

Polaris® Public Access Administration Guide



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About This Guide



This guide contains information about using Polaris® Administration to set up Polaris for your library's public access policies and procedures. It discusses administration of Polaris® PowerPAC™, Polaris® PowerPAC™ Children's Edition, and Mobile PAC.

Public Access Administration Topics

Important:

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

- Public Access Administration** General instructions for setting the profiles and parameters that control public access features.
- Administering Polaris PowerPAC** 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.
- Searching in 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.
- Managing Federated Search Targets** How to organize remote databases so that patrons can select them in the PowerPAC's Select Databases page to search simultaneously; setting up databases using Z39.50 search protocol; setting up databases that use other search protocols provided in partnership with MuseGlobal; setting up use conditions and access conditions; setting up follow-on searching.
- Managing E-Sources** Setting up and organizing e-sources, which are proprietary, non-Z39.50 databases that the library offers to patrons for searching in Polaris PowerPAC. Setup examples; E-Source connection report.
- 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.

Integrated Econtent in PAC	Setting econtent search results restrictions; 3M integrated ebooks in PAC search results; circulating and requesting 3M ebooks from PAC.
Enabling Enriched Data	Settings that integrate third-party book jacket images and additional title content in Polaris PowerPAC search results.
Polaris Social with ChiliFresh Connections	Integrated social features in Polaris PowerPAC: exporting records; log-on; patron account features; search results features; setup.
Enabling Online Book Purchases	Setting up links to online bookstores for titles in Polaris PowerPAC search results; Polaris Bookstore.
Setting Up Patron Account Access	Settings that affect patron account access in Polaris PowerPAC and Mobile PAC: enabling account access; limiting log-in attempts; inactivity timeout; patron account features; self-registration and online updates; patron passwords and user names; patron e-mail (Ask Us).
Editing Messages and Labels	Editing and translating standard messages for Polaris PowerPAC in Polaris Administration; reference list of messages and labels.
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.
Standard PAC Pages Reference	Reference list and description of Polaris PowerPAC and Polaris PowerPAC Children's Edition default pages.
PAC CQL Commands & Access Points	Reference information for constructing PAC search filters using CQL commands.
Deep Links to Polaris PAC	Stable URLs for setting up links to specific bibliographic records in your PAC from an external site.
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.

Related Resources

- *Polaris Installation Guide*

Contains information about installing and updating Polaris servers, staff client software, and public access software.
- **Polaris Administration Guides**

This guide is part of a Polaris Administration document set. The set also includes the following guides:

 - *Polaris Administration Guide* - Contains information about using the Polaris Administration interface; setting up organizations, servers, collections, workstations, and staff members; setting permissions, parameters, and profiles; working with tables; setting search tool characteristics, barcode formats, online document location, and transaction logging.
 - *Polaris Patron Services Administration Guide* - Setting up patron services and circulation functions, and granting permissions to your front desk staff and supervisors.
 - *Polaris Telephony Administration Guide* - Contains information about setting up and customizing outbound and inbound telephony services.
 - *Polaris ExpressCheck Administration Guide* - Contains information about setting up the Polaris ExpressCheck workstation, Polaris Administration settings for Polaris ExpressCheck circulation, and customizing the Polaris ExpressCheck interface.
- *Polaris Basics Guide*

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

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

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

Public Access Administration



Polaris Administration settings control how Polaris data is categorized, used, and stored, and what functions are available to staff and patrons. You can make most administration settings by two methods: through the Administration Explorer, and through the appropriate workflow for a specific record. For detailed information about using the Administration Explorer, finding and opening administration records, and general methods for setting permissions, parameters, profiles, and tables, see the *Polaris Administration Guide 4.1R2*.

Note:

Topics in Polaris Administration guides and online Help use the Administration Explorer method, unless you must specifically open the record workflow.

Your library may use multiple Polaris public access applications:

- Polaris® PowerPAC™ provides Web-based access to library searches and services from remote computers, and from computers 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.

Public access administration includes settings that affect PAC functions in general, as well as specific settings for each of the Polaris PAC applications. Some settings affect the appearance of the user interface. Others determine whether certain functions are available for use.

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. For more information, see [“Using Polaris Standard Reports”](#) in the *Polaris Basics Guide 4.1R2*.

See the following topic:

- [“Setting Public Access Profiles and Parameters”](#) on page 5

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.**

See the following topic:

- “Review and set public access profiles and parameters” on page 5

1-2-3

Review and set public access profiles and parameters

Follow these steps to review and set public access profiles and parameters.

1. In the Administration Explorer tree view, expand the organization for which you want to set profiles or parameters.
2. Select **Parameters** or **Profiles** in the list under the expanded folder.
The **Parameters** or **Profiles** tabs are displayed in the details view.
3. Select the appropriate tab:
 - If you selected **Parameters**, click the **PAC** tab.

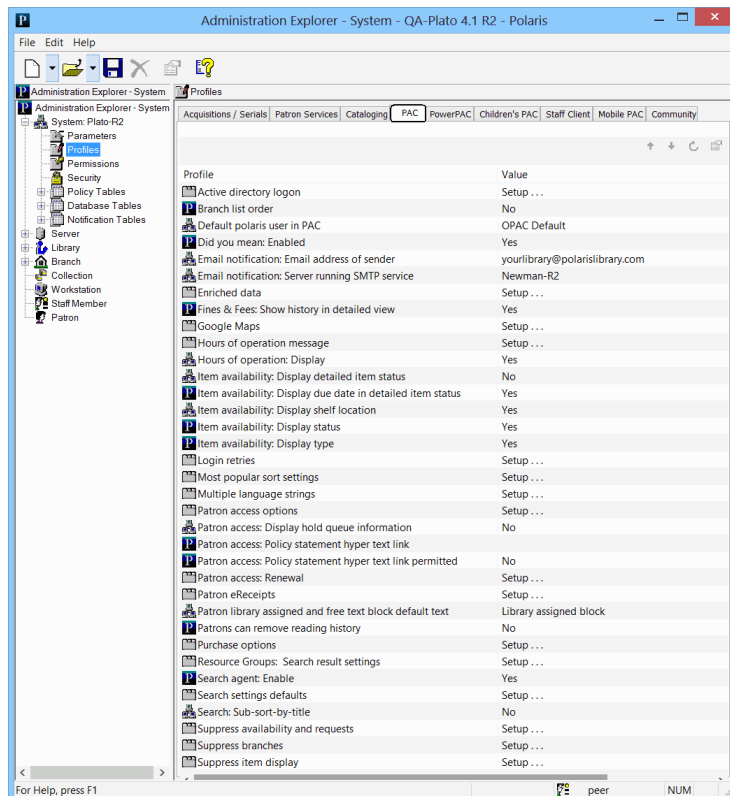
Note:

Search Agent Parameters is the only organization PAC parameter. It controls the ability to set up and save automatic searches in the PAC. See “[PAC Search Agent \(Saved Searches\)](#)” on page 87.

- If you selected **Profiles**, click the **PAC** tab for general public access profiles, the **PowerPAC** tab for profiles specifically for Polaris PowerPAC, the **Children's PAC** tab for profiles specifically for Polaris PowerPAC Children's Edition, or the **Mobile PAC** tab for profiles specifically for Polaris Mobile PAC.

The selected tabbed page appears.

The illustration shows the system-level PAC profiles view on the Administration Explorer.



4. Double-click the parameter or profile you want to set.

The option value is highlighted for editing, or a dialog box appears.

5. Depending on the options, set the parameter or profile by typing text or selecting an option, and click **OK**.
6. Select **File, Save** to save any changes.

Important:

To see the effects of your changes, you may need to update page caches. See [“Updating Page Caches”](#) on page 9.

Tip:

To get a setting from the next higher organizational level, right-click the parameter or profile and select **Inherit higher level values**. To give a setting to multiple lower organizations, right-click the parameter or profile and select **Transmit values to lower levels**. Not all settings can be inherited or transmitted.

Related Information

- [“Setting Parameters and Profiles”](#) in the *Polaris Administration Guide 4.1R2*.
- [“Setting Web Server Parameters”](#) in the *Polaris Administration Guide 4.1R2*.
- [“PAC Profiles Reference”](#) on page 417.
- [“Polaris PowerPAC Profiles Reference”](#) on page 423.
- [“Children’s PAC Profiles Reference”](#) on page 436.
- [“Mobile PAC Profiles Reference”](#) on page 442.

Administering Polaris PowerPAC



This unit covers how to set up and customize the appearance of Polaris PowerPAC, the Polaris Web application for public access. 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 *Polaris PAC Customization Guide*, available on the Customer Extranet and the Polaris Developers Network.

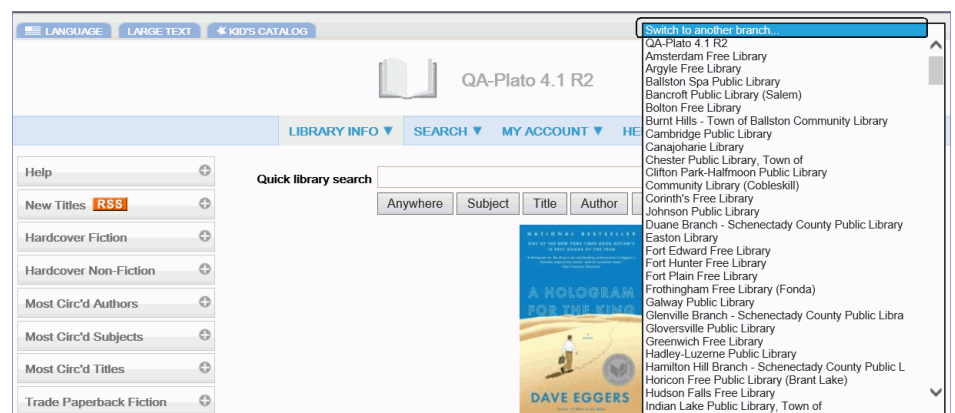
See the following topics:

- [“Setting Up Polaris PowerPAC”](#) on page 8
- [“Setting Polaris PowerPAC Themes”](#) on page 24
- [“Customizing Portal Page Features”](#) on page 25
- [“Content Carousels on the PowerPAC Portal Page”](#) on page 31
- [“Defining Web Parts for Dashboards”](#) on page 36
- [“Setting Up RSS Feeds”](#) on page 46
- [“Setting Up Live Virtual Reference Services”](#) on page 48
- [“Polaris PowerPAC Help”](#) on page 51
- [“Customizing Language Strings”](#) on page 57

Setting Up Polaris PowerPAC

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. For more information, see [“Governing Library for Circulation Transactions”](#) in the *Polaris Patron Services Administration Guide 4.1R2*. Also, settings for the patron's registered branch control many patron account functions.

See the following topics:

- [“Updating Page Caches”](#) on page 9
- [“Patron Privacy in the Library - Tips”](#) on page 9
- [“Polaris PowerPAC and JavaScript™”](#) on page 10
- [“Polaris PowerPAC Accessibility”](#) on page 10
- [“Analyzing Polaris PowerPAC Use”](#) on page 11
- [“Set up Polaris PowerPAC”](#) on page 11

- “Customize the page header” on page 15
- “Set Polaris PowerPAC features on the menu bar” on page 18
- “Add text to the Events page” on page 22
- “Add text to the Policies page” on page 23

Updating Page Caches

When you change Polaris PowerPAC, Mobile PAC, and PowerPAC Children’s Edition settings, you may 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 the Polaris WebAdmin (Language Editor). For more information, see the *Polaris WebAdmin (Language Editor) Guide* or 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 been changed. You may also need to close and re-open browsers. You may 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 “[Patron Inactivity Timeout at In-House Workstations](#)” on page 248.

“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”](#) on page 57.

Polaris PowerPAC Accessibility

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

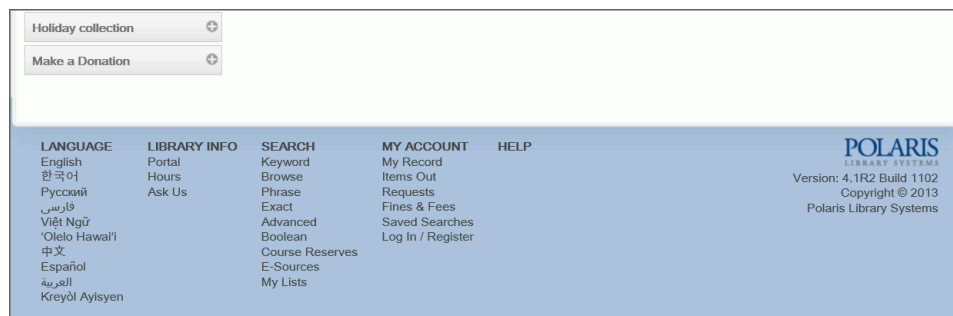
- ALT tags provide text equivalents for inline images.
- “Skip navigation” links are included at the top of each PowerPAC page.
- Table header <TH> tags distinguish column headers for data tables, such as those displayed on patron account pages.

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, see the *Polaris PAC Customization Guide*, available on the Customer Extranet and the Polaris Developers Network.

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



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://code.google.com/apis/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”](#) on page 325.

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

1-2-3

Set up Polaris PowerPAC

Follow these steps to set basic operating features for Polaris PowerPAC.

1. Set up the Polaris PowerPAC Web server in Polaris Administration. See [“Setting Web Server Parameters”](#) in the *Polaris Administration Guide 4.1R2*.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.

Note:

Except where noted in this procedure, you can set these profiles at the system, library, or branch level.

3. To allow remote connections to Polaris PowerPAC, double-click the PowerPAC profile **Remote User PowerPAC: Enable**, and select **Yes**.
If you use Polaris PowerPAC as your PAC interface only in the library, and you do not offer remote PAC access, set this profile to **No**.
4. To allow access to the portal page, double-click the PowerPAC profile **Navigation: Portal**, and select **Yes**.

This setting displays the **Portal** option on the Library Info menu. Set this profile to **Yes** if you are using the portal page as the Polaris PowerPAC home page. For more information, see [“Customizing Portal Page Features”](#) on page 25.

Set this profile to **No** if the home page is a library page from which patrons access the public catalog. When you turn off the portal button, the default Polaris PowerPAC home page is the keyword search page.

5. To allow access to the library Web site from the portal page, or to another page you specify, set these PowerPAC profiles:
 - Double-click **Navigation: Web Site**, and select **Yes**. This setting displays the **Web site** option on the Library Info menu.
 - Double-click **Navigation: Web Site URL**, and type the URL or complete network path to the page you want to display. If you leave this value blank, the default page **website.aspx** is displayed.

Note:

Website.aspx is stored on the Web server (**Polaris/PowerPAC/library/website.aspx**). You can edit the file to display a set of appropriate Web links. If you customize this file, back up your changes to preserve them in case Polaris is reinstalled on the server.

6. To allow patrons to connect to other branches in the system once they have connected to Polaris PowerPAC, double-click the PowerPAC profile **Branch Switching: Enable**, and select **Yes**.

This setting allows patrons to choose branches in the **Switch to another branch** list on the Polaris PowerPAC banner. The chosen branch's settings become effective. If you set this to **No**, the patron can connect only to the organization represented by the connection URL.

7. If you set **Branch switching: Enable** to **Yes**, select **Profiles**, select the PAC tab, and set the PAC profile **Branch list Order** to specify the display order of the branches: select **Yes** to display the branch names in ascending alphabetical order by name, or **No** to display the branch names in ascending numerical order by internal organization ID.

With either setting, the system organization is always first. This profile also controls the display order of branches on the 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.

Note:

Use the system-level PAC profile **Suppress branches** to suppress a branch from display in the **Switch to another branch** list. This profile also suppresses the selected branches from the branch lists on the Search Options scoping page, the Advanced Search scoping page, and the donation page.

8. To log transactions (such as hold requests and renewals) initiated through Polaris PowerPAC, select **System, Profiles** and select the PowerPAC tab, select **Enable logging of transactions**, and select **Yes**.

Note:

This setting is available at the system level only. For more information about selecting transactions to log, see [“Collecting Transaction Statistics”](#) in the *Polaris Administration Guide 4.1R2*.

9. To allow patrons to log on once for the Polaris PowerPAC session, double-click **Single Login: Enable**, and select **Yes**.

When this profile is set to **Yes**, the My Account menu and page footer display a Log In option. Once logged in, patrons select a Log Out option or quit Polaris PowerPAC to log out. For more information, see [“Patron Log-In”](#) on page 246. Be sure to set the profile to **Yes** in these cases:

- You offer e-sources that require patron log-in. See [“Setting Up E-Source Targets”](#) on page 115.
- You offer the ability to save searches, and want patrons to be able to work with a list of their saved searches in the dashboard. See [“PAC Search Agent \(Saved Searches\)”](#) on page 87.
- Your library uses 3M™ Public Access Management System smart cards. See step 11.

10. To display a link to Polaris PowerPAC Children’s Edition on Polaris PowerPAC pages, double-click **Navigation: Children’s PAC**, and select **Yes**.

Note:

Polaris PowerPAC Children’s Edition is available by specific contract.

11. If your library uses 3M™ Public Access Management System smart cards, double-click **3M PAMS: Enabled**, and select **Yes**.

Patrons use smart cards to log in by placing the card in a reader. The cards may also provide scheduling and fund transaction capabilities. If you set this profile to **Yes**, also set **Single logon: Enable** to **Yes** (see step 9).

Note:

Polaris PowerPAC workstations with readers must be listed in the In-House IP Addresses table. See [“Identifying In-House Computers”](#) in the *Polaris Administration Guide 4.1R2*.

12. Select **File, Save**.

Related Information

- **Page header** - You can specify colors and your own logo image and position for the page header. See [“Customize the page header”](#) on page 15.
- **Page themes** - You can choose the overall appearance of Polaris PowerPAC pages from several ready-made themes. See [“Setting Polaris PowerPAC Themes”](#) on page 24.
- **Portal page** - See [“Customizing Portal Page Features”](#) on page 25.
- **Main menu bar features** - See [“Set Polaris PowerPAC features on the menu bar”](#) on page 18.
- **Messages** - Certain messages and labels on the portal page are stored in your database, and you can edit them in Polaris Administration. If you have Polaris PowerPAC Multilingual Version, you can edit them for each supported language. See [“Edit PowerPAC messages and labels”](#) on page 288.
- **Dashboards** - See [“Defining Web Parts for Dashboards”](#) on page 36.

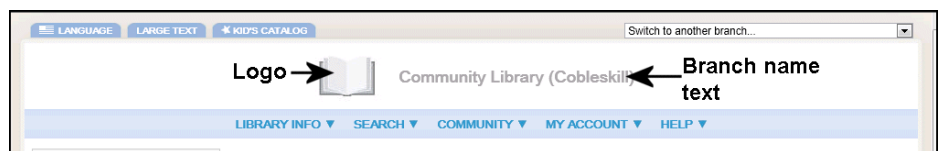
- **Searching options** - See [“Setting Available Search Types”](#) on page 82.
- **Search results display** - See [“Displaying PAC Search Results”](#) on page 132.
- **Patron help** - See [“Polaris PowerPAC Help”](#) on page 51.
- **Patron log-on and access to patron accounts** - See [“Setting Up Patron Account Access”](#) on page 245.
- **E-mail from PAC** - Set the following PAC profiles for patron e-mail:
 - Double-click **Email notification: Email address of sender**, and type the address that should appear on patron e-mail from the library (such as when a patron sends a title list by e-mail). You can use a real address or a fictitious account. It must contain the @ symbol.
 - Double-click **Email notification: Server running SMTP service**, and type the domain name of the e-mail service.
- **Editing text on Polaris PowerPAC pages** - You can edit most of the text on Polaris PowerPAC pages, and preserve your changes from being overwritten if the application is updated and reinstalled. See [“Customizing Language Strings”](#) on page 57.
- **PowerPAC profiles** - For reference information about each Polaris PowerPAC profile, see [“Polaris PowerPAC Profiles Reference”](#) on page 423. For basic information about setting profiles, see [“Setting Public Access Profiles and Parameters”](#) on page 5.
- **Server settings** - Certain parameters at the server level determine how Polaris PowerPAC works in the context of the system network. See [“Setting Web Server Parameters”](#) in the *Polaris Administration Guide 4.1R2*.

1-2-3

Customize the page header

You can customize the header for all PowerPAC pages using the PowerPAC profile **Page header options**. The profile is available at the system, library, and branch levels; the system uses the setting for the PowerPAC connection organization. The header logo is a graphic file that you can specify. This area is also a link to the Polaris PowerPAC home page (the portal page, if you choose to use it, otherwise the keyword search page or a destination you specify).

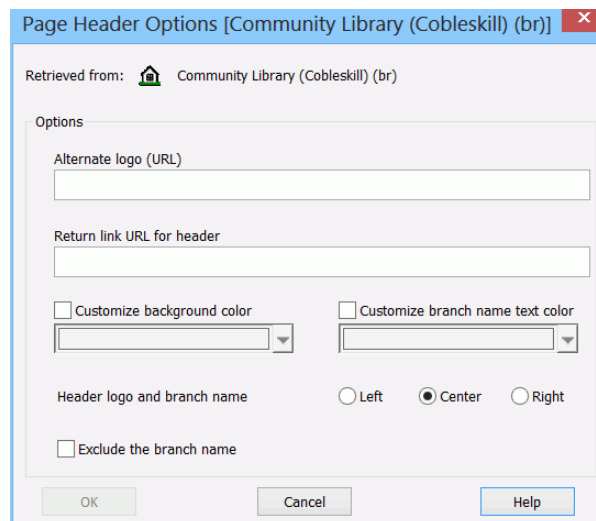
The profile also offers options to set the position of the logo image and branch name. You can also set custom colors for background and text, and suppress the branch name text if your logo already includes this information.



Follow these steps to customize the PowerPAC page header.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.
2. Double-click **Page header options**.

The Page Header options dialog box opens.



3. If you will use your own logo, type the path for your custom graphic file, in the **Alternate logo (URL)** box.

If none is specified, the default logo image is used. Any standard graphic file format, such as .gif or .jpg, is acceptable. The size does not matter.

Example:

[PACWebServer]/Polaris/custom

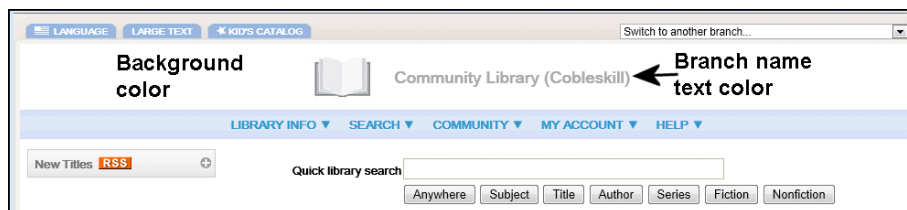
Note:

You can place the graphic file in a different location. In this case, type the complete URL for that location. Be sure the security settings for the directory allow access to the file. The location must have a security (SSL) certificate.

4. In the **Return link URL for header logo** box, type the URL for the page that should appear when the user clicks the header logo.

If this setting is left blank, the link destination is the portal page if you choose to use it, or the keyword search page if you do not use the portal page.

5. Set custom background and/or branch name text colors:

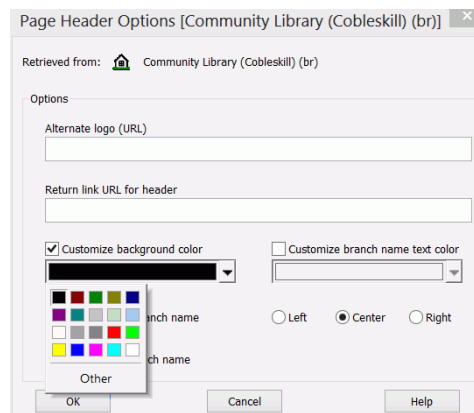


- a) Select (check) **Customize background color**, **Customize branch name text color**, or both.

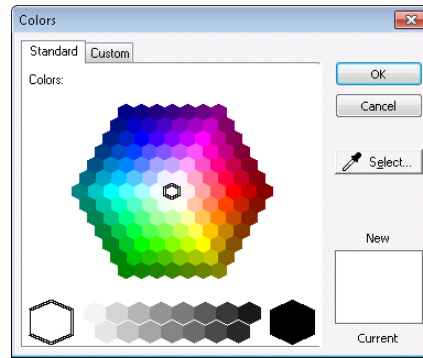
Note:

You can suppress the branch name text from the header, which you may want to do if your logo image includes the organization name. See step 7 below.

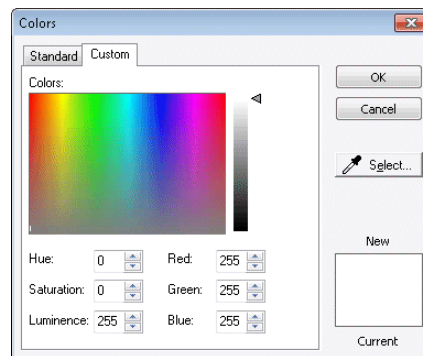
- b) Select the drop-down arrow for each selected option to access the color picker.



- c) Click a color, or click **Other** to open the color tool.



- To select a color on the Standard tab of the color tool, click **Select** and click the color or gray-scale value.
- Or click the Custom tab to select a color from a palette. Alternatively, you can type standard RGB values.



Click **OK** to close the color tool.

6. Select **Left**, **Center**, or **Right** to position the logo and branch name in the header. The default position is center.
7. If your logo image already includes your branch name, check **Exclude the branch name** to suppress the branch name text string from the header.

Note:

If you suppress the branch name at the system level, and all connection branches inherit the system setting, users cannot readily determine their connection branch after switching branches if the branch logo does not include the branch name. To avoid this problem, you can suppress the organization name for the system but allow the branch name to be displayed at the appropriate branches by setting the profile at the branch level.

Tip:

Reload Polaris PowerPAC to see your changes. See [“Updating Page Caches”](#) on page 9.

8. Click **OK** to close the Page Header dialog box and save your changes.

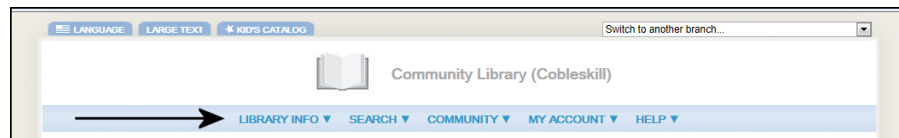
Related Information

- **Page themes** - You can choose the overall appearance of Polaris PowerPAC pages from several ready-made themes. See “[Setting Polaris PowerPAC Themes](#)” on page 24.
- **Portal page** - See “[Customizing Portal Page Features](#)” on page 25.
- **Basic setup** - See “[Set up Polaris PowerPAC](#)” on page 11.
- **Advanced customization** - See the *Polaris PAC Customization Guide*, available on the Customer Extranet and the Polaris Developers Network.

1-2-3

Set Polaris PowerPAC features on the menu bar

Follow these steps to set Polaris PowerPAC features on the menu bar.



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

Note:

You can set these profiles at the system, library, or branch level.

2. To allow access to an events page, double-click **Navigation: Events**, and select **Yes**.

This setting displays the **Events** option on the Library Info menu. When the patron selects **Events**, the events page on the Web server, **Polaris/PowerPAC/library/events.aspx**, is displayed. For information about editing the events page, see “[Add text to the Events page](#)” on page 22.

3. To allow access to a policies page, double-click **Navigation: Policies**, and select **Yes**.

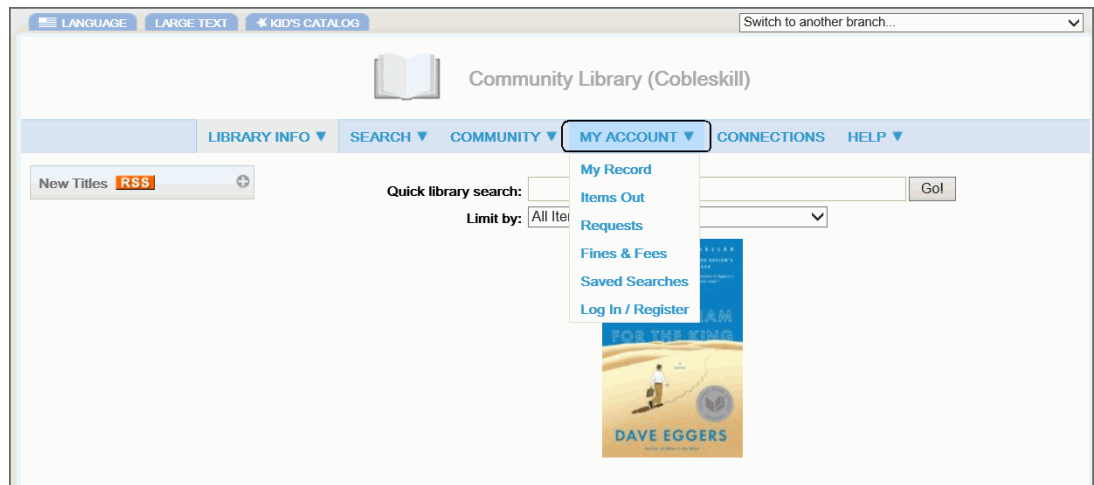
This setting displays the **Policies** option on the Library Info menu. When the patron selects **Policies**, the policy page on the Web server, **Polaris/PowerPAC/library/policies.aspx**, is displayed. For information about editing the policies page, see “[Add text to the Policies page](#)” on page 23.

4. To allow patrons to send an e-mail message to a designated library address, double-click **Navigation: Ask Us**, and select **Yes**.

This setting displays the **Ask Us** option on the Library Info menu. For information about setting up the Ask Us feature, see “[Setting Up Patron E-Mail \(Ask Us\)](#)” on page 268.

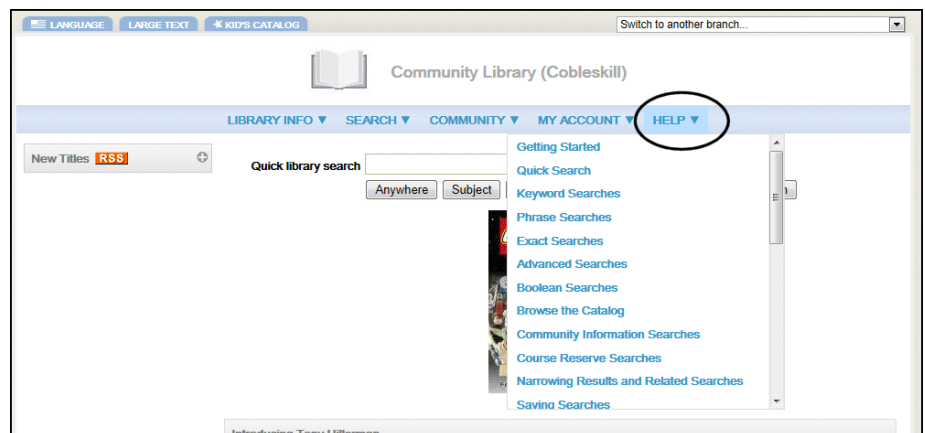
- To allow access to patron accounts, double-click **Navigation: Patron Account**, and select **Yes**.

This setting displays the **My Account** option on the main menu bar. See “[Setting Up Patron Account Access](#)” on page 245.



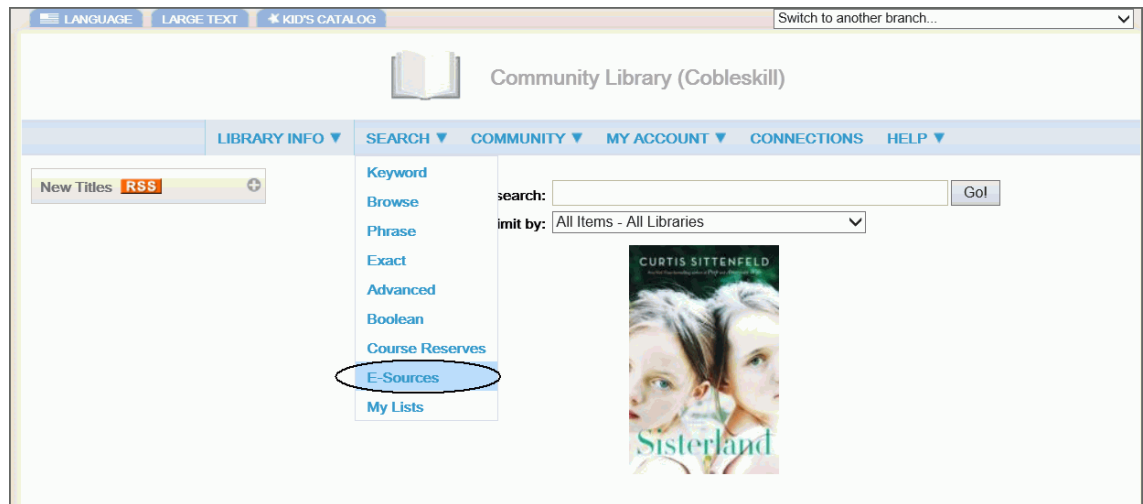
- To offer access to help topics, double-click **Navigation: PAC Help**, and select **Yes**.

This setting controls access to the.html help files that Polaris Library Systems provides with Polaris PowerPAC. See “[Polaris PowerPAC Help](#)” on page 51.



- To allow access to the e-Sources page, double-click **Navigation: E-Sources**, and select **Yes**.

This setting displays the **E-Sources** option on the Search menu. E-sources are non-Z39.50, proprietary databases that may require authentication for use. See “[Managing E-Sources](#)” on page 114. When the patron selects this option, the e-Sources page is displayed.



8. To allow access to an Hours page, double-click the PowerPAC profile **Navigation: Hours**, and select **Yes**.

This setting displays the **Hours** option on the Library Info menu. When the patron selects **Hours**, the hours page on the Web server, **Polaris/PowerPAC/library/hours.aspx**, is displayed.

The Hours page includes location information and optional schedule information for the current connection organization. The schedule information is drawn from settings in the Patron Services parameter **Hours of operation** for the connection organization. The location information comes from the organization administration record. For formatting options, see step 10.

9. Select **File, Save**.
10. To set the information to display on the Hours page, choose one or both of the following PAC profiles:

Note:

These settings also affect Mobile PAC.

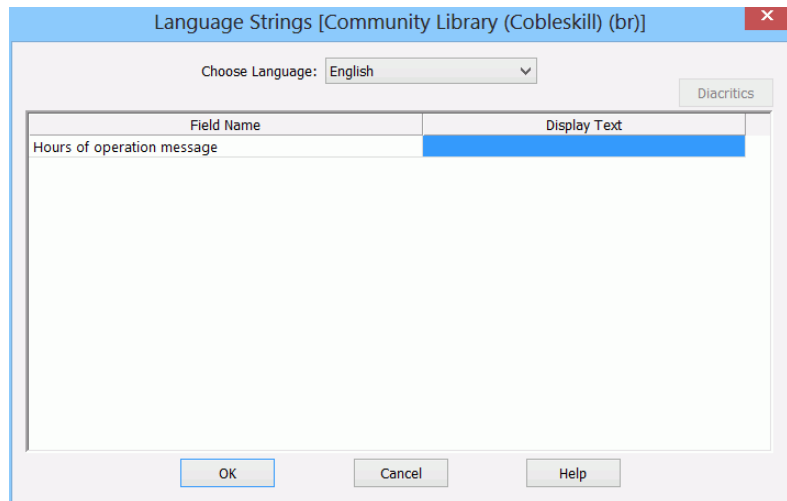
- To display the organization's hours formatted in a table, set the PAC profile **Hours of operation: Display** to **Yes**.

Important:

The hours listed in the table on the PAC Hours page are controlled by the settings in the Patron Services parameter **Hours of operation**. Even if you do not want to display the table on the PAC Hours page, you must set up the organization's schedule in the Patron Services parameter **Hours of operation**, because these settings also affect due dates and other circulation processes.

- To specify a message to display on the Hours page, double-click the PAC profile **Hours of operation message**. (This option is useful for organizations with split hours or other conditions that the Hours of Operation table does not accommodate.)

The Language Strings dialog box opens.



You can choose a language from those licensed for Polaris PowerPAC. Then double-click the message field in the **Display text** column and type the message (up to 500 characters). Click **OK**.

Notes:

You can insert diacritic characters in your message. Click **Diacritics**. In the Character Picker dialog box, select a graphic character set. Then select the character, and click **Insert**.

You can also use the PAC profile **Multiple language strings** to specify the message. This method may be more convenient if you have multiple messages to customize. For more information, see [“Editing Messages and Labels”](#) on page 288.

11. Select **File, Save**.

Related Information

- **Search options** - See [“Setting Available Search Types”](#) on page 82.
- **Profile list** - See [“Polaris PowerPAC Profiles Reference”](#) on page 423.

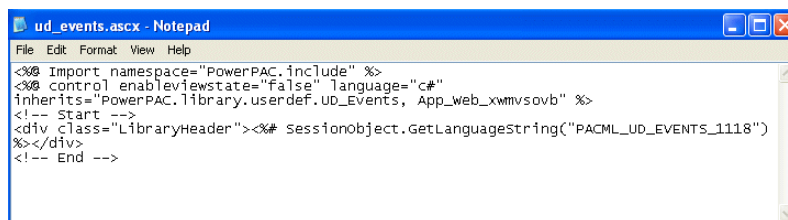
1-2-3

Add text to the Events page

The Events page is displayed when a patron selects **Events** on the Library Info submenu in Polaris PowerPAC. The Events page is located on the Web server, **Polaris [version]/PowerPAC/library/events.aspx**. You can place your own text on the page by editing the file **Polaris [version]/PowerPAC/library/userdef/ud_events.ascx**. You can format your text with basic HTML tags. Follow these steps to add events or other text to the events page.

1. On the Web server, open the file **Polaris [version]/PowerPAC/library/userdef/ud_events.ascx** in any HTML or text editor.

The text of the file is displayed.



```
ud_events.ascx - Notepad
File Edit Format View Help
<%@ Import namespace="PowerPAC.include" %>
<%@ control enableviewstate="false" language="c#"
inherits="PowerPAC.library.userdef.UD_Events, App_web_xmvsobv" %>
<!-- Start -->
<div class="LibraryHeader"><%# SessionObject.GetLanguageString("PACML_UD_EVENTS_1118")
%></div>
<!-- End -->
```

2. Insert your text between the elements `</div>` and `<!-- End -->`.

Example:

```
SessionObject.GetLanguageString("PACML_UD_EVENTS_1118") %></div>
```

```
<p> event1 </p>
```

```
<p> event2 </p>
```

```
<p> event3 </p>
```

```
<!-- End -->
```

3. Save the file.
4. Back up your edited file to preserve your changes in case they are overwritten when Polaris PowerPAC is reinstalled on the server.

Note:

To display the Events option on the Library Info menu, set the PowerPAC profile **Navigation: Events** to **Yes**.

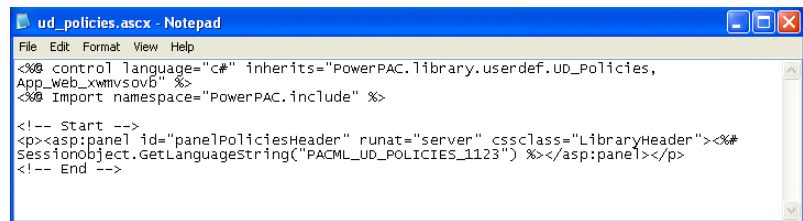
1-2-3

Add text to the Policies page

The Policies page is displayed when a patron selects **Policies** on the Library Info menu in Polaris PowerPAC. The Policies page is located on the Web server, **Polaris [version]/PowerPAC/library/policies.aspx**. You can place your own text on the page by editing the user-defined file **Polaris [version]/PowerPAC/library/userdef/ud_policies.ascx**. You can format your text with basic HTML tags. Follow these steps to add text to the policies page.

1. On the Web server, open the file **Polaris [version]/PowerPAC/library/userdef/ud_policies.ascx** in any HTML or text editor.

The text of the file is displayed.



```
ud_policies.ascx - Notepad
File Edit Format View Help
<%@ control language="c#" inherits="PowerPAC.library.userdef.UD_Policies,
App_Web_xwmvsov8" %>
<%@ Import namespace="PowerPAC.include" %>

<!-- Start -->
<p><asp:panel id="panelPoliciesHeader" runat="server" cssclass="LibraryHeader"><%#
SessionObject.GetLanguageString("PACML_UD_POLICIES_1123") %></asp:panel></p>
<!-- End -->
```

2. Insert your text between these elements:
`SessionObject.GetLanguageString("PACML_UD_POLICIES_1123") %></asp:panel></p>`
and
`<!-- End -->`.

Example:

```
SessionObject.GetLanguageString("PACML_UD_POLICIES_1123") %></asp:panel></p>
<p> policy1 </p>
<!-- End -->
```

3. Save the file.
4. Back up your edited file to preserve your changes in case they are overwritten when Polaris PowerPAC is reinstalled on the server.

Note:

To display the Policies option on the Library Info menu, set the PowerPAC profile **Navigation: Policies** to **Yes**.

Setting Polaris PowerPAC Themes

You can change the overall appearance of your library's Polaris PowerPAC, without complex coding, by choosing a page theme (skin). You can set themes at the system, library, or branch level. 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 setting. Five themes are available: Classic (the default), Antique, Casual, Formal, and Modern. You can also set the dashboard position (left or right side of the page) for any theme you select.

See the following topic:

- [“Set a Polaris PowerPAC theme and dashboard position”](#) on page 24

1-2-3

Set a Polaris PowerPAC theme and dashboard position

Follow these steps to set a Polaris PowerPAC theme and dashboard position.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.
2. Double-click **Theme selection**, and select a theme from the drop-down list.
3. Double-click **Theme dashboard position**, and set the position of the dashboard (**Left** or **Right**) for your selected theme.

Note:

This setting does not affect the product page (full display) for an entry in the user's search results. The product page dashboard is always on the right.

4. Select **File, Save**.

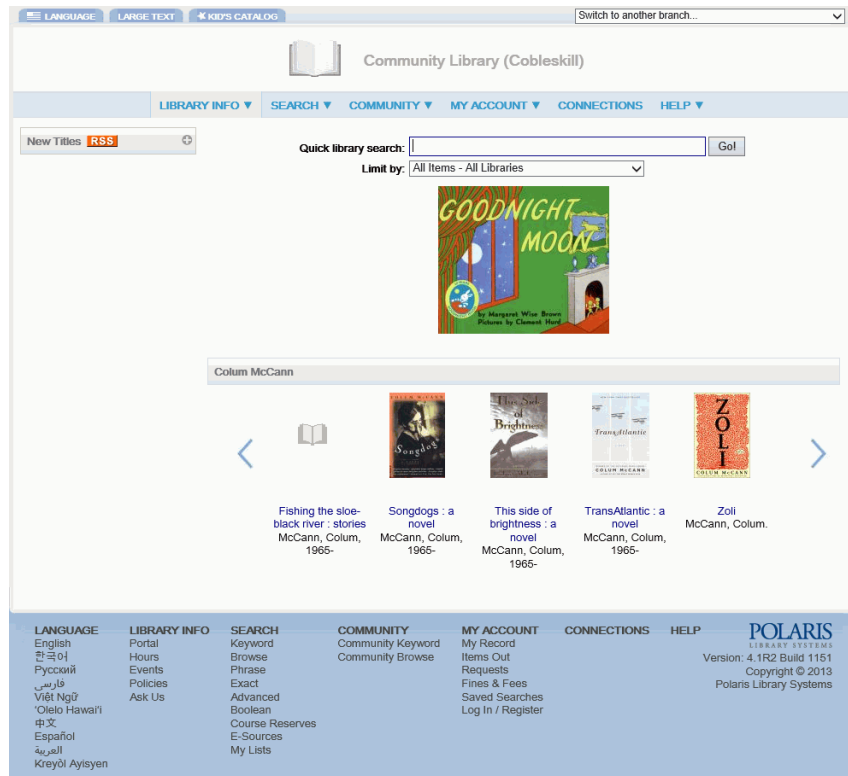
Remember to reload PowerPAC pages to see your changes. See [“Updating Page Caches”](#) on page 9.

Related Information

- **Editing theme fonts and colors** - Theme appearance is controlled by a shared style sheet (.css) file. You can override fonts, colors, and link appearance for a custom theme. For more information, see the *Polaris PAC Customization Guide*, available on the Customer Extranet and the Polaris Developers Network.
- **Editing text on Polaris PowerPAC pages** - You can edit most of the text on Polaris PowerPAC pages no matter what theme is chosen, and preserve your changes from being overwritten if the application is updated and reinstalled. See [“Customizing Language Strings”](#) on page 57.

Customizing Portal Page Features

The default Polaris PowerPAC portal page offers a quick search feature; content carousels or rotating book jackets; optional custom content; and specific dashboard elements. The illustration shows the default Polaris PowerPAC portal page (Classic theme) with a rotating book jacket image and a content carousel.



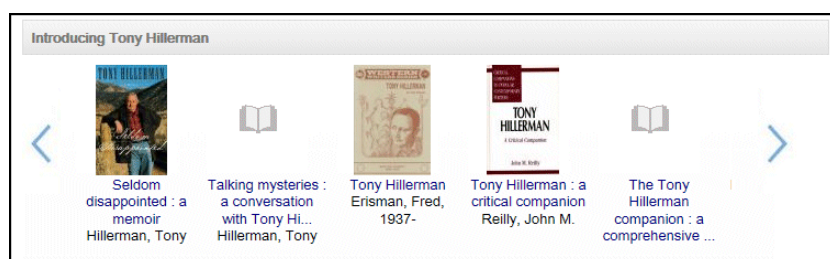
Each branch can use the default portal page or a custom portal page, or all organizations can share a single portal page. You can designate the portal page as the home page, see [“Set up Polaris PowerPAC”](#) on page 11.

You can customize the portal page with the following features:

- **Default quick search** - The default quick search launches a keyword search in any field. You can set the search field, the default search filter (**Limit by**), the database to search, and the sort order for results in Polaris Administration, although patrons cannot specify these options for the quick search other than selecting a search filter. By selecting an option in the **Limit by** list, a patron can limit the quick search by any filter you offer. For information about search filters, see [“Setting Up Search Filters \(Limit By\)”](#) on page 70.

- **Quick search with search option buttons** - You can provide optional buttons with the quick search feature, instead of a search filter. The patron types the search text and selects a button to launch a particular type of search. You can offer **Anywhere**, **Fiction**, **Nonfiction**, **Subject**, **Title**, **Author**, and **Series** buttons. **Anywhere**, **Fiction**, and **Nonfiction** are always keyword searches. For **Subject**, **Title**, **Author**, and **Series**, you can specify whether a keyword or browse search should be launched.

- **Rotating book jackets** - If you subscribe to enriched data, you can offer rotating book jacket images on the portal page. Each time the page is loaded, the image changes to show the book jacket of a title randomly selected from best-seller lists. When a patron selects the jacket image, a search is launched for the title. If the title is not found, a form opens where the patron can ask the library to purchase the title.
- **Custom content** - You can also place custom content on the portal page.
- **Content carousels** - A content carousel is a rotating graphical representation of a list of materials in the local library catalog. The PowerPAC user can click any title in the carousel to launch a search for the title in the catalog. You can set up content carousels based on bibliographic record sets, and/or on certain system-defined and automatic dashboards (Web parts). See [“Content Carousels on the PowerPAC Portal Page”](#) on page 31.



- **Custom dashboard links** - Web parts can provide links to pre-defined searches or Web sites. See [“Defining Web Parts for Dashboards”](#) on page 36.

See the following topics:

- [“Set up quick search with search option buttons”](#) on page 27
- [“Set up rotating book jackets”](#) on page 29
- [“Set up custom portal page content”](#) on page 30

1-2-3

Set up quick search with search option buttons

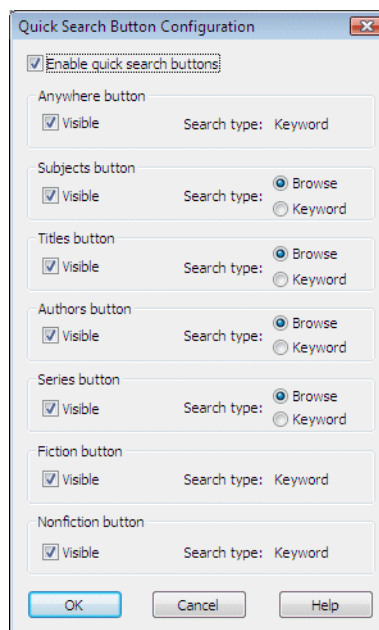
By default, the Polaris PowerPAC portal page includes a quick search feature that allows the patron to select a search filter. You can choose instead to supply a quick search feature with search option buttons. Follow these steps to set up the quick search feature with search option buttons.

Note:

You can set up the quick search with search option buttons at the system, library, or branch level. The settings for the organization to which the patron is connected determine whether this feature is available.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.
2. Double-click **Quick search button configuration**.

The Quick Search Button Configuration dialog box opens.



3. Select (check) **Enable quick search buttons**.

The remaining options become available for selection.

Note:

If you select **Enable quick search buttons** but do not select any specific buttons, Polaris PowerPAC will use the default quick search feature instead of the quick search with buttons.

4. Select (check) each button option that you want to display for quick search.

5. Select the search type (**Browse** or **Keyword**) that each selected button should launch.

Note:

Anywhere always launches a keyword search for the search text in any indexed field in the bibliographic records. This type of search is also launched if a patron presses **ENTER** without selecting a search option button.

Fiction and **Nonfiction** also launch keyword searches in any indexed field, but filtered by fiction or nonfiction as appropriate. The system determines whether a title is fiction or non-fiction by the following bibliographic record information:

Fiction - 008/33= 1, c, d, f, h, j, p

Nonfiction - 008/33 = 0, e, i, s

Keyword search results are presented as a list of titles that match the search criteria. The results are sorted by relevance. Brief information is presented about each title, and the patron can select various options to see more information. See [“Displaying PAC Search Results”](#) on page 132.

Browse search results initially present the portion of the index or title listings that begins with the search text. Patrons can browse through the index or title listings and select an entry to see the titles associated with the entry.

6. Click **OK**.

Related Information

Default quick search settings - If you choose to use the default quick search instead of the quick search with search option buttons, you can set certain values that apply to every quick search. See [“Specifying Default Search Settings”](#) on page 59.

1-2-3

Set up rotating book jackets

If you subscribe to an enriched data service, you can display book jacket images drawn from the enriched data source, randomly selected from the titles in the best-seller lists provided for dashboards. See [“Best-Seller Lists from IndieBound \(Book Sense, Inc.\)”](#) on page 38. A different image is displayed each time the portal page is accessed or refreshed. When a patron selects the image, a search is launched in the catalog for the title. If the title is not found in the catalog, the patron can click an e-mail link to the library to request that the title be purchased. Follow these steps to set up rotating book jackets (system, library, or branch level).

1. Set up the subscription to the enriched data service. For more information about enriched data, see [“Enabling Enriched Data”](#) on page 222.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PAC** tab in the details view.
3. Double-click **Enriched data**.
4. Enable cover images from your enriched data provider. See [“Enabling Enriched Data”](#) on page 222.
5. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.
6. Double-click **Rotating best seller jacket on portal page**, and select **Yes**.
7. Select **File, Save**.

Related Information

- **E-mail server and address for purchase request** - When a search on the book jacket returns no results in the library catalog, the patron can request that the library purchase the title. Any e-mail from PAC, including the purchase request, requires you to specify the SMTP server in Polaris Administration. Double-click the PAC profile **Email notification: Server running SMTP service**, and type the domain name of the e-mail SMTP server. The purchase request goes to the e-mail address specified for Ask Us e-mail. See [“Setting Up Patron E-Mail \(Ask Us\)”](#) on page 268.
- **Rotating book jackets and content carousels** - A content carousel is a rotating graphical representation of a library-specified list of materials in the local library catalog. The PowerPAC user can click any title in the carousel to launch a search for the title. While it is possible to enable both rotating book jackets and content carousels on the portal page, the result will likely confuse the user since the features may appear somewhat similar but serve different purposes. Polaris recommends that you enable one or the other of these features, but not both. If you do enable both, the content carousel appears below the rotating book jacket image. See [“Content Carousels on the PowerPAC Portal Page”](#) on page 31.



Set up custom portal page content

You can display your own content on the portal page. Follow these steps to specify the link to your content.

Tip:

If you use Polaris Bookstore, you can use the custom content area to promote the bookstore. For more information about Polaris Bookstore, see [“Enabling Online Book Purchases”](#) on page 239.

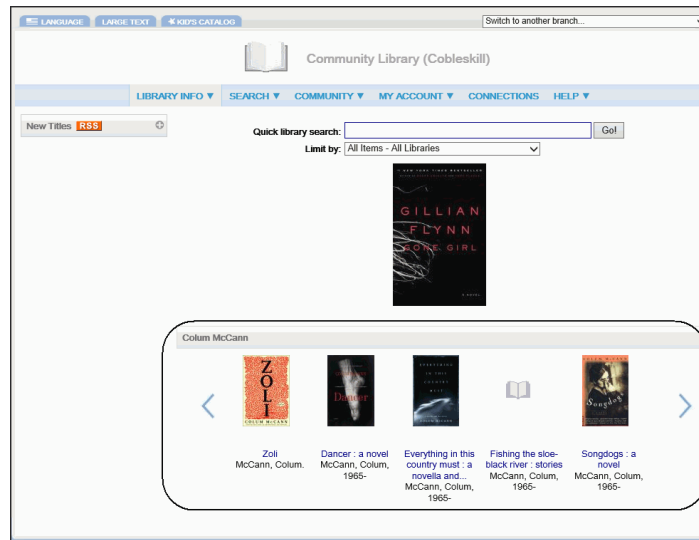
1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.
2. Double-click **Portal custom content (URL)**.
3. Type the complete URL for your content, beginning with **http://**.
4. Select **File, Save**.

The HTML content from the page you specify will be displayed in the custom content area on the portal page. You can include elements such as links and graphics, but be sure the source HTML specifies an absolute path for these elements.

You do not have to reload Polaris PowerPAC to clear the cache whenever you change your custom content. The HTML is reloaded whenever the portal page is accessed and the content was cached more than five minutes previously. Also, you can enable or disable the custom content by setting or clearing the profile without reloading Polaris PowerPAC.

