowerPAC server in the Children subfolder as noted.

Page	PageID	Function
children\default.aspx	44	The default page appears when you connect to the Children's Edition, and when you click the banner graphic to clear search results.
children\events.aspx	45	The events page appears when you click the Events link on any Children's Edition page. The page lists events specified by the library
children\fulldisplay.aspx	47	The full display page appears when you click the More Information link for a title, or the title name itself, in a search results list. The page displays

Page	PageID	Function
		detailed bibliographic and location information for the selected title.
children\searchresults.aspx	46	The search results page displays the results of a search as a list of titles, with brief information about each title.

PAC Profiles Reference

These profiles are available on the Profiles, PAC tabbed page on the Administration Explorer at the levels listed. They affect aspects of Polaris PowerPAC and Polaris Mobile PAC.

Note:

For more information about Polaris Mobile PAC, see [Setting Up Mobile PAC](#).

Profile	Org Levels	Description	Default Setting
Active directory logon	<ul style="list-style-type: none"> System 	Enables log-on to PowerPAC and Mobile PAC using network credentials instead of the Polaris barcode/username and password. See Set Up PAC Active Directory Log On .	No
Branch list order	<ul style="list-style-type: none"> System Library Branch 	For Polaris PowerPAC and Mobile PAC, sets the display order of branches in the Switch to another branch list if	No

Profile	Org Levels	Description	Default Setting
		<p>you allow patrons to switch connection branches. This profile also controls the display order of branches on the PowerPAC search options page, the self-registration page, and the donations page. The setting for the current connection branch is used. The profile also controls the display order of the list of pick-up libraries for requests, but in this case the setting for the patron's registered branch is used. Set the profile to Yes to display the branch names in ascending alphabetical order by name. Set the profile to No to display the branch names in ascending numerical order by internal organization ID. In either case, the system organization is always first.</p>	
Default Polaris user in PAC	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies a user account for recording and reporting statistics.	

Profile	Org Levels	Description	Default Setting
		Leave this profile at the default setting.	
Did you mean: Enabled	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies whether Did You Mean search suggestions are displayed in Polaris PowerPAC and Polaris PowerPAC Children's Edition. See Setting Up Did You Mean Term Checking .	Yes (suggestions are displayed)
Email notification: Email address of sender	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies a standard sender address (required for most e-mail applications) for e-mail services from the public interfaces, such as e-mailing a title list. This address is also used for online payment receipts, telephony service error and warning messages, and the EDI e-mail log. Type an email address (it must contain the @ symbol).	youremail@yourdomain.com
Email notification: Server running SMTP service	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies the Simple Mail Transfer Protocol (SMTP) server to use for PAC e-mail features such as Ask Us or purchase requests from	

Profile	Org Levels	Description	Default Setting
		<p>rotating book jacket titles. If each branch has its own SMTP server, patron e-mail messages from public stations can be routed through that server. This setting is also used for telephony service error and warning messages, and for e-mail notification.</p> <p>Type the domain name of the e-mail SMTP server.</p>	
Enriched data	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies the settings to receive cover images, reviews, ratings, and other enriched data content from your enriched data provider or providers. See the Public Access Administration PDF Guide, Enabling Enriched Data.	
Fines and Fees: Show history in detailed view	<ul style="list-style-type: none"> • System • Library • Branch 	When set to Yes, displays a history section that includes date, type, amount, payment, and staff name for a selected fine or fee when a logged-in patron clicks	Yes

Profile	Org Levels	Description	Default Setting
		the information icon for a fine or fee in the Fines & Fees page of the patron account in Polaris PowerPAC. The setting for the patron's registered branch controls the display.	
Google Maps	<ul style="list-style-type: none"> • System • Library • Branch 	Enables the Map It! feature in PowerPAC and/or Mobile PAC search results for the connection organization and sets the initial map center and zoom level. See the Public Access Administration PDF Guide, Map It (Google Maps) in PAC.	
Hours of operation: Display	<ul style="list-style-type: none"> • System • Library • Branch 	(Polaris PowerPAC and Mobile PAC) When set to Yes, the organization's Hours page includes a formatted schedule derived from the settings for the Patron Services parameter Hours of operation. See Set Polaris PowerPAC features on the menu bar .	Yes
Hours of	<ul style="list-style-type: none"> • System 	(Polaris PowerPAC and	

Profile	Org Levels	Description	Default Setting
operation message	<ul style="list-style-type: none"> Library Branch 	Mobile PAC) Displays a message on the organization's Hours page. See Set Polaris PowerPAC features on the menu bar .	
Item availability: Display detailed item status	<ul style="list-style-type: none"> System Library Branch 	<p>Specifies whether the Item Availability display includes item status information more detailed than Not Available. Set the profile to Yes to displays the detailed item status description.</p> <p>Requirement: Detailed item status descriptions are specified in the Circulation Statuses table (Database Tables).</p>	Yes
Item availability: Display due date in detailed item status	<ul style="list-style-type: none"> System Library Branch 	<p>Specifies whether the Item Availability detailed item status display includes the item's due date.</p> <p>Requirement: The PAC profile Item availability: Display detailed item status must also be set to Yes to display the due date</p>	Yes

Profile	Org Levels	Description	Default Setting
Item availability: Display shelf location	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies whether the Item Availability display includes the item shelf location (for example, New Arrivals or Children's Center).	Yes
Item availability: Display type	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies whether the Item Availability display includes the material type (for example, books or audio cassettes) from the item record.	Yes
Item availability: Display status	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies whether the Item Availability display includes item availability status.	Yes
Item availability: Suppress for integrated eContent titles	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies whether availability information appears in the PAC for integrated eContent titles. See the Public Access Administration Guide, Suppress eContent availability display in PAC.	No
Login retries	<ul style="list-style-type: none"> • System 	Double-click to display the PAC Login Retries dialog box. Use this dialog box to enable a limit on the number of times a patron can	

Profile	Org Levels	Description	Default Setting
		attempt to log in before waiting 5 minutes to try again. See Limit log-in attempts .	
Most popular sort settings	<ul style="list-style-type: none"> • System 	This profile is used if the Most Popular sort option is selected in the Search Settings Defaults profile. It is set by default to apply 50% relevance and 50% popularity when Most Popular is the selected sort option. You can adjust this setting to factor relevance either more or less than 50% when results are sorted by popularity. See Specify level of relevance applied to popularity sort .	
Multiple language strings	<ul style="list-style-type: none"> • System • Library • Branch 	Double-click to display the Language Strings dialog box. Use this dialog box to edit messages and news headings. If you have Polaris PowerPAC Multilingual Version, you can edit messages and headings in your choice of languages. See Editing Messages and Labels .	

Profile	Org Levels	Description	Default Setting
Patron access options	<ul style="list-style-type: none"> • System • Library • Branch 	Double-click to display the Patron Access Options dialog box. Use this dialog box to set up patron account, self-registration features, suppress gender, send patrons a reset password link, and enforce phone number format validation. You can have different setup options for each organization.	
Patron access: Display hold queue information	<ul style="list-style-type: none"> • System • Library • Branch 	Determines whether the holds queue column is displayed in the online patron account, and whether the patron receives a message about the current number of active requests for the material when she places a hold. The system uses the profile setting for the patron's registered branch.	
Patron access: Policy statement hyper text link	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies the URL or network path to the Web page for the library privacy policy. The link is displayed on the patron self-registration	

Profile	Org Levels	Description	Default Setting
		<p>pages and at all patron log-in points when Single Login is enabled and the patron has not yet logged in.</p> <p>Type the complete path to the privacy policy page.</p> <p>Requirement: Set Patron Access: policy statement hyper text link permitted to Yes.</p>	
Patron access: Policy statement hyper text link permitted	<ul style="list-style-type: none"> • System • Library • Branch 	<p>Indicates whether a link to the Web page of the library privacy policy is displayed from the patron self-registration pages, and at all patron log-in points when Single Login is enabled and the patron has not yet logged in.</p> <p>If set to Yes, the privacy policy link For more information on our privacy policy, click here is displayed on the Select a home library page, and at all patron log-in points when Single Login is enabled and the patron has not yet logged in. If you set this profile to Yes,</p>	No