Content Carousels on the PowerPAC Portal Page

A content carousel is a rotating graphical representation of a list of materials in the local library catalog, displayed on the PowerPAC portal page. The PowerPAC user can click any title in the carousel to launch a search for the title in the library catalog.



Each carousel can consist of a specified bibliographic record set created in the staff client, or titles from any of the following system-defined and automatic dashboards (Web parts):

- Most Circulated Titles
- On-Order Items
- New Books
- New Large Print
- New Sound Recordings
- New Videos
- BookSense best-seller lists:
 - Children's Illustrated
 - Children's Interest
 - Hardcover Fiction
 - Hardcover Non-Fiction
 - Mass Market
 - Trade Paperback Fiction
 - Trade Paperback Non-Fiction

Tip:

The content carousel is not intended to be an alternate display of the best-seller lists as they appear in the dashboard. Instead, it is an entry point into the library's collection because it contains only materials known to be in the library's database.

Tip:

If a bibliographic record on a carousel is deleted or updated to not display in PAC, it will continue to display on the carousel until the cache is rebuilt. If the user selects that record before the cache is rebuilt, the search returns 0 results.

For more information about these system-defined and automatic Web parts, see [“Defining Web Parts for Dashboards”](#) on page 36.

Carousels based on record sets are populated when they are displayed. If a title is added to or deleted from a record set, the carousel is updated when the page cache is refreshed (for example, through IIS reset or auto-cycling), rather than every time the carousel appears. If the record set is deleted, the carousel is not created and does not appear on the page. Carousels based on automatic and system-defined dashboards are also refreshed to reflect new content whenever the cache is rebuilt in PowerPAC.

There is no limit to the number of content carousels that can appear on the portal page, but you may find that displaying too many content carousels will adversely affect response time.

- **Carousel title display** - Content carousels display only titles for which there is a bibliographic record in the local database. The record must be set to display in PAC, and the record status must be final. For each title, the carousel contains the cover image if any, and title and author tags and subfields specified in the Primary Display Title and Primary Display Author database tables. When the PAC connection is to a branch, carousels based on new titles include only new titles for that branch. When the PAC connection is to the system, the carousel includes new titles for the whole system.
- **Sort order and entry point** - Carousels based on ranked best-seller lists are sorted in the ranked order provided by the best-seller list supplier. All other carousels are sorted in title order. The carousel “starts” at a random point in the list every time it appears, and the display is circular. That is, the user can scroll endlessly through the carousel. When the carousel reaches the end of the designated sort order (when the scrolling forward) or the beginning (when scrolling backward), the carousel continues at the beginning (or end) of the sorted list.
- **Maximum entries** - Content carousels display a maximum of 50 titles. If the list that generates the carousel contains more than 50 items, only the first 50 items in the sorted list appear in the carousel, using the sort order described above.
- **Content carousels and rotating book jackets** - You can enable a rotating, random book jacket image on the portal page. The user clicks the book jacket image and if the title is not in the library catalog, the user can request that the library purchase it. For details, see [“Set up rotating book jackets”](#) on page 29. While it is possible to enable both rotating book jackets and content carousels on the portal page, the display may confuse the user since the features may appear somewhat similar but serve different purposes. Polaris recommends that you enable one or the other of these features, but not both. If you do enable both, the content carousel appears below the rotating book jacket image.

See the following topic:

- [“Set up content carousels”](#) on page 33

1-2-3

Set up content carousels

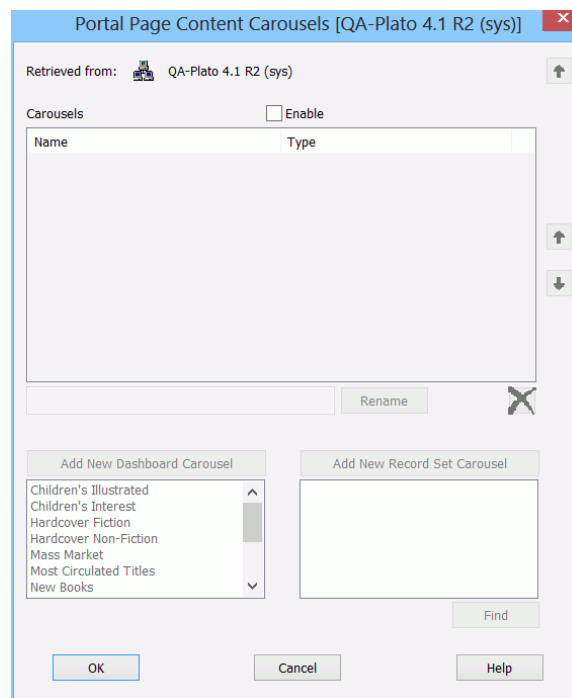
You can set up content carousels at the system, library, or branch level. The system uses the settings of the PowerPAC connection organization. Follow these steps to set up content carousels.

Important:

Content carousels are displayed on the PowerPAC portal page. You must also enable the portal page. See [“Set up Polaris PowerPAC”](#) on page 11.

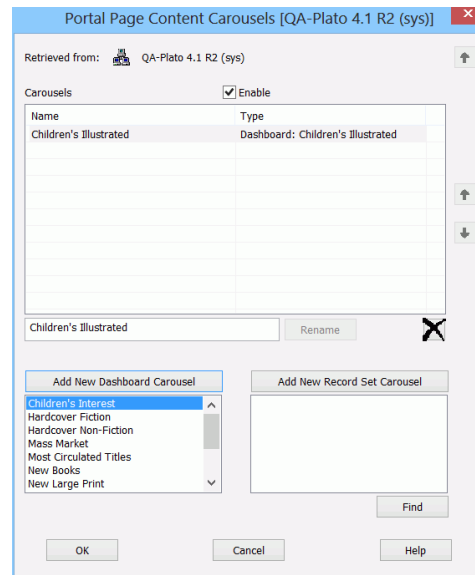
1. To enable the display of cover images in content carousels, check that enriched data options for cover images have been set in Polaris Administration. See [“Enabling Enriched Data”](#) on page 222.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.
3. Double-click **Portal page content carousels**.

The Portal Page Content Carousels dialog box opens.



4. Select (check) **Enable**.
5. To add a dashboard carousel, select a dashboard (Web part) from the dashboard list and click **Add New Dashboard Carousel**.

The selected dashboard appears in the Carousels list in the upper part of the dialog box. For more information about these lists, see [“Defining Web Parts for Dashboards”](#) on page 36.



6. To add a record set carousel, follow these steps:

a) Click **Find**.

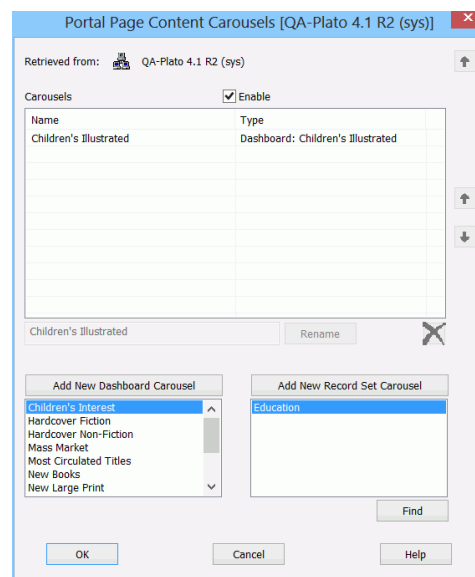
The Find Tool for bibliographic record sets opens.

b) Search for the record set and select one or more record sets in the results lists.

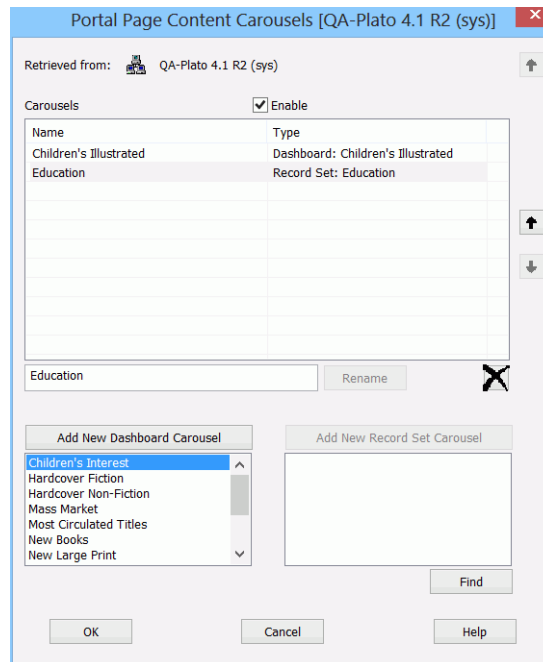
The record set or sets you selected are displayed in the record set list.

Tip:

You can search for any bibliographic record set. Existing rules and permissions are in effect when searching for and selecting record sets. For example, you cannot find record sets owned by individuals other than yourself. For more information about creating record sets, see [“Using Cataloging Record Sets”](#) in the *Polaris Cataloging Guide 4.1R2*.




c) To create the carousel, select the record set in the list and click **Add New Record Set Carousel**. The selected record set appears in the Carousels list in the upper part of the dialog box.



7. By default, the carousel name is the name of the dashboard or record set. To assign a different display name for the PAC:
 - a) Select the carousel in the Carousels list.

The name appears in the text box just below the list.
 - b) Type the new name and click **Rename**.
8. To set the display order of multiple carousels, select a carousel and click the up arrow to move it closer to the top of the list, or click the down arrow to move it closer to the bottom. The order of the list represents the display order in PAC.
9. Click **OK**.

Related Information

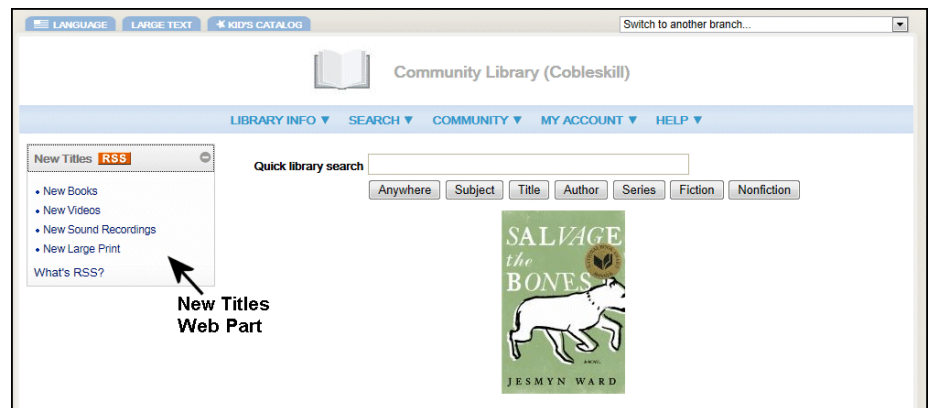
- **Delete a carousel** - Select the carousel in the Carousels list and click the delete icon .
- **Inherit settings from a parent organization** - The top of the dialog box indicates the organization where the current carousel options have been set. To inherit the settings of the parent organization, click the up arrow at the top of the dialog box.
- **Content carousels and Community Profiles** - For libraries that use Polaris Community Profiles, organization representatives can display content carousels on the organization's page in PAC search results or on the organization's own web site through widgets that are created with ContentXChange. These carousels can consist of title lists or searches saved in association with the organization representative's patron account. For more information about Community Profiles and ContentXChange, see "[Polaris Community Profiles Topics](#)" in the *Polaris Community Profiles Guide 4.1R2*.

Defining Web Parts for Dashboards

Web parts are displayed in the dashboard area on the side of the pages on Polaris PowerPAC and Polaris PowerPAC Children's Edition. Web parts can provide links to pre-defined searches or Web sites and deliver messages or instructions. Different Web parts can be displayed on different pages. You set up Web parts at the system level for use by any or all branches. Then, each branch can choose which Web parts to display on the dashboard for any particular page.

Note:

Separate Polaris Administration profiles control Web parts for Polaris PowerPAC and Polaris PowerPAC Children's Edition, but the process for setting up the Web parts is the same for both PACs.



See the following topics:

- “Automatic Web Parts” on page 37
- “Custom Web Parts” on page 38
- “Best-Seller Lists from IndieBound (Book Sense, Inc.)” on page 38
- “Create a custom Web part” on page 39
- “Assign Web parts to public pages” on page 43
- “Limit items in Polaris and third-party lists” on page 45

Automatic Web Parts

Polaris provides several Web parts that are automatically updated by background database processing, using transactions at your library to determine the contents of the lists:

- **Most Circulated** - The Most Circulated Web part elements are links that launch searches for popular titles, authors, or subjects in the Polaris database, based on circulation statistics for the past 31 days. Only items that are marked for display in PAC are listed. By default, the SQL job **Dashboard_MostCirculated** updates the list once a month.
- **New Titles** - The New Titles Web part elements are organized by the broad material categories **Books**, **Videos**, **Sound Recordings**, and **Large Print**. When the patron selects a category, the page displays appropriate links that launch searches for titles that have recently been added to your catalog. Only items that are marked for display in PAC are listed, and an item must have been checked in to be eligible for inclusion. By default, the SQL job **Dashboard_NewTitles** updates the list nightly and includes items new in the last 31 days. Although the title search is for bibliographic records, if the process finds any bibliographic records that do not have a First Available date, the process checks their associated items to see if an item has become available since the last time it was processed. If so, the First Available date in the bibliographic record is updated with the item's First Available date. You can also provide RSS feeds from the New Titles Web part. See ["Setting Up RSS Feeds"](#) on page 46.

Note:

When the PAC connection is to a branch, the patron sees only new titles for that branch. When the PAC connection is to the system, the patron sees new titles for the whole system.

- **On-Order Items** - The On-Order Items Web part elements are links that launch searches for titles in the Polaris database that have linked items with a status of On Order. By default, 20 titles are listed; the title that has the linked item with the most recent status change to On Order is listed first. If more than one On-Order item is associated with a bibliographic record, the most recent On-Order item is used to order the list. Only titles that are marked for display in PAC are listed. This Web part is updated as part of the nightly **Dashboard_NewTitles** job.

Tip:

By default, **Narrow** and **Related** Web parts are displayed on the search results page. You can determine whether or not to display these features, specify the filters and categories they contain, and customize the labels. See ["Setting PowerPAC Narrow/Related Search Options"](#) on page 159. You cannot specify the number of elements in them or assign them to other pages.

You can set the number of items that are automatically listed in the Most Circulated, New Titles, and On-Order Items Web parts. See ["Limit items in Polaris and third-party lists"](#) on page 45.

Polaris also provides a Make a Donation Web part that allows users to make a donation to the library by credit card. The user does not have to log in to make the donation. For more information about setting up credit card processing, see ["Setting Up E-Commerce"](#) in the *Polaris Patron Services Administration Guide 4.1R2*.

Custom Web Parts

You can create custom Web parts tailored to your needs and programs. See [“Create a custom Web part”](#) on page 39. Custom Web parts can include any combination of the following types of data elements:

- **Title Search** - Links that launch searches for specific titles. Title search elements work well for listing titles for a particular purpose, such as a reading program, seasonal reading, special-interest subjects, or a teacher’s reading list.
- **URL** - Links to Web sites or pages. You define the text or image that serves as the link. The link element can be formatted with basic HTML tags. For example, you can create a link to a URL that launches a search for the records in a record set created in the staff client. See [“Searching Record Sets \(Polaris PowerPAC\)”](#) on page 84.
- **Free text** - Text that is displayed in the Web part. You can use free text for announcements, page instructions, or for introducing other elements in the list. The text can be formatted using basic HTML tag elements. You can include images using the `` tag.

Best-Seller Lists from IndieBound (Book Sense, Inc.)

The following Web parts are updated automatically with content from IndieBound (formerly Book Sense, Inc.), based on sales from over 350 independent bookstores in the United States: Trade Paperback Fiction, Trade Paperback Nonfiction, Hardcover Fiction, Hardcover Nonfiction, Mass Market, Children’s Interest, and Children’s Illustrated. When a patron selects a title from one of these lists, a search for the title is launched in the Polaris database.

Every week, Polaris Library Systems receives a file of the updated best-seller lists from IndieBound. During overnight processing at your library, the **BookSenseImport** Microsoft SQL Server Agent at Polaris Library Systems updates the best-seller lists at your site.

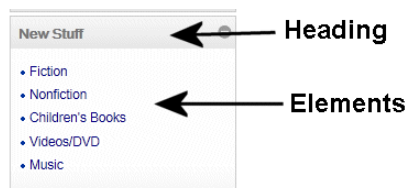
Polaris Customer Operations helps you set up your Polaris system to support updating the IndieBound best-seller lists. The server running MS SQL Server must be able to do FTP downloads, and your Web page caches must be cleared after the download to allow the updated pages to be displayed (see [“Updating Page Caches”](#) on page 9).

You can limit the number of items that are automatically listed, but you cannot change the contents of the lists. See [“Limit items in Polaris and third-party lists”](#) on page 45.

1-2-3

Create a custom Web part

To create a custom Web part, you define a heading for the Web part and add data elements to the heading. You can add any combination of elements to the heading.



Follow these steps to create a custom Web part. (You create Web parts for Polaris PowerPAC Children's Edition separately from Polaris PowerPAC, but the method is the same.)

Important:

You can create Web parts at the system level only. To actually display the created Web parts in the PAC, you assign them to specific pages for the appropriate organization. See [“Assign Web parts to public pages”](#) on page 43.

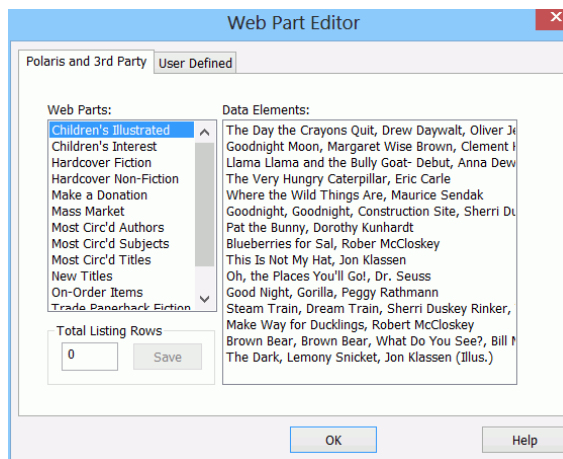
1. In the Administration Explorer tree view, open the **Profiles** folder for the system, and click the **PowerPAC** tab in the details view.

Note:

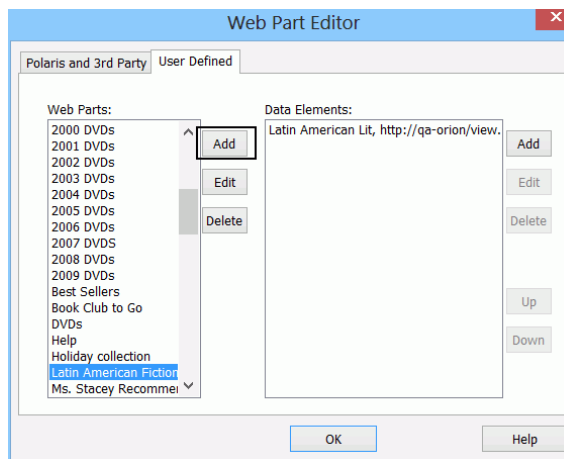
If you are working with Web parts for Polaris PowerPAC Children's Edition, click the **Children's PAC** tab.

2. Double-click **Dashboards: Web part construction**.

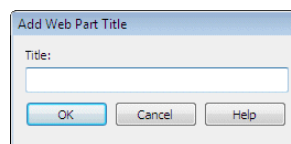
The Web Part Editor dialog box appears.



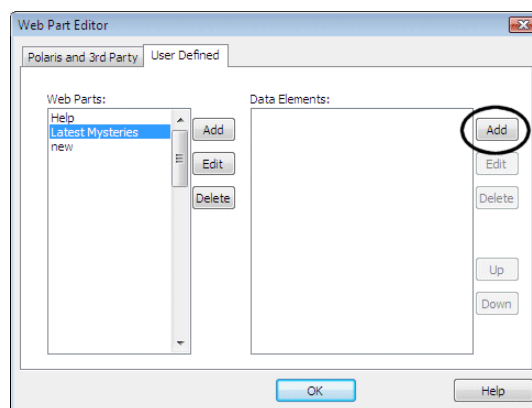
3. Click the **User Defined** tab.
4. Click **Add** by the Web Parts list to specify the heading for the new Web part.



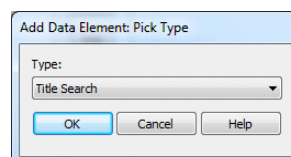
The Add Web Part Title dialog box appears.



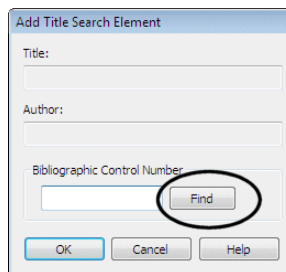
5. Type the heading text in the **Title** box, and click **OK**.
The heading for the new Web part is displayed in the Web Parts list.
6. Select the heading in the Web Parts list to which you want to add elements.
7. Click **Add** by the Data Elements list.



The Add Data Element: Pick Type dialog box appears.



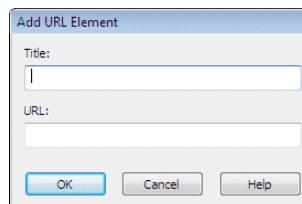
8. Select one of the following element types to add to the Web part. When you select an element type, the appropriate Add ... Element dialog box for the selected element type appears:
 - **Title Search** – Puts a title link in the list. When a patron selects the title in the list, the title information is displayed as search results. Then type the bibliographic control number of the title, or select the title from the Polaris Find Tool results list (click **Find** to display the Find Tool).



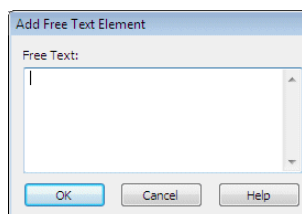
Note:

For more information about using the Find Tool, see “[Finding Polaris Records](#)” in the *Polaris Basics Guide 4.1R2*.

- **URL** – Puts a link to a Web site or page in the list. When a patron selects the link, the browser displays the destination page. Type the link text in the **Title** box, and type the uniform resource locator (address) in the **URL** box.



- **Free Text** – Puts text in the list. Use free text for announcements, page instructions, or introducing the list. Type the text of the announcement or message you want to display. You can use basic HTML tags to format the text.



9. Click **OK** on the Add ... Element dialog box.

The new element is displayed in the Data Elements list on the Web Part Editor dialog box.

10. Repeat steps 8-9 to add additional elements to the selected Web Part (heading). You can add any combination of element types to a single heading.
11. When you are finished working with the library-defined Web parts, click **OK**. The Web Part Editor dialog box closes.
12. Select **File, Save**.

Related Information

- **Edit the title of a Web part** - Select the heading in the Web Parts list, and click **Edit** by the Web Parts list.
- **Delete a Web part** - Select the heading in the Web Parts list, and click **Delete** by the Web Parts list.
- **Edit an element in a Web part** - Select the heading in the Web Parts list, and select the element in the Data Elements list. Click **Edit** by the Data Elements list.
- **Delete an element from a Web part** - Select the heading in the Web Parts list, and select the element in the Data Elements list. Click **Delete** by the Data Elements list.
- **Reorder the elements in a Web part** - Select the heading in the Web Parts list, and select the element in the Data Elements list. Click **Up** or **Down** by the Data Elements list. The order in the Data Elements list determines the display order in the dashboard.
- **Add a Web part to a page** - See “Assign Web parts to public pages” on page 43.

1-2-3

Assign Web parts to public pages

Each organization specifies which Web parts are displayed on the dashboard for specific pages. You can add and remove Web parts from individual pages without affecting other pages, and change the order in which Web parts appear on any specific page.

Note:

Custom Web parts must be defined at the system level before they can be assigned to public pages at the branch level. See [“Create a custom Web part”](#) on page 39. Web parts set up for Polaris PowerPAC are available to be assigned to Children’s PAC pages, and Web parts set up for the Children’s PAC are available to be assigned to Polaris PowerPAC pages.

Follow these steps to specify which Web parts are available on specific public pages for an organization.

Important:

Web parts are inherited from the system level unless you make any change at the branch level. Then none are inherited for that branch and you must make the appropriate assignments at the branch level.

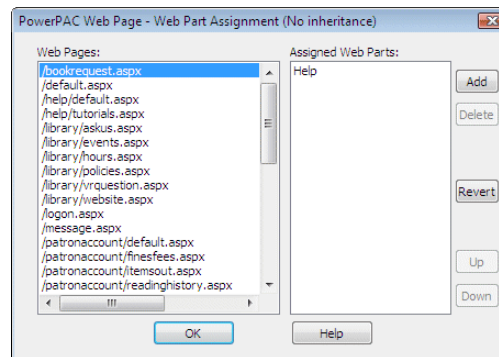
1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PowerPAC** tab (or **Children’s PAC** tab) in the details view.

Note:

You assign Web parts to Polaris PowerPAC Children’s Edition separately from Polaris PowerPAC, but the procedure is the same.

2. Double-click **Dashboards: Web Page/Web Part Assignment**.

The Web Page-Web Part Assignment dialog box opens.



3. In the Web Pages list, select the public page to which you want to assign Web parts:
 - If you are assigning Web parts to Polaris PowerPAC pages, see [“Polaris PowerPAC Pages”](#) on page 400 for information about each page.
 - If you are assigning Web parts to Polaris PowerPAC Children’s Edition pages, see [“Polaris PowerPAC Children’s Edition Pages”](#) on page 403 for information about each page.

Tip:

To set a page to use the same Web parts specified for the page in a parent organization, select the page, and click **Revert**.

The Web parts currently assigned to the page are shown in the Assigned Web Parts list.

4. To assign a Web part to the selected page, do the following actions:
 - a) Click **Add**.

The Web Page - Add Web Parts dialog box appears.



The Web Pages-Add Web Parts dialog box lists all the Web parts that are not currently assigned to the selected page.

- b) Select the Web parts you want to assign to the Web page.
- c) Click **OK** on the Web Pages - Add Web Parts dialog box.

The selected Web parts are displayed in the Assigned Web Parts list on the Web Page - Web Part Assignment dialog box. The order of the list determines the display order in the dashboard for the selected page. To change the position of a Web part in the dashboard, select the Web part in the Assigned Web Parts list, and click **Up** or **Down**.

5. Repeat steps 3-4 for each page to which you want to assign Web parts for this organization.
6. Click **OK** on the Web Page-Web Part Assignment dialog box.
7. Select **File, Save**.

Related Information

- **Delete a Web part from a page** - On the Web Page-Web Part Assignment dialog box, select the Web part in the Assigned Web Parts list, and click **Delete**.
- **Revert to system-level settings** - On the Web Page-Web Part Assignment dialog box, click **Revert**.
- **Set the default display of Web parts** - You can determine whether Web parts are expanded or closed by default when a page opens. (Patrons can always select a control in the header to expand or close a Web part.) To set the default display to expanded Web parts, set the PowerPAC profile **Dashboards: Expanded** to **Yes**. To set the default display to closed Web parts, set the profile to **No**.

1-2-3

Limit items in Polaris and third-party lists

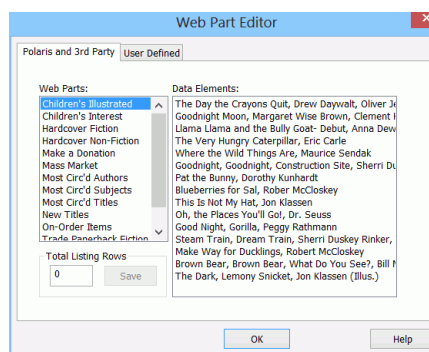
Follow these steps to specify the maximum number of items to display in the Polaris and third-party Web parts that are updated automatically, such as “Most Circulated.”

Note:

You must set the limit at the system level. You set the limits for Polaris PowerPAC Children’s Edition separately from Polaris PowerPAC, but the procedure is the same.

1. In the Administration Explorer tree view, open the **Profiles** folder for the system, and select the **PowerPAC** tab (or **Children’s PAC** tab) in the details view.
2. Double-click **Dashboards: Web part construction**.

The Web Part Editor dialog box appears.



3. On the Polaris and 3rd Party tabbed page, select the heading in the Web Parts list for the Web part you want to limit.
4. Type the number of items (elements) in the **Total Listing Rows** box to display for the selected list, and click **Save**.

Tip:

The maximum number is 100 for Polaris and 3rd Party Web parts, except the New Titles Web part. The maximum for this Web part is 9,999.

Type **0**, indicating no limit, in the **Total Listing Rows** box to display all items available for the automated list. For the Web part New Titles, a setting of **0** in the **Total Listing Rows** box will display all titles added to the catalog in the past 31 days in each New Title category. Any other setting limits the number of new titles in each category to that number. The zero setting has the same effect on the On-Order Items Web part. For more information about these Web parts, see “[Automatic Web Parts](#)” on page 37.

5. Repeat steps 3-4 for each Polaris and third-party Web part you are using.
6. Click **OK**.

The Web Part Editor dialog box closes.

7. Select **File, Save**.

Your new settings are effective when the automatic lists are updated.

Setting Up RSS Feeds

Real Simple Syndication (RSS) is a method of publishing links to content on your Web site. You can allow patrons to set up RSS feeds for new titles from Polaris PowerPAC directly to a Web site such as My Yahoo! or Bloglines. When the feed is received, the patron can click the link on the Web site to see a list of new titles in your library catalog and launch a catalog search for a specific title. Polaris PowerPAC is RSS 2.0 compliant.

Processing for the RSS feed is related to Polaris PowerPAC's New Titles dashboard feature (see "[Automatic Web Parts](#)" on page 37). Automatic processing for the New Titles Web part occurs nightly via the SQL job `Dashboard_NewTitles`, and the dashboard links contain new titles for the past 31 days. For the RSS feed, background processing updates the current New Titles list hourly via the SQL job `RSS_PopulateNewTitles`. If you want to test RSS feeds after setup, you can run this job manually.

Set these **PowerPAC** profiles to control RSS feeds:

- **RSS Feeds: Enable** - Allows RSS feeds from Polaris PowerPAC. This profile is available at the system, library, and branch levels.
- **RSS Feeds: Maximum new releases** - Specifies how many titles should be listed in the RSS feed that the patron receives. This profile is available at the system level only; that is, it controls the number for every branch that enables RSS feeds.

When RSS is enabled, an orange RSS icon appears in the New Titles dashboard.



Patrons can click the icon to set up feeds, or click **What's RSS?** for more information about how to set up RSS feeds and where to find readers. When you click the RSS icon, the RSS feeds are listed in the center area of the page. If you have a Windows-based reader such as SharpReader, you can drag each feed's orange XML icon to the reader. If you have a Web-based RSS news reader such as My Yahoo!, you copy the URL for the feed and paste it into the appropriate field on the news reader's RSS set-up page. If the patron subscribes to the RSS feed while connected to the system organization, the feed supplies all new titles in the system. If the patron subscribes to the feed while connected to a branch organization, the feed supplies all new titles for the branch.

When RSS is enabled, the header of the Polaris PowerPAC default.aspx page includes link tags that contain the RSS URLs. This allows RSS-aware browsers such as Firefox® to recognize the RSS feeds automatically when the user navigates to the portal page. Also, certain RSS programs such as SharpReader allow the user to enter the main URL of the Web site. For these programs, the patron can enter the main Polaris PowerPAC URL. The RSS program recognizes the links in the page header and subscribes to the feeds automatically.

Setting Up Live Virtual Reference Services

If your library contracts for services with a virtual reference service provider, you can offer online reference services in live chat format through Polaris PowerPAC. Polaris currently supports virtual reference services from Tutor.com (Virtual Reference Toolkit™) and QuestionPointSM from OCLC Online Computer Library Center, Inc. The provider can be set at the branch level, and different organizations in the system can use different providers. However, a branch can offer only one provider at a time.

Tutor.com services require a patron log-on to use live virtual reference. If you use QuestionPoint services, you can require a patron log-on or allow users to access virtual reference services as “guests” without logging on.

When the virtual reference service is enabled, a link at the bottom of most PowerPAC pages leads to the reference service. If a search is unsuccessful, Polaris PowerPAC also displays a prompt to use the service. A patron selects the link, logs on, and types a question. The question, along with patron identification information, is sent to the provider’s URL. If you do not require users to log on for QuestionPoint, the **Guest** link on the log-on page goes directly to the QuestionPoint site, and users submit their questions at the site. Polaris records a transaction for every virtual reference session.

In addition, patrons can access their patron accounts to see a list of their virtual reference sessions. Only logged-on sessions are listed. The session list includes the date and time the session was ended and the original question. From the list, the patron may be able to view a detailed transcript of the session. The branch where the patron is logged on (not necessarily the patron’s registered branch) must be set up for the specific provider in order to display that provider’s transcripts in the patron account. The information available in a transcript varies by virtual reference provider, and some virtual reference providers may not support stored transcripts. Currently, both Tutor.com and QuestionPoint support transcripts viewable from the PAC.

See the following topic:

[“Make virtual reference service available”](#) on page 49

1-2-3

Make virtual reference service available

You can set up virtual reference services at the branch level. Different branches in the system can use different virtual reference providers. Follow these steps to make a virtual reference service available.

1. Establish an agreement with a virtual reference service.

Note:

Obtain the settings you need for this procedure from the virtual reference provider. See later steps in this procedure for the appropriate list of settings. Be sure the provider is aware of which Polaris PowerPAC page patrons should return to when they exit from the provider's site.

2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
3. Double-click **Virtual reference: Enable**, and select **Yes**.

This setting displays the virtual reference link on Polaris PowerPAC pages, and allows access to the virtual reference session history from the patron account.

4. Double-click **Virtual reference: Supplier**, and select your virtual reference provider from the list.
5. Double-click **Virtual reference: Configure**.

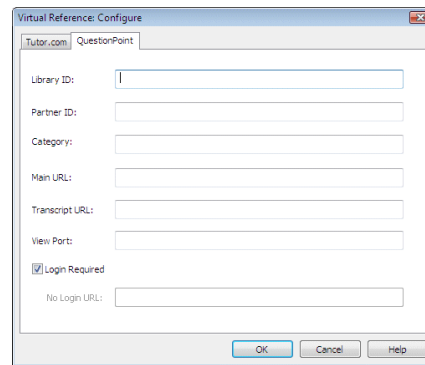
The Virtual Reference Configure dialog box opens with the Tutor.com tabbed page displayed.

Note:

You need specific information from the provider to do the next steps.

6. If your provider is Tutor.com, set the following connection profiles on the Tutor.com tabbed page:
 - **Category, DB Name, DB Login, DB Password, Interact Server, Live Server** - Obtain these site-specific values from Tutor.com.
 - **Main URL** - URL that connects to the Tutor.com virtual reference librarian
 - **Partition** - Obtain this site-specific value from Tutor.com.
 - **Transcript URL** - URL that retrieves virtual reference history for a patron
 - **View Port** - Your Polaris PowerPAC home page URL

7. If your provider is QuestionPoint, set the following profiles on the QuestionPoint tabbed page:



- **Library ID, Category** - Obtain these site-specific values from OCLC.
- **Partner ID** - Not needed
- **Main URL** - URL that connects to the QuestionPoint virtual reference librarian
- **Transcript URL** - Not needed
- **View Port** - Your Polaris PowerPAC home page URL
- **Log in required** - If you want to restrict access to registered patrons, select (check) this option. If this option is not checked, a **Guest** button is displayed on the virtual reference log-in page. The user can click **Guest** to go straight to the QuestionPoint Web site and submit a question.
- **No Login URL** - If you do not require log-in, type the QuestionPoint URL to which the **Guest** link should connect.

For more information about setting up QuestionPoint virtual reference, go to

<http://questionpoint.org/support>

8. Click **OK** to save your settings for the currently selected provider and close the dialog box.

Note:

Click **X** in the upper right corner of the dialog box to cancel your changes for the currently selected provider and close the dialog box.

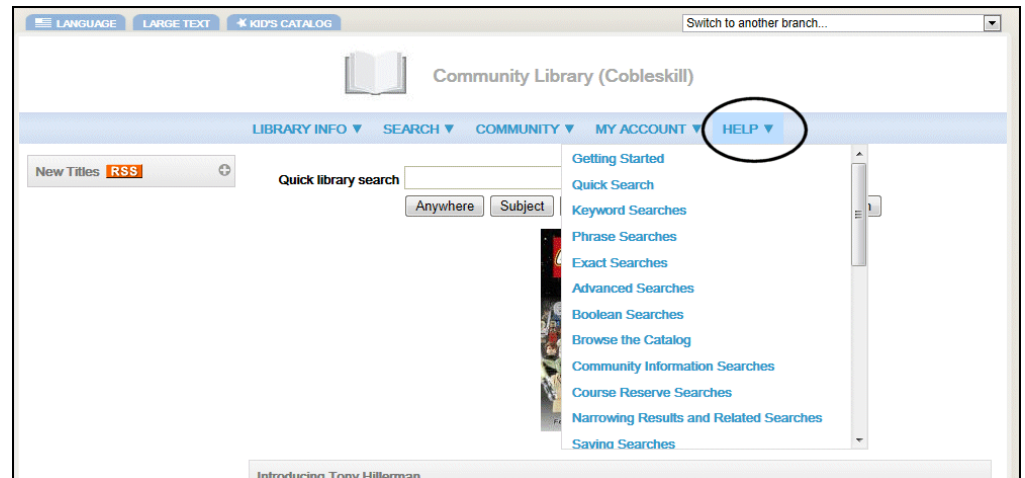
9. Restart the Internet Information Server (IIS).

Related Information

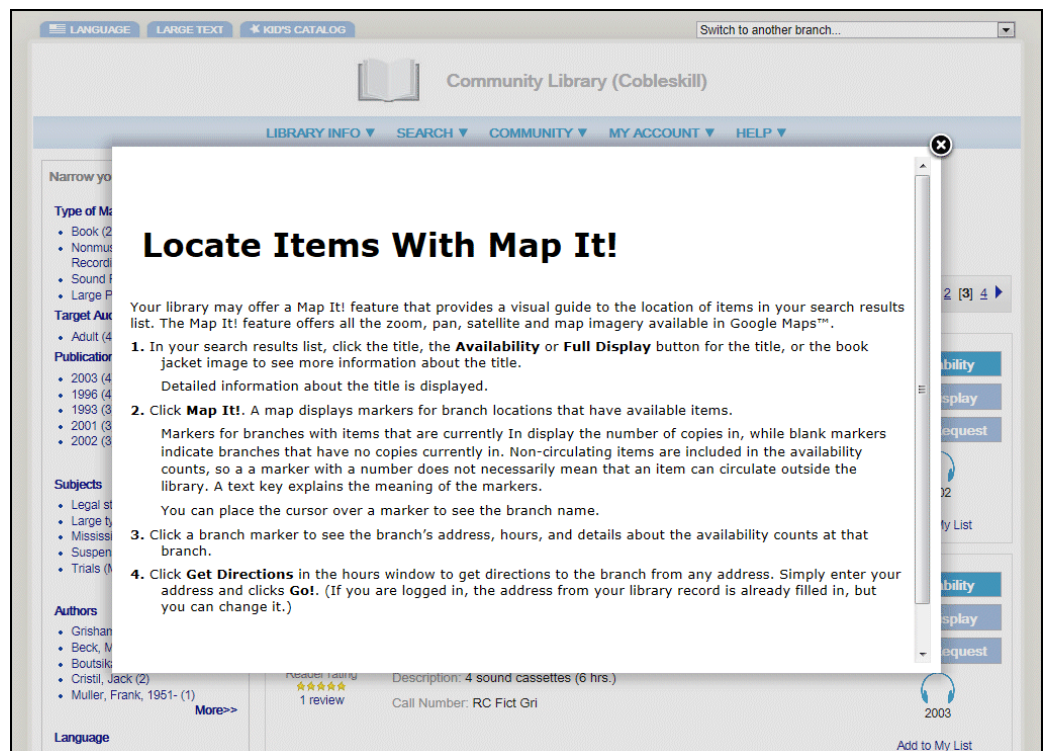
E-mail reference service - You can allow patrons to send reference questions to the library via e-mail. See [“Setting Up Patron E-Mail \(Ask Us\)”](#) on page 268.

Polaris PowerPAC Help

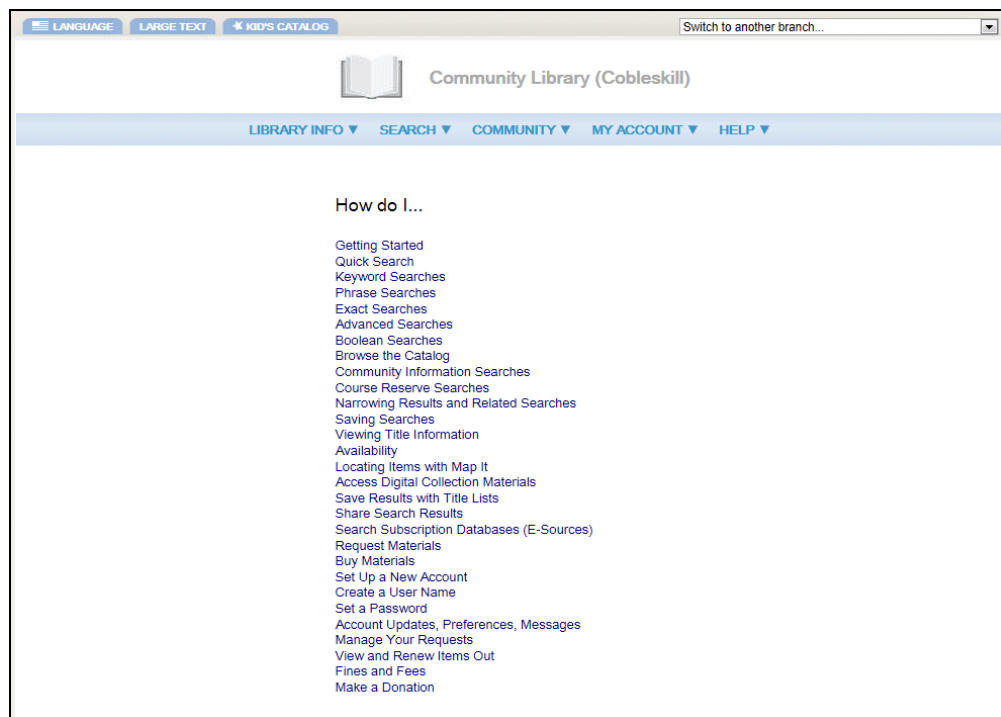
Polaris PowerPAC is installed with a default set of help topic html files. When the user clicks the **Help** option on the menu bar, a scrollable set of help topic links is displayed.



When the user clicks a topic link, the appropriate topic is displayed in a lightbox, without losing the current page context.



When the user clicks **All topics** at the bottom of the Help menu list, a page with the complete set of links is displayed. This page is also available by clicking the **Help** link in the site index list at the bottom of the page.



Certain links are always displayed because they are applicable to PowerPAC in general. **Availability** is an example of this type of topic link. Others are displayed only when the connection organization has enabled the corresponding feature in Polaris Administration. For example, if the organization has not enabled Google Maps, the topic link **Locate Items with Map It** is automatically suppressed. The table shows the PowerPAC feature settings in Polaris Administration that control whether a help topic is displayed. You can customize the link labels in Polaris WebAdmin (Language Editor); see “[Customizing Language Strings](#)” on page 57. The table lists the Language Editor string IDs.

<i>Help Topic Filename</i>	<i>Topic Link Label</i>	<i>Language Editor String ID</i>	<i>Polaris Administration Feature Setting</i>
Overview.htm	Getting Started	PACML_HELP_INTRO	[Always displayed]
QuickSearch.htm	Quick Searches	PACML_HELP_SEARCHQUICK	PowerPAC profile Navigation: Portal
Keyword.htm	Keyword Searches	PACML_HELP_SEARCHKEYWORD	PowerPAC profile Navigation: Keyword
Phrase.htm	Phrase Searches	PACML_HELP_SEARCHPHRASE	PowerPAC profile Navigation: Phrase
Exact.htm	Exact Searches	PACML_HELP_SEARCHEXACT	PowerPAC profile Navigation: Phrase
Advanced.htm	Advanced Searches	PACML_HELP_SEARCHADVANCED	PowerPAC profile Navigation: Advanced
Boolean.htm	Boolean Searches	PACML_HELP_SEARCHBOOLEAN	PowerPAC profile Navigation: Boolean
Browse.htm	Browse the Catalog	PACML_HELP_SEARCHBROWSE	PowerPAC profile Navigation: Browse
CommInfo.htm	Community Information Searches	PACML_HELP_SEARCHCOMMUNITY	Community profile Navigation (PowerPAC): Community - Keyword Search
CourseReserve.htm	Course Reserve Searches	PACML_HELP_SEARCHCOURSE	PowerPAC profile Navigation: Course Reserves
Filters.htm	Narrowing Results and Related Searches	PACML_HELP_SEARCHNARROW	[Always displayed]
SavingSearches.htm	Saving Searches	PACML_HELP_SAVESEARCH	PAC profile Search agent: Enabled
TitleInfo.htm	Viewing Title Information	PACML_HELP_TITLEINFO	[Always displayed]
Availability.htm	Availability	PACML_HELP_AVAILABILITY	[Always displayed]
MapIt.htm	Locate Items with Map It	PACML_HELP_MAPIT	PowerPAC profile Google Maps
Fusion.htm	Access Digital Collection Materials	PACML_HELP_FUSION	[Polaris Fusion is enabled]
TitleLists.htm	Save Results with Title Lists	PACML_HELP_TITLELISTS	PowerPAC profile Title List: Enable
Share.htm	Share Search Results	PACML_HELP_SHARE	PowerPAC profile Bookmarking & Sharing: Enable
ESources.htm	Search Subscription Databases (E-Sources)	PACML_HELP_ESOURCES	PowerPAC profile Navigation: E-Sources
Request.htm	Request Materials	PACML_HELP_REQUEST	Request parameter Holds options
Purchase.htm	Buy Materials	PACML_HELP_PURCHASE	PAC profile Purchase options

<i>Help Topic Filename</i>	<i>Topic Link Label</i>	<i>Language Editor String ID</i>	<i>Polaris Administration Feature Setting</i>
NewAccount.htm	Set Up a New Account	PACML_HELP_NEWACCOUNT	PAC profile Patron access options (self-registration enabled)
Username.htm	Create a User Name	PACML_HELP_USERNAME	PAC profile Patron access options (patron user name enabled)
Password.htm	Set a Password	PACML_HELP_PASSWORD	[Always displayed]
AcctUpdates.htm	Account Updates, Preferences, Messages	PACML_HELP_UPDATEACCOUNT	[Always displayed]
AcctRequests.htm	Manage Your Requests	PACML_HELP_ACCTREQUESTS	PowerPAC profile Navigation: Requests
AcctItemsOut.htm	View and Renew Items Out	PACML_HELP_ACCTITEMSOUT	PowerPAC profile Navigation: Items out
AcctReadingHistory.htm	Your Reading History	PACML_HELP_ACCTHISTORY	[Reading history is enabled for patron]
AcctFines.htm	Fines and Fees	PACML_HELP_FINESFEES	PowerPAC profile Navigation: Fines and fees
AcctCourseStats.htm	Course Reserve Statistics	PACML_HELP_ACCTCOURSE	[Course reserves enabled, patron is instructor]
Donations.htm	Make a Donation	PACML_HELP_DONATE	Credit Card Payment parameter Online payments: Configure (Allow donations from PowerPAC)

The PowerPAC profile **Navigation: PAC help** controls whether the **Help** option appears on the menu bar. If you choose to offer your own help materials from the dashboard, set this profile to **No** to suppress the **Help** option from the menu bar.

You can also display the **Help** option on the menu bar but edit the default .html files, retaining the same filenames. The files, with the .css style sheet and appropriate graphic files, are located at {PowerPAC Root}/help/content/.

Important:

If you edit the .html help files, be sure to back up your customized files in a location where they will not be overwritten if Polaris is re-installed.

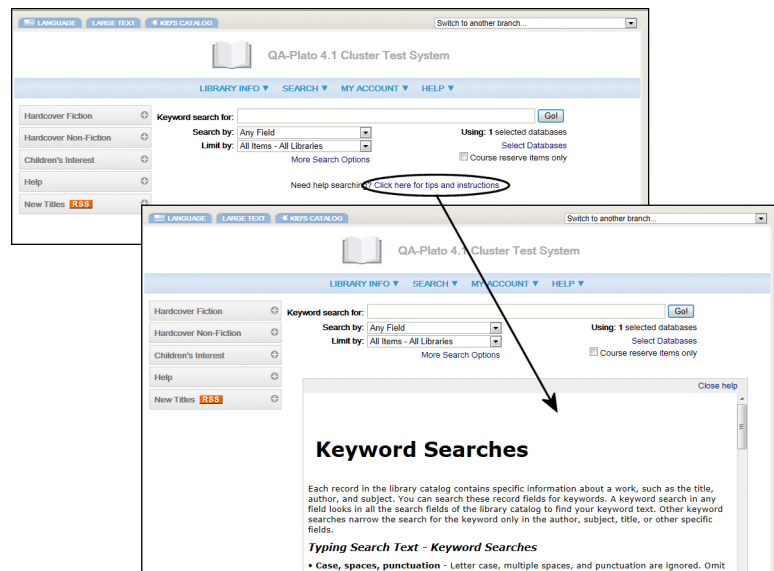
If you have some programming knowledge, you can add your own links to the Help page. For more information, see the *Polaris PAC Customization Guide*, available on the Customer Extranet and the Polaris Developers Network.

Tip:

The *Polaris PowerPAC User Guide* is available as an English-language .pdf file, delivered as part of the Polaris documentation set. The *User Guide* covers the same content as the default set of .html help pages. The *User Guide* is not exposed in the PAC interface unless you choose to make it available through a dashboard link or by some other mechanism.

Help with Searching

On each search page except Advanced, the user can click a link to display the appropriate help information within the search page itself.



See this topic:

- [“Create custom help on the dashboard”](#) on page 55.

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Tip:

Your instruction pages can be any file format that the workstation can display. If patrons use Polaris PowerPAC from remote locations, choose a format that is accessible to most workstations and browsers, such as .html.

Create custom help on the dashboard

Follow these steps to provide custom help from the dashboard in Polaris PowerPAC.

1. Create and save the instruction pages you want to be accessible from the dashboard.
2. In the Administration Explorer tree view, open the **Profiles** folder for *the system*, and select the **PowerPAC** tab in the details view.
3. Double-click **Dashboards: Web part construction**.

The Web Part Editor dialog box appears.

4. Click the **User Defined** tab.
5. Click **Add** by the Web Parts list to specify the heading for the instruction Web part.

The Add Web Part Title dialog box appears.

6. Type the heading text in the **Title** box, and click **OK**.

The heading for the new Web part is displayed in the Web Parts list.

7. Select the new heading in the Web Parts list.
8. Click **Add** by the Data Elements list.

The Add Data Element: Pick Type dialog box appears.

9. Select URL.

The Add ... Element dialog box for the URL element type appears.

10. Type the link text in the Title box, and type the complete path and filename or URL in the URL box.

11. Click OK on the Add ... Element dialog box.

The new element is displayed in the Data Elements list on the Web Part Editor dialog box.

12. Repeat steps 8-11 to add additional elements to the selected Web Part (heading), and click OK.

The Web Part Editor dialog box closes.

13. Select File, Save.

14. To assign the instruction Web part to the appropriate pages, do these steps:

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

b) Double-click **Dashboards: Web Page / Web Part Assignment**.

The Web Page - Web Part Configuration dialog box appears.

c) In the Web Pages list, select the page to which you want to assign the instruction Web part. See "[Standard PAC Pages Reference](#)" on page 399.

The Web parts currently assigned to the page are shown in the Assigned Web Parts list.

d) Click **Add**.

The Web Page -Add Web Parts dialog box appears. It lists all the Web parts not currently assigned to the selected page.

e) Select your instruction Web part.

f) Click **OK** on the Web Pages - Add Web Parts dialog box.

The selected Web parts are displayed in the Assigned Web Parts list.

g) Click **OK** on the Web Page - Web Part Configuration dialog box.

15. Select File, Save.

Related Information

More about dashboards - See "[Defining Web Parts for Dashboards](#)" on page 36.

Customizing Language Strings

Polaris WebAdmin (Language Editor) is a Web-based tool you can use to customize English and other licensed language strings in all the parts of Polaris that support multiple languages, including Polaris PowerPAC, Polaris Mobile PAC, Polaris ExpressCheck, printed and e-mail notices, telephone notices, and Polaris Phone Attendant (inbound telephony). You can compare, add, edit and distribute language strings easily, without editing individual files. Polaris WebAdmin also provides a language string identifier specifically for Polaris PowerPAC.

You can add or customize language strings at the system, library, and branch levels. Branch settings override library settings; settings made at the library level override system-level settings.

When you change Polaris PowerPAC, PowerPAC Children's Edition, or Mobile PAC settings in Polaris Administration, or customize language strings with WebAdmin, you must update page caches to see the effects of your changes. Most cached information is stored at the application level on the specified Web server. You update that information with the Reload tool in WebAdmin.

For security purposes, Polaris WebAdmin should be installed on a server to which there is no outside access, but which has access to the Polaris database—for example, the Web portion of the Polaris application server. You can access and use WebAdmin with most browsers.

You need the Polaris permission **WebAdmin access: Allow** to use Polaris WebAdmin. In Polaris Administration, this permission is available at the system level under the System Administration security node. For more information about setting Polaris permissions, see [“Granting Permissions”](#) in the *Polaris Administration Guide 4.1R2*.

To access WebAdmin, open your browser and navigate to the site where WebAdmin is installed. You must supply your Polaris username, password, and domain to log in. For detailed information about using WebAdmin, see the *Polaris WebAdmin (Language Editor) Guide* (available on the Customer Extranet), or select the WebAdmin **Help** tab.

Note:

You can also edit certain messages and labels in Polaris Administration. See [“Editing Messages and Labels”](#) on page 288.

Searching in Polaris PowerPAC



Polaris PowerPAC search features can be tailored to your library catalog and your patrons' needs. (Certain settings described here also affect Polaris Mobile PAC. For details, see [“Mobile PAC Search Settings”](#) on page 343.)