Profile	Org Levels	Description	Default Setting
		specify a URL for the privacy policy Web page using the profile Patron Access: policy statement hyper text link.	
Patron access: Renewal	<ul style="list-style-type: none"> • System • Library • Branch 	Indicates whether patrons can renew items from PAC. If this option is selected, you can also choose to allow renewals if the patron record will expire before the renewal due date. (You can also set up blocks that apply specifically to renewals from PAC.)	Yes
Patron eReceipts		Provides patrons the option of selecting e-mail renewal receipts, TXT message renewal receipts, or both, during patron self-registration and account updates. The patron's registered branch must also enable eReceipts.	
Patron library assigned and free text block default text	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies the text to display in the PAC patron account summary when a patron account has selected library-	Library assigned block

Profile	Org Levels	Description	Default Setting
		assigned blocks or free text blocks. The maximum number of characters is 255	
Patrons can remove reading history	<ul style="list-style-type: none"> • System • Library • Branch 	Determines whether patrons can remove individual items from their readings histories from the PAC patron account.	No
Purchase options	<ul style="list-style-type: none"> • System • Library • Branch 	(Polaris PowerPAC) Specifies whether the Purchase link or Buy It Now link (Polaris Bookstore) is available in the results list, and contains the appropriate settings to set up the links. When a patron selects the link, an online bookstore Web site is displayed. See Enabling Online Book Purchases .	
Reset password link timeout duration	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies the time period, in minutes, during which the time-sensitive password reset link remains valid once a patron initiates the password reset process from either Polaris PowerPAC or Mobile PAC. Enter a value	60

Profile	Org Levels	Description	Default Setting
		between 1 and 999 minutes. See the Polaris PowerPAC help for more information about the patron workflow for recovering, resetting, or creating a password.	
Resource Groups: Search results settings	<ul style="list-style-type: none"> • System • Library • Branch 	Sets conditions for the display of eContent in PAC search results.	
Search agent: Enable	<ul style="list-style-type: none"> • System • Library • Branch 	<p>Provides patrons the ability to set up and save searches to run automatically at specified intervals. If the profile is set to Yes, the Search Agent option is available to patrons using Polaris PowerPAC and Mobile PAC. See Setting Public Access Profiles and Parameters.</p> <p>Requirements:</p> <p>Configure Search Agent Parameters (in Polaris Administration, PAC Parameters).</p> <p>To allow logged-in patrons to view a list of their saved searches in</p>	Yes

Profile	Org Levels	Description	Default Setting
		the Polaris PowerPAC dashboard, set the PowerPAC profile Single Login: Enable to Yes.	
Search settings defaults	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies the default settings for Search by, Limit by, Sort by, and Using for each PAC search type as applicable. See Specifying Default Search Settings .	
Search: Sub-sort-by-title	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies whether search results for many types of searches and sort orders are automatically subsorted by title. See Specifying Default Search Settings .	No
Suppress availability and requests	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies the primary types of material (TOMs) for which availability and request options should be suppressed from PowerPAC and Mobile PAC search results displays. See the Public Access Administration PDF Guide, Suppressing Request and Availability Options.	No TOMs checked (all display)

Profile	Org Levels	Description	Default Setting
Suppress branches	<ul style="list-style-type: none"> • System 	Specifies branches to suppress from list displays. For Polaris PowerPAC, suppresses selected branches from the connection branch list (Switch to another branch), the list of branches on the Search Options scoping page, the list of branches on the Advanced Search scoping page, and the list of branches on the donations page. For Mobile PAC, suppresses selected branches from the drop list of organizations on the Library Hours page and the Mobile PAC Preferences page.	No branches checked (all display)
Suppress item display	<ul style="list-style-type: none"> • System • Library • Branch 	Specifies the item circulation statuses that should prevent an item from being displayed in Polaris PowerPAC and Mobile PAC search results. See Suppressing Items from Search Results .	No statuses checked (all display)

Customizing Mobile PAC

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

- Polaris Administration settings control many aspects of Mobile PAC function and appearance. See [Public Access Administration](#).
- You can edit most page text and messages using Polaris Language Editor (WebAdmin). See WebAdmin online Help for more information.
- Innovative Interfaces offers custom services for libraries that want to customize Mobile PAC beyond Polaris Administration or Polaris Language Editor settings, but do not have the staff resources to do so. Contact a Customer Account Manager for more information.

Important:

To see the effects of any changes, you may need to update page caches. Restart the Internet Information Server (IIS) to clear the cache and load any pages that have been changed, or use the Reload feature in the Polaris Language Editor (WebAdmin). Polaris Hosted customers should contact Polaris Customer Support to perform an IIS reset.

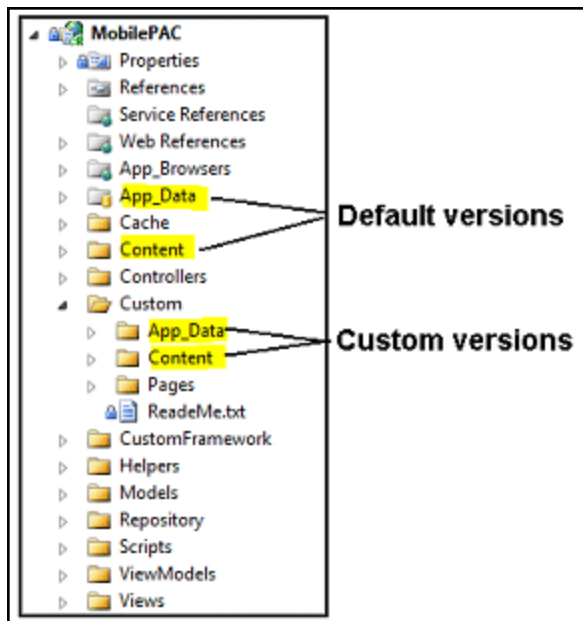
See also:

- [Protecting Mobile PAC Changes](#)
- [Customizing Mobile PAC Search By and Sort By Options](#)
- [Creating Custom Mobile PAC Links](#)
- [Creating Custom Mobile PAC Pages](#)
- [Creating Custom Mobile PAC Themes](#)

Protecting Mobile PAC Changes

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

In general, the folder structure in the **Custom** folder mirrors the Mobile PAC folder structure. The Mobile PAC application checks for the existence of specific files in the **Custom** folder to be used as overrides for the default versions of those files. The illustration shows the **Custom** folder structure as delivered with Mobile PAC.



Customizing Mobile PAC Search By and Sort By Options

You can edit Mobile PAC Search by and Sort by options as described below. If you choose to remove options, be sure to coordinate your default settings in the Mobile PAC profile **Search settings defaults** if appropriate. See [Specifying Mobile PAC Search Settings](#).

Search By Options

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

1. Copy **/App_Data/SearchByOptions.xml** to **/Custom/App_Data/SearchByOptions.xml**.
2. Working in **Custom/App_Data/SearchByOptions.xml**, remove any of the **<SearchByOption>** XML nodes that you do not want to display in the drop-down list.
3. Perform a reload of the Mobile PAC Web site in Polaris Language Editor (WebAdmin), or perform an IISRESET.

Sort By Options

The list of options available in the Mobile PAC **Sort by** drop-down list is defined in the file **/App_Data/SortByOptions.xml**. To modify the list:

1. Copy **/App_Data/SortByOptions.xml** to **/Custom/App_Data/SortByOptions.xml**.
2. Working in **Custom/App_Data/SortByOptions.xml**, remove any of the **<SortByOption>** XML nodes that you do not want to display in the drop-down list.
3. Perform a reload of the Mobile PAC Web site in Polaris Language Editor (WebAdmin), or perform an IISRESET.

Creating Custom Mobile PAC Links

Custom links to other web pages can be added to the Mobile PAC Home, Hours & Contact, and New & Popular pages. They can be displayed below or above the Polaris-defined links. To create custom links:

1. Copy **/CustomFramework/Links-template.xml** to **/Custom/Links.xml**.
2. Working in **Links.xml**, define the custom links. The template file **/Custom/Links-template.xml** includes detailed step-by-step instructions for setting up a **/Custom/Links.xml** file.
3. Perform a reload of the Mobile PAC Web site in Polaris Language Editor (WebAdmin), or perform an IISRESET.

Pages of Custom Links

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

1. Copy and rename **/CustomFramework/PageLinks-template.aspx** to a file in the **/Custom/Pages/** folder; for example, **/Custom/Pages/BookClubs.aspx**.
2. Edit the custom page, changing the **{title}** and **{breadcrumb}** strings to the display title for your custom page.
3. Follow the examples in the template for creating links in the custom section of the page. See below.