See the following topics:

- [“Specifying Default Search Settings”](#) on page 59
- [“Setting Up Search Filters \(Limit By\)”](#) on page 70
- [“Setting Available Search Types”](#) on page 82
- [“Searching Record Sets \(Polaris PowerPAC\)”](#) on page 84
- [“PAC Search Agent \(Saved Searches\)”](#) on page 87
- [“Auto-Search Suggestions - PowerPAC”](#) on page 90
- [“Setting Up Did You Mean Term Checking”](#) on page 92

Specifying Default Search Settings

Patrons can set various options for each type of search in Polaris PowerPAC. For example, for keyword searches, patrons can set a search field (**Search by**) and search filter (**Limit by**) for the search, and then sort the returned results by any of several options.

You use the PAC profile **Search settings defaults** to specify the default settings for search field, search filter, and sort order.

See the following topics:

- [“Customizing Search by Labels”](#) on page 59
- [“Set PAC search setting defaults”](#) on page 61
- [“Specify level of relevance applied to popularity sort”](#) on page 68

Customizing Search by Labels

You can edit the search field (**Search by**) labels in Polaris WebAdmin (Language Editor). Your custom labels are displayed in Polaris PowerPAC but the default system labels are used in the Polaris Administration profile for search setting defaults. See [“Set PAC search setting defaults”](#) on page 61. The table shows the default labels and the corresponding language string in Polaris WebAdmin.

<i>Search by Option Default Label</i>	<i>Code</i>	<i>Language String ID</i>
Any Field	KW	PACML_SEARCHBARS_XSL_1607
Title	TI	PACML_SEARCHBARS_XSL_1608
Author	AU	PACML_SEARCHBARS_XSL_1609
Subject	SU	PACML_SEARCHBARS_XSL_1610
General notes	NOTE	PACML_SEARCHBARS_XSL_1611
Publisher	PUB	PACML_SEARCHBARS_XSL_1612
Genre	GENRE	PACML_SEARCHBARS_XSL_1613
Series	SE	PACML_SEARCHBARS_XSL_1614
ISBN [International Standard Book Number]	ISBN	PACML_SEARCHBARS_XSL_1615

<i>Search by Option Default Label</i>	<i>Code</i>	<i>Language String ID</i>
ISSN [International Standard serial Number]	ISSN	PACML_SEARCHBARS_XSL_1616
LCCN [Library of Congress Control Number]	LCCN	PACML_SEARCHBARS_XSL_1617
Publisher No. [Publisher's number]	PN	PACML_SEARCHBARS_XSL_1618
LC [Library of Congress call number option for browse searches]	LC	PACML_SEARCHBARS_XSL_1642
Dewey [Dewey call number option for browse searches]	DD	PACML_SEARCHBARS_XSL_1643
Call Number [Local call number option for browse searches]	LOCAL	PACML_SEARCHBARS_XSL_1624
SuDoc [Superintendent of Documents classification number (identifier)]	SUDOC	PACML_SEARCHBARS_XSL_1639
CODEN [Identifier for scientific and technical periodical titles]	CODEN	PACML_SEARCHBARS_XSL_1640
STRN [Standard technical report number (identifier)]	STRN	PACML_SEARCHBARS_XSL_1641
Control Number [Not exposed in default user interface, but available as a search access point by editing the configuration file SearchByOptions.xml.]	CN	PACML_SEARCHBARS_CNUMBER
Item Barcode [Not exposed in default user interface, but available as a search access point by editing the configuration file SearchByOptions.xml.]	BC	PACML_SEARCHBARS_BARCODE
Course Name	CRSNA	PACML_SEARCHBARS_XSL_1647
Course Number/Section	CRSNO	PACML_SEARCHBARS_XSL_1648
Course Abbreviation	CRSABBR	PACML_SEARCHBARS_XSL_1649
School/Division Name	CRSSCHL	PACML_SEARCHBARS_XSL_1650
Department Name	CRSDPT	PACML_SEARCHBARS_XSL_1651
Instructor Name	CRSINST	PACML_SEARCHBARS_XSL_1652

1-2-3

Set PAC search setting defaults

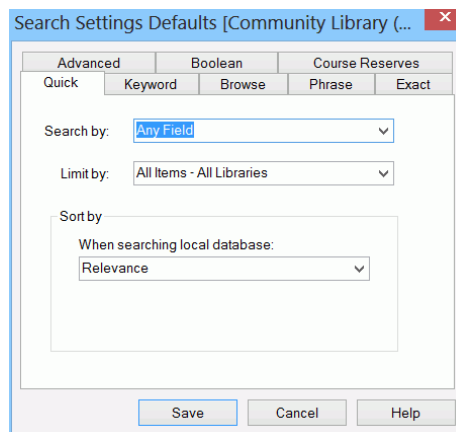
Follow these steps to set the library's defaults for PAC searches.

Note:

Certain search settings affect both Polaris PowerPAC and Polaris Mobile PAC. These are noted in the following procedure.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
2. Double-click **Search settings defaults**.

The Search Settings Defaults dialog box opens. Settings on each tabbed page control the defaults for that search type.



3. Set the quick search defaults:

Note:

Quick search settings also apply to Mobile PAC.

- a) Click the **Quick** tab.
- b) Select the library default search field in the **Search by** list.

The Polaris default selection is **Any Field**. Patrons cannot select a search field for quick searches, so your setting applies to every quick search.

Note:

You can customize the labels displayed in Polaris PowerPAC for **Search by** options. See [“Customizing Search by Labels”](#) on page 59. However, the Search Setting defaults dialog box always displays the default labels.

- c) Select the library default search filter in the **Limit by** list.

The available selections depend on the library's settings in the PAC Limit By Display policy table. You can change the label of existing filters and set up custom filters. See [“Setting Up Search Filters \(Limit By\)”](#) on page 70. The default selection is **All formats** (that is, no filter).

d) Select the library's default sort order for search results in the **Sort by** list.

The Polaris default selection is **Relevance**. This selection sorts results based on weighted keyword frequency and proximity, so that those most likely to meet the user's needs appear first in the list.

If you select **Most Popular**, the sort is affected by the settings in the **Most popular sort settings** system level PAC profile, which is set to a Polaris default of 50% relevance and 50% popularity. You can adjust this setting to factor relevance either more or less than 50% when results are sorted by popularity. For example, if you want the sort to be based only on popularity (the titles most frequently checked out or requested over the past 120 days first in the list) you can adjust the **Most popular sort settings** to 100% popularity. See [“Specify level of relevance applied to popularity sort”](#) on page 68.

Note:

Quick searches are available for the library catalog only, not remote databases.

Options that include two categories sort results by the first category, then by the second category. For example, with **Author, then Title**, the titles are sorted alphabetically by author then within each author's works, alphabetically by title.

Note (Polaris PowerPAC):

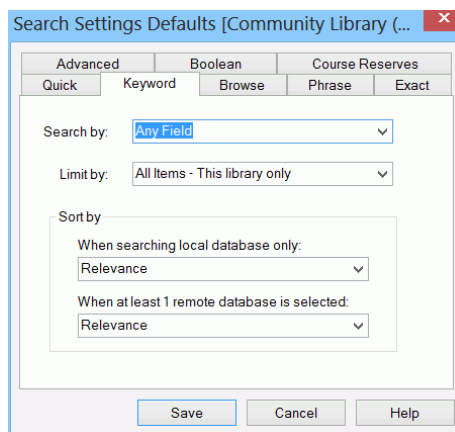
These settings apply only to the default quick search. If you choose to offer a quick search feature with search option buttons, these settings are not used. For more information about the two types of quick searches, see [“Customizing Portal Page Features”](#) on page 25.

4. Set the keyword, phrase, or exact search defaults:

Note:

The same settings are available for keyword, phrase, and exact searches. Click the appropriate tab to make the settings.

a) Click the **Keyword, Phrase, or Exact** tab.



b) Select the library default search field in the **Search by** list.

The Polaris default selection is **Any Field**.

Note:

You can customize the labels displayed in Polaris PowerPAC for **Search by** options. See [“Customizing Search by Labels”](#) on page 59. However, the Search Setting defaults dialog box always displays the default labels.

Tip:

You can set an automatic subsort by title for many types of searches. See [“Related Information”](#) at the end of this procedure.

- c)** Select the library default search filter in the **Limit by** list.

The available selections depend on the organization’s settings in the PAC Limit By Display policy table. See [“Setting Up Search Filters \(Limit By\)”](#) on page 70.

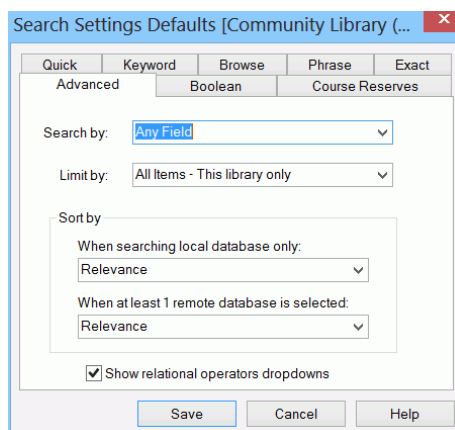
- d)** Select the library default sort order for local catalog search results in the **When searching local database only** list.

- e)** Select the library default sort order for search results in the **When at least 1 remote database is selected** list.

Most Popular and call number sorting options are not available for searches that include at least one remote database.

- 5.** Set the advanced search defaults:

- a)** Click the **Advanced** tab.



- b)** Select the default search field in the **Search by** list.

The default selection is **Any Field**.

Note:

This setting also applies to Mobile PAC.

Note:

You can customize the labels displayed in Polaris PowerPAC for **Search by** options. See [“Customizing Search by Labels”](#) on page 59. However, the Search Setting defaults dialog box always displays the default labels.

Tip:

You can set an automatic subsort by title for many types of searches. See [“Related Information”](#) at the end of this procedure.

- c)** Select the default search filter in the **Limit by** list.

The available selections depend on the organization’s settings in the PAC Limit By Display policy table. See [“Setting Up Search Filters \(Limit By\)”](#) on page 70.

Note:

This setting also applies to Mobile PAC.

- d) Select the default sort order for local catalog search results in the **When searching local database only** list.

Note:

This setting also applies to Mobile PAC.

- e) Select the default sort order for search results in the **When at least 1 remote database is selected** list.

Most Popular and call number sorting options are not available for searches that include at least one remote database.

- f) To offer patrons choices regarding how multiple words in a text entry box should be handled, select (check) **Show relational operators dropdowns**.

When this option is checked, a drop-down list of options next to each text box is displayed. The table shows the applicable access points for each option, and the effect on search results:

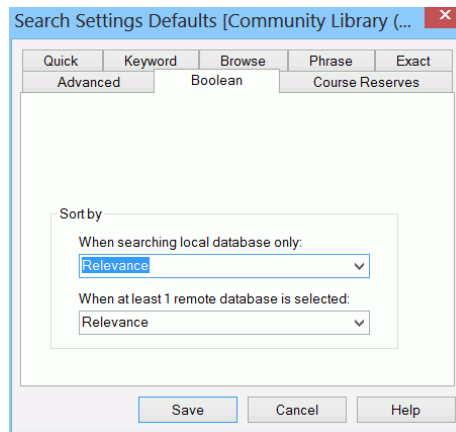
<i>Relational Operator Option</i>	<i>Access Points</i>	<i>Search Effect</i>
Keyword (ALL)	AU, GENRE, KW (Any Field), NOTE, PUB, SE, SU, TI	All of the keywords in the search term must exist.
Keyword (ANY)	AU, GENRE, KW (Any Field), NOTE, PUB, SE, SU, TI	Any one of the keywords in the search term must exist.
Phrase (ADJ)	AU, GENRE, KW (Any Field), NOTE, PUB, SE, SU, TI	All of the keywords in the search term must exist, and must be adjacent to each other in the order specified in the search term.
Exact (==)	AU, CODEN, ISBN, ISSN, LCCN, PN, SE, STRN, SU, SUDOC, TI	The search term must be an exact match.

If you think these choices would be confusing to patrons, leave the **Show relational operators dropdowns** option unchecked (the default setting). In this case, the list of options is suppressed and the search looks for all the words entered in a text box (**Keyword ALL** search).

Note:

You must display the relational operators to make phrase searching available in Advanced searches. The Advanced **Keyword All** search does not support quotation marks to indicate a search phrase.

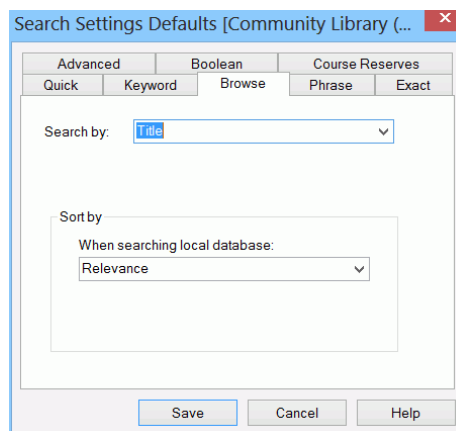
6. Set the Boolean search defaults:
- a) Click the **Boolean** tab.



- b) Select the default sort order for local catalog search results in the **When searching local database only** list.
- c) Select the default sort order for search results in the **When at least 1 remote database is selected** list.

Most Popular and call number sorting options are not available for searches that include at least one remote database.

7. Set the browse search default:
 - a) Click the **Browse** tab.



- b) Select the default search index in the **Search by** list.

The default selection is **Title**.

If you are setting this profile at the system level, the **Call Number** choice is unavailable as a default, since it browses a local (item-level) call number index. See also [“Related Information”](#) on page 66, at the end of this procedure.

Note:

You can customize the labels displayed in Polaris PowerPAC for **Search by** options. See “[Customizing Search by Labels](#)” on page 59. However, the Search Setting defaults dialog box always displays the default labels.

- c) In the **Sort by** list, select the default sort order for the list of titles associated with a heading.

Note:

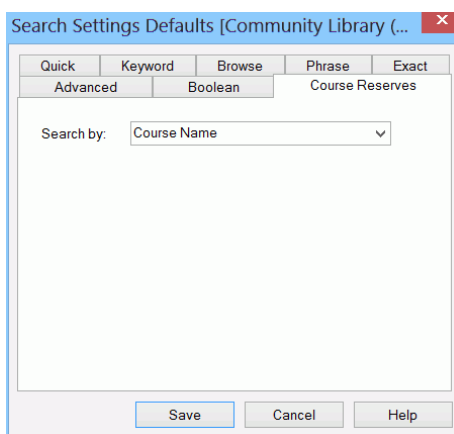
Browse searches are available for the library catalog only, not remote databases.

8. Set the course reserve search default:

Note:

This option is available only if your system includes course reserve functions.

- a) Click the **Course Reserves** tab.



- b) Select the default search field in the **Search by** list.

The default selection is **Course Name**.

9. Click **Save**.

Related Information

- **Customizing labels for search options** - You can customize the labels displayed in Polaris PowerPAC for **Search by** options. See “[Customizing Search by Labels](#)” on page 59. However, the Search Setting defaults dialog box always displays the default labels.
- **Making search types available in Polaris PowerPAC** - See “[Set Polaris PowerPAC search types](#)” on page 83.
- **Limit call number browse searching to the local item-level call number index** - Open PowerPAC profiles, double-click **Local Call Number Indexed Field: Limit Choice**, and select **Yes**. If the profile is set to **Yes** at the system level, and a Polaris PowerPAC user is connected to the system organization, *all* call number options for browse searching are suppressed. If the profile is set to **No** at the system level, and a Polaris PowerPAC user is connected to the system organization, the user can

choose to browse the Dewey or LC bibliographic-level call number indexes. (The item-level call number index is not available for the system organization.) If the profile is set to **Yes** at the branch level, and a Polaris PowerPAC user is connected to the that branch, the user can browse the local item-level call number index only. If the profile is set to **No** at the branch level, and a Polaris PowerPAC user is connected to that branch, the user can choose to browse the Dewey or LC bibliographic-level call number indexes as well as the local item-level index.

- **Automatic subsorting by title (PowerPAC and Mobile PAC)** - Set the PAC profile **Search: Sub-sort-by-title** to **Yes** to have PowerPAC and Mobile PAC search results for most types of searches secondarily sorted by title. This allows patrons to quickly find a known title in a large results set. The profile is available on the system, library, and branch levels. It is set to **No** by default; you may want to leave this setting to preserve former behavior for patrons or if you find the automatic subsort impacts performance. When the profile is set to **Yes**, the records are first sorted by the selected sort option and then sorted alphabetically by title, ignoring nonfiling characters (respecting the value of the 245 second indicator). However, the setting does not cover the following search and sort types:
 - Any browse search
 - Any multi-database search
 - The following sort types: relevance, most popular, title, author then title, title then author, title then publication date, title then format, publication date then title, call number then title
- **Search performance** - You may experience decreased performance for searches with large results sets if your server capacity is limited. To improve performance, you can adjust the maximum number of records to return. The PowerPAC profile **Result set: Maximum number of records to return**, available at the system, library, and branch levels, controls this limit for Polaris PowerPAC.

Notes:

If you lower the maximum number of records to return, relevancy ranking may be less effective.

For browse search results, the maximum number of headings that a user can browse through is 1,000.

- **Did You Mean search suggestions** - See [“Setting Up Did You Mean Term Checking”](#) on page 92.

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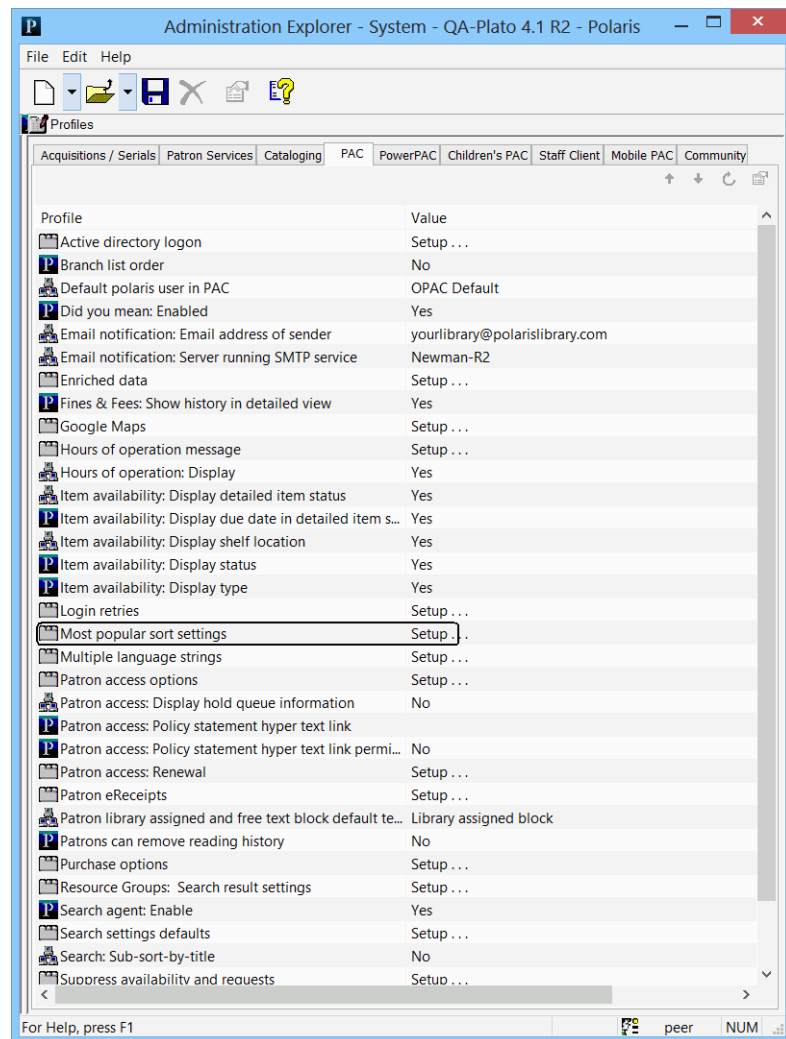
Specify level of relevance applied to popularity sort

The system-level PAC profile, **Most popular sort settings**, automatically incorporates relevance into the **Most popular** sort option if this sort is selected in the PowerPAC or Mobile PAC. The Polaris default setting provides a 50/50 balance between popularity and relevancy when the **Most popular sort** option is selected. If you want the sort to only consider the popularity of the titles, adjust the setting in the Most Popular Sort Settings dialog box to 100% popularity. If you adjust the sort settings and do not like the results, click **Revert** to return to the default setting of 50% popularity and 50% relevance.

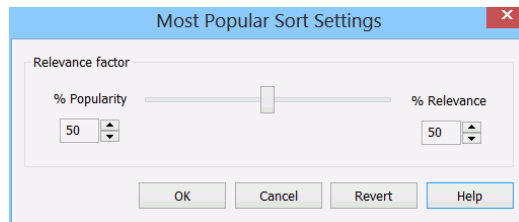
Follow these steps to adjust the relevancy factor applied to most popular sorting of search results in the PowerPAC or Mobile PAC.

1. In the Administration Explorer tree view, open the **Profiles** folder at the System level, and click the **PAC** tab in the details view.

The PAC tab displays the profiles.



2. Double-click **Most popular sort settings**.



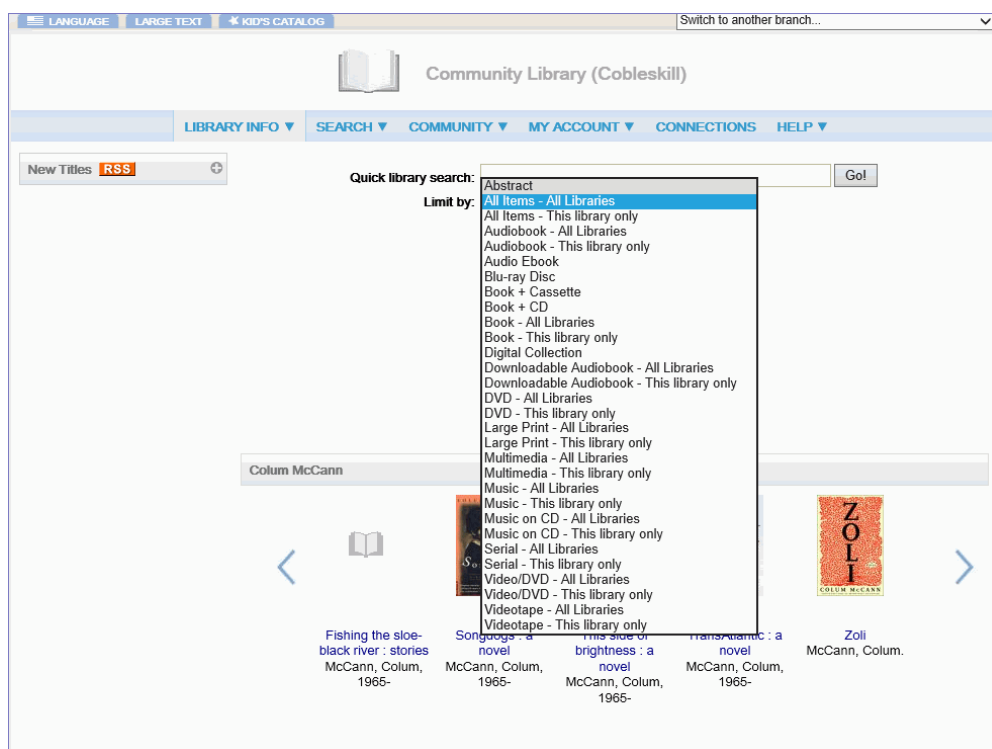
3. To adjust the Polaris default sort settings of 50/50, either click on an up or down arrow or move the slider. The **% Relevance** number increases as you move the slider right, and the **% Popularity** number increases as you move the slider left.

If you find that this adjustment is not what you expected, click **Revert** to restore the 50/50 default.

Any changes made to this dialog box are reflected immediately in PAC search results.

Setting Up Search Filters (Limit By)

You can set up search filters that PAC users can select to limit search results. PowerPAC users can select a filter before launching a quick, keyword, phrase, exact, or advanced search. For example, a patron can filter a keyword search to return only DVDs. The filters are also available to Mobile PAC users who use the Mobile PAC Advanced search.



Use the PAC Limit by Display policy table to specify the search filters available to PAC users in the **Limit by** drop-down list, and the order in which the filters are listed. The PAC Limit by Display policy table is available at the system, library, or branch level. The organization level at which the table is opened determines the entries you see in the list, and you can view and change entries for the selected organization only. This table can be displayed with the Administration Explorer.

Note:

These System Administration permissions are required to modify this table:
Access administration: Allow, Access tables: Allow, Modify PAC limit by display table: Allow

The screenshot shows the Administration Explorer interface. On the left is a tree view of Policy Tables, with 'PAC Limit By Display' selected and circled in blue. The main window displays a table with the following columns: Organization Name, Limit Description, CCL/Filter, Enabled, Display Order, and Protected. The table contains 32 rows of data for various material types and filters.

Organization Name	Limit Description	CCL/Filter	Enabled	Display Order	Protected
Community Library...	Abstract	TOM=abs	Yes	2	Yes
Community Library...	All Items - All Libraries	TOM=*	Yes	3	Yes
Community Library...	All Items - This library only	AB=25	Yes	4	No
Community Library...	Art and photographs - All MVLS-SALS Libraries	TOM=ngr	No	5	Yes
Community Library...	Art and Photographs - This library only	TOM=ngr and ...	No	6	No
Community Library...	Audio-book	TOM=abk	No	7	Yes
Community Library...	Audiobook - All Libraries	TOM=nsr	Yes	8	Yes
Community Library...	Audiobook - This library only	TOM=nsr and A...	Yes	9	No
Community Library...	Audio Ebook	TOM=aeb	Yes	10	Yes
Community Library...	Blu-ray Disc	TOM=brd	Yes	11	Yes
Community Library...	Book + Cassette	TOM=bcs	Yes	12	Yes
Community Library...	Book + CD	TOM=bcd	Yes	13	Yes
Community Library...	Book - All Libraries	TOM=bks	Yes	14	Yes
Community Library...	Book - This library only	TOM=bks and ...	Yes	15	No
Community Library...	Braille	TOM=brl	No	16	Yes
Community Library...	Cartographic	TOM=cmt	No	17	Yes
Community Library...	Digital Collection	TOM=dmc	Yes	18	Yes
Community Library...	Downloadable Audiobook - All Libraries	SU="download...	Yes	19	No
Community Library...	Downloadable Audiobook - This library only	SU="download...	Yes	20	No
Community Library...	DVD - All Libraries	TOM=dvd	Yes	21	Yes
Community Library...	DVD - This library only	tom=dvd and a...	Yes	22	No
Community Library...	Ebook	TOM=ebk	No	23	Yes
Community Library...	Globe	TOM=glb	No	24	Yes
Community Library...	Kit	TOM=kit	No	25	Yes
Community Library...	Large Print - All Libraries	TOM=lpt	Yes	26	Yes
Community Library...	Large Print - This library only	TOM=lpt and A...	Yes	27	No
Community Library...	Manuscript	TOM=mss	No	28	Yes
Community Library...	Manuscript maps	TOM=mcm	No	29	Yes
Community Library...	Manuscript music	TOM=mmu	No	30	Yes
Community Library...	Map - All MVLS-SALS Libraries	TOM=map	No	31	Yes
Community Library...	Map - This library only	TOM=map and...	No	32	No

You can include the following types of filters in the **Limit by** list:

Tip:

If a PAC user enters a search term, selects the local database and one or more remote databases, and selects a Limit by option, the Limit by filters will be applied to the remote databases that can support that filter. If the remote database is unable to use the filter, it will be applied only to the local results.

- **Type of material filters** - Polaris PowerPAC offers a set of standard formats/types of material and custom search filters in the **Limit by** list. In the PAC Limit by Display policy table, you can modify the description and the **Enabled** setting for standard formats/types of materials, but you cannot edit the CQL command for these standard filters.
- **Custom filters** - Use CQL commands to set up custom filters for the **Limit by** list. You can combine standard type of material codes with other CQL commands to create custom search filters.
- **Availability filters** - You can also use the PAC Limit by Display policy table to set up search filters that limit search results to titles with at least one available linked item. The patron selects the filter in the **Limit by** list before launching the search. If a PowerPAC or Mobile PAC connection is at the system level, the search results include all titles with at least one available item. If the connection is at the branch level, the results include all titles that have at least one linked available item assigned to that branch or the other branches defined as **Local** in the branch's Item Availability Display Order table. (At either level, items with a suppressed circulation status are not included, and items where **Display in PAC** is not checked in the linked bibliographic record are not included.)

See the following topics:

- [“Set up type of material/custom search filters for PAC”](#) on page 72
- [“Set up availability search filters for PAC”](#) on page 76
- [“Type of Material Filters”](#) on page 78

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Set up type of material/custom search filters for PAC

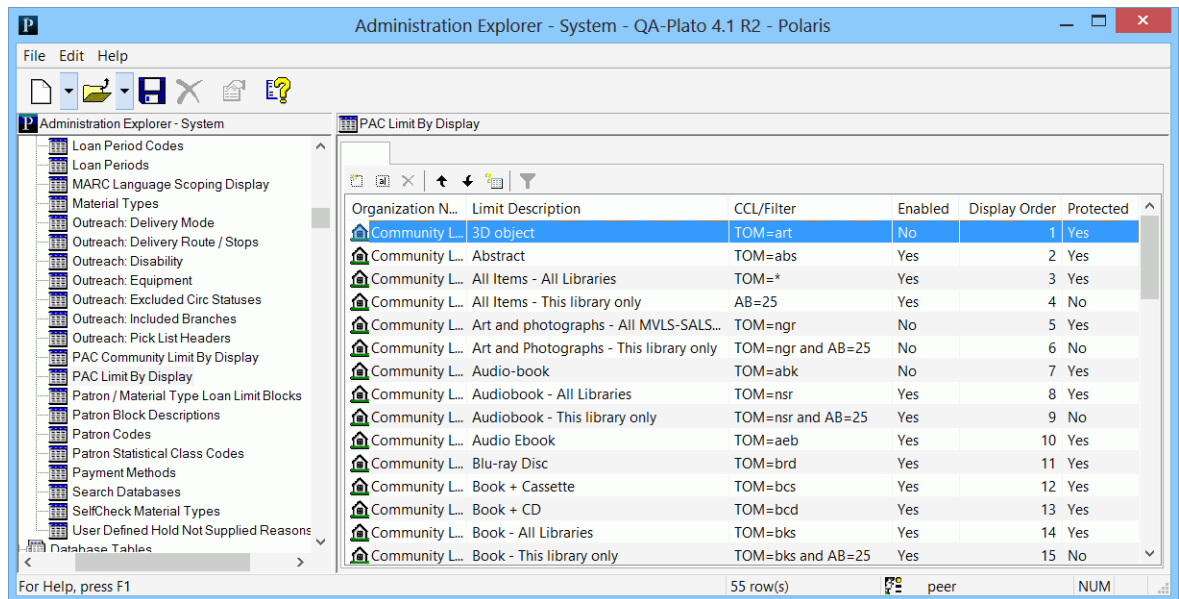
Follow these steps to specify what format/types of material are listed in the **Limit by** list as search filters in Polaris PowerPAC and Mobile PAC, set up your own filters, and specify the default (top) filter for the **Limit by** list.

Note:

For a list of the Type of Material codes, see “[Type of Material Filters](#)” on page 78. For a list of CQL codes that you can use to create custom filters, see “[PAC CQL Commands & Access Points](#)” on page 404.

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

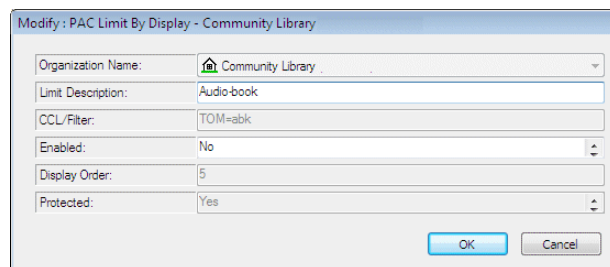
The PAC Limit by Display table appears in the details view.



2. To work with a standard format/type of material, follow these steps:

- a) Select the format and click .

The Modify PAC Limit by Display dialog box appears.



- b) To change the name of the format/type of material, type the new name in the **Description** box.

Note:

This setting affects only the names as listed in the PAC Limit by list. The tooltip associated with each format icon in PAC search results always displays the default name of the format, as does the detailed information for a title.

- c) To display or suppress the format/type of material in the PAC Limit by list, select **Yes** (display) or **No** (suppress) in the **Enabled** box.

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

Note:

The Digital Collection format/type of material identifies materials such as images, sound files, video clips, and text files. It is intended for use with Polaris Fusion™, a separately licensed feature. Contact the Polaris Customer Sales Department for more information about Polaris Fusion.

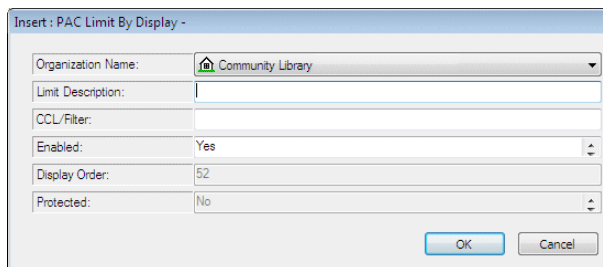
- d) Click **OK**.

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

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

- a) Click  in the PAC Limit By Display table.

The Insert PAC Limit By Display dialog box appears.



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

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

You can type any valid CQL command. Refer to “[PAC CQL Commands & Access Points](#)” on page 404. (If the command is not valid, the PAC search will return no results.) If the patron leaves the search term blank, the search finds all the titles that satisfy the CQL command.

Tip:

You can construct a filter that limits search results to titles with at least one linked item that is available. See “[Set up availability search filters for PAC](#)” on page 76.

Examples:

A filter that allows patrons to search quickly for mysteries on DVD:

Description: **DVD Mysteries**



CQL Filter: **TOM=DVD and GENRE=mystery**

- d) Click **OK**.

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

Tip:



When Polaris ILS is installed, the default selection is **All formats**, which specifies no filter on the search. You may want to change the description of this selection—to **No limits**, for example—if your list includes custom filters.

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

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

5. Select **File, Save**.

Related Information

- **Setting a default search filter by search type** - You can specify a **Limit by** default setting for each search type that includes this feature. See [“Specifying Default Search Settings”](#) on page 59.
- **Deleting a search filter** - Select a custom filter in the PAC Limit by Display policy table, and click . You cannot delete standard formats/types of materials. The **Protected** column indicates whether a filter can be deleted. If the value is **Yes**, you cannot delete the filter.
- **Modifying a search filter** - Select the filter in the PAC Limit by Display policy table, and click . You can modify the description, CQL command, and the **Enabled** setting for a custom filter. You can modify only the description and the **Enabled** setting for standard formats/types of materials. The **Protected** column indicates whether the CQL command can be edited for a filter. If the value is **Yes**, you cannot edit it.
- **Ebooks and electronic resources** - The definition of electronic resources includes any ebooks that contain 07/00=c (see [“Type of Material Codes \(TOMs\)”](#) in the *Polaris Cataloging Guide 4.1R2*). If you want ebooks to be excluded from searches for electronic resources, change the **Enabled** setting for the standard electronic resource (TOM=elr) to **No**. Then create a custom Limit by filter for electronic resources that excludes ebooks: TOM=elr not TOM=ebk and enable your custom filter for display.
- **Narrowing search results** - The **Narrow Web** part is displayed in the dashboard by default with the patron’s search results. When the patron selects a filter with this feature, the filter is applied to the current results set. See [“Setting PowerPAC Narrow/Related Search Options”](#) on page 159.
- **Scoping searches by collection** - To offer an option to scope searches by collection, set the PowerPAC profile **Search options: Limit by collection enabled** to **Yes**. This setting places the **Collections** option on the Search Options light box in Polaris PowerPAC.

The screenshot displays the Polaris PowerPAC search interface. At the top, there are navigation tabs for 'LANGUAGE', 'LARGE TEXT', and 'KID'S CATALOG', along with a 'Switch to another branch...' dropdown. The main header shows 'QA-Plato 4.1 R2'. Below this, there are tabs for 'LIBRARY INFO', 'SEARCH', 'MY ACCOUNT', and 'HELP'. The search area includes a 'Keyword search for:' field, a 'Go!' button, and dropdown menus for 'Search by:' (Any Field) and 'Limit by:' (All Items - All Libraries). A 'More Search Options' link is circled in red, with an arrow pointing to a 'Need help searching? Click here for tips and instructions' link. Below the search area, there are several filter sections: 'Libraries' (listing Amsterdam Free Library, Argyle Free Library, Ballston Spa Public Library, and Bancroft Public Library (Salem)), 'Publication Dates' (listing 2014, 2013, 2012, and 2011), 'Detailed Material Types' (listing Art, Audiobook, Book, and Book and CD), 'Target Audiences' (listing Adolescent, Adult, General, and Juvenile), 'Collections' (listing space in name test, !special character test 3, "special character test 25, and ##special character test 5), and 'Languages' (listing Chinese, English, French, and Italian). Each filter section has an 'Exclude' checkbox. At the bottom of the filter area, there are buttons for 'Set Search Options', 'Reset', and 'Close'. On the left side, there is a 'New Titles' section and a 'LANGUAGE' dropdown menu with options: English, 한국어, Русский, العربية, Việt Ngữ, 'Olelo Hawai'i, 中文, Español, العربية, and Kreyòl Ayisyen. On the right side, there is a 'OLARIS' logo and text: 'OLARIS LIBRARY SYSTEMS R2 Build 1151 Copyright © 2013 Library Systems'.

- Scoping searches by language** - To allow search scoping by the languages specified in the MARC Language Scoping Display table, set the PowerPAC profile **Scoping: Use MARC language scoping display table** to **Yes**. For more information about this table, see [“Setting Language Display”](#) in the *Polaris Administration Guide 4.1R2*. If you select **No**, all languages defined by the MARC 21 format are displayed for search scoping on the Search Options page of Polaris PowerPAC.

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Set up availability search filters for PAC

Note:

When a patron selects remote databases to search along with the local Polaris database, and an availability search filter is selected, the availability search filter is applied to the Polaris database but not to the selected remote databases.

Follow these steps to place an availability search filter in the Polaris PAC Limit by list.

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

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

The screenshot shows the Administration Explorer window with the 'Policy Tables' folder expanded. The 'PAC Limit By Display' table is selected and displayed in the main pane. The table has the following columns: Organization Name, Limit Description, CCL/Filter, Enabled, Display Order, and Protected.

Organization Name	Limit Description	CCL/Filter	Enabled	Display Order	Protected
Community Library...	Abstract	TOM=abs	Yes	2	Yes
Community Library...	All Items - All Libraries	TOM=*	Yes	3	Yes
Community Library...	All Items - This library only	AB=25	Yes	4	No
Community Library...	Art and photographs - All MVLS-SALS Libraries	TOM=ngr	No	5	Yes
Community Library...	Art and Photographs - This library only	TOM=ngr and ...	No	6	No
Community Library...	Audiobook	TOM=abk	No	7	Yes
Community Library...	Audiobook - All Libraries	TOM=nsr	Yes	8	Yes
Community Library...	Audiobook - This library only	TOM=nsr and A...	Yes	9	No
Community Library...	Audio Ebook	TOM=aeb	Yes	10	Yes
Community Library...	Blu-ray Disc	TOM=brd	Yes	11	Yes
Community Library...	Book + Cassette	TOM=bcs	Yes	12	Yes
Community Library...	Book + CD	TOM=bcd	Yes	13	Yes
Community Library...	Book - All Libraries	TOM=bks	Yes	14	Yes
Community Library...	Book - This library only	TOM=bks and ...	Yes	15	No
Community Library...	Braille	TOM=brl	No	16	Yes
Community Library...	Cartographic	TOM=cmt	No	17	Yes
Community Library...	Digital Collection	TOM=dmc	Yes	18	Yes
Community Library...	Downloadable Audiobook - All Libraries	SU="download...	Yes	19	No
Community Library...	Downloadable Audiobook - This library only	SU="download...	Yes	20	No
Community Library...	DVD - All Libraries	TOM=dvd	Yes	21	Yes
Community Library...	DVD - This library only	tom=dvd and a...	Yes	22	No
Community Library...	Ebook	TOM=ebk	No	23	Yes
Community Library...	Globe	TOM=glob	No	24	Yes
Community Library...	Kit	TOM=kit	No	25	Yes
Community Library...	Large Print - All Libraries	TOM=lpt	Yes	26	Yes
Community Library...	Large Print - This library only	TOM=lpt and A...	Yes	27	No
Community Library...	Manuscript	TOM=mss	No	28	Yes
Community Library...	Manuscript maps	TOM=mcm	No	29	Yes
Community Library...	Manuscript music	TOM=mmu	No	30	Yes
Community Library...	Map - All MVLS-SALS Libraries	TOM=map	No	31	Yes
Community Library...	Map - This library only	TOM=map and...	No	32	No

2. Click  in the PAC Limit By Display table.

The Insert PAC Limit By Display dialog box appears.

The dialog box 'Insert: PAC Limit By Display -' contains the following fields:

- Organization Name: Community Library (dropdown)
- Limit Description: (text input)
- CCL/Filter: (text input)
- Enabled: Yes (checkbox)
- Display Order: 52 (spin box)
- Protected: No (checkbox)

Buttons: OK, Cancel



3. Type a name for your availability filter in the **Description** box. This name appears in the **Limit by** list in PAC.
4. In the **CCL Filter** box, type the following command:
`AVAILABILITY > 0`

Note:

The **AVAILABILITY** access point works only for values greater than 0. (**AVAILABILITY = 0** is not valid.)

5. Click **OK**.

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

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

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

7. Select **File, Save**.

Tip:

When Polaris ILS is installed, the default selection is **All formats**, which specifies no filter on the search. You may want to change the description of this selection—to **No limits**, for example—if your list includes custom filters.

Related Information

- **More about search filters** - See [“Setting Up Search Filters \(Limit By\)”](#) on page 70.
- **Defining local branches for availability** - See [“Set up the local/system item availability display”](#) on page 177.
- **Suppressing items by circulation status** - See [“Suppress items by circulation status”](#) on page 183.

Type of Material Filters

The standard formats/material types are derived from the bibliographic records. The Polaris database includes a Type of Material search access point, which finds the formats and types of materials defined in the Z39.89 standard for MARC bibliographic records, as well as several Polaris-specific types. Formats are identified in the LDR/06, LDR/07, 006/00 or 007/00 fields of the MARC record. Types of material are identified in the LDR/06, LDR/07, 006/00, 007/00, 008/21, 008/23, or 008/29 fields. For details, see [“Type of Material Codes \(TOMs\)”](#) in the *Polaris Cataloging Guide 4.1R2*. You can offer any, all, or none of these as options in the **Limit by** list. In addition to selecting a format/material type filter from the **Limit by** list, patrons can do a Boolean (CQL) search for any format/type of material using the access point **TOM =**. For more information about CQL, see [“PAC CQL Commands & Access Points”](#) on page 404.

In PAC search results, an icon indicates the format/type for a title. A tooltip identifies the icon. If several formats/types are associated with a title, a programmed order of precedence determines which icon is displayed. Users can see all the formats/types in the record in the detailed information view of the title.

You can also use CQL commands to set up custom filters for the **Limit by** list. You can offer only standard formats/types of material, only your custom filters, or any combination of the two.


















Note:


















Search filters do not apply to title searches launched from the dashboard.






The table lists the standard types of material (TOM), the TOM's corresponding icon, and the display precedence when more than one TOM is present in the bibliographic record. These are the default filters available for the **Limit by** list.

Note:

By default, the TOM icon files are located at **C:\Program Files\Polaris\{version}\PowerPAC\themes\shared\formats** on your PowerPAC server. See the table below for icon filenames. If you edit an icon file, be sure to back up your changes so you can replicate them after an upgrade.

<i>Format/Type of Material</i>	<i>Code</i>	<i>Enabled by Default</i>	<i>Icon</i>	<i>Icon Filename</i>	<i>Precedence in Results Display</i>
Abstract	abs	Y		formatid39.gif	5
Audio books	abk	Y		formatid37.gif	16
AudioEbook	aeb	Y		formatid41.gif	2
Blu-Ray Disc	brd	Y		formatid40.gif	1
Book + Cassette	bcs	Y		formatid43.gif	4
Book + CD	bcd	Y		formatid42.gif	3
Books	bks	Y		formatid01.gif	39
Braille	brl	N		formatid28.gif	36
Cartographic material	cmt	N		formatid03.gif	27
Digital collection	dmc	Y		formatid38.gif	6
DVD	dvd	Y		formatid33.gif	7
Ebooks	ebk	Y		formatid36.gif	28
Electronic resources	elr	Y		formatid06.gif	34
Globe	glb	Y		formatid14.gif	24
Kit	kit	N		formatid23.gif	29
Large print	lpt	Y		formatid27.gif	35
Manuscript cartographic material	mcm	N		formatid12.gif	26

<i>Format/Type of Material</i>	<i>Code</i>	<i>Enabled by Default</i>	<i>Icon</i>	<i>Icon Filename</i>	<i>Precedence in Results Display</i>
Manuscript material	mss	N		formatid15.gif	37
Manuscript music	mmu	N		formatid10.gif	21
Map	map	Y		formatid13.gif	23
Microform	mic	N		formatid26.gif	38
Mixed materials/archival	mix	N		formatid07.gif	30
Motion picture	mot	Y		formatid17.gif	10
Music CD	mcd	Y		formatid35.gif	15
Musical sound recording	msr	Y		formatid21.gif	17
Newspaper	new	Y		formatid25.gif	31
Nonmusical sound recording	nsr	Y		formatid22.gif	18
Periodical	per	Y		formatid24.gif	32
Printed cartographic material	pcm	N		formatid11.gif	25
Printed music	pmu	N		formatid09.gif	20
Printed or manuscript music	mus	N		formatid02.gif	22
Projected medium	pgr	Y		formatid16.gif	11
Serial	ser	Y		formatid08.gif	33
Sound recording	rec	Y		formatid05.gif	19

<i>Format/Type of Material</i>	<i>Code</i>	<i>Enabled by Default</i>	<i>Icon</i>	<i>Icon Filename</i>	<i>Precedence in Results Display</i>
Three-dimensional object (artifact)	art	Y		formatid20.gif	13
Two-dimensional nonprojected graphic	ngr	Y		formatid19.gif	12
Videorecording	vid	Y		formatid18.gif	9
Videotape	vcr	Y		formatid34.gif	8
Visual materials	vis	N		formatid04.gif	14

Setting Available Search Types

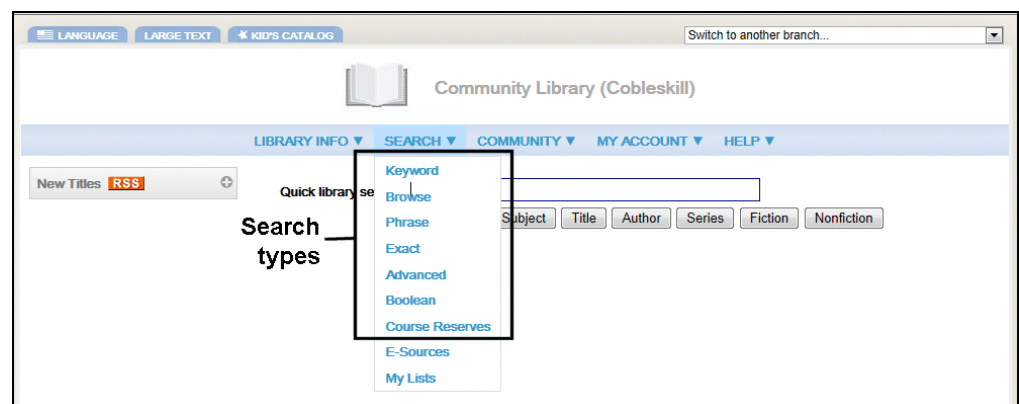
You can make the following kinds of searches available in Polaris PowerPAC, in addition to the Quick Search feature:

- **Keyword** - Search for a word or multiple words (in any order) in bibliographic record fields.
- **Browse** - Browse the title, author, subject, series, and call number indexes in the library catalog database.
- **Phrase** - Search for multiple words (in order) in bibliographic record fields.
- **Exact** - Search for multiple words (in order) in bibliographic record fields, including stop words.
- **Advanced** - Do a complex keyword search by typing keywords and selecting And, Or, and Not operators.
- **Boolean** - Search by typing a CQL (Common Query Language) command.
- **Course reserves** - Search for course records and associated reserved items (available only if your Polaris contract includes course reserves)

Note:

Options for community information keyword and browse searches are also available if your Polaris installation includes Polaris Community Profiles, a separately licensed feature. For more information, see [“Setting Community Search Options for PAC”](#) in the *Polaris Community Profiles Guide 4.1R2*.

You control what searches are available with settings that display or suppress options on the Search menu.



See the following topic:

[“Set Polaris PowerPAC search types”](#) on page 83

1-2-3

Set Polaris PowerPAC search types

Follow these steps to set the search types available in Polaris PowerPAC.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Set the following profiles to display or suppress the appropriate search types; by default, all are set to **Yes** (available):
 - **Navigation: Advanced**
 - **Navigation: Boolean**
 - **Navigation: Browse**
 - **Navigation: Course reserves** (available by contract)
 - **Navigation: Exact**
 - **Navigation: Keyword**
 - **Navigation: Phrase**
3. Select **File, Save**.

Related Information

- **Quick search setup (Polaris PowerPAC)** - You can offer a quick search feature on the portal page that includes search option buttons. See [“Customizing Portal Page Features”](#) on page 25.
- **Search filters (Limit by)** - PAC offers a set of standard formats/types of material and custom search filters in the **Limit by** list. Users can select a filter before launching a quick, keyword, phrase, exact, or advanced search. See [“Setting Up Search Filters \(Limit By\)”](#) on page 70.
- **Default search settings** - Users can select various settings for each type of search. For example, for keyword searches, patrons can set a search field, search filter, search database, and sort order for the results. You can set the default selections for these options. See [“Specifying Default Search Settings”](#) on page 59.
- **Remote databases (Z39.50 search targets) for PAC searches** - See [“Managing Federated Search Targets”](#) on page 95.
- **Subscription databases for PAC searches** - See [“Managing E-Sources”](#) on page 114.
- **Course reserve functions** - See [“Setting Up Course Reserves”](#) in the *Polaris Patron Services Administration Guide 4.1R2* and [“Managing Course Reserves”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Search results display** - You can determine what data to display in PAC search results. See [“Configuring the PowerPAC Title Display”](#) on page 133.
- **Search Agent** - Using the search agent, patrons can save searches and have them run automatically. The PAC parameter **Search Agent Parameters** controls search agent functions for both Polaris PowerPAC and Mobile PAC. When the search agent is enabled, the **Save Search** link is available in the Polaris PowerPAC and Mobile PAC. See [“PAC Search Agent \(Saved Searches\)”](#) on page 87.

Searching Record Sets (Polaris PowerPAC)

You can create a bibliographic record set in the Polaris staff client and publish the URL to the record set on your Polaris PowerPAC portal page, to a page dashboard, or to your Web site pages. One or multiple record sets can be referenced by a single URL, and you can specify a sort order for the results. For information on creating record sets, see [“Using Cataloging Record Sets”](#) in the *Polaris Cataloging Guide 4.1R2*. For information about making record sets available in PowerPAC, see [“Defining Web Parts for Dashboards”](#) on page 36.

When the patron clicks the URL link, a catalog search is launched for the titles in the record set. The Polaris PowerPAC results set consists of the titles in the record set, formatted according to your organization’s settings for PowerPAC search results and including all the title information that your PAC normally displays. You can use this feature to integrate bibliographies such as summer reading lists with your catalog and make them readily accessible to your patrons.

This feature uses two search access points that are also available for Boolean searches in Polaris PowerPAC: **brs** - Record set control number; **brsn** - Record set name

See the following topics:

- [“Record Set Control Number Searches”](#) on page 85
- [“Record Set Name Searches”](#) on page 85
- [“Sort Order”](#) on page 86
- [“Record Set Results”](#) on page 86

Record Set Control Number Searches

To set up a record set link with the record set control number, structure the URL like this:

```
http://{PowerPACURL}/polaris/view.aspx?brs=bibrecordsetid
```

Where `bibrecordsetid` is the Polaris control number for the bibliographic record set.

Example (single record set by number):

```
http://mylibrary.org/polaris/view.aspx?brs=1234
```

Separate multiple record set control numbers with commas.

Example (multiple record sets by number):

```
http://mylibrary.org/polaris/view.aspx?brs=1234,12345,123456
```

Record Set Name Searches

To set up a record set link with the record set name, structure the URL like this:

```
http://{PowerPACURL}/polaris/view.aspx?brsn='bibrecordsetname'
```

Where `bibrecordsetname` is the name of the record set. Enclose the name in single quotation marks.

Example (single record set by name):

```
http://mylibrary.org/polaris/view.aspx?brsn='MyRecordSet'
```

This format also works with a record set name that contains spaces.

Example (record set name with spaces):

```
http://mylibrary.org/polaris/view.aspx?brsn='Science Fiction Book Club'
```

Separate multiple record set names with commas, enclosing each name in single quotation marks.

Example (multiple record sets by name):

```
http://mylibrary.org/polaris/  
view.aspx?brs='TotSummer','TeenSummer','AdultSummer'
```

Sort Order

By default, the PAC search results (the titles in the record set) are sorted by author, then title. You can specify a different sort option using this format:

`http://{PowerPACURL}/view.aspx?brs={bibrecordsetid}&sort={sortoption}`

Example (results sorted by call number):

`http://mylibrary.org/polaris/view.aspx?brs=1234&sort=CALL`

The following table lists the mnemonics for the valid sort options:

<i>Sort Order</i>	<i>Mnemonic</i>	<i>Sort Order</i>	<i>Mnemonic</i>
Relevance	<code>&sort=RELEVANCE</code>	Title, then Author	<code>&sort=TI_AU</code>
Most Popular	<code>&sort=MP</code>	Title, then Publication Date	<code>&sort=TI_PD</code>
Author	<code>&sort=AU</code>	Title, then Format	<code>&sort=TI_TOM</code>
Title	<code>&sort=TI</code>	Publication Date, then Author	<code>&sort=PD_AU</code>
Call Number	<code>&sort=CALL</code>	Publication Date, then Title	<code>&sort=PD_TI</code>
Publication Date	<code>&sort=PD</code>	Call Number, then Author	<code>&sort=CALL_AU</code>
Author, then Title (default)	<code>&sort=AU_TI</code>	Call Number, then Title	<code>&sort=CALL_TI</code>
Author, then Publication Date	<code>&sort=AU_PD</code>	Call Number, then Publication Date	<code>&sort=CALL_PD</code>

Record Set Results

Record sets may contain any number of records, but the number of records displayed in the PAC is limited by the setting in Polaris Administration for the PowerPAC profile **Result set: Maximum number of records to return**. Searches for multiple record sets return results in one results list.