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

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

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

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

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

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

Custom Links in the Mobile PAC Footer

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

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

```

<div id="footer">
    <%= Html.ActionLink(SessionCache.ShowText("MP_FOOTER_HOME"), "Index", "Home") %> |
    <a href="<>MPUtil.GetFullSiteUrl(SessionCache) %>"><%= SessionCache.ShowText("MP_FOOTER_FULLSITE") %></a> |
    <%= Html.ActionLink(SessionCache.ShowText("MP_FOOTER_ABOUT"), "Index", "About") %>
    <% if (SessionCache.Org.IsDonationsEnabled == true)
    { %>
        <%= Html.ActionLink(SessionCache.ShowText("MP_FOOTER_DONATION"), "ProcessDonation", "FinesAndFees") %>
    <%} %>

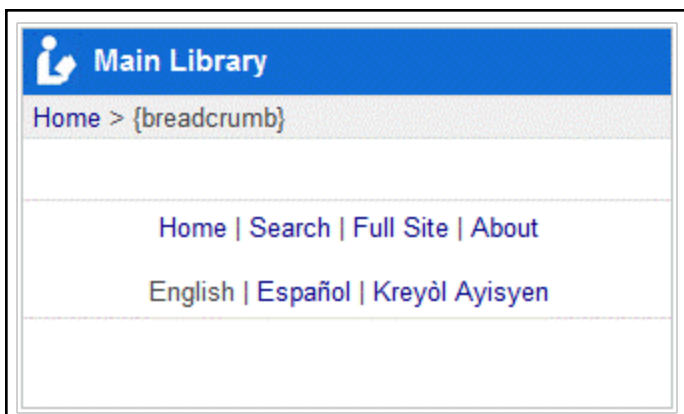
```

Creating Custom Mobile PAC Pages

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

1. Copy **/CustomFramework/Templates/Page-template.xml** to the **/Custom/Pages** folder.
2. Rename the copied file to the desired file name. The file must have an **.aspx** file extension. Example: **/Custom/Pages/CommunityLinks.aspx**

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



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

4. Add your custom HTML where noted:

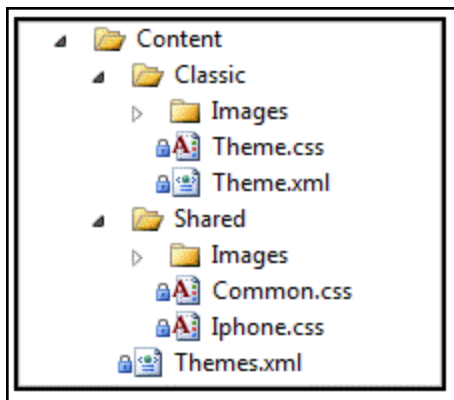
```

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

```

Creating Custom Mobile PAC Themes

Mobile PAC allows multiple Polaris-defined and custom themes, but includes one Polaris-defined, default theme called **Classic**. Polaris theme files are contained in the **Content** folder.



Custom themes should be placed in the **Custom/Content** folder. Any theme folders created in the **/Custom/Content/** folder will be available to Mobile PAC users. If there are multiple custom themes, a drop-down list of themes will be available to the user in the Mobile PAC **Preferences** page.

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

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

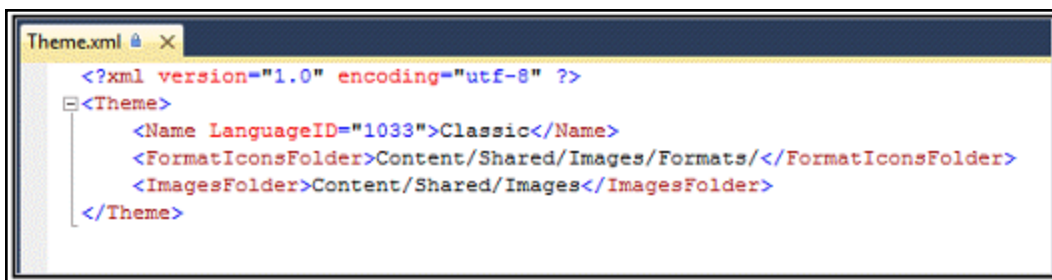
Since custom themes are created in the **Custom** folder, the following steps should only have to be done once, as subsequent upgrades of Polaris Mobile PAC will not overwrite files in the **Custom** folder.

Note:

A node in the **Themes.xml** file, **SuppressAllIfCustomDefine**, has a default value of **True**. If at least one custom theme is defined in the **Custom** folder, the standard theme cannot be viewed in Mobile PAC.

To create a custom theme for Mobile PAC:

1. Place a copy of the **/Content/Classic** folder and its contents in the **/Custom/Content** folder.
2. Rename your copied folder to your own theme name.
3. Edit the **Theme.xml** file in your new custom theme folder.



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

Example:

```
<Name LanguageID="1033">Old English</Name>
```

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

Example:

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

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

1033 - English

1042 - Korean

1049 - Russian

1065 - Farsi-Persian

1066 - Vietnamese

1141 - Hawaiian

2052 - Chinese

3082 - Spanish

3084 - French

12289 - Arabic

15372 - Haitian Creole

5. If you do not need to override any of the Mobile PAC images (format icons or other images), leave the **<formatIconsFolder>** and **<imagesFolder>** nodes pointing to the shared folder; you do not have to make copies of all of those image files in your custom theme. If you do wish to change format icons or other images, create folders in your custom theme for those image files, and set the **<formatIconsFolder>** and **<imagesFolder>** nodes to point to those new folders in your custom theme.
6. Edit the **Theme.css** file in your custom folder to begin your customization of your theme. The only styles that you need to include in this file are styles you want to override from the shared theme. You can view all of the shared common styles that can be overridden in **/Content/Shared/Common.css**.

7. Perform a reload of the Mobile PAC Web site in Polaris Language Editor (WebAdmin), or perform an IISRESET, after you initially create a new custom theme. Any subsequent changes to the **Theme.css** file or addition of image files do not require an application reload to see the changes.

Glossary

0

006 field

Fixed-length Data Elements -Additional Material Characteristics This field contains 18 character positions (00-17) that provide for coding information about special aspects of the item being cataloged that cannot be coded in field 008 (Fixed-Length Data Elements). It is used in cases when an item has multiple characteristics. It is also used to record the coded serial aspects of nontextual continuing resources. The field has a tree structure, whereby the code given in 006/00 (Form of material) determines the data elements defined for subsequent character positions. Except for code s (Serial/Integrating resource), the codes in field 006/00 correspond to those in Leader/06 (Type of record). For each occurrence of field 006, the codes defined for character positions 01-17 will be the same as those defined in the corresponding field 008, character positions 18-34. Configurations of field 006 are given in the following order: books, computer files/electronic resources, maps, music, continuing resources, visual materials, and mixed materials.

007 field

Physical Description Fixed Field This field contains special information about the physical characteristics in a coded form. The information may represent the whole item or parts of an item such as accompanying material. The data elements in field 007 are positionally defined and the number of character positions in field 007 depends upon the code contained in 007/00. Character position 00 contains a code that identifies the category of material. The fill character (I) is not allowed in this position. The fill character may be used in any other character position when the cataloging agency makes no attempt to code the position. The categories of material for which field 007 is applicable in bibliographic records are presented in the following order in the field description: map, electronic resource, globe, tactile material, projected graphic, microform, nonprojected graphic, motion picture, kit, notated music, remote-sensing image, sound recording, text, videorecording, and unspecified.

008 field

Fixed-length Data Elements - General Information This field contains 40 character positions (00-39) that provide coded information about the record as a whole and about special bibliographic aspects of the item being cataloged. These coded data elements are potentially useful for retrieval and data management purposes. The data elements are positionally defined. Character positions that are not defined contain a blank (#). All defined character positions must contain a defined code; for some field 008 positions, this may be the fill character (I). The fill character may be used (in certain character positions) when a cataloging organization makes no attempt to code the character position. The fill character is not allowed in field 008 positions 00-05 (Date entered on file). Its use is discouraged in positions 07-10 (Date 1), 15-17 (Place of publication, production, or execution), and the 008 position defined for Form of item (either position 23 or 29 depending upon the 008 configuration). Character positions 00-17 and 35-39 are defined the same across all types of material, with special consideration for position 06. The definition of character positions 18-34 was done independently for each type of material, although certain data elements are defined the same in the specifications for more than one type of material. When similar data elements are defined for inclusion in field 008 for different types of material, they occupy the same field 008 character positions.