Note:

Bibliographic records that are suppressed from display in PAC are not included in the results set.

If records are added, edited, or removed from the record set, the changes are reflected in the result set. If you have enabled the Search Agent for Polaris PowerPAC, patrons can save the search, have it run automatically, and receive notification of any changes.

If the record set itself is deleted, and you do not remove the URL from the Web page or dashboard, the standard Web error message for “page not found” is displayed when a patron clicks the URL.

PAC Search Agent (Saved Searches)

Using the search agent, registered patrons can save any search except browse searches, and have the saved searches run automatically either weekly or monthly. (Patrons can also run a saved search manually, at any time.) Saved search criteria have full Unicode support; that is, saved searches can contain non-ASCII characters. Each search run looks for results in the local database that are new since the last run. The results are automatically sent to an e-mail address the patron specifies. By accessing their patron accounts, patrons can view, edit, and delete saved searches. The result count displayed in the PAC patron account shows the total number of new records found in all weekly and/or monthly runs (excluding the initial run).

Note:

Saved searches return results from the local database only, even if the original search included remote databases.

You specify a maximum number of titles to return in the e-mail message. If the maximum is exceeded, the e-mail message includes a link that allows the patron to retrieve the entire set of new titles. Resource groups are honored in saved searches, and a log-in link is displayed for econtent in the search results e-mail message. If the patron's registered branch is a member of a resource group for the econtent, the patron can access the econtent.

The system also stores a "DaysToBacktrack" value, set to 180 days. This allows records that did not match the search criteria in a previous run, but that match now (for example, because a record's **Display in PAC** setting has been changed) to be reported once they become available.

The search agent is available in Polaris PowerPAC and Mobile PAC.

The screenshot shows the Polaris PowerPAC search results page for the Community Library (Cobleskill). The search term is "hillerman". The results are displayed in a list format. The first result is "Hunting badger" by Hillerman, Tony. The second result is "Hunting badger [sound recording]" by Hillerman, Tony. The "Save Search" button is circled in red. The page includes navigation links for "LIBRARY INFO", "SEARCH", "COMMUNITY", "MY ACCOUNT", and "HELP". The search results are sorted by "Relevance" and show 10 items per page. The page number is 1 of 19. The search results are displayed in a list format with buttons for "Availability", "Full Display", and "Place Request".

For each organization that makes the search agent available, you can specify how many searches a patron can have currently saved, the maximum total number of new titles that can be returned when a search is run, and the number of times a search can be run. You specify whether to offer weekly search runs, monthly search runs, or both, and designate a “from” address to appear in the e-mail that delivers the search results to the patron.

The SQL job **SDIDaily** runs nightly to process the appropriate saved searches. That is, on any given night, both the weekly and monthly searches scheduled to run on that date are processed. Any errors in the job are reported in an error log, which is placed by default in **C:\ProgramData\Polaris\[version]\Logs\SDIAgent** (server installation). If there is a datalink (instance), the default location is **C:\ProgramData\Polaris\[version]\[DataLinkName]\Logs\SDIAgent**.

You set up the search agent with the PAC parameter **Search agent parameters**, and make it available with the PAC profile **Search Agent: Enable**.

See the following topic:

- “Set up and enable the search agent” on page 88

1-2-3

Set up and enable the search agent

Follow these steps to set up the search agent, which allows patrons to save searches and have them run automatically at designated intervals.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **PAC** tab in the details view.
2. Double-click **Search agent parameters**.

The Search Agent Parameters dialog box opens.

Number of Saved Searches:	10
Maximum Number of Search Results Returned:	500
Number of Times to Run a Saved Search:	3
<input checked="" type="checkbox"/> Allow Weekly Searches	<input checked="" type="checkbox"/> Allow Monthly Searches
Notification "from" Address	user@PolarisLibrary.com

3. In the **Number of Saved Searches** box, type the maximum number of searches a patron can have saved at a time.
4. In the **Maximum Number of Search Results Returned** box, type the maximum number of titles that any run of a saved search can return *after filtering for newness*.

The default value is 500. Since 500 is a potentially large number to include in an e-mail message, you may want to set this to a lower number. (The minimum value is 1, and the maximum value is 1000.)

5. In the **Number of Times to Run a Saved Search** box, type the maximum number of times a saved search can be run.

Note:

Patrons can set the number of times to run a saved search, up to the maximum you specify with this setting.

6. Specify what search frequencies to offer to patrons by selecting either or both of the following options:
 - Select the **Allow Weekly Searches** check box to offer patrons the option of running a saved search weekly.
 - Select the **Allow Monthly Searches** check box to offer patrons the option of running a saved search monthly.

The frequency options you specify are displayed in the form that patrons complete when they save searches. The form always offers the additional option **Suspend**, which the patron might use to stop the search for a period of time.

7. To set up a “from” address for the notification e-mail, type the address in the **Notification “from” Address** box.

The address can be a real address or a fictitious account. The address must contain the @ symbol. For example, **yoursearch@yourlibrary.org**

8. Click **OK** on the dialog box.
9. In the Administration Explorer, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
10. Double-click **Search Agent: Enable**, and select **Yes**.

Note:

To allow logged-in patrons to view a list of their saved searches in the dashboard area of the Polaris PowerPAC window, set the PowerPAC profile **Single Login: Enable** to **Yes**.

11. Select **File, Save**.

Related Information

- **Book jacket images in search agent results** - When a saved search is run, book jackets are displayed in the results based on the **Enriched Data** setting for the patron’s registered branch. See [“Enabling Enriched Data”](#) on page 222.
- **Patron e-mail format** - All saved searches sent to the same patron e-mail address must be in the same e-mail format. If the patron specifies a format different from existing saved searches when saving a new search, a message provides the options to specify a different format for the new search or to change all the others.
- **Mobile PAC interface** - See [“Saved Searches \(Search Agent\) in Mobile PAC”](#) on page 370.

Auto-Search Suggestions - PowerPAC

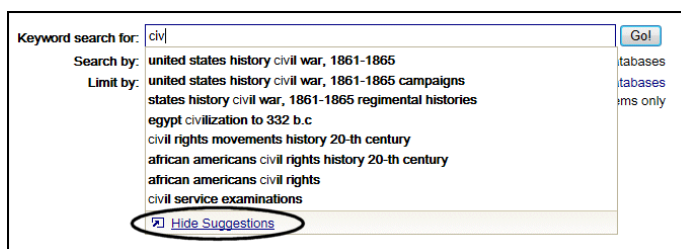
The system-level Cataloging parameter **Auto-suggest feature enabled** controls whether the auto-suggest feature is available in both Polaris PowerPAC and the staff client Find Tool. (For details on the applicable Find Tool searches, see “[Automatic Suggestions in Keyword or Phrase Searching](#)” in the *Polaris Basics Guide 4.1R2*.) If you set this parameter to **No**, automatic search suggestions are suppressed in both PAC and the Find Tool.

By default, quick, keyword, and phrase searches in Polaris PowerPAC offer suggested search terms as you type. A user can ignore the suggestions and continue to type the search term, or click a suggestion to launch the search for the suggested term.

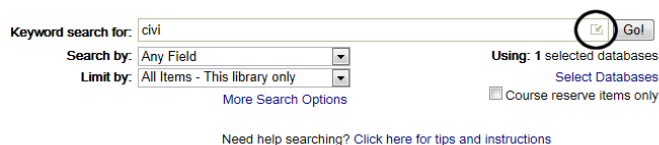
Note:

The auto-suggest feature is not available for numeric search access points, such as ISBN and ISSN, in keyword searches.

To hide suggestions for the PAC session, the user can click **Hide Suggestions** at the bottom of the suggestion list.



To show the suggestions after hiding them, you click the arrow in the search text box.



See the following topic:

- “[Secure Socket Layer \(SSL\) and Auto-Suggest](#)” on page 91

Secure Socket Layer (SSL) and Auto-Suggest

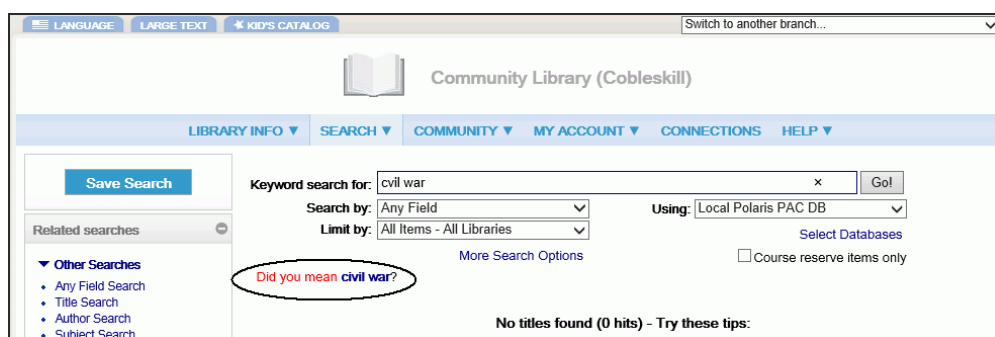
The ERMS Daemon is a service that provides storage, processing, and access to electronic resources. When **ERMS Server** is selected during Polaris server software installation, an ERMS Port Configuration dialog box appears. Use this dialog box to change the default listening ports if necessary. The **HTTPS Port** option is disabled by default. If you will use HTTPS (Secure Socket Layer) for the entire Polaris PowerPAC site, select the **HTTPS Port** check box and enter the HTTPS port (normally 443). This allows auto-suggest features to function properly when site-wide Secure Socket Layer is in use.

Note:

If you will use Secure Socket Layer to protect patron account information only (not site-wide HTTPS), do not check the **HTTPS Port** option. For more information about Secure Socket Layer, see “[Secure Socket Layer \(SSL\)](#)” in the *Polaris Administration Guide 4.1R2*.

Setting Up Did You Mean Term Checking

When you enable “did you mean” search term checking, the search results page includes a suggested alternate search term if one can be identified. You can click the alternate term to launch a search on that term. If enabled, the Did You Mean function applies to quick, keyword, phrase, and exact phrase searches in Polaris PowerPAC, and to searches typed in the **Look for** bar in Polaris PowerPAC Children’s Edition. The illustration is an example from Polaris PowerPAC.



For single words, the “best suggestion” is the similar keyword that most frequently occurs in the Polaris database. For phrases, the system checks a “sounds like” search suggestions table that is based on author, subject, and title headings in the database. (A SQL job, **Did You Mean Processing**, runs once a month to populate the keyword counts and search suggestions tables.) If a database match is found, suggestions are returned. If a match is not found, a spell-check is performed which returns the auto-corrected suggestion.

You can set whether Did You Mean suggestions are displayed at all, for PowerPAC only, whether they are displayed when there are search results or only when there are none. In addition, in the Did You Mean Overrides database table, you can specify your own Did You Mean suggestions for specific search terms to be displayed instead of the program’s suggestions.

See the following topic:

- [“Set up Did You Mean search suggestions”](#) on page 93

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Set up Did You Mean search suggestions

Follow these steps to set up Did You Mean search suggestions.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
2. Double-click the profile **Did You Mean: Enabled**, and set the profile to **Yes**. This setting displays Did You Mean search suggestions in Polaris PowerPAC and Polaris PowerPAC Children's Edition.
3. (PowerPAC only) On the PowerPAC profile tab, double-click the profile **Did You Mean: Suggestions are to display even when hits are returned**, and set the profile to **Yes** to display Did You Mean search suggestions when a search returns hits.

When this profile is set to **No** (the default), Did You Mean search suggestions are displayed only when a search returns no hits at all. If you think patrons will find the search suggestions confusing when they already have satisfactory results, set the profile to **No**.

Note:

This profile does not apply to Polaris PowerPAC Children's Edition. In the Children's Edition, when Did You Mean is enabled, suggestions are displayed only when a search produces no hits.

4. Select **File, Save**.
5. To set override suggestions, follow these steps:

Note:

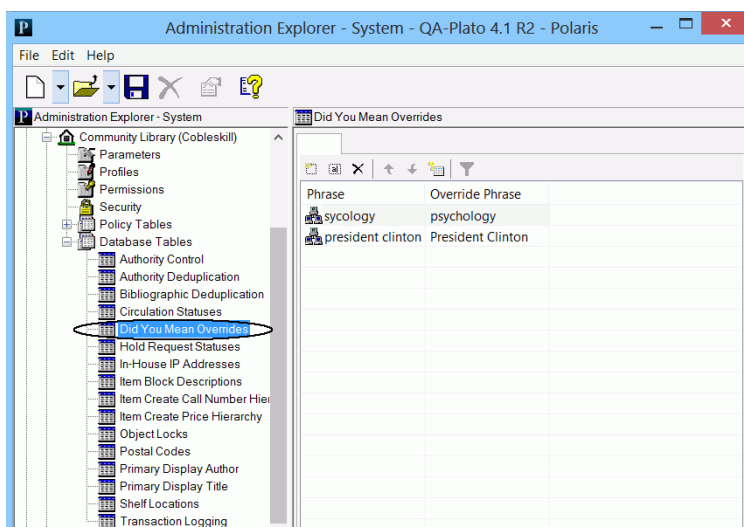
You may want to wait to set overrides until you have an idea of the common mistakes your patrons may make.

- a) In the Administration Explorer tree view, open the **Database Tables** folder for the organization, and select **Did You Mean Overrides**.

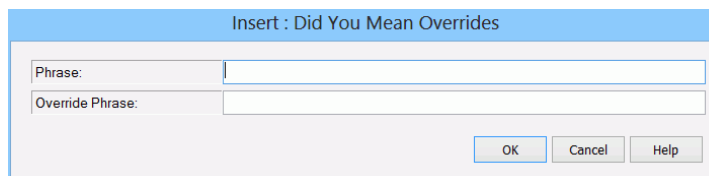
The Did You Mean Overrides table appears in the details view.

Important:

You can modify this table at the system, library, or branch level, but your changes affect all organizations in the system.



- b) Click  to display the Insert: Did You Mean Overrides dialog box.



- c) In the **Phrase** box, type the search term as your patrons may enter it.
- d) In the **Override Phrase** box, type the Did You Mean suggestion that you want to be displayed instead of any system-generated suggestion.

These fields are not case-sensitive.

Example:



A unique local place name is commonly misspelled. You can enter the common misspelling in the **Phrase** box, and the correct spelling in the **Override Phrase** box. Your override phrase will always be suggested for the misspelled term.

Note:

You may find that the system suggests inappropriate terms for terms that the patron intended. For example, the patron types **amelia bedelia** (correct), but the system suggests **Amalia Delia**. You can enter a correctly spelled term in the **Phrase** box and the identical term in the **Override Phrase** box. In this case, when the patron enters the term correctly, no Did You Mean suggestion will be displayed.

- e) Click **OK**.
- f) The new entry is displayed in the Did You Mean Overrides database table for the organization. **Modification pending** appears in the status bar.
- g) Repeat steps a-f until you have listed all the overrides for the organization.
6. Select **File, Save**.

Related Information

- **Modify a table entry** - Select the entry and click .
- **Delete an entry** - Select the entry and click .

Managing Federated Search Targets



Polaris PowerPAC features integrated federated searching, which enables users to simultaneously search local and remote databases, and retrieve merged search results. Libraries can offer federated searching of Z39.50 databases only, which is included in Polaris at no additional cost. These search targets are remote databases or Web search engines that can be searched simultaneously with the Polaris database using the Z39.50 search protocol. If your library allows patrons to place interlibrary loan requests from PAC, you will likely provide Z39.50 search targets that patrons can choose using the **Select Databases** feature in Polaris PowerPAC.

Tip:

Your library can also offer remote databases that are searched separately in PowerPAC. See [“Managing E-Sources”](#) on page 114.

In addition, Polaris offers separately-licensed federated searching in partnership with MuseGlobal, a leading supplier of content integration, aggregation and transformation solutions. This partnership extends federated search capabilities to other protocols in addition to Z39.50, such as: HTTP sources; free text databases; SQL or ODBC databases; and proprietary protocol sources. MuseGlobal offers over 6,500 potential targets and provides search access, connectors, and appropriate URLs for the target resources covered by your subscription. For more information about MuseGlobal, see <http://www.museglobal.com>.

Note:

For specific information about setting up federated searching with MuseGlobal, see [“Polaris PowerPAC & MuseGlobal Federated Search”](#) in the *Polaris Administration Guide 4.1R2*.

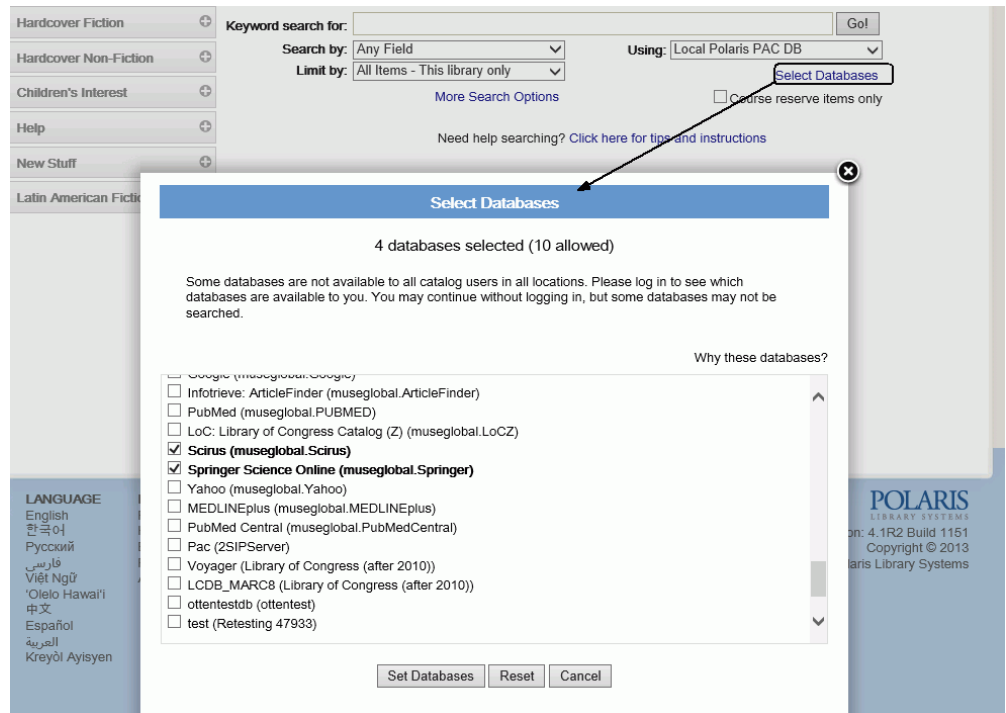
To set up remote resources as federated search targets, you set up server records for the remote resources in Polaris Administration. See [“Registering Remote Resource Servers”](#) in the *Polaris Administration Guide 4.1R2* for more information. Then, using the procedures outlined here, you organize them in the way that is most convenient for your patrons, using the PowerPAC profile **Remote databases: Categorization of target databases**. You can set usage conditions on individual databases, and set a limit on the number of targets that can be searched at one time.

See the following topics:

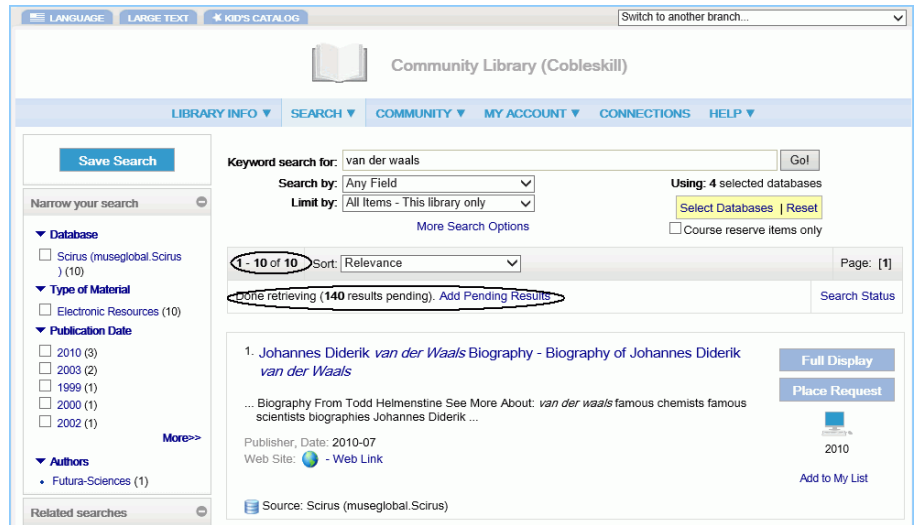
- [“Merged Results in Polaris PowerPAC”](#) on page 96
- [“Organizing Target Databases for PowerPAC Display”](#) on page 99
- [“Maximum Number of Databases Searchable at One Time”](#) on page 105
- [“Remote Database Usage Settings for PowerPAC”](#) on page 106

Merged Results in Polaris PowerPAC

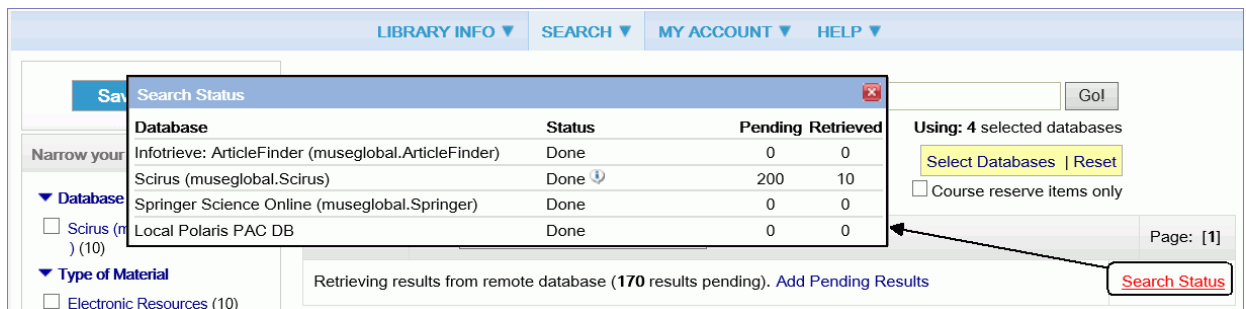
When users search both remote databases and the local catalog, the results are displayed in a merged list. To select the remote databases for searching, the user clicks the **Select Databases** link to open the list of available databases, and clicks the check box next to the databases.



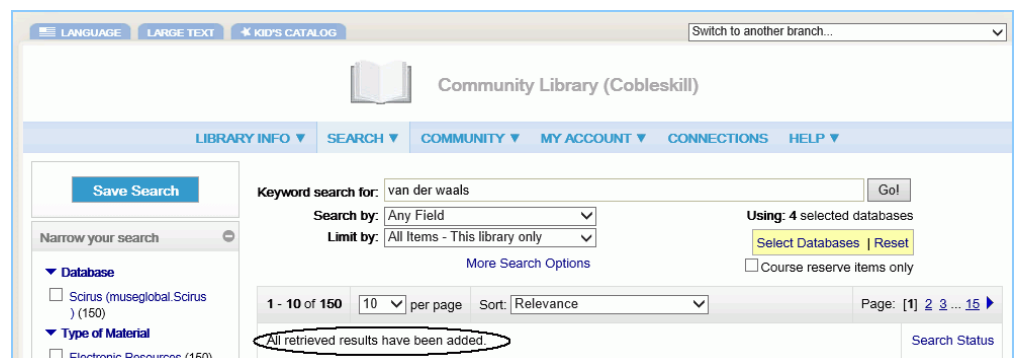
After selecting databases and entering the search term, the user clicks **Go**. The search results list first displays results from the local catalog, if selected, and the user has the option of clicking **Add Pending Results** to add more results to the list. The number displayed at the top of the list changes as the results are added.



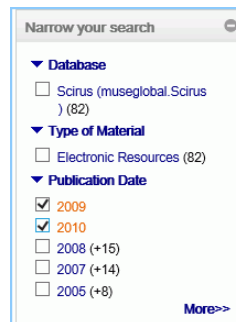
As results are being added from the selected databases, the user can click **Search Status** to see the progress. A status window displays the total results for each database, the database status, the results pending, and the results retrieved.




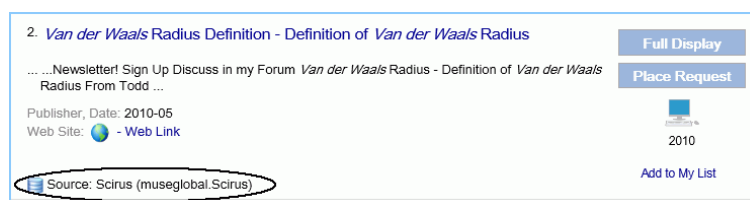
When all the pending records have been retrieved, the search bar indicates that all retrieved results have been added.



Users can filter the search results list by database. The **Narrow your search** dashboard displays the **Database** facets at the top of the list by default. For more information about setting up facets, see “[Setting PowerPAC Narrow/Related Search Options](#)” on page 159.



In the merged result set, the brief information for the title displays a database icon  and the source database for titles found in remote databases.



Organizing Target Databases for PowerPAC Display

By default, all remote search targets available for the connection organization's PowerPAC searches are displayed as a single list, which may be very long. Using the PowerPAC profile **Remote databases: Categorization of target databases**, you can organize the list into categories, add search targets, and specify which targets should be listed under each category heading. A specific search target can be represented in multiple categories. In the PowerPAC Select Databases lightbox, the user can select a category to search all the targets in the category, or select single targets to search. For example, you might set up categories for different types of targets, such as university libraries and local history archives, or for topics such as Genealogy, Health, and Employment. Categories are initially displayed as expanded, but the user can collapse them as desired. You can have an unlimited number of categories that you can set up at the system, library, or branch level. If categories are not set up for an organization, the organization scheme from the parent level is used.

See the following topics:

- [“Select Databases Lightbox in PowerPAC”](#) on page 99
- [“Develop the remote targets display for PAC”](#) on page 102

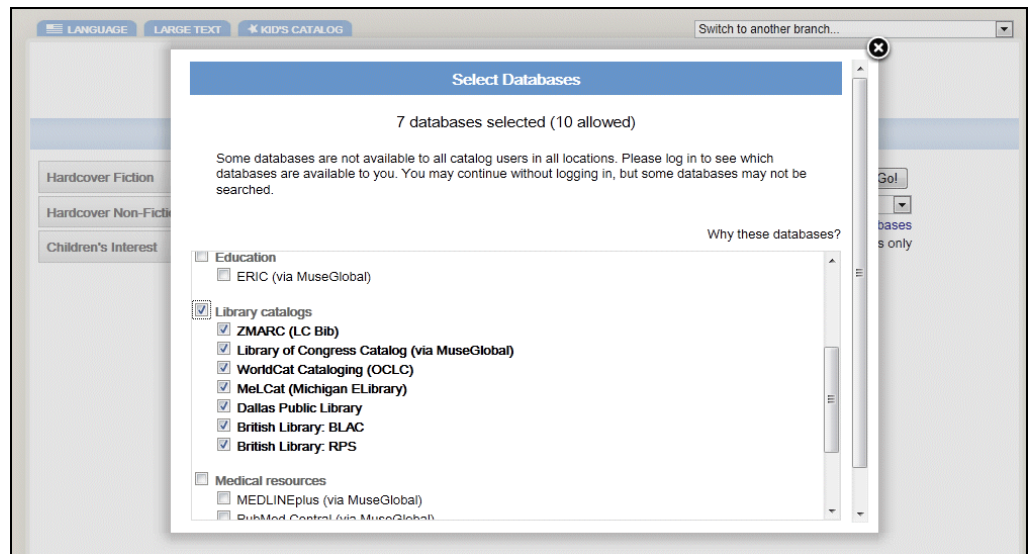
Select Databases Lightbox in PowerPAC

Your settings in the PowerPAC profile **Remote databases: Categorization of target databases** determine the Select Databases lightbox display in Polaris PowerPAC. However, any access restrictions you have set may suppress specific targets from the display (see [“Remote Database Usage Settings for PowerPAC”](#) on page 106).

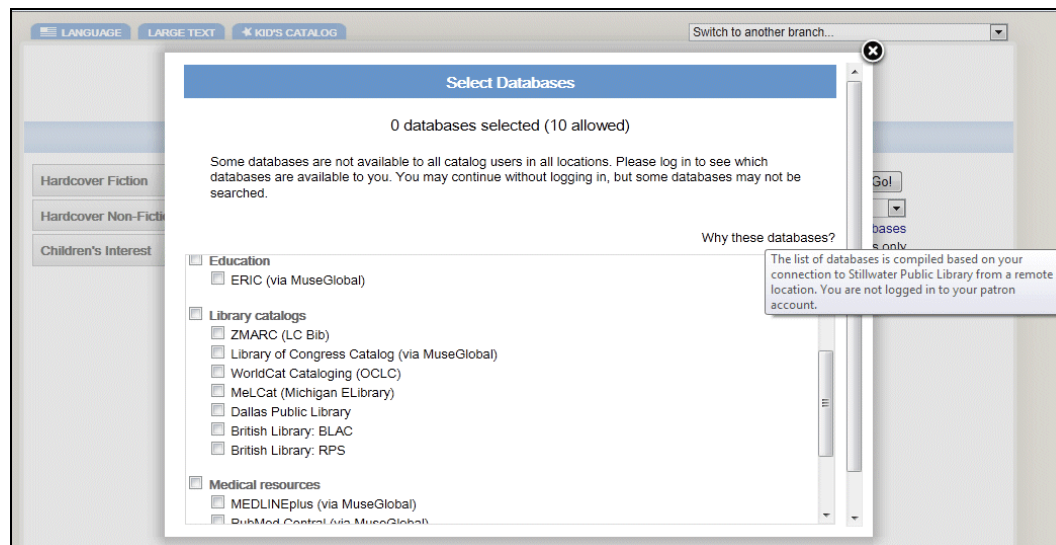
An explanatory message is displayed at the top of the Select Databases lightbox. If the patron is not logged in, the default text is:

Some databases are not available to all catalog users in all locations. Please log in to see which databases are available to you. You may continue without logging in, but some databases may not be searched.

You can edit the message in Polaris WebAdmin (Language Editor). Choose the PowerPAC product; the language string IDs for this message are **PACML_SELECTDB_NOTE_LOGIN** and **PACML_SELECTDB_NOTE_LOGIN2**.



In addition, the Select Databases lightbox displays a **Why these databases?** link. When the user hovers over the link, an explanatory message is displayed:



You can edit the label and message in Polaris Language Editor (WebAdmin). Choose the PowerPAC product; the language string IDs for the label and message are **PACML_SELECTDB_WHYDB** and **PACML_SELECTDB_NOTE_CONNECT**.

At the bottom of the lightbox, the user clicks **Set Databases** to save the database selections. This action typically launches the search in the selected databases using the search term from the user's immediately preceding search. However, no search is launched in these cases:

- The immediately preceding search was a keyword control number search (launched when the user selected a dashboard or content carousel link).

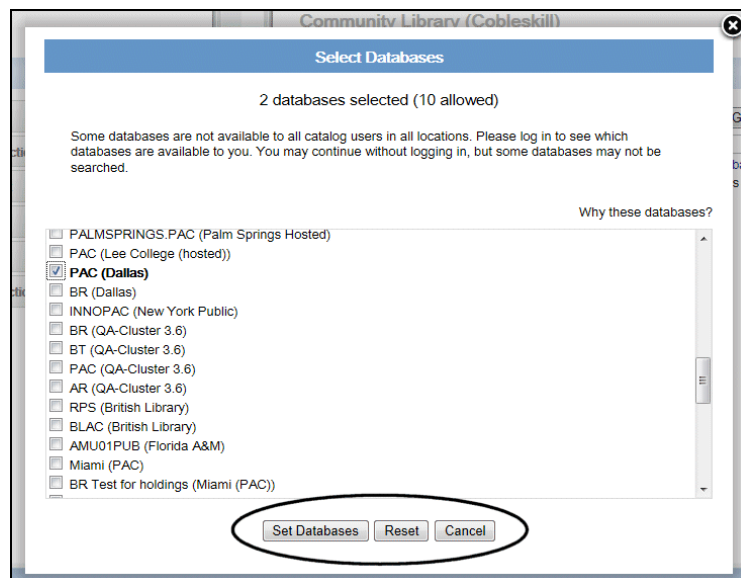
- There was no immediately preceding search in the current session.

Note:

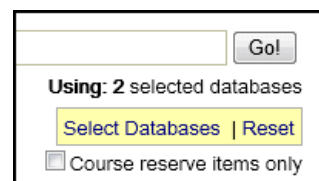
If the user types a new search term but does not click **Go**, and then opens the Select Databases lightbox and clicks **Set Databases**, the new search term is ignored and the search is launched using the immediately preceding search for which the application actually constructed a search string.

Clicking **Reset** deselects (unchecks) all databases except the local database, and selects the local database.

The **Close** option is displayed when no changes have been made, and simply closes the lightbox, retaining the current selections. A new search is not launched. If changes have been made, a **Cancel** option is displayed instead of **Close**; this option cancels any changes and closes the lightbox, retaining the selections in place before the lightbox was opened. A new search is not launched. The X button in the upper right corner of the lightbox functions like **Close** if no changes have been made, or like **Cancel** if changes have been made.



Users can also reset the database selections from the search form. When remote databases have been selected, a **Reset** option appears next to the **Select Databases** option; both are highlighted.



1-2-3

Develop the remote targets display for PAC

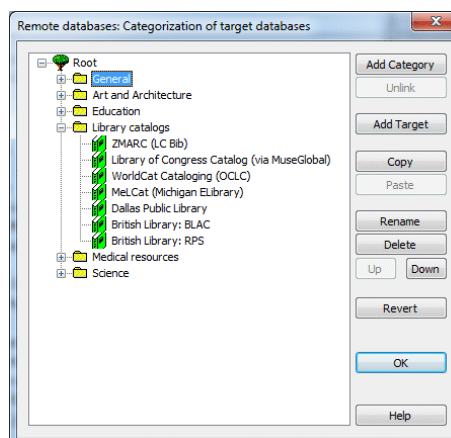
Follow these steps to make remote search targets available for searching in Polaris PowerPAC, and organize them into categories.

Note:

You establish connections to remote resources through Polaris Administration server records. See “[Registering Remote Resource Servers](#)” in the *Polaris Administration Guide 4.1R2*. In Polaris PowerPAC, if no remote search targets have been set up, the **Select Databases** link and the **Using** label and drop-down list are not displayed.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click the PowerPAC profile **Remote databases: Categorization of target databases**.

The **Remote databases: Categorization of target databases** dialog box displays a list of remote database targets and any defined categories. Book icons represent individual targets. Folder icons represent categories.



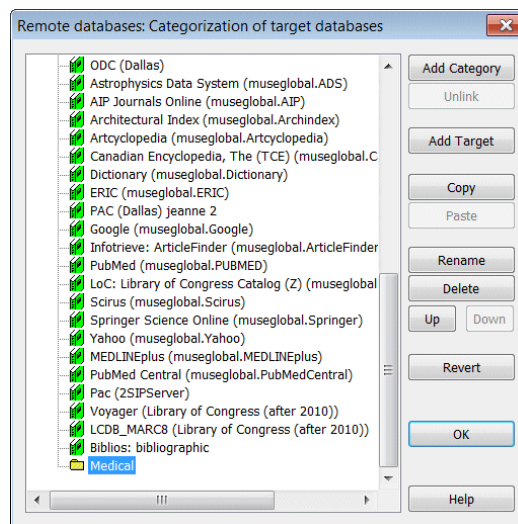
3. Select **Root** to add a new category at the top level, or select an existing category folder to add a subcategory, and click **Add Category**.

Note:

Root is the default category, represented by a tree icon. It cannot be copied, deleted, or renamed.

A new category folder icon appears in the tree view, with the cursor positioned to name the folder.

4. Type a category heading, and press **ENTER**.

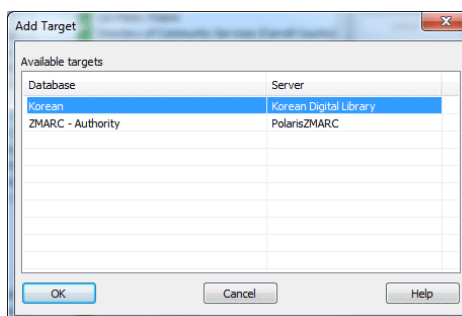


- To make an individual search target available, select the category, and click **Add Target**. (To add a target directly to the Root level, select **Root**.)

Note:

New search server targets are not automatically added to the Root level category folder for the system. You must explicitly add them to make them available for search selection. Also, if an organization no longer inherits system-level settings, the organization will need to manually add the new target at the organization level.

The Add Target dialog box appears with a list of databases available to the organization, based on its membership in the resource groups with access to the databases. See [“Setting Up Organization Resource Groups”](#) in the *Polaris Administration Guide 4.1R2*.



- Select the target database to add to the category.

Note:

You can specify a PAC display name for the target. See [“Remote Database Usage Settings for PowerPAC”](#) on page 106.

Note:

If a single category contains more than the maximum number of databases to search (see [“Maximum Number of Databases Searchable at One Time”](#) on page 105), a warning message advises you to put fewer databases in the category.

7. Click **OK**.

The target database is added to the category.

8. Continue adding categories and targets as needed for the organization.

Related Information

- **Copy a target** - Select the target in the Remote databases: Categorization of target databases dialog box, and click **Copy**. Then select the category where you want to place the copy of the target, and click **Paste**. You can use the Copy/Paste function to add a target to multiple categories. However, a single target cannot appear more than once at the same category level, unless the different instances of the target are in different subcategories.
- **Copy a category** - Select the category in the Remote databases: Categorization of target databases dialog box, and click **Copy**. Then select the category where you want to place the copy, and click **Paste**. This procedure creates categories that are linked. When you copy categories, all subcategories and targets are copied, and all the copied subcategories and targets also become linked. Any change to one category is applied to all the linked categories. A linked category is indicated by a hand on the folder icon. To remove the link between categories, select the category you want to make independent, and click **Unlink**.

Note:

You cannot paste a copied category at the same level as the original category.

- **Delete a target** - Select the target in the Remote databases: Categorization of target databases dialog box and click **Delete**. (Deleting a target from a particular category, including Root, does not delete it from other categories.) The local Polaris database cannot be completely removed from the categorization dialog box. If you select the last instance of the local database and click **Delete**, a message informs you that the local database must appear at least once, either at the root level or within one category. When you click **OK**, the message box closes and the local database remains selected. It is not deleted.

Important:

When the last instance of a target is removed from the categorization dialog for an organization, the **Enable for follow-on searching** and **Include in quick-select drop down** options are automatically disabled for that database in that organization context. For more information about these options, see [“Remote Database Usage Settings for PowerPAC”](#) on page 106. If you add the database back to the categorization dialog, the **Enable for follow-on searching** and **Include in quick-select drop down** options must be manually set again; they are not automatically restored.

- **PAC display** - See [“Select Databases Lightbox in PowerPAC”](#) on page 99.
- **Enable ILL requests from PAC** - See [“Setting Up ILL Requests”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.

Maximum Number of Databases Searchable at One Time

If system performance is a concern, you can restrict the number of databases that can be searched at one time. Use the PowerPAC profile **Remote databases: Maximum number that can be searched at once**. Valid values are 1-25; the default setting is 10. The profile is available at the system, library, and branch levels. The PAC connection organization's setting is used.

Note:

You cannot set a maximum number of databases searchable at one time that is fewer than the number of databases you have selected for follow-on searches. See [“Remote Database Usage Settings for PowerPAC”](#) on page 106. Conversely, you cannot select more follow-on databases than your setting for the maximum number searchable at one time.

Remote Database Usage Settings for PowerPAC

You can set usage conditions for individual remote databases, including use in the PowerPAC quick-select drop-down, limits on records returned and search time, use as follow-on databases, access restrictions, and search access points.

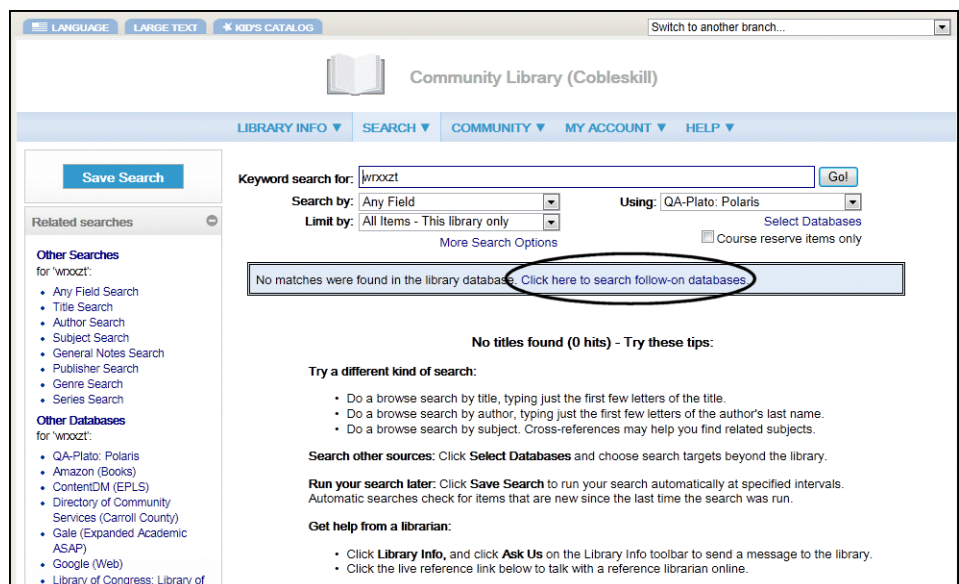
See the following topics:

- “Follow-On Search Display in PowerPAC” on page 106
- “Configure remote database usage settings” on page 108

Follow-On Search Display in PowerPAC

You can enable a prompt to the PowerPAC user for a follow-on search of databases pre-selected by the library, when a search of the local database returns no hits. This feature is most effective when you specify follow-on target databases that all your patrons can access, regardless of branch, location or logged-in status; for example, a state union database.

If you have enabled follow-on searching and designated follow-on databases (see “Configure remote database usage settings” on page 108), a message and link are displayed when the PowerPAC user searches the local database only and no hits are found. If you have not enabled the **Show total hits in follow-on search databases** option (see “Configure remote database usage settings” on page 108), the user must click the link to determine if there are results in the follow-on databases.



The screenshot displays the PowerPAC search interface for the Community Library (Cobleskill). The search bar contains the keyword 'jwxxzt'. The search results show 'No matches were found in the library database.' A link is provided to search follow-on databases. The interface includes a navigation menu with options like LIBRARY INFO, SEARCH, COMMUNITY, MY ACCOUNT, and HELP. The search results section includes a list of related searches and a section titled 'No titles found (0 hits) - Try these tips:' with suggestions for different search methods and sources.

If the **Show total hits in follow-on search databases** option is enabled and no results are found, no message is displayed. If there are results in the follow-on databases, the message displays the search link and the total number of hits found in the follow-on databases.

Note:

If **Show total hits** is enabled, the search is performed in the background regardless of whether the user links to the results. The remote database will likely count the search for statistical purposes. If **Show total hits** is not enabled, no searches are done unless the user clicks the link to see the results.

When follow-on searching is enabled, the user does not have to retype the search term when the follow-on search is launched. However, if any of the follow-on databases require log-in, and the user has not logged in, the database requiring log-in is not searched. Only those follow-on databases that do not require log-in are searched, and an error message is displayed in the search status window for the databases that could not be searched. Similarly, if the library has selected databases that are not accessible to the current user (perhaps because of the user's registered branch, location, or patron code), those databases are not searched and an error message is displayed in the search status window for the databases that could not be searched.

The follow-on databases (and the local database) are also automatically selected on the Select Databases light box (see "[Select Databases Lightbox in PowerPAC](#)" on page 99). All subsequent searches use the selected databases, until the user resets the search databases or ends the session. The **Reset Databases** option is also displayed next to the **Select Databases** option on the search form.

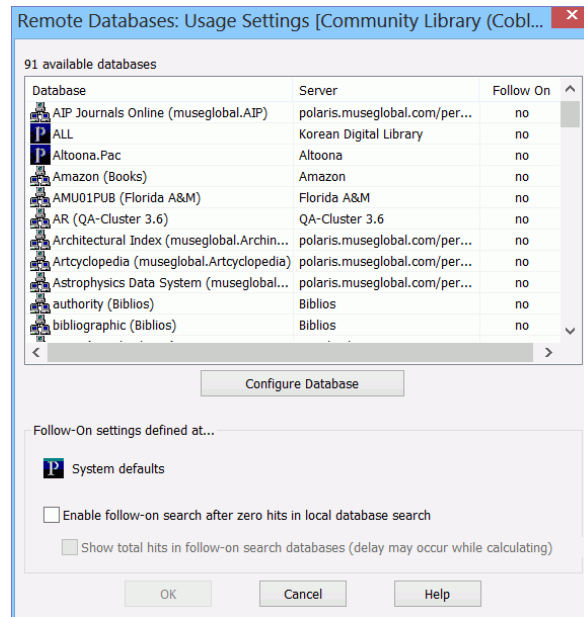
1-2-3

Configure remote database usage settings

Usage settings for remote databases can be defined at the system, library, or branch level. Follow these steps for each remote database you want to configure.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click the **Remote databases: Usage settings** profile.

The Remote Databases: Usage Settings dialog box opens.



The database list is filtered based on the organization's resource group membership. The number of entries is displayed at the top of the list. The **Follow On** column indicates whether the database has been configured to be a follow-on search database for the organization (see step 6).

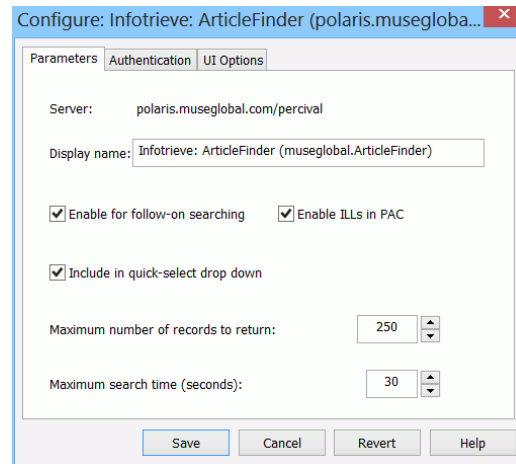
Note:

Each database can inherit configuration settings independently of the other databases. The icon to the left of the database name indicates the level at which the database was configured.

3. To enable any remote databases to be suggested automatically if a search of the local database yields no results, select the **Enable follow-on search after zero hits in local database search** check box. To also show the total number of hits in the follow-on search databases, select the **Show total hits in follow-on search databases** check box.

Once follow-on searching is enabled, you can set specific databases for the follow-on search. See step 6.

4. Select the database you want to configure, and click **Configure Database**. The Configure “*Database Name*” dialog box opens to the Parameters tabbed page.

**Note:**

The Revert button returns all settings in this dialog box to those of the parent organization (System, Library, or System defaults).

5. (Optional) Specify a PowerPAC display name for this database, if you want a name other than that shown.
6. To designate this database for follow-on searching, select **Enable for follow-on searching**.

Note:

This option is available only if follow-on searching has been enabled for remote databases on the Remote Databases Usage Settings dialog box (see step 3). The database must also be added as a search target for this organization’s PAC. See “[Organizing Target Databases for PowerPAC Display](#)” on page 99.

Consider selecting databases that are universally available to all patrons, regardless of location (all branches, both in-house and remote locations) or patron code, and that do not require logging in. If you select a database that requires logging in, the patron will be required to be logged in before the follow-on search occurs. If you select a database that is not available to all patrons, then that database will not be searched during the follow-on search. See “[Follow-On Search Display in PowerPAC](#)” on page 106.

Note:

You cannot select more follow-on databases than the limit set with the PowerPAC profile **Remote databases: Maximum number that can be searched at once**. See “[Maximum Number of Databases Searchable at One Time](#)” on page 105. Conversely, you cannot set a maximum number that is fewer than the number of follow-on databases you have selected.

7. To enable interlibrary loan (ILL) requests from the PowerPAC for this remote database, select **Enable ILLs in PAC**. This check box is checked by default. If you do not want to enable ILL requests for this database, clear the **Enable ILLs in PAC** check box.

Important:

To allow ILL requests to be sent to remote databases from the PAC, the **Enable** check box must be selected in the ILL options dialog box available from the Parameters Request tab (**Parameters, Request, ILL options**).

8. To include the database in the **Using** drop-down list box in the PowerPAC, select the **Include in quick-select drop down** check box.

The illustration shows an example from PowerPAC.

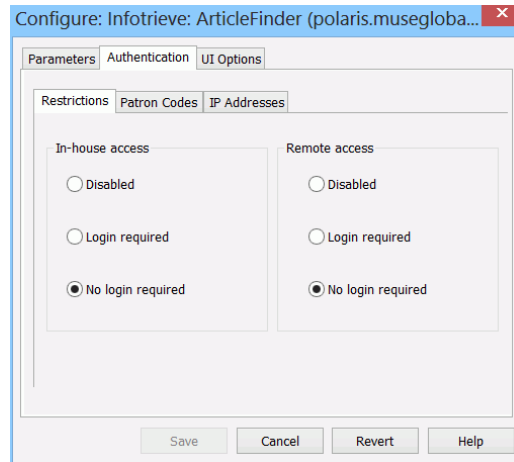
The screenshot shows the PowerPAC search interface. At the top, there are navigation tabs: LIBRARY INFO, SEARCH, COMMUNITY, MY ACCOUNT, and HELP. Below these is a search bar with a 'Go!' button. The search parameters are set to 'Any Field' and 'All Items - This library only'. The 'Using' field is open, displaying a list of databases. The 'Local Polaris PAC DB' is highlighted in blue. Other databases in the list include AIP Journals Online, Amazon, ContentDM, Directory of Community Services, Gale, Google, Infotrieve, Scirus, Springer Science Online, WindowsLive, and Yahoo.

The PowerPAC **Using** field always includes the local database. When at least one remote database is specified for the **Using** quick-select drop down, the drop-down list includes the local database and any remote databases specified for inclusion. However, the drop-down list suppresses a database from display according to access restrictions (see steps 11-14), even if it is selected for inclusion.

Note:

A database must be selected to appear in at least one place in the **Remote Databases: Categorization of Target Databases** dialog box for the organization. See “[Organizing Target Databases for PowerPAC Display](#)” on page 99. If the database is not currently categorized and you select **Include in quick-select drop down**, a warning message appears and the selection is stopped.

9. Specify the retrieved records limit by selecting a number in the **Maximum number of records to return** box.
10. Specify the search time limit in seconds by selecting a number in the **Maximum search time (seconds)** box.
11. Click **Save**.
12. Click the **Authentication** tab to set the authentication methods. The Authentication tab page has three subtabs: Restrictions, Patron Codes, and IP Addresses. The Restrictions subtab is displayed first.



13. On the Restrictions subtab, specify whether and how patrons access the database from in-house computers within the library and from remote computers:

a) Select one of the following options under **In-house access**:

- **Disabled** - Prevents patrons from accessing the database from a library computer.
- **Login required** - Requires patrons to log in with their library account credentials to access the database from a library computer.
- **No login required** - Patrons can access the database from a library computer without logging in.

Note:

For information about setting the criteria that determine whether a workstation is in-house or remote, see [“Identifying In-House Computers”](#) in the *Polaris Administration Guide 4.1R2*.

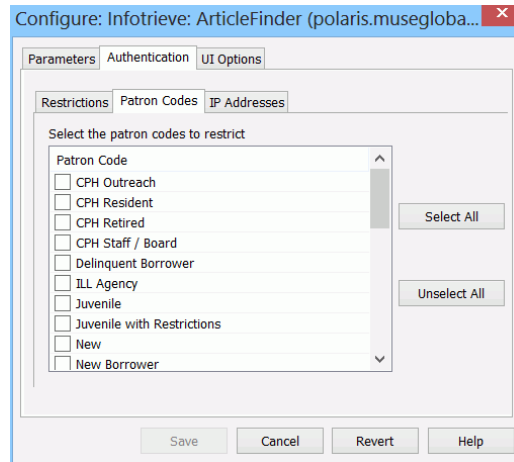
b) Select one of the following options under **Remote access**:

- **Disabled** - Prevents patrons from accessing the database from a computer outside of the library.
- **Login required** - Requires patrons to log in with their library account credentials to access the database from a computer outside of the library.
- **No login required** - Patrons can access the database from a computer outside of the library without logging in.

14. To control access to the database by patron code, select the Patron Codes subtab, and select the patron codes to restrict. Patrons whose records have the selected patron code will be prevented from accessing the database.

Important:

If you choose to restrict access by patron code, you must also require the patron to log in on the Restrictions subtab. If you do not require log-in, your settings for restricted patron codes are ignored.

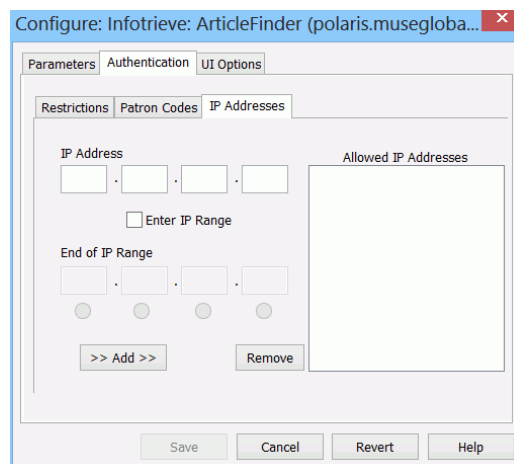


15. To allow access to the remote database by the IP address of the PAC search computer, select the **IP Addresses** subtab, and do the following:

- Type the IP address in the top boxes and click **Add**.
- To include an IP address range, select **Enter IP range**, type the beginning IP address in the top boxes and the last two digits of the ending IP address in the bottom boxes.

The IP addresses allowed access are listed in the **Allowed IP Addresses** box.

- To remove an IP address, select it and click the **Remove** button.



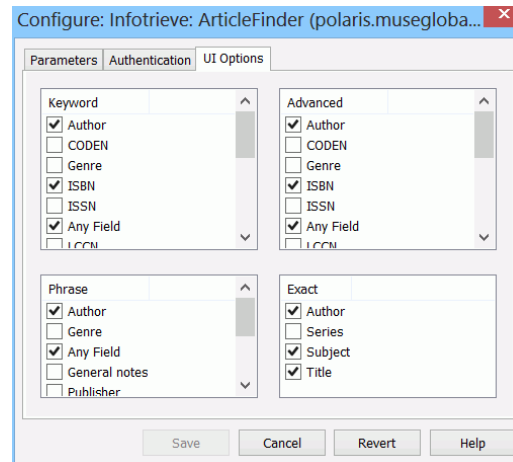
16. Select the **UI Options** tab to define the search access points that are available for the selected database and search type as follows:

Note:

The default access points for all search types are: **Author**, **Subject**, and **Title**.

- **Keyword** - Select the access points available for a keyword search with this database selected. **ISBN** and **Any field** are additional default access point for keyword searches.

- **Advanced** - Select the access points available for an advanced search with this database selected. **ISBN** and **Any field** are additional default access point for advanced searches.
- **Phrase** - Select the access points available for a phrase search with this database selected. **Any field** is an additional default access point for phrase searches.
- **Exact** - Select the access points available for an exact search with this database is selected.



Your settings also control the types of searches available in the PowerPAC **Other Searches** dashboard that is displayed with results when this database is searched.

17. Click **Save** to save the settings.

Managing E-Sources



E-sources are subscription databases presented as search links on an e-sources page in Polaris PowerPAC. The library may limit access to specific e-sources, often to comply with the terms of the database subscription.

Unlike federated databases, which can be searched simultaneously along with the local catalog, e-source databases are searched separately. When the patron selects an e-source target, the patron uses the provider's interface for searching (not the PowerPAC interface). When the e-source session is finished, the Polaris PowerPAC session is resumed.

Tip:

You can also offer remote databases that can be searched simultaneously in PowerPAC. See [“Managing Federated Search Targets”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

To set up e-source targets, you need to get the appropriate connection information from the e-source provider and enter it in the PowerPAC profile, **Categorization of e-source targets**.

See the following topics:

- [“Setting Up E-Source Targets”](#) on page 115
- [“Organizing E-Source Targets”](#) on page 129
- [“E-Source Reports”](#) on page 131

Setting Up E-Source Targets

To set up an e-source target for Polaris PowerPAC, you specify how the connection to the database is made, and set any authentication criteria and access restrictions. The terms of your library's contract with the e-source provider may require authentication from your system when a patron attempts to connect to the e-source. Authentication identifies your library as a subscriber to the e-source provider. When a patron selects an e-source, and the access criteria are met, authentication data for the library is automatically passed to the e-source target for validation, bypassing the provider's log-in page. You can allow access from in-house workstations, remote workstations, or both, and set separate login requirements for each location. You can further define access by preventing patrons with certain patron codes from accessing an e-source target, and by setting specific IP addresses for access.

See the following topics:

- [“Set up an e-source target”](#) on page 115
- [“Provide links to e-sources on external sites”](#) on page 128
- [“Categorize e-source targets”](#) on page 129

1-2-3

Set up an e-source target

Follow these steps to set up access restrictions and authentication data elements for an e-source target.

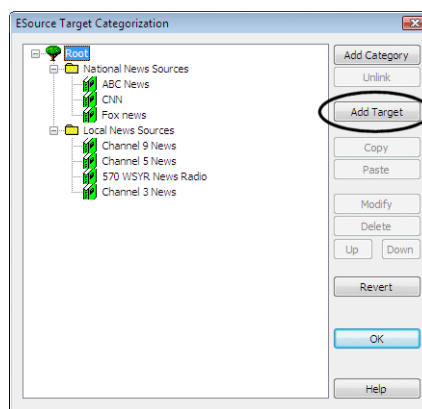
1. Obtain the following information from the e-source target provider:
 - **URL for the target's log-in page** - The complete URL for the target's *log-in page* (not the site's home page, or account setup page). Polaris automatically passes your library's authentication information to this URL.
 - **Connection data parameters** - Connection data parameters are set up in sets consisting of **Name** and **Value**. **Name** is the descriptive field name that the database provider uses to prompt for input. **Value** is the actual text string that the database provider assigns to your library when the subscription is established.

Example:

A vendor requires a user ID and a password to access a database, so you define two parameters (two sets of Name and Value data elements). For the first set, Name is **UserID**. Value is **WESTSIDELIBRARY**. For the second set, Name is **Password** and Value is **read**.

- **Transfer type (Get or Post)** - The protocol for passing authentication data from your library to the e-source target. **Get** displays authentication information in the URL string, unless Secure Socket Layer (SSL) is enabled at the server level. For more information about enabling SSL, see [“Setting Web Server Parameters”](#) in the *Polaris Administration Guide 4.1R2*. **Post** does not display the authentication information. Most vendors can use the post method.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
 3. Double-click **Categorization of E-Source targets**.

The E-Source Categorization dialog box appears.



Tip:

Click **Revert** to restore system-level settings.

4. Select a category for the new target (optional), and click **Add Target**.

Note:

Root is the default category, represented by a tree icon. Other categories are represented by folder icons. See [“Organizing E-Source Targets”](#) on page 129.

The Add E-Source Target dialog box appears.

5. Set up general information for the target as follows:
 - Type a name for the target in the **Name** box. This name is displayed on the PAC E-Sources page.
 - Type a brief (890-character maximum) description in the **Description** box, if you want to display a description on the PAC E-Sources page.
 - Type a brief message in the **Message** box, if you want to display a message to patrons regarding the target.
 - Input the complete URL for the target's log-in page in the **URL** box.
 - Select **Get** or **Post** in the **Transfer Type** box (see step 1).
6. To set in-library access to the target, select an option under **Inhouse access** (General Restrictions tabbed page):
 - To make the e-source unavailable to in-house users, select **Disabled**.

Note:

If you disable access for *both* in-house and remote users (see step 7), the e-source will be displayed on the PowerPAC page as unlinked text.

- To make the e-source available from in-house workstations only to registered patrons, select **Login required**. If you select this option, you can further restrict access by blocking selected patron codes. See step 8.
- To make the e-source available from in-house workstations to anyone, select **No login required**.

By default, if a workstation is registered in Polaris Administration, it is automatically considered "in-house." If the workstation is not registered in Polaris Administration, but the IP address is listed in the system-level In-House IP Addresses database table, it is considered to be in-house. See "[Identifying In-House Computers](#)" in the *Polaris Administration Guide 4.1R2*. If you use Polaris PowerPAC on workstations within the library, you may want to list them in the In-House IP Addresses database table. If neither the workstation nor the IP address is found in the system, the user is considered remote.

Note:

By default, the system checks both the In-House IP Addresses table and registered workstations to determine if a computer is in-house. However, if you experience performance issues related to e-source restrictions, you can set the system to check only the In-House IP Addresses table. See "[Set criteria for determining in-house location](#)" in the *Polaris Administration Guide 4.1R2*.

Tip:

The message can inform patrons of any use restrictions for the target, or to highlight a new offering.

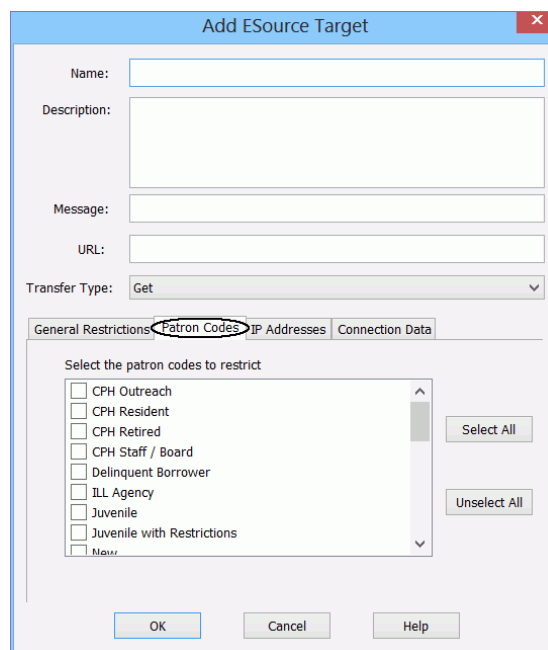
7. To set remote access to the target, select an option under **Remote access** (General Restrictions tabbed page):

- To make the e-source unavailable to remote users, select **Disabled**.

Note:

If you disable access for *both* remote and in-house users (see step 6), the e-source will be displayed on the PowerPAC page as unlinked text.

- To make the e-source available from remote workstations only to registered patrons, select **Login required**. If you select this option, you can further restrict access by blocking selected patron codes. See step 8.
 - To make the e-source available from remote workstations to anyone, select **No login required**.
8. If you have required log-in for in-house or remote access, and you want to prevent patrons with certain patron codes from accessing the target, follow these steps:
 - a) Click the **Patron Codes** tab on the Add E-Source Target dialog box.



The screenshot shows the 'Add ESource Target' dialog box with the 'Patron Codes' tab selected. The dialog contains the following fields and options:

- Name: [Text Field]
- Description: [Text Area]
- Message: [Text Field]
- URL: [Text Field]
- Transfer Type: [Dropdown Menu, currently set to 'Get']
- General Restrictions | **Patron Codes** | IP Addresses | Connection Data
- Select the patron codes to restrict:
 - CPH Outreach
 - CPH Resident
 - CPH Retired
 - CPH Staff / Board
 - Delinquent Borrower
 - ILL Agency
 - Juvenile
 - Juvenile with Restrictions
 - None
- Select All [Button]
- Unselect All [Button]
- OK [Button] | Cancel [Button] | Help [Button]

- b) Select (check) the codes you want to prevent from accessing the target.

Patrons who are assigned these codes cannot access the e-source target.

Important:

Your patron code settings are used only if you have required log-in for in-house or remote access.

9. If you want to allow access only from certain IP addresses, follow these steps:

Important:

Set this restriction if you want to allow access only from the specific IP addresses listed here. If at least one address is listed, the system blocks access from *any* workstations or IP addresses that are not listed here, regardless of any other access restrictions you may have set. You might use this setting to limit access to a very specialized (and costly) research site.

- a) Click the **IP Addresses** tab on the Add E-Source Target dialog box.

The screenshot shows the 'Add ESource Target' dialog box with the 'IP Addresses' tab selected. The dialog has several input fields: 'Name', 'Description', 'Message', and 'URL'. The 'Transfer Type' is set to 'Get'. Below these fields are four tabs: 'General Restrictions', 'Patron Codes', 'IP Addresses' (which is selected and circled), and 'Connection Data'. The 'IP Addresses' tab contains two groups of input boxes. The first group is for a single IP address, with four boxes separated by dots. Below it is a checkbox labeled 'Enter IP Range'. The second group is for an IP range, with two groups of four boxes separated by dots, and four radio buttons below them. At the bottom of the tab are buttons for '>> Add >>', 'Remove', 'OK', 'Cancel', and 'Help'.

- b) Define IP addresses using one of the following methods:

- To define IP addresses one at a time, type each IP address in the boxes and click **Add**. The addresses are displayed in the **Allowed IP Addresses** list.
- To define a range of IP addresses, select the **Enter IP Range** check box. Then enter the first address of the range in the IP address boxes, and enter the last address of the range in the **End of IP Range** boxes. Click the radio button below the appropriate **End of IP Range** box to specify if the last number in the range is in that address segment. Click **Add** to add the range to the **Allowed IP Addresses** list.

Note:

To remove IP addresses from the **Allowed IP Addresses** list, select the address and click **Remove**. Use **CTRL+select** or **SHIFT+select** to select multiple entries.

10. Set connection parameters for the target by following these steps:

- a) Click the **Connection Data** tab on the Add E-Source Target dialog box.

- b) Type a name in the **Name** box, type a value in the **Value** box for the first parameter, and click **Add**.

Note:

The Name requirement is specific to the vendor, and the Value requirement is set up in your organization's account with the vendor. See step 1.

- c) Repeat step b to add as many parameters as the e-source provider requires for connection authentication.

11. Click **OK** on the Add E-Source Target dialog box.

The new target is represented by a book icon in the E-Source Categorization dialog box.

12. Click **OK** on the E-Source Categorization dialog box.

Related Information

- **Connection setup examples** - “[Example: EBSCOhost® Connection Setup \(Post Transfer Type\)](#)” on page 121 and “[Example: Gale Connection Setup \(Get Transfer Type\)](#)” on page 125
- **Modify an e-source target** - Select the target in the E-Source Categorization dialog box, and click **Modify**. The Modify E-Source Target dialog box offers the same functions as the Add E-Source Target dialog box.
- **E-Source reports** - You can print a report of the e-source targets you have set up, including any access restrictions and connection requirements. You can also choose to log e-source transactions for custom reports. See “[E-Source Reports](#)” on page 131.

Example: EBSCOhost® Connection Setup (Post Transfer Type)

This example shows how to enter a URL and view source code to set up connection authentication to EBSCOhost. See “Set up an e-source target” on page 115 for a detailed procedure on setting up e-sources.

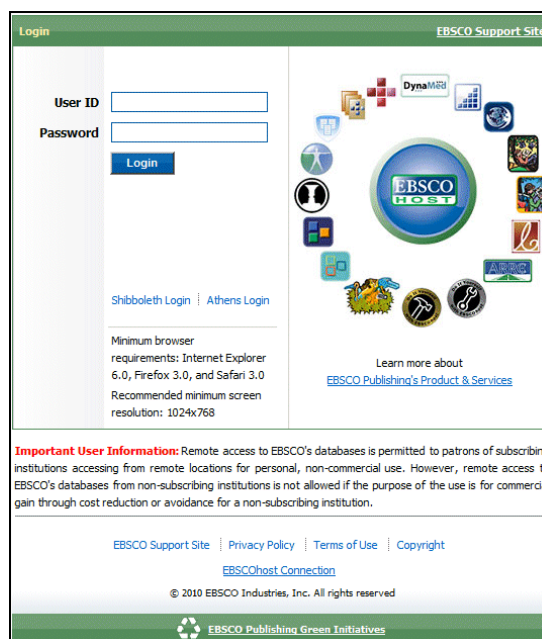
Note:

Database suppliers may require different authentication routines for different databases. Therefore, the authentication setup for one EBSCO database may differ from the setup for another EBSCO database. The following procedure is just an example. You must contact your vendor to get your library-specific connection information.

1. On the PowerPAC profiles tab for the organization, double-click **Categorization of E-Source targets**.
2. Click **Add Target** on the E-Source Categorization dialog box to display the Add E-Source Target dialog box.
3. Open a Web browser, and access the online log-in form for EBSCO at <http://search.ebscohost.com>.

Tip:

If the library has an existing subscription with the supplier that uses IP authentication, the log-in page is automatically bypassed. You can access the log-in page by working from an IP outside the subscribed range.



4. Copy the URL in the browser address bar, and paste it into the URL field on the Add E-Source Target dialog box. (Keep the browser window open.)

Note:

As a general rule, if the URL contains a question mark, copy all the text before the question mark. Do not copy the question mark or any text following it.

The screenshot shows the 'Add ESource Target' dialog box. The 'Name' field contains 'EBSCO'. The 'URL' field contains 'http://search.ebscohost.com/'. The 'Transfer Type' is set to 'Post'. The 'Connection Data' tab is selected, showing a table with columns 'Name' and 'Parameter'. There are 'Add' and 'Remove' buttons below the table.

5. Return to the browser menu bar, and select **Page, View Source**.
The HTML source code for the log-in page is displayed in your default text editor.
6. Determine the transfer method by following these steps:
 - a) Select **Edit, Find** (or press **CTRL+F**) to display a Find dialog box.
 - b) Search for the text string **form** or **method**.

```

1  <!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN" >
2  <html>
3  <head><title>
4  EBSCOhost - world's foremost premium research
5  database service
6  </title><meta name="GENERATOR" content="Microsoft Visual Studio .NET 7.1"><meta
7  name="CODE_LANGUAGE" content="C#"><meta name="vs_defaultClientScript"
8  content="JavaScript"><meta name="vs_targetSchema"
9  content="http://schemas.microsoft.com/intellisense/ie6"><meta name="description"
10 content="EBSCOhost (ebscohost.com) serves thousands of libraries and other
11 institutions with premium content in every subject area. Free LISTA:
12 LibraryResearch.com"><meta name="ROBOTS" content="ALL"><link href="ep-styles.css"
13 type="text/css" rel="stylesheet" />
14 <script type="text/javascript" language="javascript">
15
16     function formSubmit ()
17     {
18         document.forms[0].FormSubmit.value='true';
19         return true;
20     }
21 </script>
22 </head>
23 <body style="margin:15px 0px 0px 0px">
24     <form name="form1" method="post" action="login.aspx" id="form1"
25     onsubmit="return formSubmit()">
26     <input type="hidden" name="__VIEWSTATE" id="__VIEWSTATE"
27     value="/wEPDwUUMjEzNzglOTE1ZGQ=" />
28
29     <input type="hidden" name="__EVENTVALIDATION" id="__EVENTVALIDATION"
30     value="/wEwBAKq+cpAQKtysb4DwKlqJDrAgL669Q/" />
31     <input type="hidden" name="FormSubmit" />
  
```

The transfer method in this example is **post**.

7. On the Add E-Source Target dialog box, set the Transfer Type to **Post**.

8. On the source code window, determine the log-in parameters by following these steps:
 - a) Select **Edit, Find** (or press **CTRL+F**) to display a Find dialog box.
 - b) Search for the text string **input**.

Ignore **input type= "hidden"** entries. Look for associated **name=** statements.

```

51 align="center" border="0" style="width:100%;border-collapse:collapse;"
    <tr id="loginUI_rw_tbl_left_1"
52 style="height:40px"
        <td id="loginUI_lb_UserMessage_Left"
        class="bodybold-shaded" style="width:33%;"/><td class="bodyLarger"
        align="left"><span id="loginUI_lb_UserMessage"></span></td>
53 </tr><tr id="loginUI_rw_tbl_left_3"
54 <td id="loginUI_lb_UserID_Left"
        class="bodybold-shaded" style="height:20px;"><span id="loginUI_tbl_lblUserID">User
        ID/></span></td><td style="height:20px;"><table id="loginUI_tbl_ExtUserID"
        cellspacing="0" cellpadding="0" align="left" border="0" style="border-
        style:None;width:70%;border-collapse:collapse;">
55 <tr>
56 style="border-style:None;"<input name="user" maxlength="20" id="user"
        class="blue_border_txt" /></td>
57 </tr>
58 </table></td>
59 </tr><tr id="loginUI_rw_tbl_left_5"
60 <td id="loginUI_lb_Fwd_Left"
        class="bodybold-shaded" style="height:20px;"><span
        id="loginUI_tbl_lblPwd">Password</span></td><td style="height:20px;"><table
        id="loginUI_tbl_txtPwd" cellspacing="0" cellpadding="0" align="left" border="0"
        style="border-style:None;width:70%;border-collapse:collapse;">
61 <tr>
62 style="border-style:None;"<input name="password" type="password" maxlength="20"
        id="password" class="blue_border_txt" /></td>
63 </tr>
64 </table></td>
65 </tr><tr id="loginUI_rw_tbl_left_6"
66 <td id="loginUI_btnLogin_Left"
  
```

For the purposes of this example, the EBSCOhost log-in form requires two parameters. Each parameter has a name (**user** and **password**) that you enter in the **Name** box on the Connection Data tabbed page of the Add E-Source Target dialog box (see step 9). Each parameter also requires a value specific to your organization.

Important:

Vendors with multiple databases usually require a separate set of parameters for each database. Typically, two parameters in the set are your library's user name and password; a third parameter is named **db** and the value is the code for the specific database.

9. On the Connection Data tabbed page of the Add E-Source Target dialog box, set the first EBSCOhost parameter by following these steps:
 - a) Type **user** in the **Name** box.
 - b) Type your organization's subscriber name (as determined by your organization and EBSCO) in the **Value** box.
 - c) Click **Add**.

The first parameter is listed in the **Parameter** box.

10. Set the second EBSCOhost parameter by following these steps:
 - a) Type **password** in the **Name** box.
 - b) Type your organization's password (as determined by your organization and EBSCO) in the **Value** box.
 - c) Click **Add**.

The second parameter is listed in the **Parameter** box.

The screenshot shows the 'Add ESource Target' dialog box. The 'Name' field is filled with 'EBSCO'. The 'Description', 'Message', and 'URL' fields are empty. The 'Transfer Type' is set to 'Post'. The 'Connection Data' tab is selected, showing a table with two columns: 'Name' and 'Parameter'. The first row is empty. The second row has 'password' in the 'Name' column and 'lib304' in the 'Parameter' column. The third row has 'user=westside' in the 'Parameter' column. There is an '>> Add >>' button and a 'Remove' button below the table. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

11. Close the log-in source code window, and exit from the browser.
12. On the Add E-Source Target dialog box, specify a description and a message, if you wish, and set any access restrictions. See [“Set up an e-source target”](#) on page 115.
13. Close the Add E-Source Target dialog box, and save your changes. See [“Set up an e-source target”](#) on page 115.

Example: Gale Connection Setup (Get Transfer Type)

This example shows how to enter a URL and view source code to set up connection authentication to a Gale CENGAGE Learning™ database. (See “Set up an e-source target” on page 115 for a detailed procedure on setting up e-sources.)

Note:

Database suppliers may require different authentication routines for different databases. Therefore, the authentication setup for one Gale database may differ from the setup for another Gale database. The following procedure is an example only. You must contact your vendor to get your library-specific connection information.

1. On the PowerPAC profiles tab for the organization, double-click **Categorization of E-Source targets**.
2. Click **Add Target** on the E-Source Categorization dialog box to display the Add E-Source Target dialog box.
3. Open a Web browser, and access the online log-in form for Gale at <http://gale.cengage.com>.

Tip:

If the library has an existing subscription with the supplier that uses IP authentication, the log-in page is automatically bypassed. You can access the log-in page by working from an IP outside the subscribed range.

4. Copy the URL for the log-in form that now displays in the browser address bar and paste it into the URL field on the Add E-Source Target dialog box. (Keep the browser window open.)

Note:

As a general rule, if the URL contains a question mark, copy all the text before the question mark. Do not copy the question mark or any text following it.

5. Return to the browser menu bar, and select **Page, View Source**.

The HTML source code for the log-in page is displayed in your default text editor.

For the purposes of this example, the Gale log-in form requires two parameters. Each parameter has a name (**userName** and **password**) that you enter in the **Name** box on the Connection Data tabbed page of the Add E-Source Target dialog box (see step 9). Each parameter also requires a value specific to your organization.

Important:

Vendors with multiple databases usually require a separate set of parameters for each database. Typically, two parameters in the set are your library's user name and password; a third parameter is named **db** and the value is the code for the specific database.

9. On the Connection Data tabbed page of the Add E-Source Target dialog box, set the first Gale parameter by following these steps:
 - a) Type **userName** in the **Name** box.
 - b) Type your organization's subscriber name (as determined by your organization and Gale) in the **Value** box.
 - c) Click **Add**.

The first parameter is listed in the **Parameter** box.

10. Set the second Gale parameter by following these steps:

- a) Type **password** in the **Name** box.
- b) Type your organization's password (as determined by your organization and Gale) in the **Value** box.
- c) Click **Add**.

The second parameter is listed in the **Parameter** box.

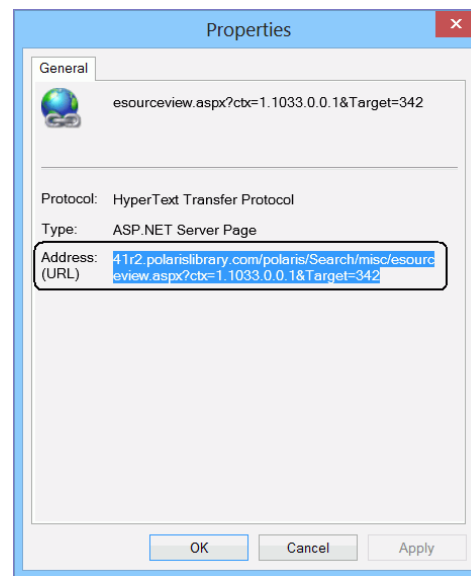
11. Close the log-in source code window, and exit from the browser.
12. On the Add E-Source Target dialog box, specify a description and a message, if you wish, and set any access restrictions. See ["Set up an e-source target"](#) on page 115.
13. Close the Add E-Source Target dialog box, and save your changes. See ["Set up an e-source target"](#) on page 115.

1-2-3

Provide links to e-sources on external sites

After you set up e-source targets, you can place links to specific e-source targets in other Web site locations, outside the catalog. Follow these steps to find and copy the link.

1. To obtain the link, right-click the e-source target on your PowerPAC e-sources page and select **Properties** from the context menu. The Properties dialog box displays the URL in the **Address (URL)** field.
2. To select the link, position the cursor at the start of the **Address (URL)** field, hold down the **Shift** key, and use the down arrow key to select all of the text.



3. Right-click the selected URL, and select **Copy**.
4. Paste the URL as a hypertext link.

The external link uses the authentication criteria and access restrictions placed on the target.

- If the e-source does not require a log-in, the user will go directly to that e-source.
- If a log-in is required, the user will go to the library's e-sources page where they can click a link to log in.



Organizing E-Source Targets

By default, all e-source targets are displayed as a single (potentially long) list on the PAC e-Source page. To make it easier for patrons to find e-source targets, you can organize the targets list into categories and subcategories. For example, you might organize e-source targets by subject matter categories, such as Business and Education, and perhaps define subcategories within these categories. You can set up categories at the system, library, or branch level. If categories are not set up for an organization, the organization scheme from the parent level is used.

A specific e-source target can be represented in multiple categories. You can add a target to a category when you set up the target, or you can copy targets from other categories. The copied targets are linked, so if you modify a target in one category, the same change is made to the linked targets in other categories. Categories can be copied, pasted, renamed, and deleted.

See the following topic:

- [“Categorize e-source targets”](#) on page 129

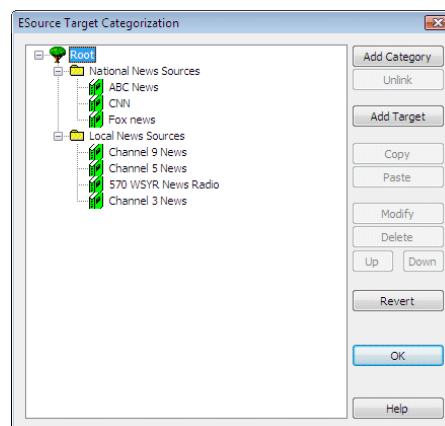
1-2-3

Categorize e-source targets

Follow these steps to organize the library’s e-source targets into categories and subcategories for ease of use.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Categorization of E-Source targets**.

The E-Source Categorization dialog box appears.



3. To add a category, do these steps:
 - a) Select (highlight) the folder to which you want to add a category.

Root, the default category, cannot be copied, deleted, or renamed. If you are adding a new category to the root level, select **Root**. If you are adding a subcategory to an existing category, select the existing category folder.
 - b) Click **Add Category**.
 - c) A folder icon appears in the Category tree view, with the cursor positioned to name the folder.
 - d) Type a category heading, and press **ENTER**.
4. Use the following methods to place e-source targets in categories:
 - Add individual e-source targets to a category. See “[Set up an e-source target](#)” on page 115.
 - Copy an existing e-source target (book icon) to another category. Select the target in the E-Source Categorization dialog box, and click **Copy**. Then select the category where you want to place the copy of the target, and click **Paste**. This procedure creates targets that are linked. Any change to one target is applied to all the linked targets.
5. To set the display order in the PAC, select a category or target and click **Up** or **Down**. Repeat until the categories or targets are in the display order you want.

Note:
On the PAC e-sources page, targets defined at the Root level are always displayed below any categories.
6. Click **OK** to close the dialog box.

Related Information

- **Delete an e-source target** - Select the target in the E-Source Categorization dialog box, and click **Delete**. Deleting a target from a particular category, including **Root**, does not delete it from other categories. Deleting a linked target only removes the target from the current category, unless the target is part of a linked category; any linked targets remain in the other categories.
- **Copy a category** - Select the category in the E-Source Categorization dialog box, and click **Copy**. Then select the category where you want to place the copy, and click **Paste**. This procedure creates categories that are linked, indicated by a hand on the folder icon. When you copy categories, all subcategories and targets are copied, and all the copied subcategories and targets also become linked. Any change to one category is applied to all the linked categories. To remove a link, select the category you want to make stand-alone, and click **Unlink**.

Note:

You cannot paste a category at the same level as the original category. There cannot be two subcategories with the same name within a category.

E-Source Reports

The **E-Source** report lists the subscription databases you have set up for searching from the PAC e-sources page, organized by branch. Information about each e-source includes the name, description, connection URL, message, categories/subcategories, restriction data, and connection data. You can filter the report by organization. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **PAC** in the Polaris Reports dialog box. For information on generating reports, see [“Using Polaris Standard Reports”](#) in the *Polaris Basics Guide 4.1R2*.

For the purposes of custom reports, you can choose to log the transaction when a patron accesses an e-source target:

- **Transaction** - E-Source Access
- **Transaction code** - 2201
- **Transaction subtypes**
 - 239 - Remote User flag
 - 240 - Selected Language ID
 - 241 - Name of e-source selected to view
 - 7 - Patron Code (if patron logged on)
 - 123 - Patron Assigned Branch (if patron logged on)
 - 33 - Patron Statistical Code (if patron logged on)

For information about logging transactions, see [“Collecting Transaction Statistics”](#) in the *Polaris Administration Guide 4.1R2*.

Displaying PAC Search Results



You can control the information displayed in PAC search results for both bibliographic records and specific items (holdings).

Note:

Certain settings described in this unit also affect Mobile PAC. For detailed information about Mobile PAC search results, see [“Mobile PAC Results Settings”](#) on page 348. Separate settings control the display of community information search results. See [“Community Setup for PAC Display”](#) in the *Polaris Community Profiles Guide 4.1R2*.

See the following topics:

- [“Configuring the PowerPAC Title Display”](#) on page 133
- [“Configuring the PowerPAC Product Page”](#) on page 150
- [“Setting Up Recently Viewed Titles”](#) on page 153
- [“Feature It Promotions”](#) on page 155
- [“Setting PowerPAC Narrow/Related Search Options”](#) on page 159
- [“Suppressing Request and Availability Options”](#) on page 169
- [“Cross-Reference Display in Browse Search Results”](#) on page 173
- [“Setting Up Local and System Availability”](#) on page 176
- [“Sending Call Numbers by Text Message”](#) on page 181
- [“Suppressing Items from Search Results”](#) on page 183
- [“Naming Shelf Locations”](#) on page 185
- [“Highlighting Titles with Local Items \(PowerPAC\)”](#) on page 188
- [“Map It \(Google Maps\) in PAC”](#) on page 189
- [“Google Preview for PowerPAC Search Results”](#) on page 195
- [“Enabling PAC Title Lists”](#) on page 197
- [“Social Bookmarking for Search Results \(AddThis™\)”](#) on page 199

Configuring the PowerPAC Title Display

Polaris provides complete flexibility in selecting, editing, and displaying information in PAC search results. Using the PowerPAC profile **Title Display: Configure**, you can do the following:

- Select which bibliographic data elements appear in the initial search results list, on the summary view for a title, and in the full display. The brief display is the information shown in initial search results. The summary information is displayed when the user hovers the cursor over a cover image. The full display appears on the product page, when the user clicks **Full Display** or the title itself.

The image shows three overlapping screenshots of the PowerPAC interface, illustrating different levels of book display for a title: "Tony Hillerman" by Fred Erisman, 1937-.

Brief Display: Shows the title, author, and a small cover image. It includes buttons for "Availability", "Full Display", and "Place Request".

Summary Display: Shows the title, author, publisher, date, and description. It includes a "Place Request" button and an "Add to My List" button.

Full Display: Shows the title, author, publisher, date, description, series, and subjects. It includes a "Place Request" button and an "Add to My List" button. The full display also shows the local numbers (813 HILze) and the system availability (1).

- Show multiple instances of a single tag in the brief display: for example, multiple 856 fields.
- Specify different elements for monographs and serials.
- Edit existing data elements.
- Set the display order of the data elements.
- Specify a custom label for each data element, and create translated versions of the data labels for languages you have licensed.

- Specify any additional data elements you need (custom entities), selecting the tags, indicator values, and subfields to include in each custom entity.
- Copy all these settings from any organization to any other organization.

The Mobile PAC profile **Title Display: Configure** provides similar flexibility for the Mobile PAC bibliographic results display, and you follow the same procedures to set up the display. See [“Configuring the Mobile PAC Title Display”](#) on page 363. For libraries that use Polaris Community Profiles, separate profiles control the PowerPAC and Mobile PAC displays of community information results, and a separate set of data elements is available for your community information displays. For details, see [“Configuring the PAC Community Results Display”](#) in the *Polaris Community Profiles Guide 4.1R2*.

See the following topics:

- [“Default Title Display Configuration for PowerPAC”](#) on page 135
- [“Select bibliographic entities for display and edit labels”](#) on page 138
- [“Edit bibliographic information display order”](#) on page 143
- [“Share a bibliographic information display configuration”](#) on page 144
- [“Edit a bibliographic entity definition”](#) on page 145
- [“Define custom entities”](#) on page 148

Default Title Display Configuration for PowerPAC

The tables show the default title display configuration for PowerPAC bibliographic search results.

<i>PowerPAC Brief Display - Monograph</i>			<i>PowerPAC Brief Display - Serial</i>		
<i>Entity</i>	<i>Display Order</i>	<i>Label</i>	<i>Entity</i>	<i>Display Order</i>	<i>Label</i>
Primary Title	1	Title:	Primary Title	1	Title:
Primary Author	2	Author:	Primary Author	2	Author:
Snippet	3	Snippet:	Snippet	3	Snippet:
Publisher (Short)	4	Publisher, Date:	Publisher (Short)	4	Publisher, Date:
Web Link (Short)	5	Web Site:	Web Link (Short)	5	Web Site:
Description (Short)	6	Description:	Description (Short)	6	Description:
Series (Short)	7	Series:	Series (Short)	7	Series:
Target Audience Note (Short)	8	Target Audience Note:	Target Audience Note (Short)	8	Target Audience Note:
Former Title (Short)	9	Former Title:	Former Title (Short)	9	Former Title:
Later Title (Short)	10	Later Title:	Later Title (Short)	10	Later Title:
System Availability	11	System Availability:	System Availability	11	System Availability:
Available System Item Count	12	# System items in:	Available System Item Count	12	# System items in:
Total System Item Count	13	System Availability:	Total System Item Count	13	System Availability:
Call Number (Short)	14	Call Number:	Call Number (Short)	14	Call Number:
Holdings Statement	15	Holdings Statement:	Holdings Statement	15	Holdings Statement:

<i>PowerPAC Summary Display - Monograph</i>			<i>PowerPAC Summary Display - Serial</i>		
<i>Entity</i>	<i>Display Order</i>	<i>Label</i>	<i>Entity</i>	<i>Display Order</i>	<i>Label</i>
Primary Title	1	Title:	Primary Title	1	Title:
Primary Author	2	Author:	Primary Author	2	Author:
Snippet	3	Snippet:	Snippet	3	Snippet:
Publisher (Short)	4	Publisher, Date:	Publisher (Short)	4	Publisher, Date:
Web Link (Short)	5	Web Site:	Web Link (Short)	5	Web Site:
Description (Short)	6	Description:	Description (Short)	6	Description:
Series (Short)	7	Series:	Series (Short)	7	Series:
Target Audience Note (Short)	8	Target Audience Note:	Target Audience Note (Short)	8	Target Audience Note:
Former Title (Short)	9	Former Title:	Former Title (Short)	9	Former Title:
Later Title (Short)	10	Later Title:	Later Title (Short)	10	Later Title:
System Availability	11	System Availability:	System Availability	11	System Availability:
Available System Item Count	12	# System items in:	Available System Item Count	12	# System items in:
Total System Item Count	13	System Availability:	Total System Item Count	13	System Availability:
Call Number (Short)	14	Call Number:	Call Number (Short)	14	Call Number:
Holdings Statement	15	Holdings Statement:	Holdings Statement	15	Holdings Statement:

<i>PowerPAC Full Display - Monograph</i>			<i>PowerPAC Full Display - Serial</i>		
<i>Entity</i>	<i>Display Order</i>	<i>Label</i>	<i>Entity</i>	<i>Display Order</i>	<i>Label</i>
Type of Material	1	Format:	Type of Material	1	Format:
Uniform Title (Long)	2	Uniform Title:	Uniform Title (Long)	2	Uniform Title:
Author (Long)	3	Author:	Author (Long)	3	Author:
Title (Long)	4	Title:	Title (Long)	4	Title:
Edition (Long)	5	Edition:	Edition (Long)	5	Edition:
Publisher (Long)	6	Publisher, Date:	Publisher (Long)	6	Publisher, Date:
Description (Long)	7	Description:	Description (Long)	7	Description:
Summary (Long)	8	Summary:	Summary (Long)	8	Summary:
Target Audience Note (Long)	9	Target Audience Note:	Target Audience Note (Long)	9	Target Audience Note:
Series (Long)	10	Series:	Series (Long)	10	Series:

<i>PowerPAC Full Display - Monograph</i>			<i>PowerPAC Full Display - Serial</i>		
Volume (Long)	11	Volume:	Volume (Long)	11	Volume:
Frequency (Long)	12	Frequency:	Frequency (Long)	12	Frequency:
Subjects	13	Subjects:	Subjects	13	Subjects:
Other Author (Long)	14	Other Author:	Other Author (Long)	14	Other Author:
Other Title (Long)	15	Other Title:	Other Title (Long)	15	Other Title:
Former Title (Long)	16	Former Title:	Former Title (Long)	16	Former Title:
Later Title (Long)	17	Later Title:	Later Title (Long)	17	Later Title:
Web Link (Long)	18	Web Site:	Web Link (Long)	18	Web Site:
LCCN (Long)	19	LCCN:	LCCN (Long)	19	LCCN:
ISBN (Long)	20	ISBN:	ISBN (Long)	20	ISBN:
ISSN (Long)	21	ISSN:	ISSN (Long)	21	ISSN:
OCLC Control Number	22	Other Number:	OCLC Control Number	22	Other Number:
STRN (Long)	23	STRN:	STRN (Long)	23	STRN:
GPO (Long)	24	GPO Item No.:	GPO (Long)	24	GPO Item No.:
CODEN (Long)	25	Label: CODEN:	CODEN (Long)	25	Label: CODEN:
Total System Item Count	26	System Availability:	Total System Item Count	26	System Availability:
Hold Request Count	27	Current Holds:	Hold Request Count	27	Current Holds:
Control Number	28	Control Number:	Control Number	28	Control Number:
Bibliographic Call Number	29	Call Number:	Bibliographic Call Number	29	Call Number:
Course Reserve Count	30	Course Reserves:	Course Reserve Count	30	Course Reserves:
Medium (Long)	31	Medium:	Medium (Long)	31	Medium:

1-2-3

Select bibliographic entities for display and edit labels

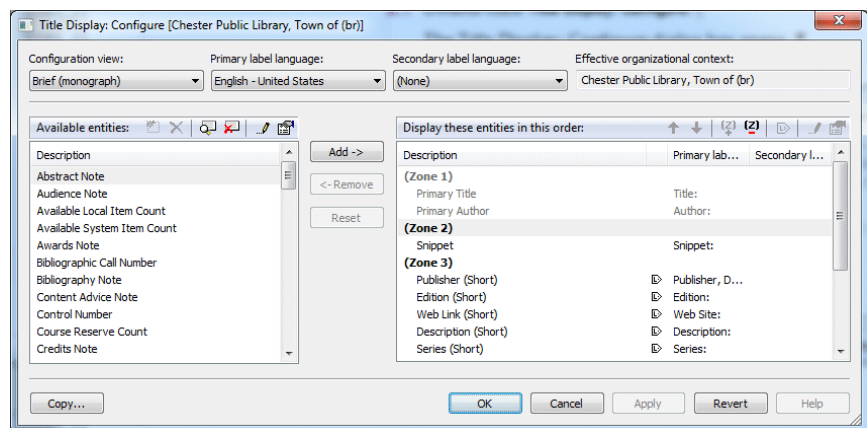
Follow these steps to select entities for display and edit their labels for PowerPAC bibliographic search results.

Note:

You need the permission **Modify bibliographic record title displays: Allow** to do this procedure.

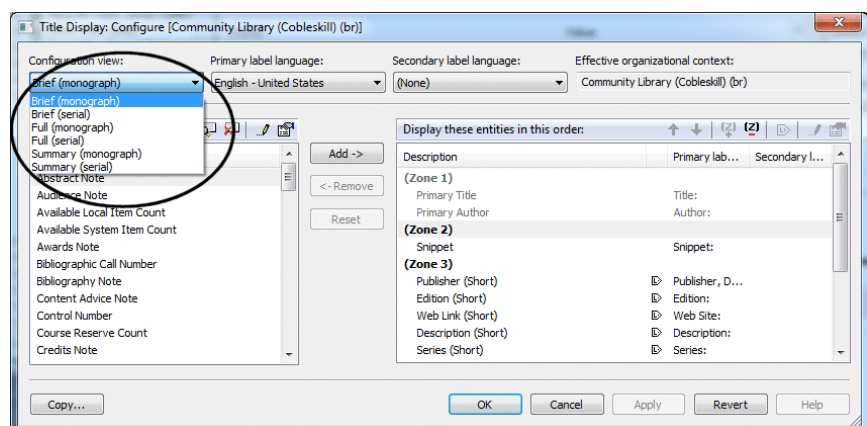
1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Title Display: Configure**.

The Title Display: Configure dialog box opens.



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

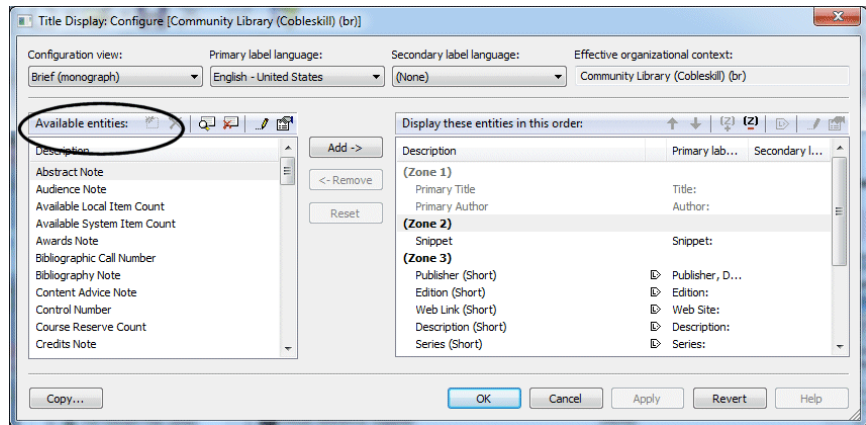
Note that you can configure separate displays for monographs and serials. The system uses your serials configurations for bibliographic records where LDR/07 = b or i or s.



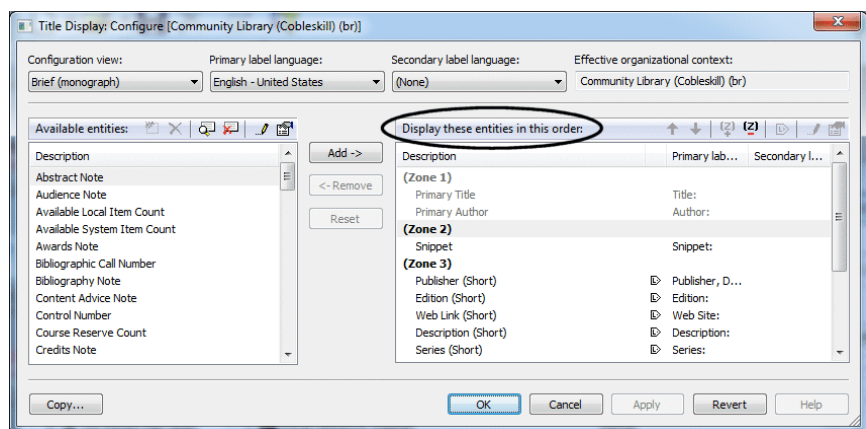
The **Available entities** list on the left side of the dialog box displays the entities that can be added to a view.

Note:

The **Available entities** list may include both system-supplied and custom entities. Custom entities are defined at the system level only. See “[Define custom entities](#)” on page 148. You can also edit many existing entities. See “[Edit a bibliographic entity definition](#)” on page 145.



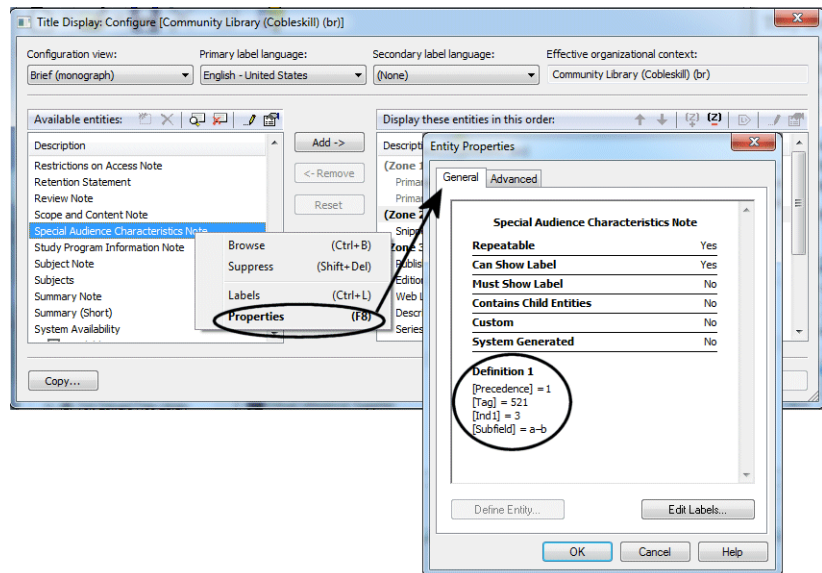
The **Display these entities** list on the right side of the dialog box lists those entities that are currently selected for the configuration view.



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

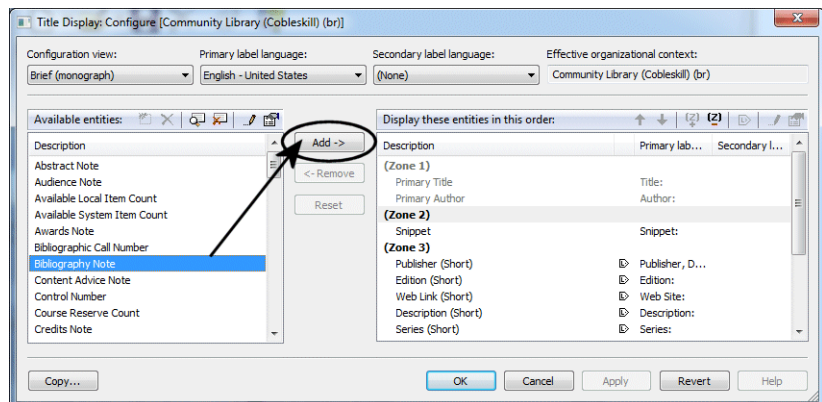
4. To see what tags, indicators and subfields are included in an entity, hover the cursor over the entity for a quick view, or right-click and select **Properties** from the context menu.

The Entity Properties dialog box opens.

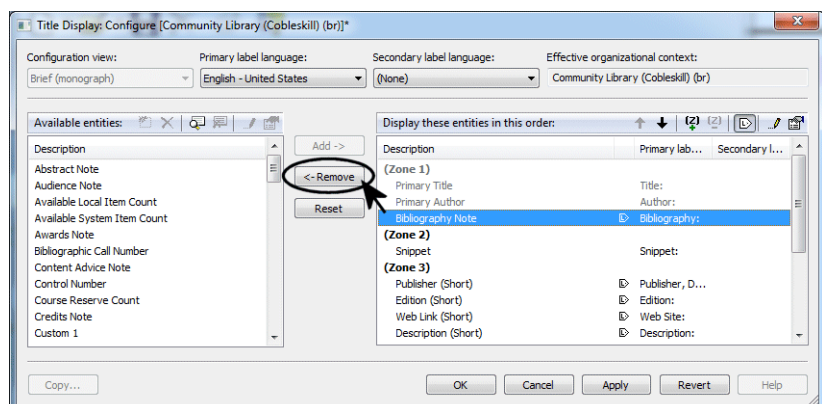


- To add an entity to the view, click the entity in the **Available entities** list and then click **Add**.

The entity is added to the **Display these entities** list.



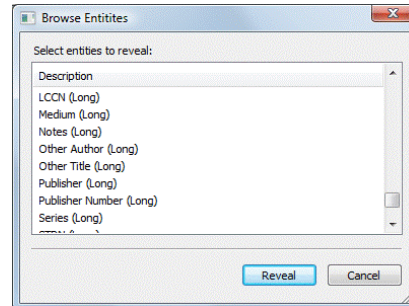
- To remove an entity from the view, click the entity in the **Display these entities** list and then click **Remove**.



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

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

The Browse Entities dialog box opens.




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

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


- c) Click **Reveal**.

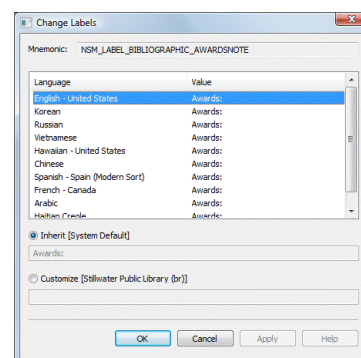
The entity now appears in the **Available entities** list and can be selected for display.

Note:

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

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

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



Tip:

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

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

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

Note:

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

- To permanently save your changes and keep the dialog box open, click **Apply**.
 - To permanently save your changes and close the dialog box, click **OK**.
 - To remove any changes that have not been applied and close the dialog box, click **Cancel**.
- 9.** Save or cancel your work in the Title Display Configure dialog box:
- To remove any changes that have not been applied and close the Title Display Configure dialog box, click **Cancel**.
 - To remove any changes that have not been applied and keep the Title Display Configure dialog box open, click **Reset**.
 - To permanently save changes and keep the Title Display Configure dialog box open, click **Apply**. See these topics for additional procedures:
 - “[Edit bibliographic information display order](#)” on page 143
 - “[Share a bibliographic information display configuration](#)” on page 144
 - “[Edit a bibliographic entity definition](#)” on page 145 (system level only)
 - “[Define custom entities](#)” on page 148 (system level only)
 - To permanently save changes and close the Title Display Configure dialog box, click **OK**.

Important:

After saving your changes, use Polaris Language Editor (WebAdmin) to reload PowerPAC. PowerPAC users may also need to clear their browser caches.

Related Information

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

Important:



When you click **Revert**, all branch-level configuration settings are lost. The action cannot be undone.

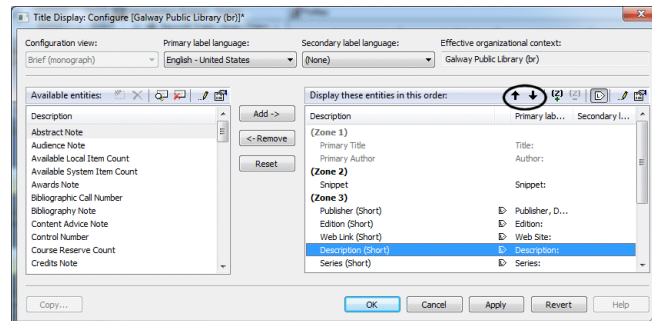
- **Copy a display configuration** - See “[Share a bibliographic information display configuration](#)” on page 144.

1-2-3

Edit bibliographic information display order


Follow these steps to insert a zone separator or set the entity display order:

1. Open the Title Display Configure dialog box if it not already open, and select the view you want to arrange. See “[Select bibliographic entities for display and edit labels](#)” on page 138.
2. To insert a zone separator:
 - a) In the **Display these entities** list, select the entity that should appear just below the new zone separator.
 - b) Right-click and select **Create Zone** from the context menu, or click the Create Zone icon  at the top of the **Display these entities** list.
3. To remove an existing zone separator, select it, right-click and select **Drop Zone**, or click the Drop Zone icon .
4. To change the order in which the entities and zone separators are displayed, select the entity or zone separator and click the up or down arrow buttons at the top of the **Display these entities** list.



5. To suppress the field label (but not the entity itself) from the PAC display, select the data element in the **Display these entities** list, right-click, and select **Show/Hide Label** from the context menu.
6. Save or cancel your work in the Title Display Configure dialog box:
 - To remove any changes that have not been applied and close the Title Display Configure dialog box, click **Cancel**.
 - To remove any changes that have not been applied and keep the Title Display Configure dialog box open, click **Reset**.
 - To permanently save changes and keep the Title Display Configure dialog box open, click **Apply**.
 - To permanently save changes and close the Title Display Configure dialog box, click **OK**.

Tip:

In the **Display these entities** list, the label icon  indicates that the label is currently set to be shown.