A**added entry**

A secondary entry to the main entry in a MARC record.

approval plan

An arrangement with a publisher or vendor to send materials automatically. With an approval plan, it is not necessary for the library to order each title individually, and titles that are not considered appropriate may be returned by the library. An approval plan with a vendor is usually an agreement that the library will receive current imprints selected for the library on the basis of a detailed profile.

ASN (Advanced Shipping Notice)

An advance shipping notice or advance ship notice (ASN) is an electronic notification of pending shipments that is provided by a supplier after an EDI order is received and processed. If the supplier has the capability to produce ASNs (X12

transaction set 856), the Polaris EDI Agent utility retrieves the shipment information, and loads the data into Polaris. This enables users to receive materials in Polaris by scanning the tracking barcode on the outside of the carton.

B

blanket plan

A blanket plan (also called a blanket order) is most commonly used for ordering all materials or a specific subset of materials that are published by an organization. In contrast with approval plans, blanket plans do not generally allow return privileges with simple deductions from the invoice. With blanket plans, quality is less important than comprehensiveness of coverage. Blanket plans can be as narrow as a specific publisher's series or as broad as a request to send all material of a particular type or on a particular subject.

blind reference

1) an authority link (see or see also - 4xx and 5xx respectively) which points to an authority heading that does not exist in the database. 2) An authority heading (1xx) to which no bibliographic records are linked.

C

cataloging source

A code stored in tag 040 \$a that tells who created the record. These codes are governed by the MARC code list for libraries.

chronology

The date(s) used by the publisher on a serially-issued bibliographic unit to help identify or indicate when it was published. The chronology may reflect the dates of coverage, publication, or printing.

content designators

Tags, indicators, and subfield codes in a MARC record.

D

delimiter

A separate character used in conjunction with a subfield code and introduces each subfield in a variable field.

deposit account

A deposit account is an account with a vendor that allows customers to pay all or a portion of the estimated annual billing in advance. Depending on the amount prepaid, the typical discount is from 1.5% to 4.5% more than with a regular plan, where invoices are paid after the receipt of titles.

diacritical mark

Any of various marks, such as a macron or cedilla, added to a letter or symbol to indicate its pronunciation or to distinguish it in some way.

E

enumeration

The designation reflecting the alphabetic or numeric scheme used by the publisher on an item or assigned when the holdings statement is created to identify the individual bibliographic or physical parts and to show the relationship of each unit to the unit as a whole.

express registration

Entering patron information during the check-out process as a service to new, unregistered patrons.

F

first available copy requests

Hold requests for specific issues of a serial title (such as the May 2015 issue of Horticulture Magazine) or specific parts of a multi-part title (such as the first season of a television series on DVD).

form subdivision

A division of a subject heading which brings out the form of the work. For example, in the headings: Internet (Computer network) - Periodicals Library technicians - Bibliography

free days

A value applied at normal and bulk check-in, renewal, and offline that allows you to omit a specified number of days from the overdue fine calculation.

G**geographic qualifier**

The name of a larger geographic entity added to a local place name. For example, in the headings: Cambridge (Mass.) Toledo (Spain)

geographic subdivision

A subdivision which limits a topical subject heading to a specific geographic location. For example, in the headings: Women - Peru Libraries - New York (State)

M**monographic series**

A group of monographs with a collective title in addition to their individual titles. The individual titles may or may not be numbered. The collective title is generally found on the title page or the cover of each monograph.

R**RTF**

Requests-To-Fill or RTF processing sends hold requests to designated libraries in a specified order. A library chooses to fill or deny the request. The request is routed until it is filled, it expires, or every library denies it.

S

SICI

The colloquial name for Serial Item and Contribution Identifier. The SICI is the SISAC bar code. The SICI incorporates the ISSN and is used on scholarly, technical, medical and other subscription based serials.

SISAC

Serials Industry Systems Advisory Committee. This committee was instrumental in creating the supporting documentation for the NISO z39.56 standard.

standing order

An order placed with a vendor or the publisher directly for all publications in a series, all volumes in a set, or all publications of a single publisher.

T

trapped

An item is said to be trapped for a hold when an item that fills a request is scanned at circulation and the system links the item to a specific request, either automatically or by displaying a message that prompts you for a decision.

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