Important:

After saving your changes, use Polaris Language Editor (WebAdmin) to reload PowerPAC

1-2-3

Share a bibliographic information display configuration

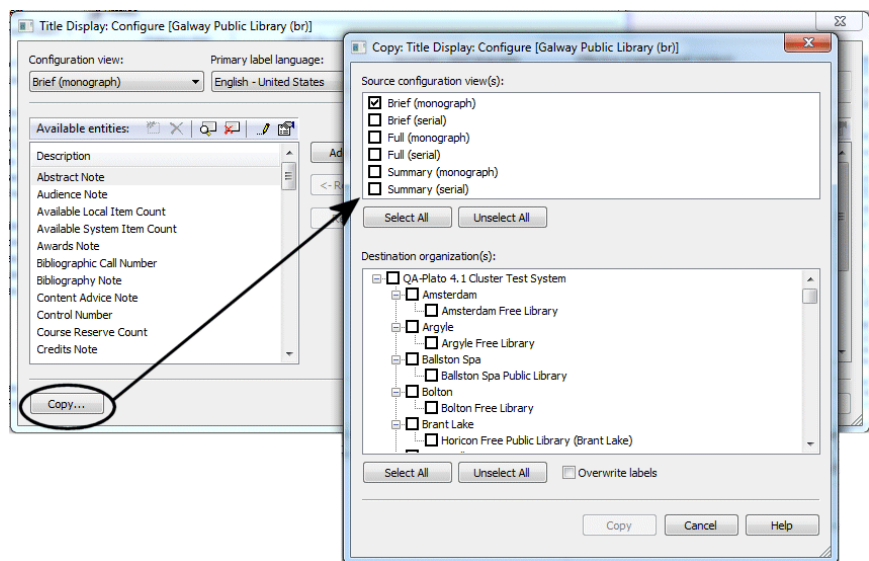
You can copy your bibliographic display configurations to other organizations. Follow these steps.

1. Open the Title Display Configure dialog box if it not already open, and select the view you want to copy. See “[Select bibliographic entities for display and edit labels](#)” on page 138.

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

2. Click **Copy**.

The Copy dialog box opens.



3. Select the configuration views you want to copy.
4. Select the organizations that should receive your settings.
5. (Optional) To overwrite the destination organization's labels with the source organization's labels, select (check) **Overwrite labels**.
6. Click **Copy**.

Important:

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

1-2-3

Edit a bibliographic entity definition

At the system level, you can edit the definitions (tags, indicators, subfields) of many bibliographic information display entities. However, the following system-defined entities *cannot* be edited:

Bibliographic call number	Fiction
Primary title	Hold Request Count
Primary author	Holdings Note
Snippet [the brief text string that shows the search terms in context]	Local Availability (Available Local Item Count and Total Local Item Count)
System Availability (Available System Item Count and Total System Item Count)	OCLC Control Number
Holdings Statement	Publication year
Available Local item Count	Retention Statement
Available System Item Count	Total Local Item Count
Control Number	Total System Item Count
Course Reserve Count	Type of Material

Also note that certain fields are ordinarily displayed as hyperlinks leading to a browse search in PowerPAC (for example, author or subject). However, adding a tag to a materialization rule for that type of data does not automatically cause the field to be displayed as a hyperlink (that is, it is not added to the browse index). The hyperlink will only occur if the tags, indicator values, and subfields selected for inclusion in the display correspond exactly to the fields that are already included in the browse index.

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

Note:

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

1. In the Administration Explorer tree view, open the **Profiles** folder for the system, and click the **PowerPAC** tab in the details view.
2. Double-click **Title Display: Configure**.
The Title Display: Configure dialog box opens.
3. Right-click the entity in the **Available entities** list and select **Properties** from the context menu.

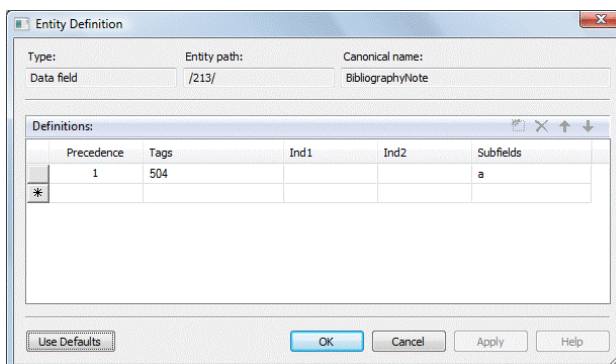
Note:

To display an entity for selection, you may need to click the Browse icon

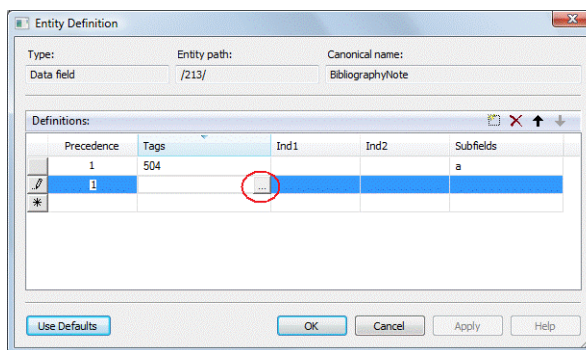


at the top of the **Available entities** list. Select the entity in the Browse Entities dialog box and click **Reveal** to add the entity to the **Available entities** list.

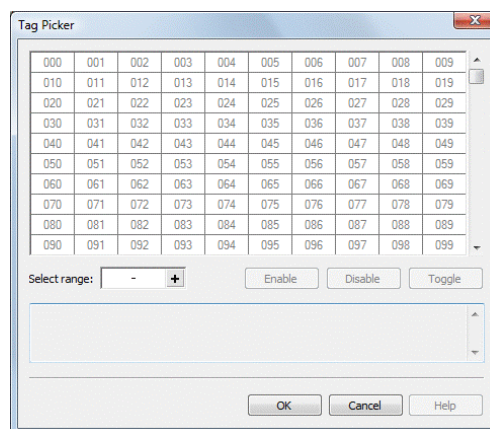
- On the Entity Properties dialog box, click **Define Entity**.
The Entity Definition dialog box opens.



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

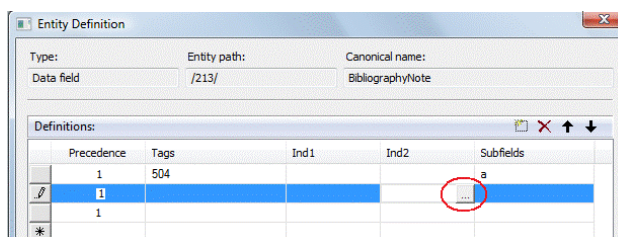


The Tag Picker dialog box opens.

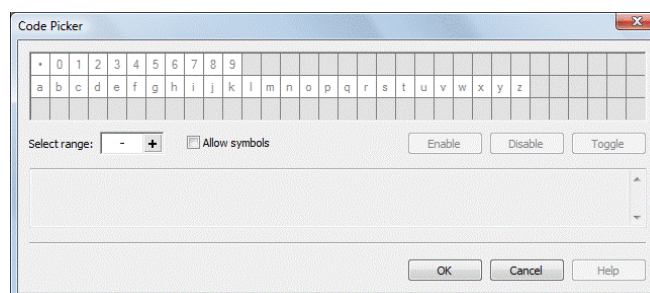


6. Select a tag or multiple tags:
 - To select one tag, click it in the grid, and then click **Enable**.
 - To select a contiguous range of tags, enter the beginning and ending tags in the **Select range** box, and click the **+** button to highlight the tags in the grid. Then click **Enable**.
 - To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

The Entity Definition dialog box is displayed.
7. To select indicator values, click the ellipsis button in the Ind1 or Ind2 column.



The Code Picker dialog box opens.



8. Select an indicator value or multiple indicator values:
 - To select an indicator value, click it in the grid, and then click **Enable**.

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

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

The Entity Definition dialog box is displayed.

9. To select subfields, click the ellipsis button in the Subfields column to display the Code Picker dialog box, and follow the same steps you used to select the indicator values. See step 8.
10. When all the tags, indicators and subfields are defined for the entity, click **Apply** to permanently save your work and keep the Entity Definition dialog open, or click **OK** to permanently save your work and close the dialog box.

Use the Change Labels dialog box to edit labels. See [“Select bibliographic entities for display and edit labels”](#) on page 138.

1-2-3

Define custom entities


At the system level, you can define new entities for display in PAC bibliographic search results. Follow these steps.

Note:

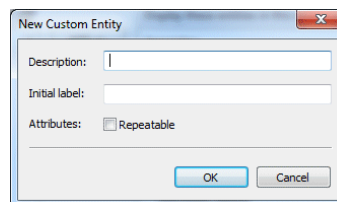
The maximum number of custom entities that can be defined at one time is 16,383. Internally, custom entities are assigned identifiers in the range of 16,384 and 32,767. The identifier number is displayed in the Entity Properties dialog box, Advanced tabbed page (**Entity path**).

Note:

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

1. Open the Title Display: Configure dialog box at the system level.
2. Click the new entity icon  at the top of the Available Entities list.

The New Custom Entity dialog box opens.



3. Type a description for the entity.

The description identifies the entity in the system, but does not display in PAC. Your description must contain at least one character and no more than 255 characters, and it must be unique within the set of bibliographic entities.

4. Type an initial label for the entity.


The label will be displayed in PAC if this entity and its label are both set to display. Labels associated with custom entities do not have default values. The initial label that you specify is created for each language at the system level. You can later edit the label for specific languages; see [“Select bibliographic entities for display and edit labels”](#) on page 138.

5. If this entity is repeatable, select (check) **Repeatable**.
6. Click **OK** to save the new entity and close the New Custom Entity dialog box.


The Entity Properties dialog box opens.

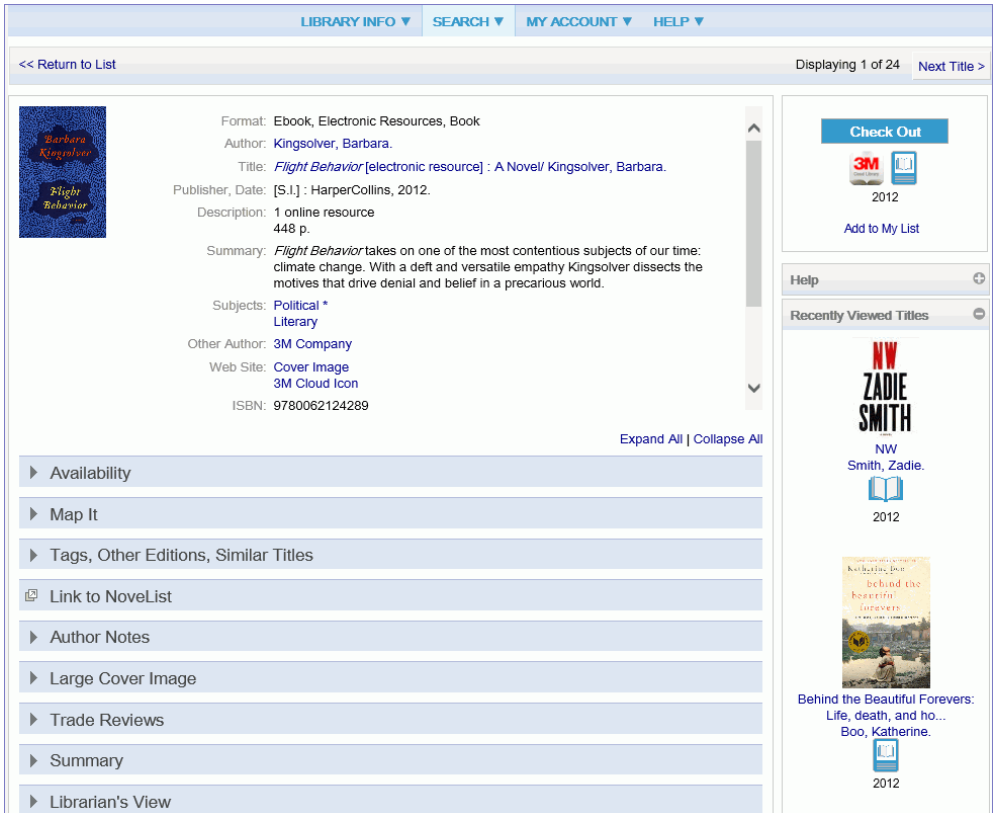
7. Define the tags, indicators, and subfields for the new entity:
 - a) On the Entity Properties dialog box, click **Define Entity**.
 - b) See [“Edit a bibliographic entity definition”](#) on page 145 for editing instructions.

Related Information

Deleting a custom entity - You cannot delete a custom entity if it is currently used in any display configuration. Select the entity in the **Available Entities** list and click the delete icon  above the list. If the entity is currently in use, a message lists the configurations where it is still in use.

Configuring the PowerPAC Product Page

The PowerPAC product page is displayed when a user clicks a title, cover image, or **Full Display** for a title in the search results list. This page includes the bibliographic information set for the full display in the PAC profile **Title display: Configure** (see “[Configuring the PowerPAC Title Display](#)” on page 133). Since this information may be extensive, this section of the page can be scrolled. Below the bibliographic information is a series of expandable category “drawers” for availability information, enriched content, and other features. External links to other resources are indicated by an icon . (These links open in a new browser window.) The user can click **Expand All** or **Collapse All** to control the display of the drawer contents, or expand and collapse individual drawers. In Polaris Administration, you can set which drawers are expanded by default when the page is opened, and specify the display order of the drawers on the page. The illustration shows an example with all drawers collapsed.



The screenshot displays the PowerPAC product page for the book *Flight Behavior* by Barbara Kingsolver. The page is organized into several sections:

- Navigation:** At the top, there are links for "LIBRARY INFO", "SEARCH", "MY ACCOUNT", and "HELP". Below this, there are navigation options: "<< Return to List" and "Displaying 1 of 24 Next Title >".
- Bibliographic Information:**
 - Format:** Ebook, Electronic Resources, Book
 - Author:** Kingsolver, Barbara.
 - Title:** *Flight Behavior* [electronic resource] : A Novel/ Kingsolver, Barbara.
 - Publisher, Date:** [S.l.] : HarperCollins, 2012.
 - Description:** 1 online resource 448 p.
 - Summary:** *Flight Behavior* takes on one of the most contentious subjects of our time: climate change. With a deft and versatile empathy Kingsolver dissects the motives that drive denial and belief in a precarious world.
 - Subjects:** Political * Literary
 - Other Author:** 3M Company
 - Web Site:** Cover Image, 3M Cloud Icon
 - ISBN:** 9780062124289
- Expandable Drawers:** A vertical list of drawers is shown, all collapsed. The drawers include:
 - Availability
 - Map It
 - Tags, Other Editions, Similar Titles
 - Link to NovelList
 - Author Notes
 - Large Cover Image
 - Trade Reviews
 - Summary
 - Librarian's View
- Right Sidebar:**
 - Check Out:** A blue button with a 3M logo and a book icon, indicating the book is available for checkout.
 - Help:** A link with a refresh icon.
 - Recently Viewed Titles:** A list of books viewed recently, including *NW ZADIE SMITH* and *Behind the Beautiful Forevers: Life, death, and hope in the slums of Mumbai* by Katherine Boo.

See the following topic:

- “[Set up the PowerPAC product page](#)” on page 151

1-2-3

Set up the PowerPAC product page

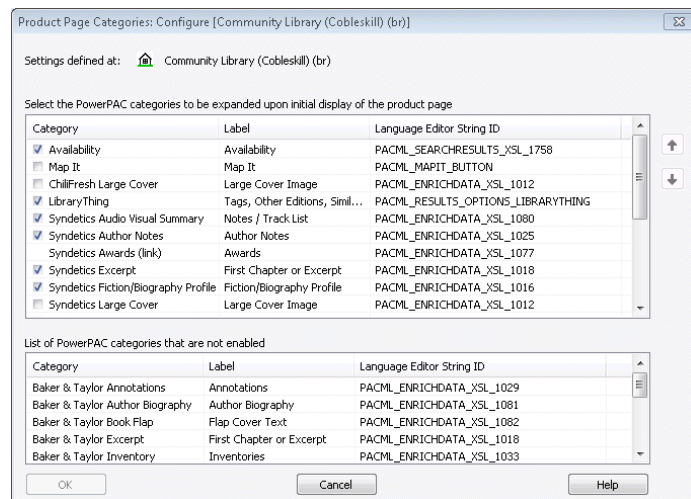
Follow these steps to set the default state of categories (expanded or collapsed) on the Polaris PowerPAC product page and determine their display order.

Note:

You need the permission **Modify product page categories: Allow** to do this procedure.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Product page categories: Configure**.

The Product Page Categories: Configure dialog box opens. The top portion lists the categories (features) that have been enabled for the organization.



3. To set a category to be expanded in the initial product page display, check the category.
4. To change the display order, select the category and click the appropriate arrow at the side of the dialog box to move the category up or down in the display order.
5. Click **OK**.

Related Information

- **Editing category labels** - The Product Page Categories: Configure dialog box lists the language string ID for each category for use in Polaris Language Editor (WebAdmin), where you can search for and edit the drawer labels. For more information, see the *Polaris Language Editor (WebAdmin) Guide* or Language Editor online Help.
 - **Enabling categories** - The bottom portion of the Product Page Categories: Configure dialog box lists the features that are possible to display on the product page, but have not been enabled for the organization. For information about setting up the features that can be displayed on the product page, see the following topics:
 - **Enriched content from third parties** - [“Enabling Enriched Data”](#) on page 222
- Note:**
Novelist Select content drawers are not displayed for digital content (Polaris Fusion) bibliographic records.
- **Map It** - [“Map It \(Google Maps\) in PAC”](#) on page 189
 - **Librarian’s View** - Set the PowerPAC profile **Librarian’s (MARC) View: Enable** to Yes.
- **Mobile PAC product page** - You can use a separate profile to configure the product page for Mobile PAC. See [“Set up the Mobile PAC title \(product\) page”](#) on page 361.

Setting Up Recently Viewed Titles

The Recently View Titles list is available when the user has viewed at least one product page for a title in the current session, and is displayed in the PowerPAC dashboard on the product page for a title, and on any bibliographic record search and results page. The list displays the titles already viewed, including the cover image, title, author, format icon, and publication date. The user can click a title in the list to launch a search for the title.

The list is available as long as the current session is active, and is cleared when the browser is closed or the session times out. It is available regardless of whether the user has logged in. The user can disable the feature for the session by clicking **Turn off recently viewed titles**. This action clears the list; the user can start it again by clicking **Turn on recently viewed titles**.

You can enable the feature for in-house workstations, remote workstations, or both. Use the PowerPAC profile **Recently viewed titles**, available at the system, library, or branch level, to set up the Recently Viewed Titles Web part.

The screenshot displays the PowerPAC interface for a product page. At the top, there are navigation tabs: LIBRARY INFO, SEARCH, MY ACCOUNT, and HELP. Below the tabs, there are navigation links: << Return to List and Displaying 1 of 24 Next Title >. The main content area shows the product details for 'Flight Behavior' by Barbara Kingsolver. The details include a cover image, Format (Ebook, Electronic Resources, Book), Author (Kingsolver, Barbara), Title (Flight Behavior [electronic resource] : A Novel/ Kingsolver, Barbara), Publisher, Date ([S.l.] : HarperCollins, 2012), Description (1 online resource 448 p.), Summary (Flight Behavior takes on one of the most contentious subjects of our time: climate change. With a deft and versatile empathy Kingsolver dissects the motives that drive denial and belief in a precarious world.), Subjects (Political * Literary), Other Author (3M Company), Web Site (Cover Image, 3M Cloud Icon), and ISBN (9780062124289). Below the details, there are expandable sections: Availability, Map It, Tags, Other Editions, Similar Titles, Link to NoveList, Author Notes, Large Cover Image, Trade Reviews, Summary, and Librarian's View. On the right side, there is a 'Check Out' button, a '3M' logo, and 'Add to My List' button. Below that, there is a 'Help' section and a 'Recently Viewed Titles' widget. The widget displays a list of titles, including 'NW ZADIE SMITH' and 'Behind the Beautiful Forevers'.

See the following topic:

- “Set up Recently Viewed Titles” on page 154

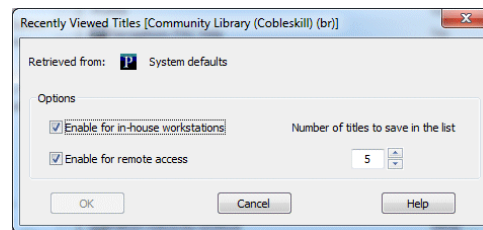
1-2-3

Set up Recently Viewed Titles

Follow these steps to set up the Recently Viewed Titles feature in Polaris PowerPAC.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Recently viewed titles**.

The Recently Viewed Titles dialog box opens.



3. Set either or both location options:
 - Check **Enable for in-house workstations** to make this feature available at workstations in the library. In-house workstations are those defined by the settings in the organization's PowerPAC profile **In-house access definitions**. If you have privacy concerns regarding in-house PAC workstations, leave this option unchecked.
 - Check **Enable for remote access** to make this feature available to users outside the library.
4. Set the maximum number of titles that should appear in the list.
The maximum is 99; the default value is 5.
5. Click **OK**.

Related Information

- **In-House access definitions** - See "[Set criteria for determining in-house location](#)" in the *Polaris Administration Guide 4.1R2*.
- **Setting up the In-House IP Addresses table** - See "[Identify IP addresses of in-house computers](#)" in the *Polaris Administration Guide 4.1R2*.

Feature It Promotions

Libraries can use Feature It to generate awareness of relevant resources that might otherwise go undiscovered in the public access catalog or in the community. With Feature It, you can promote library materials, Web resources, and/or community organizations and events in the context of specific search results, similar to “You might also like” features on many popular web sites.

Note:

Feature It and Community Profiles are available by separate licenses. For more information about Community Profiles, see “[Polaris Community Profiles Topics](#)” in the *Polaris Community Profiles Guide 4.1R2*.

Use the Cataloging Promotions function in the staff client to select resources to feature, and to specify the conditions under which they will be featured. For detailed instructions, see “[Managing Promotions](#)” in the *Polaris Cataloging Guide 4.1R2*.

Once promotions are set up, when one or more of the PowerPAC user’s search terms (16 words maximum) match the triggers and filters associated with one or more promotion records, promotion links are displayed in a position you specify on the PowerPAC search results screen. A maximum of 8 promotion links can be displayed. If more than 8 promotion links match the user’s search terms, a relevancy ranking formula is applied to select those most relevant to the user’s search terms. (Relevancy is based on the words entered as triggers in the promotion record, not on the metadata in the featured resource records.)

The screenshot displays the Polaris Public Access Administration interface for Community Library (Cobleskill). The search results for the keyword "vampires" are shown. A "You might also like" section is circled, highlighting two promotional items:

- A new item about Vampires: Some girls bite [sound recording]. Format: Electronic Resources
- A new item about Vampires: Twice bitten [sound recording]. Format: Book

The main search results list includes:

- Vampires : opposing viewpoints** by Scavone, Daniel C., 1934-
... Examines the subject of *vampires* in legend and in history. ...
Publisher, Date: San Diego, Calif. : Greenhaven Press, c1990.
Description: 80 p. : ill., map ; 24 cm.
Series: Great mysteries
Call Number: J 398.4 Sca
- Vampires** by Jenkins, Martin.
... Examines *vampires* in literature, film, history, and the animal world. ...
Edition: 1st U.S. ed.
Description: 92 p. : col. ill. ; 24 cm.

For bibliographic searches, promotions may be displayed for keyword, phrase, exact, advanced, and Boolean searches by one of the following access points (**Search by**): **Any field, Author, General notes, Publisher, Series, Subject, Title**. Promotions are not available for course reserve searches or browse searches. However, when the user selects a heading in a browse search headings list, promotions are displayed along with the titles associated with the heading. The selected heading is considered to be the user's search term when determining which promotions to display.

Promotions are also available for community keyword searches by one of the following access points: **Any Field, Organization Name, Event Name, Services available, Subject, Notes**. Promotions are not available for community browse searches, but when the user selects a heading in community browse results, promotions are displayed along with the records associated with the heading. As with bibliographic browse results, the selected heading is considered to be the user's search term when determining which promotions to display.



When the user clicks a promotion for a bibliographic record, a deep link to the catalog, or a community/event record, a search is launched for the appropriate bibliographic or community/event record, and the record is displayed in the PowerPAC results list.

The screenshot displays the PowerPAC search interface. At the top, there are navigation tabs: LIBRARY INFO, SEARCH, COMMUNITY, MY ACCOUNT, and HELP. The search bar contains the text 'artists' and a 'Go!' button. Below the search bar, there are dropdown menus for 'Search by' (set to 'Any Field') and 'Limit by' (set to 'All Items - All Libraries'). A 'Using: 1 selected databases' indicator is present, along with a 'Select Databases' link and a checkbox for 'Course reserve items only'. A 'More Search Options' link is also visible.

On the left side, there is a 'You might also like' section with a list of promotions. A callout box with a black arrow points to the first promotion, 'Art for Dummies'. The callout box contains the following text: 'Art for Dummies', 'Hosted by: ZZZ-Caldwell-Lake George Library', and 'Community Event'. Below this, there are other promotions: 'Southwest Artisans Society', 'Writing Together: Write On Series', 'A new item about Artists', and another 'A new item about Artists'.

The main content area shows the details for the 'Art for Dummies' promotion. It includes a title, a host (ZZZ-Caldwell-Lake George Library), a web link to the event calendar, an event date (Thursday, November 10, 2011: All Day), and a primary address (336 Canada Street, Lake George NY 12845). Contact information (Phone, E-mail) is also provided. A summary describes the promotion as an online discussion group for art enthusiasts. The target group is 'Adult Everyone', and the performer/presenter is 'Amie'. Services available are 'Adult'. At the bottom right, there are links for 'Expand All' and 'Collapse All'.

When the user clicks a promotion link that is a URL for an external resource, a new browser window opens.

You can enable Feature It for library materials and web resources, community profile and event information (if licensed), or both, setting a separate display placement for each or presenting all promotions in one merged list. In the PAC display, the library icon  indicates bibliographic materials. The briefcase icon  indicates community information.

For library (bibliographic) material, the list header is **You might also like these library materials and web pages**. For community information, the list header is **You might also like these community resources**. For a merged list, the header is **You might also like**. You can edit the headers in Polaris Language Editor (WebAdmin). The language string IDs are:

- Bibliographic materials - PACML_PACFEATURE_DASHHEAD
- Community information - PACML_CIPACFEATURE_DASHHEAD
- Merged list - PACML_FEATURE_DASHHEAD

See the following topic:

- “Set up the Feature It display for PowerPAC” on page 157

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Set up the Feature It display for PowerPAC

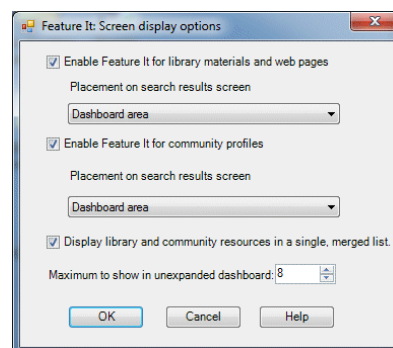
In the staff client, use the Cataloging Promotions workflow to set up promotions for specific resources. Then follow these steps to specify how the promotions are displayed in Polaris PowerPAC.

Note:

You can set Feature It display options at the system, library, or branch level. The system uses the settings for the PowerPAC connection organization.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Feature It: Screen display options**.

The Feature It: Screen display options dialog box opens.



3. To set up Feature It for library materials and web resources:
 - a) Select (check) **Enable Feature It for library materials and web pages**.

This setting enables promotion links for library materials and featured URLs when the user searches for either bibliographic records or community information.
 - b) Select the promotion placement on the search results screen. You can select **Dashboard area**, **Beginning of search results**, or **End of search results**.
4. To set up Feature It for community information:
 - a) Select (check) **Enable Feature It for community profiles**.

This setting enables promotion links for community information when the user searches for either bibliographic records or community information.
 - b) Select the promotion placement on the search results screen. You can select **Dashboard area**, **Beginning of search results**, or **End of search results**.

Note:

Community Profiles is a separately licensed feature.

5. To display library materials and community profile information in one list:
 - a) Enable both options and choose the same display position for both. See steps 3 and 4.
 - b) Select (check) **Display library and community resources in a single merged list**.
6. If you have selected **Dashboard area** as the placement for an enabled Feature It option, set the maximum number of promotion links to show in an unexpanded dashboard list.

The maximum (and default) value is 8 promotion links. Since this list can occupy considerable dashboard space at the top of the dashboard, forcing the user to scroll to see search filters and related searches, you can set the value to a lower number. In this case, the dashboard list displays a **more** link when appropriate. The user can click **more** to expand the list (up to 8 links) and **less** to collapse it. If you set this value to 0, the list is completely collapsed and the user must click a plus sign to expand it.
7. Click **OK**.

Setting PowerPAC Narrow/Related Search Options

When a user's search results are returned, the Polaris PowerPAC dashboard can display two Web parts to launch searches related to the results. The **Narrow your search** Web part offers facets to filter the current search results; the **Related searches** Web part offers links to launch other, related searches.

Using the PowerPAC profile **Dashboards: Narrow your search & Related searches**, you can offer the **Narrow your search** Web part, the **Related searches** Web part, or both; specify the elements available for each Web part and set the display order; set the initial display to expanded or collapsed; set the minimum and maximum number of links for each element; specify your own labels for the Web parts and elements and translate the labels. By default, both Web parts and all their available elements are enabled and set to an expanded initial display.

Note:

This profile does not affect course reserve or community information search results. A separate profile is available for community information search results. See [“Community Search Results Facets in Polaris PowerPAC”](#) in the *Polaris Community Profiles Guide 4.1R2*.

See the following topics:

- [“Narrow Search Web Part”](#) on page 160
- [“Related Searches Web Part”](#) on page 162
- [“Set up the Narrow your search Web part”](#) on page 163
- [“Set up the Related searches Web part”](#) on page 165

Narrow Search Web Part

The **Narrow your search** dashboard offers two types of facets for filtering a set of search results: check boxes and bulleted items. When a user selects a facet, it is placed at the top of the list and the results set is filtered accordingly.

- **Check box facets** represent “or” filters for the results set. If you select another facet from within the same group, it is also added to the top of the list for that facet type. The filtered results set grows to include results that match the first selected facet *or* the second selected facet. When you select facets from different check box groups, the filtered results set is restricted to results that match the selected facet in one group *and* the selected facet in the other group.

Note:

Check box facets are not necessarily mutually exclusive. For Type of Material, each title is included in the count for all facets that apply to it. For example, a large print book appears in the counts for both the **Book** and **Large Print** facets. As another example, **Musical sound recording** is a subset of **Sound recording**. If you select the **Musical sound recording** facet, the count for **Sound recording** may go down.

The screenshot shows the Community Library (Cobleskill) search interface. At the top, there are navigation links for LANGUAGE, LARGE TEXT, and KID'S CATALOG. The search bar contains the query "morrison, Toni". Below the search bar, there are dropdown menus for "Search by" (Any Field) and "Limit by" (All Items - All Libraries). The "Using" dropdown is set to "Local Polaris PAC DB".

The "Narrow your search" sidebar is highlighted with a red box. It contains the following facets:

- Type of Material:** Book
- Target Audience:** Adolescent, Juvenile, Adult (+7), General (+1), Pre-adolescent (+1)
- Publication Date:** 2003 (3), 1996 (2), 2000 (2), 2001 (2), 2002 (2)
- Subjects:** Authors, American (6), Morrison, Toni (6), Women (6), African Americans (5), Fables, American (4)
- Authors:** Morrison, Toni (7), Morrison, Slade (6), Lemaitre, Pascal (6), Morrison, Toni. Who's got game? (4), Bolden, Tonya (2)
- Series:** Morrison, Toni. Who's got

The main results area shows three items:

- 1. Toni Morrison : great American writer** by Rhodes, Lisa Renee.
 Publisher, Date: New York : Franklin Watts, c2001.
 Description: 128 p. : ill. ; 22 cm.
 Series: Book report biography.
 Call Number: j B Morrison Rho
- 2. Who's got game? : three fables** by Morrison, Toni.
 ... Who's got game? : three fables / by Toni Morrison and Slade Morrison ; pictures by Pascal Lemaitre. ...
 Publisher, Date: New York : Scribner, 2007.
 Edition: 1st combined ed.
 Description: unsp. : 24 cm.
 Series: Morrison, Toni. Who's got game?
- 3. The ant or the grasshopper?** by Morrison, Toni.
 ... The ant or the grasshopper? / by Toni Morrison & Slade Morrison ; illustrated by Pascal Lemaitre. ...

- **Bulleted facets** represent “and” filters for the results set. When you select a bullet facet, it is also placed at the top of its list. The filtered results set is now restricted to results that match any already selected facet *and* the selected bullet facet.

The screenshot shows a library search interface. At the top, there are navigation tabs: LIBRARY INFO, SEARCH, COMMUNITY, MY ACCOUNT, CONNECTIONS, and HELP. The search bar contains 'morrison, Toni'. Below the search bar, there are options for 'Search by' (Any Field), 'Limit by' (All Items - All Libraries), and 'Using' (Local Polaris PAC DB). A 'Save Search' button is visible on the left. The left sidebar is titled 'Narrow your search' and contains several filter categories: Type of Material (Ebook checked), Publication Date (2007, 2008, 2012), Subjects (Electronic books, Literary, Fiction, War), Authors (3M Company, Morrison, Toni), Popularity (Low), Language (English), Assigned Branch (Digital Branch, Digital Branch Two), and Record Owner (QA-Plato 4.1 R2). The main search results area shows two items: 1. 'The Bluest Eye [electronic resource]' by Morrison, Toni, published in 2007, and 2. 'Home [electronic resource]' by Morrison, Toni, published in 2012. Each item has a cover image, a brief description, and buttons for 'Availability', 'Full Display', and 'Check Out'. There are also icons for 'Add to Shelf' and 'Add to My List'.

The following elements are available for narrowing search results:

- Database - See “[Managing Federated Search Targets](#)” on page 95 for information about setting up remote databases for searching.
- Type of Material - See “[Setting Up Search Filters \(Limit By\)](#)” on page 70 for detailed information about this filter.
- Target Audience
- Publication Date
- Subjects
- Authors
- Series
- Popularity - Divides the results set into three roughly equal-sized groups. Records with the highest popularity index are placed in the high group, those with the lowest popularity index are placed in the Low group, and the others are placed in the Medium group. The popularity index rank associated with each bibliographic record is based on sorting all the bibliographic records in the database by the following characteristics, listed in descending order of significance:
 - (1) number of hold requests plus the number of check-outs in the last 120 days;
 - (2) number of check-outs in the last 120 days;
 - (3) lifetime circulation count;
 - (4) in-house use count;
 - (5) record creation date
- Language

- Assigned Branch
- Record Owner
- Literary Form

Record counts are included for each filter offered on the **Narrow your search** dashboard element. The counts are recomputed by the Keyword Processing SQL job, which runs nightly by default.

Related Searches Web Part

The **Related searches** Web part is displayed below the **Narrow your search** Web part in the dashboard. When the user selects an element in this Web part, a new search for the same search text is launched. Depending on the element, the new search may be a browse search for a heading in a specified index (**Subject, Author, or Series**), a keyword search in a specified field (**Other searches**), or a keyword search in a different (Z39.50) database (**Other databases**). The **Other databases** element lists the databases you specified for the **Using** box in the top area of the search page (see “[Develop the remote targets display for PAC](#)” on page 102).

Note:

The Related browse search options (**Subject, Author, or Series**) are not displayed when remote databases have been selected.

The screenshot displays the search interface with the following elements:

- Navigation:** LIBRARY INFO, SEARCH, MY ACCOUNT, HELP.
- Search Bar:** Keyword search for: civil war. Search by: Any Field. Limit by: All Items - All Libraries. Using: Local Polaris PAC DB.
- Results Summary:** 1 - 10 of 4813. 10 per page. Sort: Relevance. Page: [1] 2 3 ... 482.
- Related Searches Sidebar:**
 - Subjects:** United States, Generals, United States Army, Confederate States of America Army, African Americans.
 - Authors:** Time-Life Books, NetLibrary, Inc., 3M Company, Recorded Books, Inc., Crane, Stephen, 1871-1900.
 - Series:** Civil War, Report, United States congressional serial set, Historical American biographies, Comwell, Bernard. Starbuck chronicles.
 - Other Searches:** Any Field Search.
- Search Results:**
 - 1. The *Civil War* Trust's official guide to the *Civil War* Discovery Trail.**
 - At head of title on cover: Frommer's The *Civil War* Trust's official guide to the *Civil War* Discovery Trail ...
 - Publisher, Date: New York, NY : Macmillan, c1996-
 - Available system-wide: 2 (of 2)
 - Call Number: 973.73 Civ
 - Description: v. : ill., maps ; 22 cm.
 - 2. *Civil war*. Companion** by Thomas, John Rhett
 - Contains material originally published in magazine form as *Civil War*files, *Civil war*: battle damage report, Marvel spotlight: Mark Millar/Steve ...
 - Publisher, Date: New York : Marvel Comics, 2007.
 - often test entity "Contains material originally published in magazine form as *Civil War*files, *Civil war*: battle damage report, Marvel spotlight: Mark Millar/Steve McNiven, Marvel spotlight: *civil war* aftermath and Daily bugle: *civil war* special edition."
 - Description: 1 v. (unpaged) : col. ill. ; 26 cm.

1-2-3

Set up the Narrow your search Web part

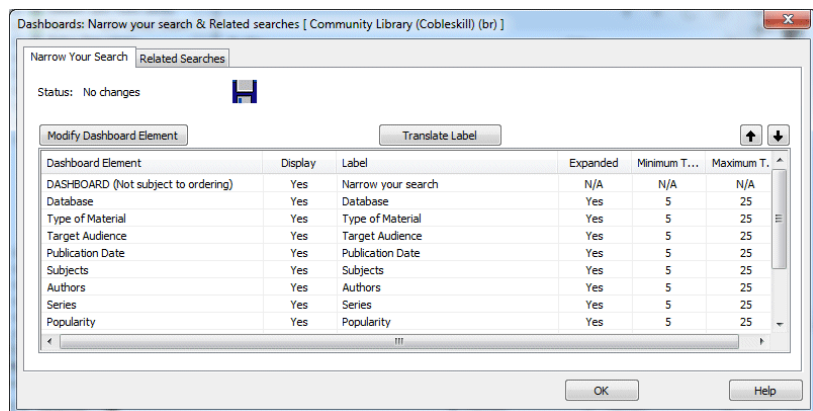
Follow these steps to set up the **Narrow your search** Web part, which provides elements to filter a PAC search results set.

Note:

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

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

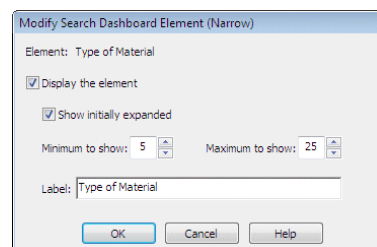
The Dashboards: Narrow your search & Related searches dialog box opens to the **Narrow Your Search** tabbed page.



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

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

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



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

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

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

Note:

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

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

The default values are 5 minimum, 25 maximum.

Important:

The maximum number of links that can be displayed for one element is 99. However, higher numbers of links can slow processing time and may not be particularly useful to patrons, since the list of links for an element may be quite long for certain searches.

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


8. Click **OK**.

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

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

Note:

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

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

Note:

A message alerts you if you have set **DASHBOARD** to be displayed without setting elements to be displayed. At least one element within the Web part must be set for display in order to display the Web part itself.

Your changes are immediately applied to the Polaris database. However, as with most administrative changes to Polaris PowerPAC, you need to clear the page caches. See "[Updating Page Caches](#)" on page 9.

Note:

Because the **Narrow your search** Web part may be quite long, the **Related** Web part may not be visible in the interface without scrolling. If you want to be sure that patrons see the **Related** Web part without scrolling, you will need to limit the elements you enable for the **Narrow your search** Web part, or set at least some of the elements to be displayed as initially unexpanded.

Related Information

- “Set up the Related searches Web part” on page 165
- “Translate labels for Narrow/Related Web parts (Polaris PowerPAC)” on page 167
- **Setting up other dashboard features** - See “Defining Web Parts for Dashboards” on page 36.

1-2-3

Set up the Related searches Web part

Follow these steps to set up the **Related searches** Web part, which provides elements to launch new searches related to a PowerPAC search results set.

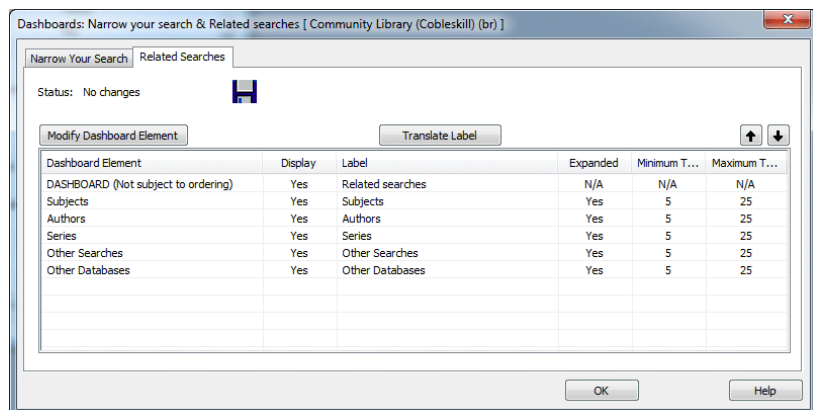
Note:

You save your settings separately for the **Narrow your search** and **Related searches** Web parts, and they are inherited separately. For example, your branch may set its own elements for the **Narrow your search** Web part, but inherit the system settings for the **Related searches** Web part. Like other Polaris Administration settings, once you change the settings at the branch level, the branch no longer inherits the system settings.

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

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

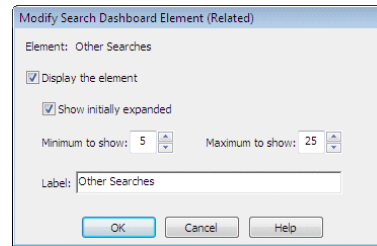
3. Click the **Related Searches** tab.



Settings on this tabbed page control whether the **Related searches** Web part is displayed, and what elements will be available for filtering search results.

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

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



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

Tip:

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

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

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

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

The default values are 5 minimum, 25 maximum.

Important:

The maximum number of links that can be displayed for one element is 99. However, higher numbers of links can slow processing time and may not be particularly useful to patrons, since the list of links for an element may be quite long for certain searches.

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


9. Click **OK**.

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

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

Note:

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

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

Note:

A message alerts you if you have set **DASHBOARD** to be displayed but have not set any elements to be displayed. At least one element within the Web part must be set for display in order to display the Web part itself.

Your changes are immediately applied to the Polaris database. However, as with most administrative changes to Polaris PowerPAC, you need to clear the page caches. See [“Updating Page Caches”](#) on page 9.

Note:

Because the **Narrow your search** Web part may be quite long, the **Related searches** Web part may not be visible in the interface without scrolling. If you want to be sure that patrons see the **Related searches** Web part without scrolling, you will need to limit the elements you enable for the **Narrow your search** Web part, or set some or all of the elements to be displayed as initially unexpanded.

Related Information

- [“Set up the Narrow your search Web part”](#) on page 163
- [“Translate labels for Narrow/Related Web parts \(Polaris PowerPAC\)”](#) on page 167
- **Setting up other dashboard features** - See [“Defining Web Parts for Dashboards”](#) on page 36.

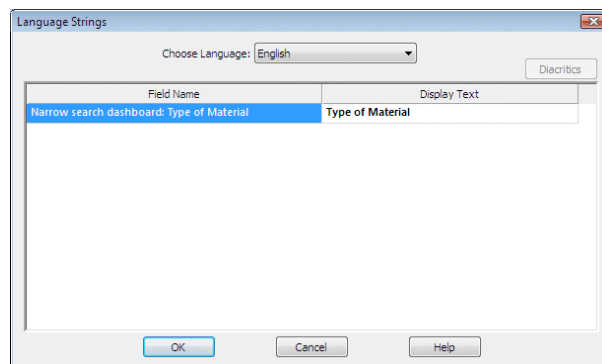
1-2-3

Translate labels for Narrow/Related Web parts (Polaris PowerPAC)

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

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Dashboards: Narrow your search & Related searches**.
The Dashboards: Narrow your search & Related searches dialog box opens to the Narrow Your Search tabbed page.
3. Click the appropriate tab (**Narrow Your Search** or **Related Searches**) for the labels you want to translate. See [“Set up the Narrow your search Web part”](#) on page 163 and [“Set up the Related searches Web part”](#) on page 165.
4. Select the appropriate data element, and click **Translate Label**.

The Language Strings dialog box opens.



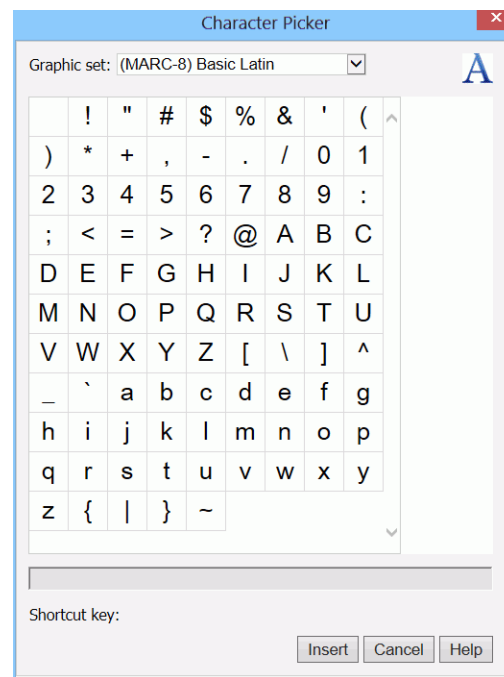
5. Select a language from the **Choose Language** box.

The options are determined by the language versions of Polaris PowerPAC purchased by your library system.

6. Double-click the box in the Display Text column next to the label name you want to translate, and type the translated text in the box. The maximum number of characters is 50.
7. To insert a diacritic character, follow these steps:

- a) Click **Diacritics**.

The Character Picker dialog box opens.




- b) Select a graphic character set. For details on choosing diacritic characters, see [“Choose characters/diacritics from a chart”](#) in the *Polaris Cataloging Guide 4.1R2*.

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

The Character Picker dialog box closes.

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

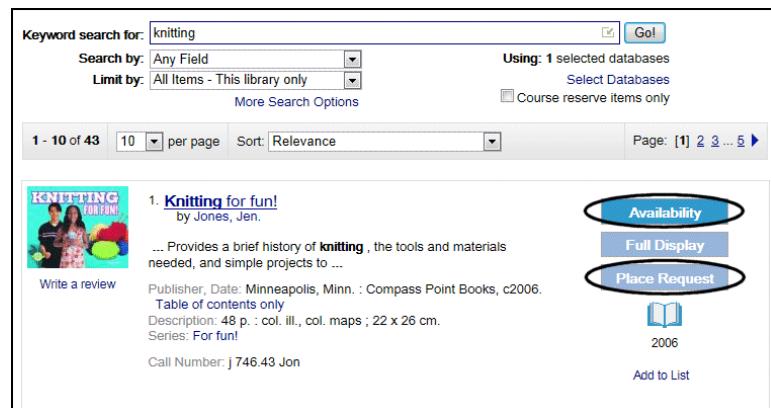
The Language Strings dialog box closes.

9. Click the Save icon  on the Dashboards: Narrow your search & Related searches dialog box to save your settings on the current tabbed page.

Your changes are immediately applied to the Polaris database, but you need to clear the page caches. See [“Updating Page Caches”](#) on page 9.

Suppressing Request and Availability Options

Typical Polaris PowerPAC and Mobile PAC search results include title-level options for placing requests and viewing availability information. The illustration is an example from Polaris PowerPAC.



For both PowerPAC and Mobile PAC, you can suppress the ability to place requests and view availability information for bibliographic records with the primary system-defined types of material (TOMs) that you specify. For example, you can suppress these features for materials where the item is not physically in the library, either because it is e-content that is available only in downloadable form, or because it is in an external storage device from companies such as Libramation's MediaBank or redbox®.

Using the PAC profile **Suppress Availability and Requests**, you can opt to suppress request and availability options for all records with a specific primary TOM, or only those with specific primary TOMs that have at least one 856 in the bib record or a resource entity. By default, Electronic resources (**elr**) and Digital collection (**dmc**) are selected for suppressing request and availability options. The option **Records with an 856** is selected by default except **dmc**, where **All records** is selected.

Other types of material for which you may want to suppress request and availability options include AudioEBook (**aeb**) and Ebook (**ebk**), but your library's cataloging practices should determine which TOMs (if any) you designate for suppressing request and availability options.

See the following topics:

- “Conditions That Suppress Holds and Availability” on page 170
- “Suppress request and availability options by types of material” on page 171

Conditions That Suppress Holds and Availability

The ability to place requests and view availability information in PAC is suppressed under these conditions:

- The title's primary TOM is checked in the PAC profile **Suppress Availability and Requests**
- At least one 856 or resource entity is present in the bib record (if you have selected **Records with an 856** for that TOM)
- The system availability count = 0, which means that there are no linked item records, the linked item records all have **Display in PAC** set to **No**, or the linked item records all have circulation statuses that are set for suppression from the display in the PAC profile **Suppress item display**.

Tip:

If a bibliographic record has linked issue records (via the serial holdings record) but no linked item records, the issue records are factored into the availability count, so availability information is not suppressed in this case.

When these conditions are met, the following elements are suppressed from the results displays in PowerPAC (local and remote databases) and Mobile PAC:

- Item availability fields in the brief and full title displays, regardless of the settings in the PAC **Title Display: Configure** profile:
 - Local Availability Summary
 - System Availability Summary
 - # Local items
 - # System items
 - # Local items in
 - # System items in
- PowerPAC **Availability** button at the title level
- Mobile PAC **Find It** button at the title level
- PowerPAC **Place Request** button and Mobile PAC **Request It** button at the title level

Because the absence of linked item records is one of the criteria for suppression, your cataloging practices will determine whether you want to use this feature. For example, if you create item records for downloadable resources, the request and availability features will not be suppressed for these types of material. As another example, if you use the same bibliographic record for multiple types of material (for example, the CD version of an audiobook and the downloadable version), and there are linked item records, the request and availability features will not be suppressed. Finally, some libraries use the same bibliographic record for items that are physically held in the library and those that are in an external storage device. For example, a library may have copies of a popular DVD available on the library shelves and also in its MediaBank distribution device. In this case, as in the preceding case, if there are linked item records, the request and availability features will not be suppressed.

1-2-3

Suppress request and availability options by types of material

You can make these settings at the system, library, or branch level. The setting of the PAC connection organization determines the effect on Polaris PowerPAC and Mobile PAC. Follow these steps to suppress request and availability options for designated types of material from the PowerPAC and Mobile PAC search results display.

Note:

These settings do not affect the staff client. They can lessen patrons' confusion about how to access and obtain certain material types, but they do not prevent a staff client user from placing a hold on one of the suppressed types of material.

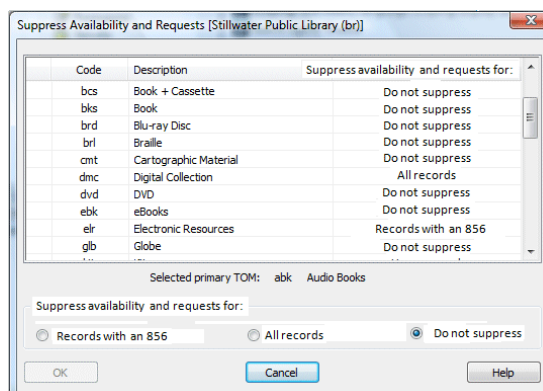
1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PAC** tab in the details view.

Note:

You can set these profiles at the system, library, or branch level.

2. Double-click **Suppress availability and requests**.

The Suppress Availability and Requests dialog box opens.



Note:

The list is ordered by the three-character alphabetic code that represents the TOM. The descriptions are the Polaris default descriptions, not the custom display descriptions you may have defined in the PAC Limit by Display policy table.

3. Select the TOM code and choose one of the following options:
 - **Records with an 856** - Suppress request and availability options for records with this TOM if there is an 856 tag or resource entity.
 - **All records** - Suppress request and availability options for all records with this TOM.

Important:

If **All records** is selected for any given type of material, records of that type that do not have 856 fields will appear in the catalog but there will be no way for the user to request the resource or view availability. This is likely acceptable for Polaris Fusion resources (TOM=dmc), which typically do not have 856 fields and are accessed by clicking a thumbnail image, but may be a problem for other types of material. The **All records** setting should be used with caution.

- **Do not suppress** - Request and availability options are displayed in search results for this type of material.
4. Repeat step 3 for each TOM for which you want to change the display setting.
 5. Click **OK**.

Related Information

Cataloging types of material - See “[Type of Material Codes \(TOMs\)](#)” in the *Polaris Cataloging Guide 4.1R2*.

Cross-Reference Display in Browse Search Results

You specify the labels that identify cross-references in Polaris PowerPAC browse search results. Typical cross-reference labels are *See* and *See Also*. However, you can specify any text for cross-reference labels.

Browse Headings	#
Rendell, Alexander.	1
Rendell, Joan	1
Rendell, Rut, 1930-	--
SEE: Rendell, Ruth, 1930-	183
Rendell, Ruth, 1930-	183
SEE ALSO: Vine, Barbara, 1930-	38
Rendell, Ruth, 1930- Chief inspector Wexford novel	--
SEE: Rendell, Ruth, 1930- Inspector Wexford mystery	1
Rendell, Ruth, 1930- Inspector Wexford mystery	1

You edit cross-reference labels in the Cross Reference Display Constants policy table, at the system, library, or branch level. Settings from the parent organization are used for the libraries or branches unless you change them at the lower level. The organization level at which the Cross Reference Display Constants table is opened determines the entries you see in the list, and you can view and change entries for the selected organization only. This table can be displayed on an organization workform or with the Administration Explorer.

Note:

These System Administration permissions are required to modify this table:
Access administration: Allow, Access tables: Allow, Modify cross reference display constants table: Allow.

See the following topic:

- [“Edit cross-reference labels”](#) on page 174

1-2-3

Edit cross-reference labels

Follow these steps to display and edit the labels that identify cross-references.


Note:

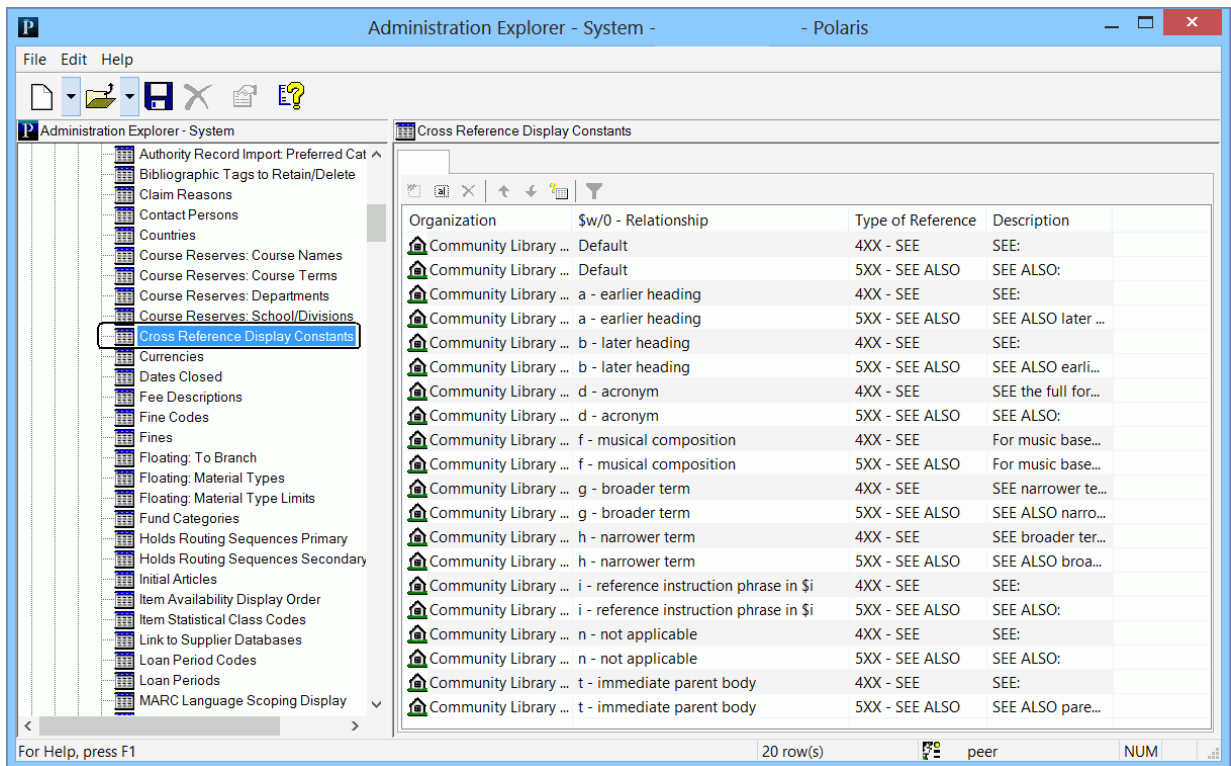
The cross-reference structure is set up when Polaris is implemented. You cannot add entries to this table or delete entries from it, only modify the text for the cross-reference labels.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Cross Reference Display Constants**.

The Cross-reference Display Constants table is displayed in the details view.

Note:

The table may be blank at the library or branch level. Click  to copy the entries from a higher level into the table for editing.

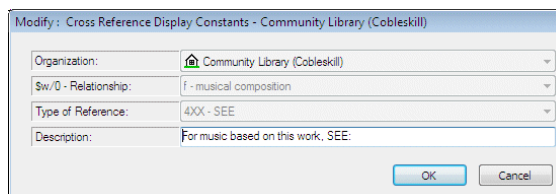


The screenshot shows the Administration Explorer - System window with the Cross Reference Display Constants table displayed. The table has the following columns: Organization, Sw/0 - Relationship, Type of Reference, and Description. The data is as follows:

Organization	Sw/0 - Relationship	Type of Reference	Description
Community Library ...	Default	4XX - SEE	SEE:
Community Library ...	Default	5XX - SEE ALSO	SEE ALSO:
Community Library ...	a - earlier heading	4XX - SEE	SEE:
Community Library ...	a - earlier heading	5XX - SEE ALSO	SEE ALSO later ...
Community Library ...	b - later heading	4XX - SEE	SEE:
Community Library ...	b - later heading	5XX - SEE ALSO	SEE ALSO earli...
Community Library ...	d - acronym	4XX - SEE	SEE the full for...
Community Library ...	d - acronym	5XX - SEE ALSO	SEE ALSO:
Community Library ...	f - musical composition	4XX - SEE	For music base...
Community Library ...	f - musical composition	5XX - SEE ALSO	For music base...
Community Library ...	g - broader term	4XX - SEE	SEE narrower te...
Community Library ...	g - broader term	5XX - SEE ALSO	SEE ALSO narro...
Community Library ...	h - narrower term	4XX - SEE	SEE broader ter...
Community Library ...	h - narrower term	5XX - SEE ALSO	SEE ALSO broa...
Community Library ...	i - reference instruction phrase in \$i	4XX - SEE	SEE:
Community Library ...	i - reference instruction phrase in \$i	5XX - SEE ALSO	SEE ALSO:
Community Library ...	n - not applicable	4XX - SEE	SEE:
Community Library ...	n - not applicable	5XX - SEE ALSO	SEE ALSO:
Community Library ...	t - immediate parent body	4XX - SEE	SEE:
Community Library ...	t - immediate parent body	5XX - SEE ALSO	SEE ALSO pare...

2. To modify an entry, select the entry and click .

The Modify Cross Reference Display Constants dialog box appears.



The Modify Cross Reference Display Constants dialog box is shown with the following fields:

- Organization: Community Library (Cobleskill)
- Sw/0 - Relationship: f - musical composition
- Type of Reference: 4XX - SEE
- Description: For music based on this work. SEE:

Buttons: OK, Cancel

Note:

You can change only the **Description** text for an existing entry. You cannot delete an entry.

3. Click **OK** on the dialog box.
4. Select **File, Save** to save any changes.

Related Information

- **Action when a cross-reference is selected** - The PowerPAC profile **Perform a new search if a cross-reference is selected** controls what happens when a cross-reference is selected. When this profile is set to **Yes** and a cross-reference is selected in the PAC browse headings index, the display is reset to the new location in the browse headings index. When this profile is set to **No** and a cross-reference is selected, the browse headings index remains at the same location, but the titles associated with the cross-reference are displayed.
- **Text in Titles column for “See” references** - The PowerPAC profile **Text: Headings count column for “See From” headings** sets the characters that are displayed instead of a title count for a “See” cross-reference entry when no titles are associated with a heading. The default characters are hyphens --, but you can specify any characters.

Setting Up Local and System Availability

When a user searches for and selects a title in the PAC, he or she can see detailed holdings information about the items associated with the title. Polaris Administration settings control the availability display in the PAC: whether all the system holdings are displayed in one list, or separated into local and system views; which branches are defined as “local,” the order of branch holdings; and the specific information that is displayed about each item.

Entries in the Item Availability Display Order policy table, combined with the **Display local and system levels** PowerPAC profile, create the following availability displays in Polaris PowerPAC:

- **Item Availability: Display local and system levels** profile set to **No** - All items for the branches set to be displayed in the Item Availability Display Order policy table are shown for a selected title. The items for branches defined as local in the table are displayed first, and the holdings for the other branches are sorted and listed by branch in the order specified in the Item Availability Display Order policy table.
- **Item Availability: Display local and system levels** profile set to **Yes** - The Local Availability view displays items for the branches defined as local. The user clicks a link to expand the list to items from all branches. When the list is expanded, items are listed for all the branches that are set to be displayed (including the local branch items), sorted and listed by branch in the order specified in the Item Availability Display Order policy table.

Note:

The **Assigned Branch** box in the item record determines the branch for which an item is displayed in the Availability view. If the item is not assigned to a branch, the item is not listed in any PAC availability display. Also, if the **Display in PAC** box is not checked in the item record, or the item has a circulation status that is suppressed from display, the item is not listed in any PAC availability display.

See the following topic:

- [“Set up the local/system item availability display”](#) on page 177

1-2-3

Set up the local/system item availability display

Follow these steps to specify how an organization's holdings are displayed in the PAC.

Note:

These settings control how information about specific *items* is displayed in Polaris PowerPAC, and Mobile PAC where noted. Use the PowerPAC profile **Title display configure** to specify the information that should be included in brief and expanded *title* information, which bibliographic-level title information should be displayed, and the labels for the information. See [“Configuring the PowerPAC Title Display”](#) on page 133.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click the profile **Item Availability: Display local and system levels**, and select one of the following options:
 - **Yes** - In Polaris PowerPAC, when a patron is connected to a branch, items for the branches defined as local for that branch are displayed and the patron can click a link to see those of other branches. When the patron is connected to the system organization, all branches' items are displayed in one list.
 - **No** - Shows all holdings, both local and system, in one view.
3. Set the following additional PowerPAC profiles for the PowerPAC display:
 - **Item Availability: Display last circ date** - Set to **Yes** to display the last circulation date of the item.
 - **Item Availability: Display notes** - Set to **Text** to display any item or issue public notes as text, set to **Icon** to display an icon that the user hovers over to see the notes, or set to **Do not display** to suppress item or issue public notes from display.

Note:

For a serials public note to display in PAC, at least one issue or issue with a linked item must be added to a serials holdings record. If no issues exist, you can generate a “dummy” issue so the note will display. See [“Serial Holdings Record Fields Affecting Serials Display in PAC”](#) on page 20.

- **Item Availability: Display textual holdings notes** - Set to **Text** to display serials textual holdings notes as text, set to **Icon** to display an icon that the user hovers over to see the notes, or set to **Do not display** to suppress textual holdings notes from display.
4. Set the following PAC profiles to **Yes** or **No** to specify what information about each item should be displayed. These settings also affect Mobile PAC:
 - **Item Availability: Display detailed item status** - Set to **Yes** to display the specific item circulation status of unavailable items, such as **Lost** or **Bindery**. Set to **No** to display **No items available** or your own text for items that are unavailable for circulation for any reason. (You must also set **Item Availability: Display status** to **Yes**.) This setting also affects Mobile PAC.

Note:

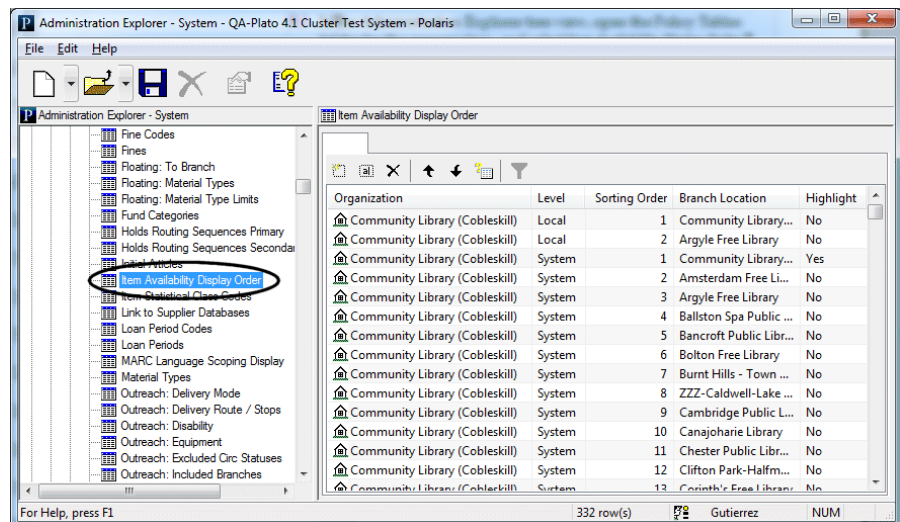
If you set this profile to **No**, you can customize the text that is displayed to indicate that an item is unavailable. See “[Editing Messages and Labels](#)” on page 288.


- **Item Availability: Display due date in detailed item status** - If you set **Item Availability: Display detailed item status** to **Yes**, you can set this parameter to display or suppress the item’s due date. (If you set **Item Availability: Display detailed item status** to **No**, you cannot display the due date.) This setting also affects Mobile PAC.
 - **Item Availability: Display shelf location** - Set to **Yes** to display an item’s shelf location. For more information, see “[Naming Shelf Locations](#)” on page 185. This setting also affects Mobile PAC.
 - **Item Availability: Display status** - Set to **Yes** to display an item’s availability status. If you set this to **Yes**, also review the setting for **Item Availability: Display detailed item status**. This setting also affects Mobile PAC.
 - **Item Availability: Display type** - Set to **Yes** to display the item’s material type. This setting also affects Mobile PAC.
5. In the Administration Explorer tree view, open the Policy Tables folder for the organization, and select **Item Availability Display Order**.

Note:

These System Administration permissions are required to modify this table: **Access administration: Allow**, **Access tables: Allow**, **Modify item availability display order table: Allow**. The organization level at which the table is opened determines the entries you see in the list.

The **Item Availability Display Order** table appears in the details view.



6. Click  to display the Insert Item Availability Display Order dialog box.

7. In the **Organization** box, select the organization for which the item availability entry is being set up. The new entry will affect the PAC item availability display for this organization.

Note:

If the Item Availability Display Order table is opened at the branch level, only the branch name is displayed in the Organization list.

8. In the **Branch Location** box, select the organization whose holdings you want to display in the PAC for the **Organization** branch.

Tip:

If you want a branch to display in both the Local and System Availability views, add it to the table twice, designating it as **Local** for one entry and **System** for the other.

9. Specify whether the item holdings for the organization named in the **Branch Location** box are displayed in the Local or System Availability view of the PAC for the **Organization** branch:
 - To display the Branch Location item holdings as local holdings, select **Local** in the **Level** box.
 - To display the Branch Location item holdings as system holdings, select **System** in the **Level** box.

Note:

If you set the PAC profile **Item Availability: Display local and system levels** to **Yes**, entries designated as **Local** are displayed in the Local Availability view, and entries designated as **System** are displayed when the user clicks the link to see all items. If you set the profile to **No**, only the entries designated as **System** are displayed.

10. Click **OK** on the dialog box.

The Item Availability Display Order dialog box closes. The new item availability display entry is displayed at the end of the policy table.

11. Position the item holdings in the availability display for the organization by following these steps:

- a) Select (highlight) the branch location entry for which you want to change the displayed order.



- b) To move the branch entry's holdings higher on the list, click .

- c) To move the branch entry's holdings lower on the list, click .


The **Sorting Order** value changes for the entry as you position the entry.

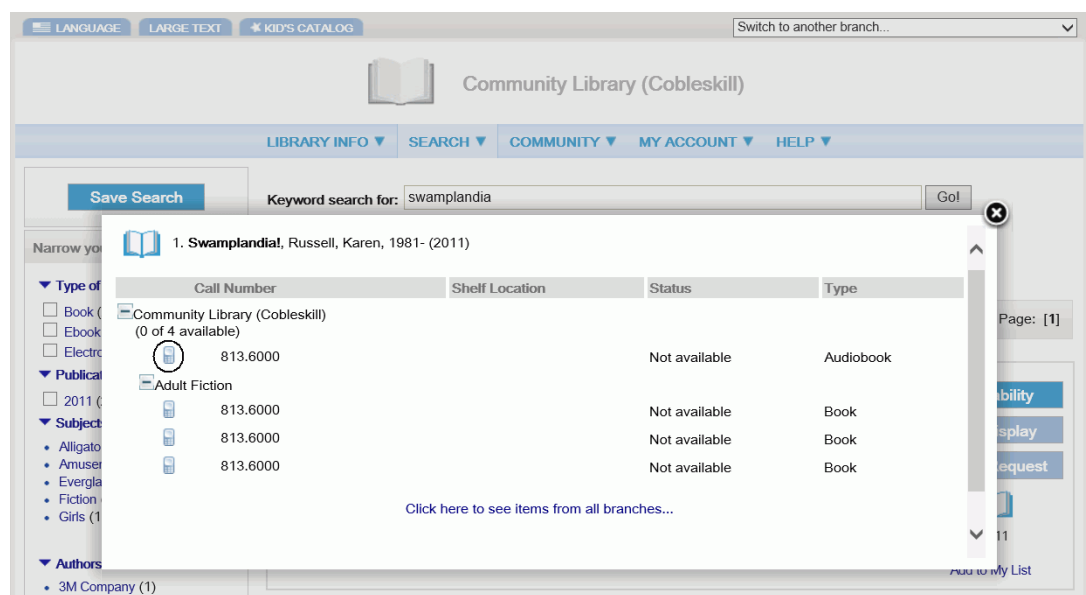
12. Select **File, Save**.

Related Information

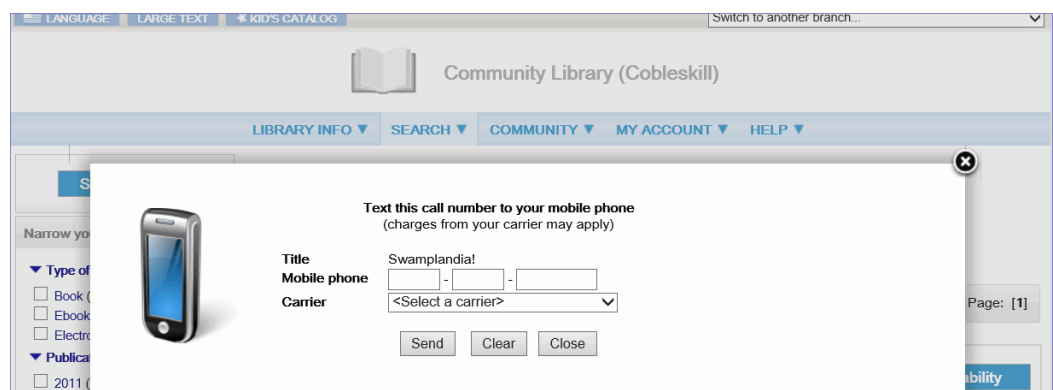
- **Modify an entry in the Item Availability Display Order policy table** - Select the entry and click . You can change only the Highlight setting for an existing entry. If you need to change the entry in another way, delete the incorrect entry and create a new entry.
- **Delete an entry in the Item Availability Display Order policy table** - Select the entry and click . If you delete an entry in the middle of the sort order, the remaining entries are automatically reordered.
- **Item availability display in Polaris PowerPAC** - You can set the default item availability display for a branch or collection to expanded or closed, and make separate settings for non-serial and serial holdings. (Patrons can always select branch and collection controls to expand or close the list of items under each branch and collection.) To set the default display to expanded branch and collection lists for non-serial holdings, set the PowerPAC profile **Item Availability: Expand non-serial titles** to **Yes**. To set the default display to closed branch and collection lists, set the profile to **No**. To set the default display to expanded lists for serial holdings (those with a holdings statement for that particular branch), set the PowerPAC profile **Item Availability: Expand serial titles** to **Yes**. To set the default display to closed branch and collection lists, set the profile to **No**. (If you have extensive serial holdings, consider setting this profile to **No** to reduce scrolling in the PAC. Patrons can expand the lists they want to see at any time.)
- **Item Availability display in Mobile PAC** - See [“Title Link: Find It”](#) on page 352.
- **Text-message call numbers from item availability display** - See [“Sending Call Numbers by Text Message”](#) on page 181.
- **Item availability summary in Polaris PowerPAC** - You can display a summary count of available items associated with a title, and the current number of holds on the title, on the initial search results pages. See [“Configuring the PowerPAC Title Display”](#) on page 133.
- **Item display and circulation status** - You can specify item circulation statuses that should prevent an item from being displayed in PAC search results. See [“Suppress items by circulation status”](#) on page 183.
- **Suppressing availability for specific types of material** - You can suppress availability information for designated types of material from the PowerPAC and Mobile PAC search results displays. See [“Suppressing Request and Availability Options”](#) on page 169.
- **Serials display in PAC availability views** - Settings in the serial holdings record control the location-specific compressed holdings statement and the issues that are displayed. See [“Displaying Serial Titles in the PAC”](#) in the *Polaris Serials Guide 4.1R2*.

Sending Call Numbers by Text Message

From the Polaris PowerPAC or Mobile PAC item availability display, a user can send an e-mail text message containing the item call number to his or her mobile phone via the mobile phone carrier's SMTP e-mail service. If you enable this feature, a Text It icon  appears next to each item in the Availability display for a title. The illustration shows the Text It icon in the Availability view in Polaris PowerPAC brief search results.



In Polaris PowerPAC, the icon is displayed in the Availability view when the view is accessed from the brief search results and from the title product page. When the user clicks the Text It icon, a "lightbox" window opens. (For details about the Mobile PAC interface, see "Text It in Mobile PAC" on page 354.)



If the user is logged in and the patron record includes a phone number designated for TXT notification, the **Mobile phone number** and **Carrier** fields are already filled in. If the user is not logged in, or is logged in but does not have a phone number designated for TXT notification in the patron record, the user enters the mobile phone number and selects a carrier from the list. (The carrier options are set in the system-level database table **Mobile Phone Carriers**.) When the patron clicks **Send**, the text message is sent to the patron's mobile phone.

To display the Text It icon in Polaris PowerPAC and Mobile PAC, set the PowerPAC profile **Item availability: "Text it" feature enabled** to **Yes** (the default setting). The profile is available at the system, library, and branch levels.

In addition, the current connection organization must have specified the e-mail server in the PAC profile **Email notification: Server running SMTP service**. The "from" field of the message is taken from the PAC profile **Email notification: email address of sender** for the current connection organization. If no address has been specified in that profile, the "from" field is taken from the system-level parameter setting for the return e-mail address in **Notification options**. (If no address is available from these settings, the Text It icon is not displayed.) The subject of the message is the first 30 characters of the title. The body of the message includes the branch display name and the call number and designation (if present).

Due to common carrier limitations, the entire message must not exceed 160 characters. If the message is longer, certain fields are automatically eliminated in the following order:

- Branch display name
- Designation
- If the branch display name and designation have been eliminated and the total still exceeds 160 characters, characters are removed from the end of the call number field until a total of 156 characters is reached. Then the system adds a space and an ellipsis to the end of the call number.

The patron does not receive notification if the delivery fails, and Polaris does not record the failure.

Text It Report

A report, **PAC text it usage**, is available in Polaris SimplyReports on the **Patron** tab, **Patron Statistical Reports** sub-tab. The report includes an activity summary, the number of in-house transactions, and the number of outside transactions. In-house transactions are those from workstations that are identified as in-house for the selected transacting organizations in the In-House IP Addresses database table. Standard SimplyReports parameters, filters, and formats for patron statistical reports are available for the report. For more information, see online Help in SimplyReports.

Suppressing Items from Search Results

To be included in item counts and displayed in search results, **Display in PAC** must be checked in the item record, and the item record status must not be provisional or deleted. Serial issues are included in the counts if **Display in PAC** is checked in the linked serial holdings record and the issues are retained (see “[Displaying Serial Titles in the PAC](#)” in the *Polaris Serials Guide 4.1R2*). In addition, you can use the PAC profile **Suppress item display** to specify item circulation statuses that should prevent an item from being displayed in both Polaris PowerPAC and Mobile PAC search results. When a circulation status is selected, items with this status are not displayed in PAC even when **Display in PAC** is checked in the item record. You can set this profile at the system, library, or branch level.

See the following topic:

[“Suppress items by circulation status”](#) on page 183

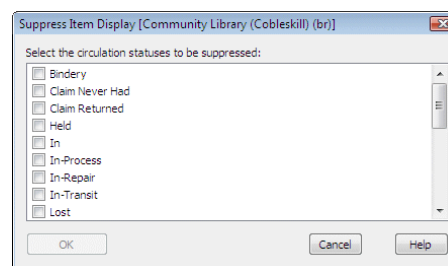
1-2-3

Suppress items by circulation status

Follow these steps to suppress items with specific circulation statuses from appearing in Polaris PowerPAC and Mobile PAC search results.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
2. Double-click **Suppress item display**.

The Suppress Item Display dialog box opens.



3. Select (check) the circulation statuses that should prevent an item from being displayed in PAC search results.

The **OK** button becomes available.

4. Click **OK**.

Tip:

For any particular item, the system uses the setting for the item's assigned branch to determine whether the item should be included in the search results display.

Your changes will not be evident in the PAC until the SQL job **PAC Availability** adjusts the counts. This job ordinarily runs automatically during overnight processing.

Related Information

- **Displaying item counts in search results** - See [“Configuring the PowerPAC Title Display”](#) on page 133.
- **Displaying holdings statement for serials** - See [“Configuring the PowerPAC Title Display”](#) on page 133.
- **Modifying status descriptions** - You can specify the text that displays for each item circulation status. See [“View circulation status names and edit descriptions”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.

Naming Shelf Locations

If the PAC profile **Item Availability: Display shelf location** is set to **Yes**, the Availability view in the PAC displays the shelf location of an item, as specified by the setting in the **Shelf Location** box on the Item Record workflow. Each branch can have its own shelf location descriptions. Typically, shelf locations are names of the various areas where items are currently shelved, such as the New Books Shelf, the Display Case, or the Atlas Stand.

Note:

You can also define collections in Polaris. For example, a branch may have collections named Genealogy, Non-Fiction, Children, and Reference. Any collection you define can be shown, along with call number and shelf location, in the Availability view in the PAC. See [“Working with Collections”](#) in the *Polaris Administration Guide 4.1R2*. Shelf locations are not related to collections, and you do not need to define collections to use shelf locations.

Entries in the Shelf Locations database table determine the branch’s shelf location options in an item record. You can open the table from the system, library, and branch levels, but entries are branch-specific. Shelf locations are not inherited or shared from the parent organizations. If you open the table at the system level, you can view, add, and change shelf locations for any branch. If the table is opened at the library level, you can view, add, or change shelf locations for the branches in the selected library. If the table is opened at the branch level, you can view, add, or change entries for the specific branch.

Note:

These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify shelf locations table: Allow.**

See the following topic:

- [“Add a shelf location entry”](#) on page 186

1-2-3

Add a shelf location entry

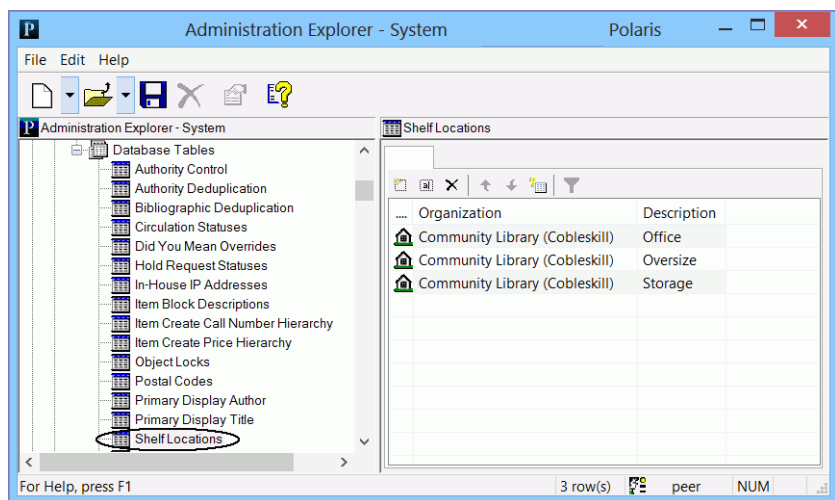
Follow these steps to define shelf location options for an organization's item records.

1. In the Administration Explorer tree view, open the **Database Tables** folder for the organization, and select **Shelf Locations**.

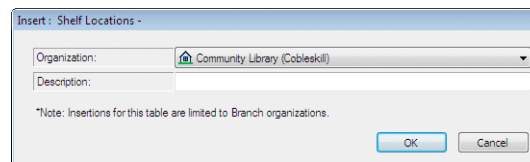
Note:

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

The Shelf Locations table appears in the details view.



2. Click  to display the Shelf Locations dialog box.



3. Select the branch that needs the shelf location in the Organization list.

Note:


If the Shelf Locations policy table is opened at the branch level, only that branch name is displayed in the Organization list.

4. Type the shelf location in the **Description** box, and click **OK**.

The new entry is displayed in the Shelf Locations database table for the selected branch. **Modification pending** appears in the status bar.

5. Repeat steps 2-4 until you have listed all shelf locations for the branch.
6. Select **File, Save**.

Related Information

- **Modify a table entry** - Select the entry and click . You can change only the description for an existing shelf location entry. Your changes should be limited to correcting spelling unless the location name has changed; for example, the *Children's Reading Room* officially becomes the *Young Readers' Center*.

Important:

Changes to a shelf location description are applied to all item records that used the original description of the entry.

- **Delete an entry** - Select the entry and click .

Important:

You cannot delete a shelf location description if it is used by any item record in Polaris. Use the Bulk Change tool on the Record Set workflow to change the shelf location on item records that use the entry, so you can delete the entry. See [“Bulk change item records”](#) in the *Polaris Cataloging Guide 4.1R2*.

Highlighting Titles with Local Items (PowerPAC)

In Polaris PowerPAC search results, you can choose to highlight titles that have at least one local item. The items considered to be local are based on the connection organization's settings in the Item Availability Display Order policy table (see "Set up the local/system item availability display" on page 177). This setting can help patrons quickly see the titles with locally owned items.



3. **The shape shifter**
by Hillerman, Tony

... The *shape shifter* / Tony Hillerman. ...

Publisher, Date: New York : HarperCollins, c2006.
Edition: 1st ed.
Description: 276 p. ; 24 cm.
Call Number: Fict Hill

Availability
Full Display
Place Request
2006
Add to My List

4. *The shape shifter* [compact audio disc (unabridged)]
by Hillerman, Tony

... *The shape shifter* [compact audio disc (unabridged)] / by Tony Hillerman. ...

Publisher, Date: New York, N.Y. : Harper Audio, 2006.
Edition: Unabridged.
Description: 6 sound discs (7 hrs.) ; 4 3/4 in.
Call Number: Hill

Availability
Full Display
Place Request
2006
Add to My List

Note:

If the connection organization is the system, or if only one local library or branch is defined as a connection organization, no titles are highlighted.

Use the PowerPAC profile, **Highlight local items in matching title view**, to control whether these titles are highlighted. The profile is available at the system, library, and branch levels. To highlight local items, set the profile to **Yes**. The default setting is **No** (do not highlight).

Map It (Google Maps) in PAC

Using the JavaScript interface provided by Google Maps™, Polaris PowerPAC and Mobile PAC offers a Map It feature that provides a visual guide to the location of items linked to titles in the patron's search results list. The Map It feature offers all the zoom, pan, satellite and map imagery available on Google's hosted mapping site.

Note:

If the PAC browser session is run directly on the PAC server, the following domain must be open for Google Maps to work properly:
Port 80: maps.google.com

When the patron clicks **Map It** in the title product page (full display), a map displays bubble markers for branch locations that have linked items.

Note:

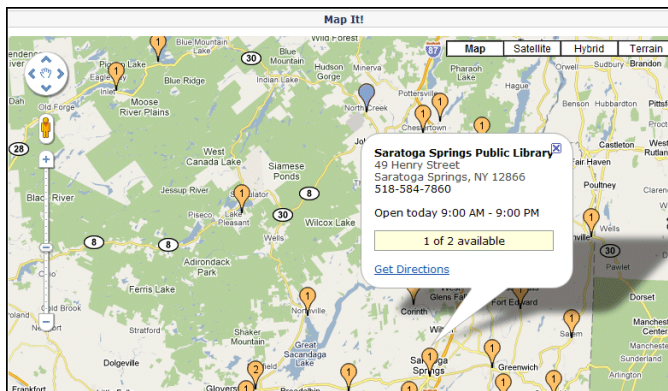
For a description of the Map It display in Mobile PAC, see "Title Link: Map It" on page 359.

The screenshot shows a book record page for "Ten big ones" by Janet Evanovich. The page includes a book cover, author information, publisher details, and a list of subjects and genres. A "Map It" button is highlighted with a red circle and an arrow pointing to a Google Map of the Syracuse, NY area. The map displays numerous yellow and blue markers representing library branches with item availability. A legend at the bottom of the map explains the markers: a yellow circle with a number indicates the number of copies currently available in the library, and a blue circle indicates that all copies at that location are currently unavailable.

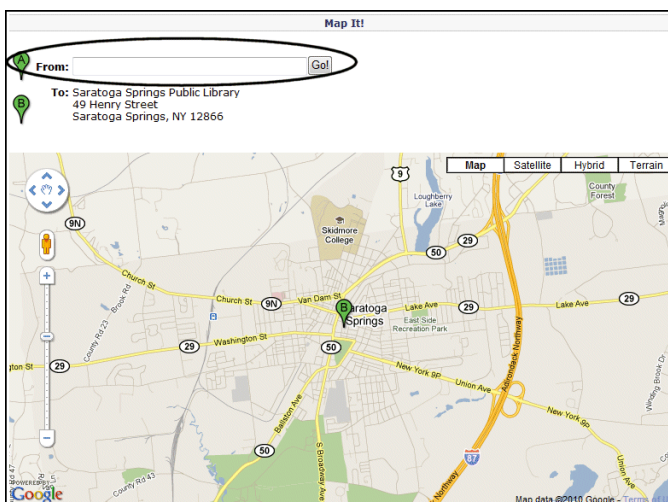
The patron can place the cursor over a marker bubble to see the branch name.



Click the branch marker to see the branch's address and hours.



When you click **Get Directions** in the hours window, you can get directions to the branch from any address. You enter the address and clicks **Go!**. (If the patron is logged in, the primary address from the patron record is already filled in for convenience, but it can be changed.)



Note:

No separate fees are required to enable Map It in Polaris PowerPAC, either by Google or Polaris Library Systems. However, to comply with Google's terms of free use, the mapping feature must be accessible on the public Internet to any user; no private Intranet use is allowed without paying Google for the service. Also, public users of the service must not be charged any fee to use it. For details, see <http://code.google.com/apis/maps/terms.html>

See the following topics:

- “PowerPAC Map It Option Display” on page 191
- “Marker Display” on page 191
- “Hours Display” on page 192
- “Set up Map It for PowerPAC and/or Mobile PAC” on page 192

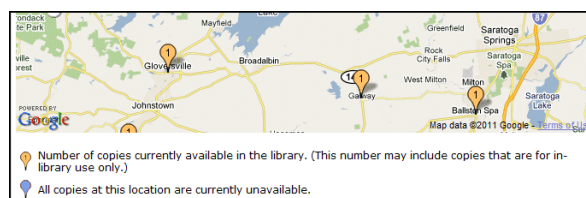
PowerPAC Map It Option Display

The Map It drawer is displayed for any title in a results set whose **# system items** count in the PAC brief display is greater than 0. For more information about **# system items**, see “[Configuring the PowerPAC Title Display](#)” on page 133. The Map It button does not appear for any title whose **# system items** is 0, even when Google Maps is enabled for the connection organization.

The PAC profile **Suppress availability and requests** also controls whether the Map It drawer appears. If the bibliographic record meets the criteria for suppression as specified in this profile, the Map It option does not appear. For more information about these settings, see “[Suppressing Request and Availability Options](#)” on page 169.

Marker Display

The map displays markers for every branch that has at least one item for that title (that is, **# local items** is greater than 0). Default markers for branches that have items that are currently in are orange and display the number of copies in, while blue markers indicate branches that have no copies currently in. “In” is defined using the same rules that govern the **# local items in** count in the PAC brief display (see “[Configuring the PowerPAC Title Display](#)” on page 133). Non-circulating items are included in the availability counts, so an orange marker does not necessarily mean that an item can circulate outside the library. A text key explains the meaning of the markers.



You can edit the explanatory text and the label on the Map It “drawer” itself with Polaris Language Editor (WebAdmin). Polaris provides a set of stock marker images in `/Themes/Shared/Map/Pins/`, so you can specify different marker shapes and colors.

Hours Display

When the patron clicks a map marker, details about the availability counts at that branch as well as address, phone, and hours open that day are listed. The details window uses the settings for the Polaris PowerPAC Hours page. For details, see “[Set Polaris PowerPAC features on the menu bar](#)” on page 18.

1-2-3

Set up Map It for PowerPAC and/or Mobile PAC

Follow these steps to set up Map It for Polaris PowerPAC and/or Mobile PAC, a feature that uses Google Maps provides a visual guide to the location of items linked to titles in the patron’s search results list.

1. Find and copy or record the geographic coordinates for each branch that should appear on the map.

Polaris Library Systems provides a tool to find coordinates, available on PolarisTown. Select **Documentation, Polaris 4.1, Documentation, Latitude and Longitude tool** (under **Usage Guides**) and enter the address for each organization that should appear on the map. If you leave the tool open, you can copy and paste the coordinates in Polaris Administration. See step 2.

2. Enter the geographic coordinates in Polaris Administration by following these steps:
 - a) In the Administration Explorer, select the system-level database table **Geographic Coordinates**.

Note:

You need the System Administration permission **Modify geographic coordinates table: Allow** to edit this table.

The table is displayed in the details view of the Explorer.

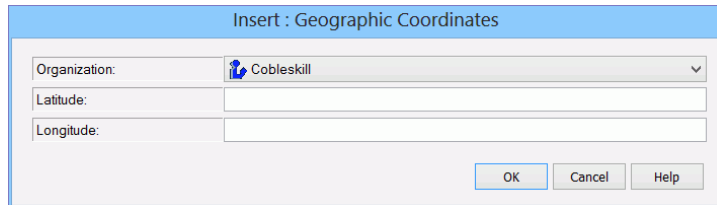
The screenshot shows the Administration Explorer - System window. The left pane displays a tree view of Database Tables, with 'Geographic Coordinates' selected and circled in blue. The right pane shows the details view of the 'Geographic Coordinates' table, displaying a list of organizations with their corresponding Latitude and Longitude coordinates.

Organization	Latitude	Longitude
Cambridge Public Library	43.0280421334894	-73.3842472487311
Canajoharie Library	42.8562288298626	-74.586764787744
Chester Public Library, Town of	43.6491773348036	-73.8011695604071
Clifton Park-Halfmoon Public Library	42.8577049773012	-73.794270005722
Community Library (Cobleskill)	42.7025384941319	-74.5236295825981
Corinth's Free Library	43.2476315092523	-73.833705280102
Duane Branch - Schenectady County Public Library	42.7962387812596	-73.9217714504374
Easton Library	43.0905590513547	-73.5053129521575
Fort Edward Free Library	43.2691597006872	-73.5849701951791
Fort Hunter Free Library	42.9434956325106	-74.2856267312593

At the bottom of the window, the status bar indicates '61 row(s)', 'peer', and 'NUM'.

b) To add an organization to the table, click .

The Insert dialog box opens.



c) Select the organization from the **Organization** list, which displays all the system organizations that have not yet been added to the table.

d) Enter or copy the organization's latitude and longitude (obtained in step 1) in the appropriate text boxes.

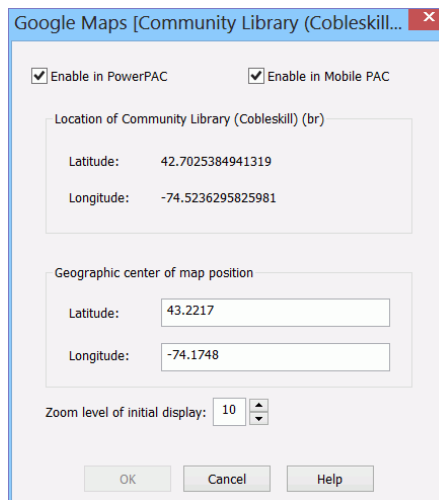
You can enter up to 20 characters in each box. Valid characters include one minus sign (to indicate a negative number, must be the first character), one period (to indicate a decimal point) and numerals 0-9. The allowed range is -90 to 90 latitude, and -180 to 180 longitude.

e) Click **OK**.

3. Set up Google Maps for an organization by following these steps:

a) Double-click the PAC profile **Google Maps** for the organization. The profile is available at the system, library, and branch level.

The Google Maps dialog box opens.



b) Select (check) **Enable in PowerPAC** to display the Map It button in Polaris PowerPAC when this organization is the connection organization.

c) Select (check) **Enable in Mobile PAC** to display the Map It link in Mobile PAC when this organization is the connection organization.

- d)** For **Geographic center of map position**, enter the latitude and longitude that should be used to position the initial display of the map. For valid format, see step 2.

If you have entered geographic coordinates for the system organization (see step 2), these are already entered as the default values. If no system coordinates have been entered, the default coordinates are those of the current organization. If these have not been entered in the Geographic Coordinates table, the **Latitude** and **Longitude** fields are blank.

Note:

Users can shift the map away from the initial center as they navigate it.

Tip:

Change the zoom level on the Polaris Latitude and Longitude tool to determine the zoom level you want for the initial map display. See step 1.

- e)** Set a value for **Zoom level of initial display**.

This setting determines the zoom level of the initial map display. The default level is 10; valid values are 1-21. Higher numbers produce a view that is zoomed in closer.

Note:

Users can change the initial zoom level as they navigate the map.

- f)** Click **OK**.

Google Preview for PowerPAC Search Results

Google Preview is a book viewer for every book that has a preview in Google Book Search. You can offer Google Preview for titles in the brief search results list, on the product page (full display) for a title, or in both locations. The Google Preview button is displayed only for titles that have Google previews. The illustration shows the Google Preview button on the title product page.

<< Return to List < Previous Title Displaying 6 of 45 Next Title >

Author: **McLaughlin, Emma.**
 Title: **Citizen girl : a novel** Emma McLaughlin and Nicola Kraus.
 Publisher, Date: **New York : Atria, 2004.**
 Description: **305 p. ; 23 cm.**
 Format: **Book**
 Other Author: **Kraus, Nicola.**
 ISBN: **0743266854**
 System Availability: **25**
 Current Holds: **0**
 # Local items: **1**
 Control Number: **544272**
 Call Number: **Fict McL**
 Course Reserves: **0**
 # Local items in: **1**
 # System items in: **22**

Write a review

Google Preview

Place Hold Request
 + Your List
 Purchase

Expand All | Collapse All

Availability

Recently Viewed Titles

Dog's colorful day : a messy story about colors and counting

When you click the Google Preview button, the preview is displayed in a lightbox window. The Preview controls are available to page through the preview.

Audience

... Citizen girl [electronic resource] / by Emma McLaughlin and Nicola Kraus. ...

Search

By the authors of the bestselling **The Nanny Diaries**

Google Books

... Citizen girl [electronic resource] / by Emma McLaughlin and Nicola Kraus. ...

nderWorks family movie (2) Publisher, Date: New York, NY : Simon & Schuster Audio, 2004.

Use the PowerPAC profiles **Google Preview: Enable on search results pages** and **Google Preview: Enable on full display** to enable this feature in the brief search results and the product page for a title respectively. The profiles are available on the system, library, or branch level and are set to **Yes** by default.

Important:

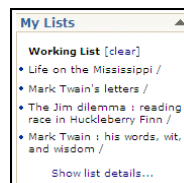
You do not need any kind of Google account ID to enable this feature, but Google's terms of service document states that you cannot alter the Google Preview button image. For details, go to <http://code.google.com/apis/books>

Note:

If the PAC browser session is run directly on the PAC server, the following domain must be open for Google Preview to work properly:
Port 80: www.google.com

Enabling PAC Title Lists

Using title lists, users can place titles selected from their search results in a formatted title list that can be printed, saved, or sent by e-mail. As the user selects titles, they are placed in a working list. In Polaris PowerPAC, the working list remains in the dashboard for the duration of the session. (For details about title list features in Mobile PAC, see “Title Lists in Mobile PAC” on page 373).



Registered library patrons can create and save multiple title lists in association with their patron accounts. Whenever the patron logs in, she can see and work with her saved lists. The patron can move or copy titles from a working list to a saved list, and print, send, or save to disk any list saved in the patron account.

See the following topic:

- “Set up PAC title lists” on page 198

1-2-3

Set up PAC title lists

Follow these steps to set up title list functions in Polaris PowerPAC and Mobile PAC.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Title List: Enable**, and select **Yes**.
3. To allow patrons to send title lists by e-mail, double-click **Title List: Email**, and select **Yes**.
4. To allow patrons to print title lists, double-click **Title List: Print**, and select **Yes**.

Note:

This setting does not apply to Mobile PAC. See [“Title Lists in Mobile PAC”](#) on page 373 for details about Mobile PAC title list features.

5. To allow patrons to save title lists to a computer drive or disk, double-click **Title List: Save**, and select **Yes**.

Note:

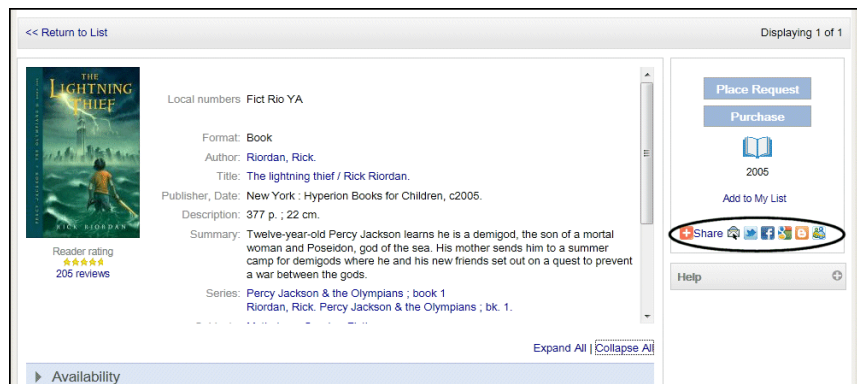
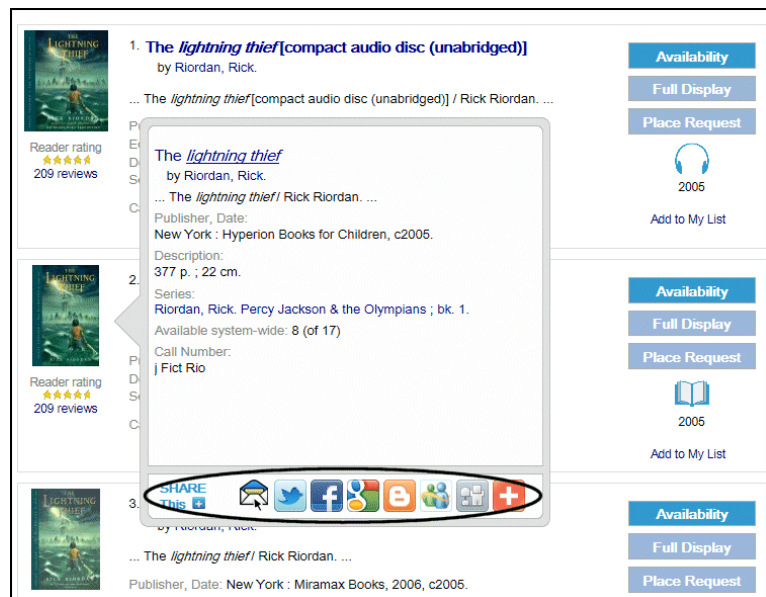
This setting does not apply to Mobile PAC. See [“Title Lists in Mobile PAC”](#) on page 373 for details about Mobile PAC title list features.

6. Select **File, Save**.

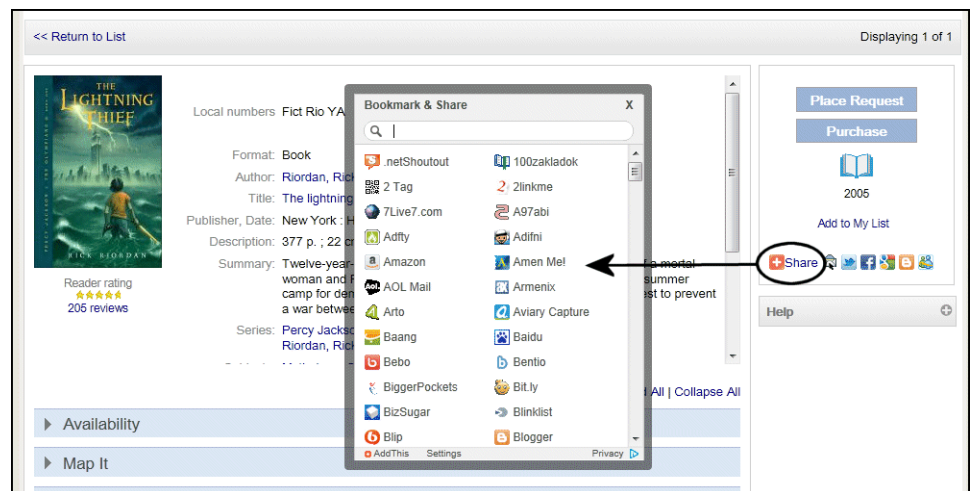
Social Bookmarking for Search Results (AddThis™)

Social bookmarking is a method for Internet users to share, organize, search, and manage bookmarks of Web resources. Polaris PowerPAC users can share bookmarks to titles in their search results on over 200 sites that support social bookmarking, such as Facebook™, Twitter™, and Digg™. Polaris uses AddThis™ to provide this feature, a widely available no-fee service that maintains the social bookmarking URLs and provides usage analytical statistics to libraries that register for an AddThis account.

If you enable bookmark sharing, icons representing popular bookmarking sites are displayed on the summary view when the user hovers the cursor over a book jacket image in brief Polaris PowerPAC search results, and on the product page for a title.



The initial icons represent the most popular bookmarking and sharing sites according to AddThis. The user can select an icon, or click **Share** to open a dialog box with a list of additional sites and a search feature that covers more than 200 social bookmarking providers.



Tip:

Users can “pin” PowerPAC search results pages in Pinterest only with the Pin It icon. The Pin It browser bookmark offered by Pinterest currently supports only static URLs and does not accommodate the dynamic URLs generated through a PowerPAC search.

The user clicks a site link to open a new window for the selected site, where she can log in to her site account and add a bookmark for the selected title. When someone clicks the link on the social network site, a search for the title is launched in the library catalog.

See the following topic:

- “Set up bookmarking and sharing” on page 200

1-2-3

Set up bookmarking and sharing

Follow these steps to set up enable bookmarking and sharing for PowerPAC search results.

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

2. Double-click **Bookmarking & Sharing: Enable**, and select **Yes**.

This setting displays the **Share** link for titles in Polaris PowerPAC search results.

3. If you want usage statistics from AddThis, follow these steps:

- a) Set up an AddThis account at the AddThis Web site: go to <http://www.addthis.com/> and click the **Join Now** link at the top of the page.
- b) Create a user name and password for the AddThis account, and supply an appropriate e-mail address.

Note:

The AddThis terms of service and privacy policies are available on the AddThis Web site.

- c) In Polaris Administration, type your AddThis profile ID in the PowerPAC profile **Bookmarking & Sharing: Profile ID for AddThis analytics**.

Note:

The current implementation of Pinterest by AddThis does not function properly across all web sites. The Pinterest feature is therefore a custom integration in PowerPAC and is not included in AddThis analytics.

4. Select **File, Save**.

Related Information

Polaris Social, in partnership with ChiliFresh Connections, offers integrated social features in Polaris PowerPAC. See [“Polaris Social with ChiliFresh Connections”](#) on page 271.

Integrated Econtent in PAC



Polaris Library Systems offers integration between the Polaris ILS and ebook vendors, starting with the 3M™ Cloud Library. When the integrated ebook vendor is implemented in Polaris, patrons can search for, place holds on, and check out the vendor's ebooks directly from the PAC. In addition, all associated circulation and patron account processing and tracking occurs in Polaris. A separate Polaris license is required for each integrated ebook vendor. (However, a license is not required if the library wants to provide ebooks to their patrons without integrating circulation and patron account transactions in the Polaris ILS.)

For information about setting up vendor accounts and importing econtent records for integrated econtent, see [“Implementing Integrated Ebook Vendors - Overview”](#) in the *Polaris Cataloging Guide 4.1R2*

Note:

You can edit most PAC display text related to 3M integrated ebook functionality in Polaris WebAdmin. For more information, see the *Polaris Language Editor (WebAdmin) Guide*.

See the following topics:

- [“Setting PAC Econtent Search Results Restrictions”](#) on page 203
- [“3M Integrated Ebooks in PAC Search Results”](#) on page 206
- [“Circulating 3M Integrated Ebooks from PAC”](#) on page 212
- [“Requesting 3M Integrated Ebooks from PAC”](#) on page 218

Setting PAC Econtent Search Results Restrictions

For every PAC search type except browse, and depending on Polaris Administration settings, the system compares the Resource Group of the connection branch and/or registration branch to the Resource Group (if any) of the bibliographic record to determine whether to display the bibliographic record. PAC searches return all bibliographic records with no Resource Entities or where all Resource Entities have no Resource Groups associated with them. (In-house or remote access does not affect the display.)

For bibliographic records with Resource Entities that have associated Resource Groups, the PAC profile **Resource Groups: Search results settings** controls when the title is displayed in PAC search results. The profile is available at the system, library, and branch levels. The system uses the settings for the current PAC connection branch.

For more information about setting up Resource Groups, see [“Setting Up Organization Resource Groups”](#) in the *Polaris Administration Guide 4.1R2*. For more information about Resource Entities, see [“Creating and Displaying Resource Entities”](#) in the *Polaris Cataloging Guide 4.1R2*.

See the following topic:

- [“Set PAC search results restrictions for econtent Resource Entities”](#) on page 204

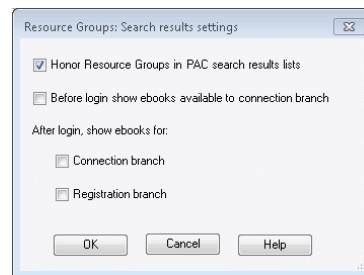
1-2-3

Set PAC search results restrictions for econtent Resource Entities

Follow these steps to set restrictions on the display of econtent bibliographic records with Resource Entities that have associated Resource Groups in search results.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
2. Double-click **Resource Groups: Search results settings**.

The Resource Groups: Search results settings dialog box opens.



3. To have the system consider Resource Groups when displaying search results, select (check) **Honor Resource Groups in PAC search results lists**.

Note:

If you leave this option unchecked, the system ignores Resource Groups and Resource Entities. That is, all ebook titles show everywhere, regardless of connection branch, patron's logged-in status, or presence of Resource Entities. The remaining options are not available for selection.

When you check **Honor Resource Groups**, the remaining options become available for selection. You must select at least one option.

4. **Before login** option - To restrict the results to those associated with the Resource Groups of which the connection organization is a member, select (check) **Before login show ebooks available to connection branch**.

If this option is checked and the patron searches at a branch that is not her registration branch, she may be restricted from checking out the title. If you leave this option unchecked and the patron is not logged in, no ebooks appear in search results.

5. **After login** options - Select an option to control the display of ebook titles after the patron is logged in:
 - **Connection branch** - Select (check) to display ebook titles that are associated with the Resource Groups of which the connection organization is a member. If this option is checked, but the **Registration branch** option is unchecked, and the patron is logged in but is searching at a branch that is not her registration branch, titles that are available at the connection branch appear in the search results list but are not available to check out.

- **Registration branch** - Select (check) to display ebook titles that are associated with the Resource Groups of which the patron's registered branch is a member. If you select this option and the **Before login** option is checked, but **Connection branch** is not checked, then when the patron logs in, titles that are available at the connection branch but not at the registration branch appear in the search results list but are not available to check out.

Note:

Although the **Before login** option is independent of the **After login** options, if you check **Before login** but do not select either **After login** option, you receive the following warning message, because in this case no ebooks will be displayed after the patron logs in: **Once a patron logs in, ebooks will no longer appear in the PAC display. Please correct this problem by checking the connection branch check box and/or the registration branch check box.**

Some libraries may be content to restrict usage based on where the patron is connected, because although the contract with the ebook provider is based on registration branch, the library is confident that an insignificant number of patrons search the catalog at branches that are not their registration branches. Other libraries may want tighter control.

3M Integrated Ebooks in PAC


Search Results

Users may search for 3M ebook bibliographic records using the same methods available for searches for other bibliographic records. The search parameters for 3M ebooks (search types, access points, and limit-by filters) are identical to the search options available for other bibliographic materials. Search options in the PowerPAC **More Search Options** lightbox and the Mobile PAC advanced search are supported to the extent that the data is present in the item and bibliographic records.

Note:

If a Limit By filter for currently available items is offered, the system uses the information currently in the Polaris database. Selecting this filter does not trigger real-time synchronization with 3M.

The 3M ebook results are integrated with other bibliographic records in PAC search results. The options for filtering 3M ebook search results are identical to the options available for filtering search results for other bibliographic materials. All facets that are typically included in the Narrow Your Search dashboard are supported to the extent that the data is present in the bibliographic records.

The system identifies 3M records as those that have a 3M resource entity on the bibliographic record. A 3M icon  appears next to the format icon to identify these records in the PAC display. The library can specify a custom icon for the display; see [“Implementing Integrated Ebook Vendors - Overview”](#) in the *Polaris Cataloging Guide 4.1R2*. When the user hovers the cursor over the logo icon, the link text and public note, if any, from the resource entity are displayed ([“Creating and Displaying Resource Entities”](#) in the *Polaris Cataloging Guide 4.1R2*).

If items are available to be checked out, a **Check Out** button is displayed (see [“Circulating 3M Integrated Ebooks from PAC”](#) on page 212). If no items are currently available for checkout, a **Place Request** button is displayed instead. The illustration shows PowerPAC search results that include 3M integrated ebooks.

The screenshot shows the Polaris Public Access (PAC) interface. At the top, there are navigation links for "LANGUAGE", "LARGE TEXT", "KIDS CATALOG", and "Switch to another branch...". Below this is a header with "QA-Plato" and navigation tabs for "LIBRARY INFO", "SEARCH", "MY ACCOUNT", and "HELP".

The main search area includes a "New Search" button, a "Keyword search for:" field, and a "Go!" button. Below the search bar are dropdown menus for "Search by:" (Any Field), "Limit by:" (3M Ebooks), and "Using:" (Local Polaris PAC DB). There are also links for "Select Databases" and "More Search Options".

On the left side, there is a "Narrow your search" section with filters for "Type of Material" (Book, Ebook, Electronic Resources), "Publication Date" (2012, 2011, 2009, 2010, 2007), "Subjects" (Library, Electronic books, Historical, Classics, Suspense), and "Authors" (3M Company, Chamberlain, Diane, Monroe, Mary Alice, Wharton, Edith, Byatt, A.S.).

The search results are displayed in a list format. The first result is "1. Secrets She Left Behind [electronic resource] by Chamberlain, Diane." It includes a cover image, publisher information (MIRA, 2012), a description ("often test entity Electronic book."), and an availability count of "1 online resource". A "3M" icon and a "Check Out" button are visible. The second result is "2. The Four Seasons [electronic resource] by Monroe, Mary Alice." It also includes a cover image, publisher information (MIRA, 2012), a description ("often test entity Electronic book."), and an availability count of "1 online resource". A "3M" icon and a "Check Out" button are visible.

Note:

When you create a resource entity from the Bibliographic Record workflow (see [“Creating and Displaying Resource Entities”](#) in the *Polaris Cataloging Guide 4.1R2*), ebook item records are created for the resource entity at the next automatic synchronization between 3M and Polaris. In the brief interval between resource entity creation and synchronization, the title is displayed in PAC with a 3M icon and a checkout/place request button (depending on current 3M availability and whether the patron is logged in), but it will have an availability count of 0 and no item records. Once the synchronization occurs and the ebook item records are built, the availability display and counts will be accurate.

See the following topics:

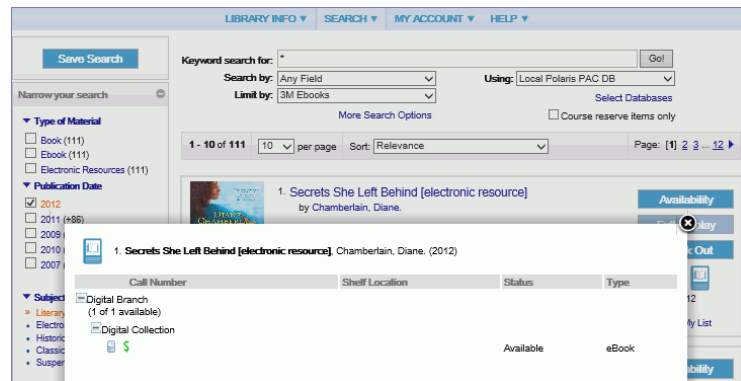
- [“E-book Availability”](#) on page 208
- [“Third-Party Enriched Data and Cover Images for 3M Ebooks”](#) on page 208
- [“3M Ebooks Product Page Display”](#) on page 209
- [“3M Econtent Display in Mobile PAC”](#) on page 210
- [“EBook Display in PowerPAC Children’s Edition”](#) on page 210

E-book Availability

Tip:

The PAC profile **Suppress availability and requests** applies only to bibliographic records with no items attached. It does not affect 3M bibliographic records, since they have items attached.

Before the patron logs in, the availability summary fields display the information available in the Polaris database, based on the latest update from 3M. After the patron logs in, availability information is also updated via real-time sync with 3M, whenever the user does an activity that causes the screen to be refreshed (such as navigating search result pages or conducting a new search). Clicking the **Availability** button shows the availability lightbox, containing information from the linked ebook item records (see “[Creating Ebook Items](#)” in the *Polaris Cataloging Guide 4.1R2*). If an item is not available to a branch, based on the branch’s resource group membership, the item does not appear in the availability view.



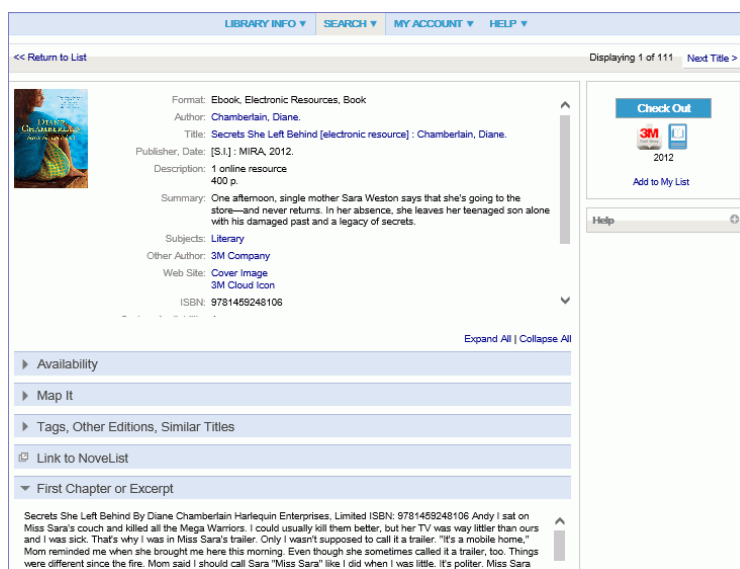
Third-Party Enriched Data and Cover Images for 3M Ebooks

3M ebook results may use any third-party enriched data that the library has acquired, including LibraryThing, Chilifresh, all NoveList products, Syndetics, and Baker & Taylor Content Cafe. Third-party enriched data is supported to the extent that is it supported by the metadata. For example, if ISBNs are used to find matching enriched data or cover images, then the 3M bibliographic record must include the ISBN in order for the enriched data to appear in PAC.

3M supplies its own cover images, carried in a separate 856 tag in the bibliographic record. These images are used for integrated 3M ebooks. For other titles, the cover image is pulled from the enriched data provider. If the 3M bibliographic record does not contain a URL for a cover image, a cover image from the enriched data provider for cover images (if any) is used. For more information about setting up enriched data, see “[Enabling Enriched Data](#)” on page 222.

3M Ebooks Product Page Display

The product page (full display) for 3M ebooks is similar to the full display for other bibliographic materials, with the Check Out/Place Request features noted above. The bibliographic information display can be configured with the PowerPAC and Mobile PAC **Title Display Configure** profiles, as for any other bibliographic records. See “[Configuring the PowerPAC Product Page](#)” on page 150. The Purchase button is suppressed for ebooks and Map It does not include indicators for ebooks. The illustration shows an example of the PowerPAC full display for a 3M ebook.

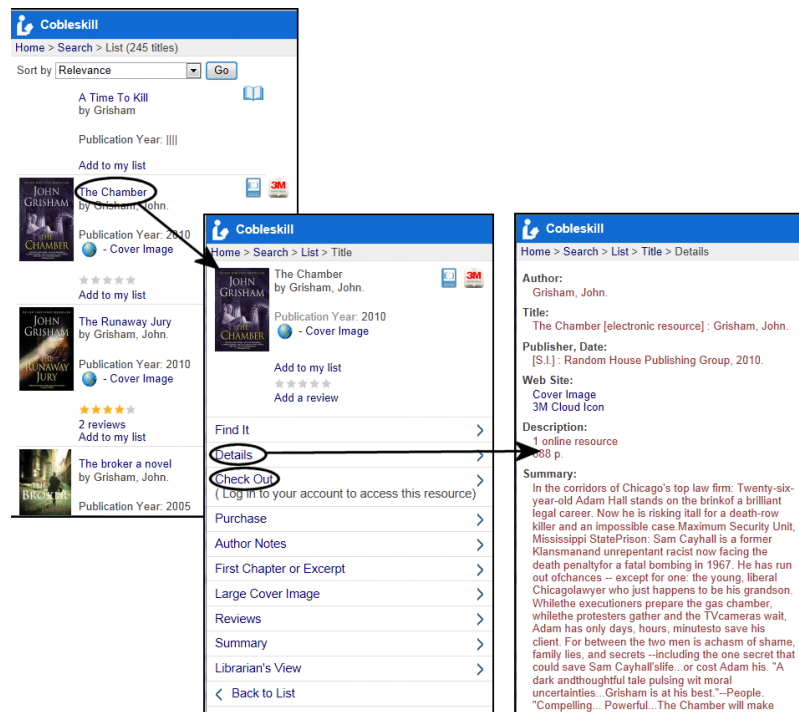


Note:

The **Title Display Configure** profiles (see “[Configuring the PowerPAC Product Page](#)” on page 150) also offer a display entity for non-integrated resource entities, such as Overdrive titles.

3M Econtent Display in Mobile PAC

Similar functionality is available for Mobile PAC search results that include integrated 3M ebook titles. See the example below.



EBook Display in PowerPAC Children's Edition

If your library has a license for integrated econtent, ebooks and audio ebooks are displayed in Children's PAC according to the following rules:

- The bibliographic record contains a resource entity for an integrated vendor account, such as 3M.
- The connection organization must be a member of the appropriate Resource Group.
- The bibliographic record must meet the usual filters for display in Children's PAC (target audience, free-text search filters, collection filters). For more information about setting these filters, "[Setting Children's Search Limits](#)" on page 302.

Note:

If a patron has logged in to PowerPAC the log-in is preserved when the patron connects to Children's PAC, so ebook results in Children's PAC are filtered according to the resource group of the patron's registered library.

Ebooks are indicated in Children's PAC search results and in the full display for a title by an icon, and a **Check ebook Availability** button is displayed instead of **Save this for me**.

Experience the Adventure

Look for: chomp

in: Anywhere Subjects Titles Authors Series Fiction Non-Fiction

Found 4 titles for : chomp
Showing: 1 - 4

Select a Theme!

- Treasure
- Antique
- Ocean

Chomp [electronic resource]

Author : Hiaasen, Carl.
Publisher, Date : New York : Alfred A. Knopf, 2012.

More [Check ebook Availability](#)

Chomp [electronic resource] :

Author : Hiaasen, Carl.
Publisher, Date : [S.l.] : Random House Children's Books, 2012.

More [Check ebook Availability](#)

Chomp! : a book about sharks

Author : Berger, Melvin.
Publisher, Date : New York : Cartwheel Books/Scholastic Inc., c1999.

More [Save This For Me](#)

Animals eating : how animals chomp, chew, slurp and swallow

When the user clicks the button, a message is displayed. If the user confirms the action, the appropriate product page in Polaris PowerPAC is displayed. From there, the user can check out the ebook (if available) or place a request. The Return to list link on the PowerPAC product page takes the user back to the Children's PAC, provided that no other navigation has taken place within PowerPAC.

Important:

The Polaris Administration Children's PAC profile **Navigation: PowerPAC** must be set to **Yes** to enable this functionality.

Circulating 3M Integrated Ebooks from PAC

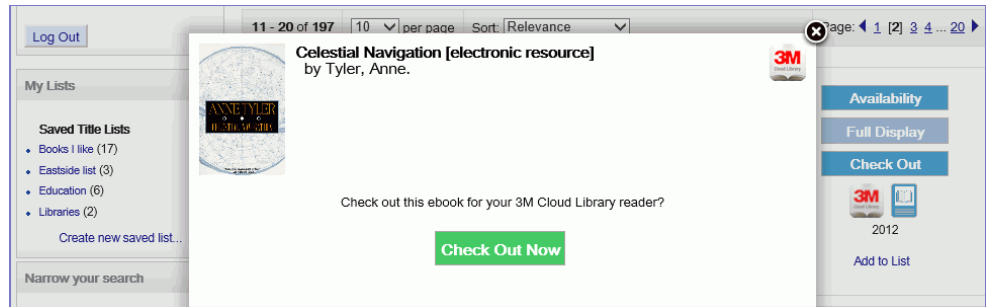
The library places a link on its Web page where patrons can download the 3M Cloud application to their ebook readers. Once the application is downloaded, obtaining 3M ebook items from PAC is a two-step process: the patron first checks the item out from PAC, then downloads it from the 3M Cloud application. The 3M account is automatically created using the patron's library credentials (barcode and password) the first time the patron checks out a 3M ebook.

Important:

Patrons can also create accounts in the 3M Cloud application by choosing their library and entering the patron barcode. The patron must sign up with the library account barcode, not the library account user name; otherwise, the patron's transactions in the 3M Cloud application and in the PAC patron account will not be synchronized.

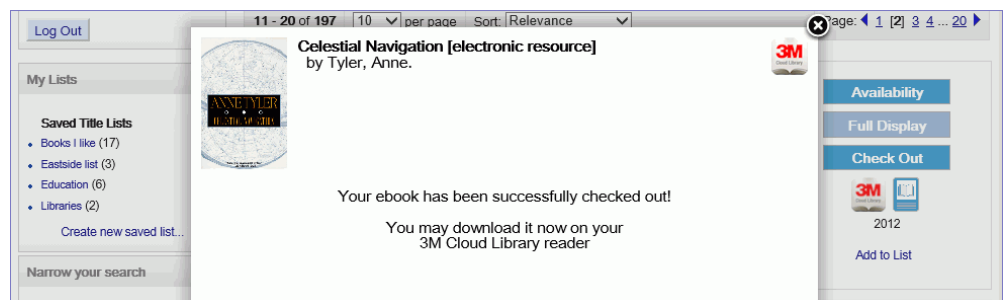
3M ebook titles in PAC search results display the **Check Out** button if the item is available in the local database (according to the last time the information was synchronized with 3M), or a **Place Request** button if no local item is available. (If the vendor account is not active, a **Temporarily Unavailable** button is displayed.) For more information about vendor accounts, see "[Implementing Integrated Ebook Vendors - Overview](#)" in the *Polaris Cataloging Guide 4.1R2*.

When the patron clicks **Check Out**, the patron must log in if he has not done so already. At this point, the system synchronizes the item availability information with 3M and the **Check Out** or **Place Request** button is re-displayed as appropriate. If a logged-in patron does not have access to materials from a particular vendor, a grayed-out **Restricted** button is displayed instead of the **Check Out** button. If the patron record has conditions that block checkouts, as specified in the Patron Services Administration profile **Patron initiated circulation: Blocking conditions**, the patron is blocked from checking out ebooks as they would be blocked from renewing other types of items. If the patron's record is not blocked, the patron clicks the **Check Out** button, and a light box displays the cover image, title and author, 3M icon, and a **Check Out Now** button.

**Tip:**

Charges for check-out do not apply to ebooks.

The patron clicks **Check Out Now** to check out the ebook. Once the book has been successfully checked out, the following message displays: **Your ebook has been successfully checked out! You may download it now on your 3M Cloud Library reader.**



If the patron has exceeded the ebook check-out limit, the checkout is blocked and a message is displayed instead: **There is a limit on the number of ebooks available at one time. To access this ebook, please check-in one of your other ebooks.** The library sets this limit when setting up the library account with 3M. The patron can check in 3M ebook items from the patron account, before they automatically expire. See [“3M Ebooks in the PAC Patron Account - Items Out”](#) on page 214.

If the checkout is successful, the title is available for download through the “My Books” section of the 3M Cloud application on the patron’s ebook reader. The due date is calculated from the check-out date and time, not from the download time, according to the library’s setup with 3M. The system does not generate a check-out receipt or e-receipt for the checkout.

Patrons can view their checked out items, and check them in, from the PAC patron account Items Out page.

The patron may also search for and check out ebooks directly from the 3M Cloud application, using library account information. The 3M application validates the patron’s library account before allowing the transaction to continue. If the patron does not yet have a 3M account, the account is automatically created based on the patron’s library account credentials. The patron and item records are then updated in Polaris during data synchronization. If the patron checks in an item in the 3M Cloud Library, the item is removed from the Items Out view in PAC and the staff client.

The check-in option is available from the Tools options in the 3M Cloud application. The transaction is communicated to Polaris when the data is synchronized, so it is possible for the item to appear Out in Polaris until the data is synchronized.

Note:

If your library uses Polaris Borrow by Mail, be sure to deselect (uncheck) any item material types used for econtent in the Request parameter **Borrow by mail** (Limits tab). For PAC requests, the system uses the setting for the patron's registered branch.

See the following topics:

- “3M Ebooks in the PAC Patron Account - Items Out” on page 214
- “Ebook Circulation Transactions in the Staff Client” on page 216

3M Ebooks in the PAC Patron Account - Items Out

Once checked out, 3M ebooks are listed on the Items Out page of the patron account. The list reflects the 3M ebooks currently checked out, regardless of whether the patron has actually downloaded them to the reader.


Note:

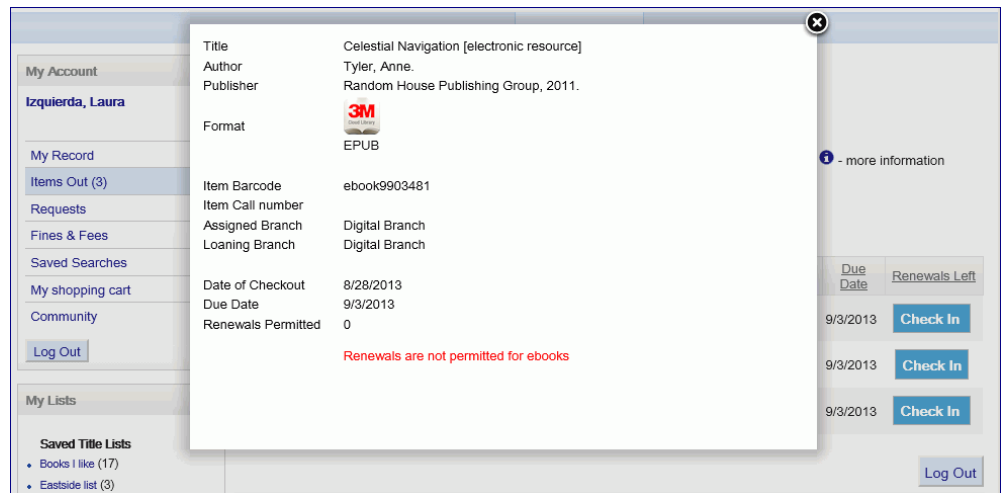
Ebooks cannot be renewed from PAC, the staff client, Polaris Phone Attendant, or the 3M Cloud Library. Check-in from the staff client is not supported.

3M Cloud items display the information icon, the 3M Cloud library icon instead of a format icon, the Online assigned branch, the due date as determined by 3M, and a **Check In** button.

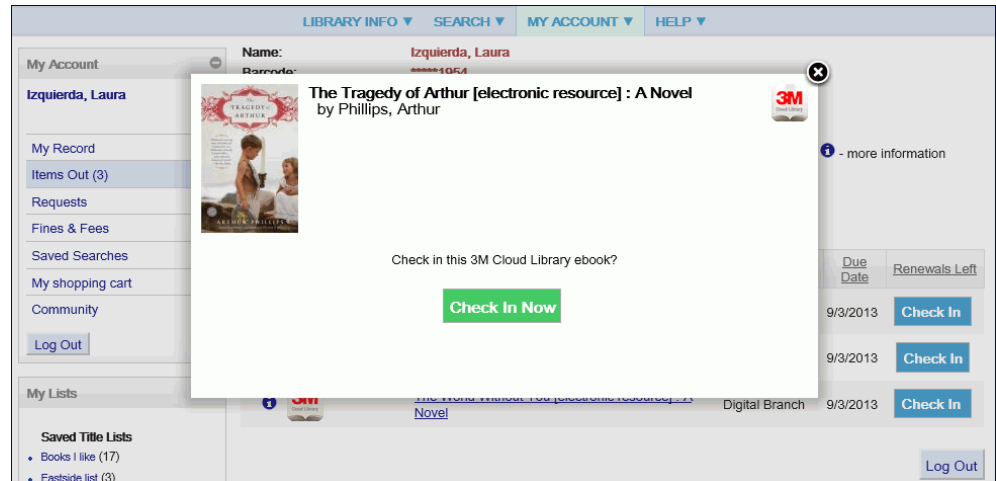
The screenshot displays the 'My Account' page for Laura Izquierda. The 'Items Out' section is active, showing a table of three 3M ebooks. Each row includes an information icon, the 3M logo, the title, the assigned branch (Digital Branch), the due date (9/3/2013), and a 'Check In' button. The left sidebar contains navigation links for account management and lists.

Format	Call Number	Title	Assigned Branch	Due Date	Renewals Left
		Celestial Navigation [electronic resource]	Digital Branch	9/3/2013	Check In
		The Tragedy of Arthur [electronic resource] : A Novel	Digital Branch	9/3/2013	Check In
		The World Without You [electronic resource] : A Novel	Digital Branch	9/3/2013	Check In

When the patron clicks the information icon , the details view for the item displays the same information as for any other item; a message informs the patron that renewals are not permitted. In this display, the Loaning Branch is the patron's registered branch.



When the patron clicks the **Check In** button, a light box displays the cover image, title and author, 3M Cloud icon, and a **Check In Now** button.



When the patron clicks **Check In Now**, a confirmation message is displayed and the item is checked in at the 3M Cloud Library and in Polaris. The patron account Items Out page is updated, and the 3M Cloud Library no longer displays the item as checked out. A check-in transaction is written to the item record history, and in the Polaris Transactions database.

3M ebook items automatically expire when the item's expiration date and time are reached. When the expiration date of the item is reached, the item becomes available to someone else. Polaris automatically checks in the item and removes it from the patron account. Items are "expired" in Polaris as close to the 3M due time as possible to prevent 3M and Polaris data from becoming unsynchronized.

Ebook Circulation Transactions in the Staff Client

Integrated ebook circulation takes place entirely within PAC or the 3M Cloud library. Ebooks cannot be checked out, renewed, or checked in from the staff client, and appropriate messages are displayed if these actions are attempted.

Other points to note:

- The fine code and renewal limit are grayed out in ebook item records. When an item record is created for an ebook, these values may be taken from a template, but they do not affect circulation behaviors. The policy established by the library in their 3M account setup determines the loan period. Ebooks cannot be renewed and are not fined
- The due date cannot be reset for ebooks. A message is displayed if this action is attempted.
- 3M ebooks cannot be set to Claimed or Lost. A message is displayed if either of these actions is attempted.
- Manual circulation status changes to ebook items is not allowed. A message is displayed if this action is attempted.
- Ebook items cannot be added to Route Lists.
- Ebook items cannot be placed on course reserve.
- Ebook items are excluded from shelving status processing.

Item and patron records and transaction files are updated whether the checkout or checkin is initiated from Polaris PAC or 3M. The item record is updated when the circulation transaction is completed in Polaris. In the staff client patron record, checked-out ebooks are displayed in the Patron Status workform - Items Out view, and in the patron's reading history. They can be removed from the reading history.

Note:

Although circulation transactions are recorded in Polaris, downloads to a reading device are not recorded. Downloading takes place separately from the check-out transaction. That is, the patron may check out an ebook but never download it to a reader, or may download it some time after the checkout. Due dates (automatic expiration dates) are calculated from the check-out transaction date and time, not the download date and time.

A 3M ebook due date is set at the point that the checkout occurs in Polaris, according to the rules established by the library's 3M account. The due date includes the time due. The loaning branch is the patron's registered branch, and the transaction is recorded in the item record history.

When a 3M ebook is checked in from PAC, the action is recorded in the Polaris item record. The due date, check-out date, original due date, current borrower and loaning branch fields are cleared, and the Last Borrower fields are populated. The check-in transaction is recorded in the item history, and the item is removed from the patron's Items Out list.

Transactions are created in Polaris for ebook checkout and checkin. Two subtype codes identify ebooks: one for an electronic item, one for the vendor account. The check-out branch is always the patron's branch. Ebook circulation transactions are included in existing standard Polaris reports, and can be identified in Polaris SimplyReports.

Note:

Check-outs and check-ins done from the 3M Cloud application are logged in Polaris after synchronization. The check-out subtype is 44 (Third party Checkout). The check-in subtype is 47 (Third party Checkin).

Requesting 3M Integrated Ebooks from PAC

Ebook titles in PAC search results display a **Place Hold** button instead of the **Check Out** button if the title is eligible to be checked out by the patron but no local item is available.

The screenshot displays the search interface of the Polaris Public Access Administration (PAC). The search results are as follows:

Item #	Title	Author	Year	Availability	Action
1	The Murder of the Century The Gilded Age Crime That Scandalized a City & Sparked the Tabloid Wars	Collins, Paul author	2011	Available system-wide: 2 (of 2)	Place Hold
2	The Sandcastle Girls [electronic resource] : A Novel	Bohjalian, Chris.	2012	Available system-wide: 0 (of 1)	Place Hold

When the patron clicks **Place Request**, the log-in page appears if appropriate, and the validated patron may request the ebook. Requests can be tracked and, when available, checked out from the patron account Requests page. See “3M Ebooks in the PAC Patron Account - Requests” on page 219.

Requests for 3M ebook titles differ in some respects from requests for other types of material:

- Holds can be placed only at the bibliographic level.
- Since the **Place Hold** functionality is specific to integrated 3M ebooks, bibliographic records with linked items of mixed materials are not supported. The best practice is to keep “hard-copy” items on separate bibliographic records.
- The Polaris Administration **Request** parameters that enable hold requests from PAC do not affect requests for ebooks.

- The Polaris Administration settings for request limits do not affect requests for ebooks. If the patron has exceeded the number of requests as set by the library during 3M setup, a message is displayed: **You have reached the maximum number of requests permitted by the library.**
- 3M ebook requests do not expire. A request remains in the patron's account until it is filled or canceled.

If the request is successfully placed, an acknowledgement message is displayed and the hold request is communicated to 3M. The PAC patron account Request display is updated in real time.

Important:

No actual hold request record is created in Polaris, and the request is not visible in the staff client.

Hold and cancelled hold notices are available for 3M ebook requests. For setup information, see [“Notices for Integrated Ebook Requests”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.

The patron can also request a title from the 3M Cloud application. In this case, the request is communicated to Polaris and is displayed in the PAC patron account.

See the following topics:

- [“3M Ebooks in the PAC Patron Account - Requests”](#) on page 219
- [“Ebook Request Transactions in the Staff Client”](#) on page 221

3M Ebooks in the PAC Patron Account - Requests

A logged-in patron can view the status of requests for 3M items, as with any other materials. Items available for checkout and download are included in the count of items ready for pickup in the patron account summary dashboard. (This count may change if the user takes action after accessing the account.)



They are also listed on the Requests page of the patron account, where a 3M icon appears instead of a format icon. The 3M items that have become available can be checked out by clicking the **Check Out** button. The pick-up library is listed as **Online**.

✓ i	Format	Title	Pickup Library	Status	Hold Position
		Dune : House Harkonnen by Herbert, Brian.	Ballston Spa Public Library	Held (for 16 more days)	
		5-Minute Mindfulness : Simple Daily Shortcuts to Transform Your Life by Dillard-Wright PhD, David B.; Spear, Heidi E.	Online	Check Out (for 2 more days)	
		10 Easter Egg Hunters by Schulman, Janet	Online	Check Out (for 2 more days)	

Requests that are not yet available for checkout are listed as **Active**. As with other requests, the queue position is displayed if this option is enabled for the patron's registered branch (PAC profile **Patron access: Display hold queue information**). The illustration shows an example.

			25 Greatest Baseball Players of All Time by Berman, Len	Online
			145th Street: Short Stories by Myers, Walter Dean	Online
			The Shadow War by Salazar, Michael	Online

As with other requests, the patron can click the information icon to see more information about a requested 3M item, including the author, the ISBN, the e-content format designator assigned by 3M, the date the item was held if applicable, and if the item is ready for check-out, the "Check-out by" date.

Title	5-Minute Mindfulness : Simple Daily Shortcuts to Transform Your Life
Author	Dillard-Wright PhD, David B.; Spear, Heidi E.
ISBN/ISSN	9781440532641
Format	 EPUB
Date held	9/12/2012
Check-out by	9/15/2012
Pickup Library	Online
This item will be held in the 3M cloud library until 9/15/2012.	

Requests for 3M ebook items cannot be suspended or reactivated. 3M item requests with a status of **Active** can be canceled.

All actions taken on the patron account Request page result in a real-time update to the patron's 3M Cloud Library account and to the information on the PAC patron account Request page. If the patron has the PAC patron account Requests page open but places a request, cancels a request, or checks out a held item directly from the 3M Cloud application, the patron can click **Refresh eContent** to see the changes in PAC.

The screenshot displays the PAC interface with the following elements:

- Navigation tabs: LIBRARY INFO, SEARCH, MY ACCOUNT, HELP.
- Patron Information:
 - Name: Farsaci, Timothy James
 - Barcode: *****4321
 - Username: moon
 - Registered at: Community Library (Cobleskill)
 - Patron code: Regular
 - Date of original registration: 2/10/2010
 - Expiration date: 2/10/2013
- Buttons: more information, additional note, and Refresh eContent (circled in red).
- Section: Requests
- Table with columns: Format, Title, Pickup Library, Status.
- Table Row:
 - Format: 3M
 - Title: The Chamber by Grisham, John
 - Pickup Library: Online
 - Status: Active (since 12/10/2012)

Ebook Request Transactions in the Staff Client

Ebook requests placed from PAC are not displayed in the staff client, including the Patron Status, Holds view. Item-level request are not allowed, and ebook item records are automatically set to non-holdable.

Hold transactions record econtent request activity:

- Econtent hold request created (6100)
- Econtent hold requests satisfied (6101)
- Econtent hold request cancelled (6102)

These transactions record the following details:

- Date/time
- Vendor ID
- Title
- Bib ID
- Patron ID and patron branch, if available

Transaction subtypes identify the econtent type: Ebook, Audio ebook, or Digital video recording.

These econtent hold transaction types are not included in existing standard Polaris reports, but are available for reporting in Polaris SimplyReports, Patron History reports.

Enabling Enriched Data



The term “enriched data” is used to describe a variety of third-party services that enhance a title’s display in the PAC. Depending on your contract with the vendor, the enriched data can consist of a simple book jacket image, or contents, excerpts, reviews, ratings, and other information related to the title. When enabled, enriched data is displayed automatically in both Polaris PowerPAC and Mobile PAC search results.

In Polaris PowerPAC, when the patron clicks the title or the **Full Display** button for a title in the search results list, the additional information is available in a series of content “drawers” on the title’s product page. You can set the display order of the drawers and whether each is initially expanded or collapsed. See “[Configuring the PowerPAC Product Page](#)” on page 150. Reader ratings and reviews may also be displayed. When the patron clicks a link, the selected information is displayed in a lightbox window. For a description of the enriched content display in Mobile PAC, see “[Title Links: Enriched Content](#)” on page 358.

You can also display rotating book jackets on the Polaris PowerPAC home page, based on the images supplied by your enriched data vendor, that launch a search for the title. For more information, see “[Set up rotating book jackets](#)” on page 29. Book jackets are also featured in content carousels. See “[Content Carousels on the PowerPAC Portal Page](#)” on page 31.

Polaris supports enriched data from Baker & Taylor; EBSCO’s NoveList®; Syndetics Solutions (Bowker); ChiliFresh; and LibraryThing. Polaris Social, a separately licensed product, offers ChiliFresh Connections features integrated in Polaris PowerPAC. See “[Polaris Social with ChiliFresh Connections](#)” on page 271.

Note:

If you use Secure Socket Layer (SSL) to secure the entire PowerPAC site, and you use content from third-party vendors, be aware that your patrons may receive messages about allowing unsecured content. If you think the messages will be a problem, contact your vendors to see if they can use https. If so, you will need to change their URL settings from **http** to **https** when you follow the procedures in this unit. For more information about securing the PowerPAC site, see “[Set the entire PowerPAC site to https only](#)” in the *Polaris Administration Guide 4.1R2*.

See the following topics:

- “Enriched Data Domains Requiring Port 80/443 Access” on page 223
- “Baker & Taylor Enriched Data” on page 224
- “EBSCO’s NoveList Enriched Data” on page 226
- “Syndetics Enriched Data” on page 230
- “ChiliFresh Enriched Data” on page 233
- “LibraryThing Enriched Data” on page 236

Enriched Data Domains Requiring Port 80/443 Access

If you lock down ports 80 and 443 on your PAC server, be aware that the following domains must be open on the PAC server for these features to work properly on *any* browser client, including remote access clients:

Feature	Domain	Port	More Setup Information
Baker & Taylor Content Cafe	contentcafe2.btol.com	80	“Baker & Taylor Enriched Data” on page 224
ChiliFresh Reviews & Ratings	secure.chilifresh.com	443	“ChiliFresh Enriched Data” on page 233
Syndetics Reviews & Ratings	www.syndetics.com	80	“Syndetics Enriched Data” on page 230
ChiliFresh Connections	chilifresh.com secure.chilifresh.com	80 443	“Polaris Social with ChiliFresh Connections” on page 271

If the PAC browser session is run *directly on the PAC server*, the following domains must be open for the features to work properly:

Feature	Domain	Port	More Setup Information
Baker & Taylor Cover Images	images.bol.com	80	“Baker & Taylor Enriched Data” on page 224
ChiliFresh Cover Images	content.chilifresh.com	80	“ChiliFresh Enriched Data” on page 233
LibraryThing Reviews & Ratings	ltfl.librarything.com	80	“LibraryThing Enriched Data” on page 236
NoveList	search.ebscohost.com	80	“EBSCO’s NoveList Enriched Data” on page 226
NoveList Select (Suggestions and More)	imageserver.ebscohost.com	80	“EBSCO’s NoveList Enriched Data” on page 226
Syndetics Cover Images	www.syndetics.com	80/443	“Syndetics Enriched Data” on page 230
Google Preview	www.google.com	80	“Google Preview for PowerPAC Search Results” on page 195
Google Analytics	google-analytics.com	80/443	“Analyzing Polaris PowerPAC Use” on page 11
Google Maps	maps.google.com	80	“Map It (Google Maps) in PAC” on page 189
ChiliFresh Connections	chilifresh.com secure.chilifresh.com	80 443	“Polaris Social with ChiliFresh Connections” on page 271

Baker & Taylor Enriched Data

You can use book jackets (cover images) from Baker & Taylor, and provide a variety of Content Cafe links on the PowerPAC and Mobile PAC product pages.

Note:

For Baker & Taylor port access requirements, see “[Enriched Data Domains Requiring Port 80/443 Access](#)” on page 223.

Note:

If you allow patrons to save searches to run automatically, cover images are displayed in the results based on the **Enriched Data** settings for the patron’s registered branch. For more information about setting up saved searches, see “[PAC Search Agent \(Saved Searches\)](#)” on page 87.

See the following topic:

- “[Set up enriched data - Baker & Taylor](#)” on page 224

1-2-3

Tip:

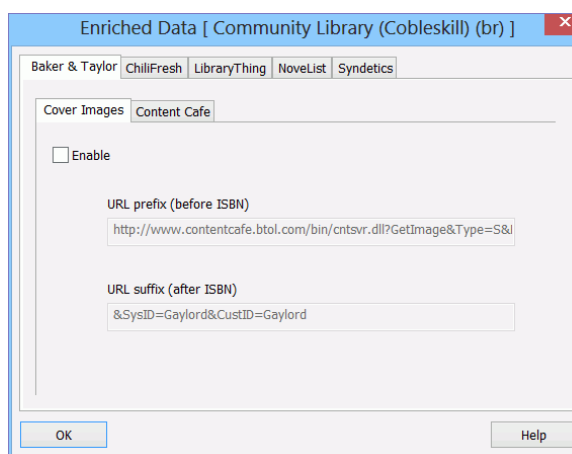
Cover images can be enabled for only a single vendor. Other enriched data services may be received by multiple vendors.

Set up enriched data - Baker & Taylor

Follow these steps to set up Polaris to use enriched data from Baker & Taylor, including Content Cafe.

1. Contact your vendor’s customer support department for help in obtaining your library’s connection and authentication information for this enriched data provider.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
3. Double-click **Enriched Data**.

The Enriched Data dialog box opens.



4. Click the **Baker & Taylor** tab, if it is not already selected.

5. If you receive cover images (book jackets) from Baker & Taylor, click the **Cover Images** tab. Then select (check) **Enable**.

Note:

If you use Baker & Taylor cover images for rotating book jackets on the Polaris PowerPAC portal page, you must also supply Content Cafe settings. See steps 8 through 10. For more information about setting up rotating book jackets, see [“Set up rotating book jackets”](#) on page 29.

6. In the **URL Prefix (before ISBN)** box, type the Web address and path to the Baker & Taylor content domain or server that provides book jacket images.

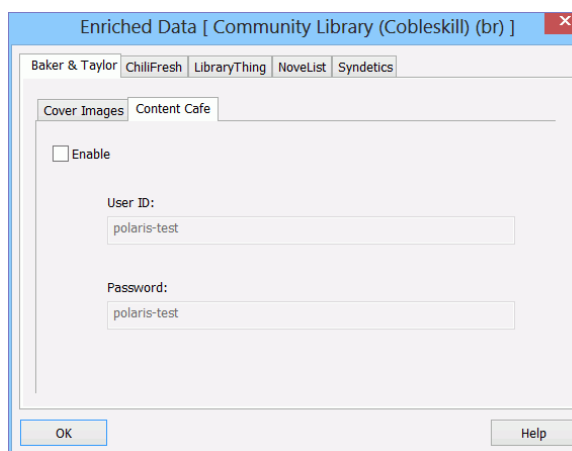
This prefix is the part of the URL that comes before the title’s ISBN when a search is launched at the Baker & Taylor site for the book jacket image. The default setting is

`http://images.btol.com/ContentCafe/Jacket.aspx?UserID={site_userid}&Password={site_password}&Return=1&Value=`

Contact your vendor to obtain the site user id and password to use in this setting.

The **URL Suffix (after ISBN)** setting is always **&Type=S**.

7. If you receive other content from Baker & Taylor’s Content Cafe, click the **Content Cafe** tab.



8. Select (check) **Enable**.
9. Type your Content Cafe user ID and password in the appropriate boxes.

These are the same settings you use for Baker & Taylor cover images. Contact your vendor to obtain these settings.

10. Click **OK**.

Related Information

Polaris Bookstore with Baker & Taylor - See [“Enabling Online Book Purchases”](#) on page 239.

EBSCO's NoveList Enriched Data

You can provide a link to the NoveList site on the title product page, where a search is automatically launched for information about a specific fiction title. (NoveList Plus also includes non-fiction titles.) In addition, if your contract with NoveList includes NoveList Select, patrons see NoveList Select content “drawers” on the Polaris PowerPAC and Mobile PAC product pages.

Important:

The display elements in the NoveList Select content are determined by NoveList. NoveList Select content drawers are not displayed for digital content (Polaris Fusion) bibliographic records.

Other NoveList options, such as **Author Biographies**, **Author Read-alikes**, **Book Discussion Guides**, **BookTalks**, **Feature Articles**, and **NextReads**, also display content drawers on the PAC product page.

Note:

NoveList works with its customers to configure NextReads newsletters and subscription links.

The NoveList content contains no active links except in the NextReads newsletter, which offers links to related newsletters (NoveList-generated content) and a link to a subscription page (also NoveList-generated content). These links open separate browser windows. The **Link to NoveList** option opens the NoveList site in a separate browser window due to frameset security issues.

Note:

For NoveList and NoveList Select port access requirements, see [“Enriched Data Domains Requiring Port 80/443 Access”](#) on page 223.

See the following topics:

- [“Updating the Library’s Holdings for NoveList Select”](#) on page 227
- [“Set up enriched data - EBSCO’s NoveList”](#) on page 227

Updating the Library's Holdings for NoveList Select

The accuracy of NoveList Select features such as Similar Titles depends on NoveList Select having up-to-date information about the titles in your library catalog. NoveList Select requires a CSV file consisting of one ISBN per line to collect this information. Polaris provides a SQL job, **ISBN List**, which is disabled by default. To generate the CSV file, enable the job, which is scheduled to run weekly (Monday at 1:10 am) by default. You can change the schedule if necessary. The job places the **ISBNList.csv** file in **{Server - Active Node}/ProgramData/Polaris/4.1/Logs/SQLJobs**. The file includes the ISBNs for bibliographic records where the ISBN is valid, the record status is final, and the record is set to display in PAC. For instructions about uploading the CSV file to NoveList, contact your NoveList support representative or go to:

<http://support.ebsco.com/help/index.php?lang=en&int=novselect>

You will need to upload the file regularly (typically once a month) to reflect changes in your catalog.

1-2-3

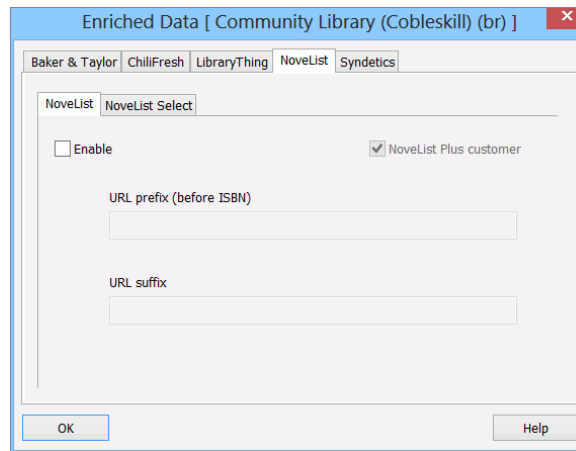
Set up enriched data - EBSCO's NoveList

Follow these steps to set up Polaris to use enriched data from EBSCO's NoveList, and to set up NoveList Select if you subscribe to this service.

Note:

You can enable and receive enriched data from more than one vendor, except cover images. These must be enabled for one vendor only.

1. Contact your vendor's customer support department for help in obtaining your library's connection and authentication information for this enriched data provider.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
3. Double-click **Enriched Data**.
The Enriched Data dialog box opens.
4. Click the **NoveList** tab.



5. Select (check) **Enable**.

Note:

The Novelist prefix and suffix surround the ISBN in the URL for a Novelist search.

6. Type your specific URL prefix and suffix in the appropriate boxes.

Note:

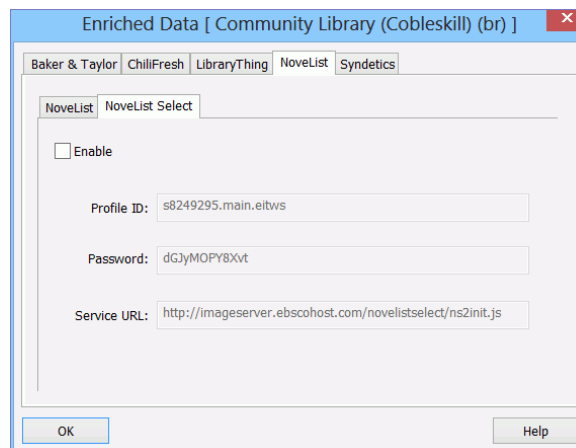
If you run Mobile PAC in SSL mode, the URL prefix must begin with **https://**

Contact your vendor to obtain these settings.

7. If your EBSCO contract includes Novelist Plus, select (check) **Novelist Plus customer**.

When this option is checked, the Novelist link is available for non-fiction as well as fiction titles.

8. If your EBSCO contract includes Novelist Select, click the **Novelist Select** tab.



9. Select (check) **Enable**.

10. Type your Profile ID and password in the appropriate boxes.

Important:

If your library subscribed to NovelList Select before an upgrade to Polaris 4.0 build 445 or later, you must obtain a new NovelList Select password when you upgrade to Polaris 4.0 build 445 or later. The new Service URL is supplied by default. If you run Mobile PAC in SSL mode, the Service URL must begin with **https://**

Contact your vendor to obtain the unique first part of the Profile ID and your password.

Note:

The Service URL is the same for all Polaris customers. You do not need to change it unless the NovelList Select Service URL changes. However, if you run Mobile PAC in SSL mode, the Service URL must begin with **https://**

11. Click **OK**.

Syndetics Enriched Data

Bowker's Syndetic Solutions offers book jackets, as well as a variety of content links in the Enriched Data window. Book jacket images are typically available in three sizes. The medium size is automatically used in the PAC search results display.

Note:

If you allow patrons to save searches to run automatically, book jackets are displayed in the results based on the **Enriched Data** settings for the patron's registered branch. For more information about setting up saved searches, see "[PAC Search Agent \(Saved Searches\)](#)" on page 87.

Syndetics cover images may fail to display in search results for certain types of material, such as music CDs or DVDs, when there is no ISBN in the MARC record. Polaris automatically sends the ISBN, UPC, and OCLC number from the title's MARC record to Syndetics. Be sure to include the UPC in the MARC records for these types of material to ensure that the appropriate cover images are displayed.

Syndetics also offers a **Find Similar Titles** link on the Polaris PowerPAC product page. The **Find similar titles** link opens a Web site in a secondary browser window where the patron can specify the characteristics of a title and get a list of similar titles available at the library.

Note:

For Syndetics port access requirements, see "[Enriched Data Domains Requiring Port 80/443 Access](#)" on page 223.

See the following topic:

- "[Set up enriched data - Syndetics](#)" on page 230

1-2-3

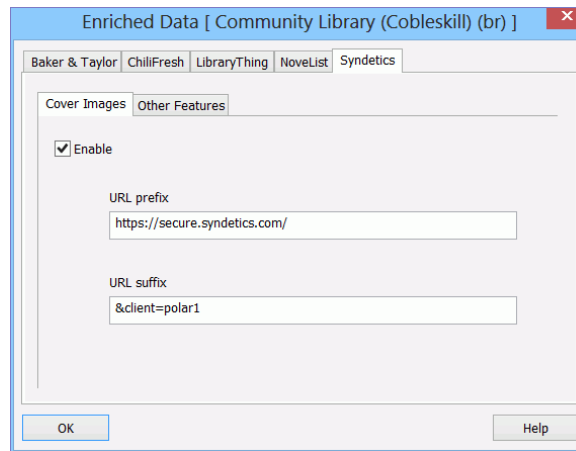
Set up enriched data - Syndetics

Follow these steps to set up Polaris to use enriched data from Bowker's Syndetic Solutions.

Note:

You can enable and receive enriched data from more than one vendor, except cover images. These must be enabled for one vendor only.

1. Contact your vendor's customer support department for help in obtaining your library's connection and authentication information for this enriched data provider.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
3. Double-click **Enriched Data**.
The Enriched Data dialog box opens.
4. Click the **Syndetics** tab.



5. If you receive cover images (book jackets) from Syndetics, click the **Cover Images** tab. Then select (check) **Enable**.

Note:

If you use Syndetics cover images for rotating book jackets on the portal page, you must also supply **Other Features** settings. See steps 8 through 11. For more information about setting up rotating book jackets, see “[Set up rotating book jackets](#)” on page 29.

6. In the **URL prefix** box, type the Web address and path to the Syndetics content server or domain used for your account. The address must begin with `http://www.syndetics.com/`

Note:

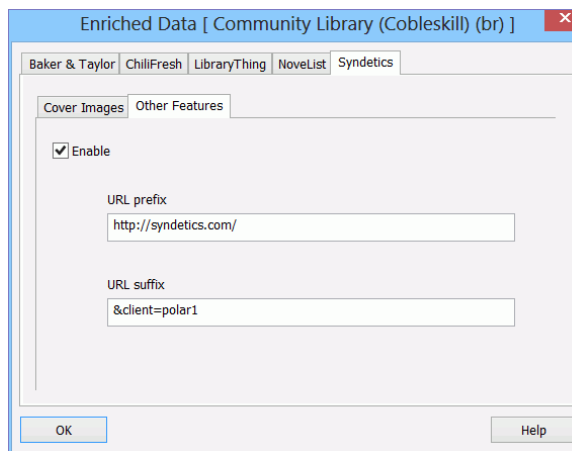
PAC title lists and request pages use https, which is not supported by this prefix. If you want book jackets to be displayed on these pages, use the prefix `https://secure.syndetics.com/`

Contact your vendor to obtain the account-specific portion of this setting.

Note:

If possible, use the Fully Qualified Domain Name instead of the IP address. If your infrastructure does not allow this, your Polaris Site Manager can help you work with Bowker Technical Support to resolve connectivity issues.

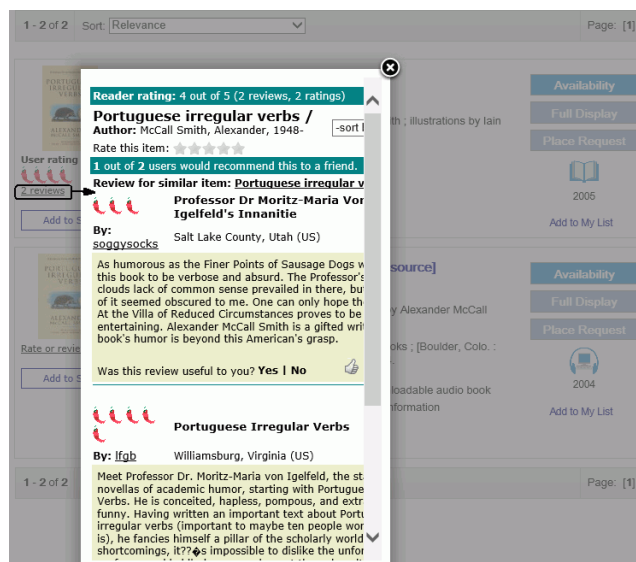
7. In the **URL suffix** box, type your client code after `&client=`.
The suffix defines your specific account access information. Contact your vendor to obtain this setting.
8. If you receive other Syndetics enriched data, click the **Other Features** tab.



9. Select (check) **Enable**.
10. In the **URL prefix** box, type the Web address and path to the Syndetics content server or domain used for your account. The address must begin with **http://www.syndetics.com/**
Contact your vendor to obtain the account-specific portion of this setting.
11. In the **URL suffix** box, type your client code after **&client=**.
Contact your vendor to obtain this setting.
12. Click **OK**.

ChiliFresh Enriched Data

ChiliFresh.com provides patron reviews and ratings in Polaris PowerPAC and Mobile PAC. You can choose to display reviews written only by your own patrons, by patrons in a specific region, or by patrons at multiple locations. You can also choose to screen reviews before they are made available for viewing. The patron logs in with a user name (e-mail address) and password to write a review. The ChiliFresh Review Engine consists of a database of reviews that reside on a ChiliFresh remote server, so your servers are not burdened with storing and processing the reviews. The illustration is an example of ChiliFresh reviews in Polaris PowerPAC.



Tip:

The PAC product page for a title displays a “drawer” for a large cover image when the large image is available from ChiliFresh. If the large image is not available, the drawer is not displayed.

ChiliFresh.com also offers cover images. If you subscribe to ChiliFresh Connections, a readers’ social networking tool available in Polaris PowerPAC and Mobile PAC, you can receive ChiliFresh cover images at no cost. These images are displayed in the PAC and work with the ChiliFresh drag-and-drop feature to add covers to reader recommendations and virtual Connections bookshelves.

Notes:

For ChiliFresh port access requirements, see “[Enriched Data Domains Requiring Port 80/443 Access](#)” on page 223.

Polaris Social, a separately licensed product, offers ChiliFresh Connections features integrated in Polaris PowerPAC. See “[Polaris Social with ChiliFresh Connections](#)” on page 271.

For more information about ChiliFresh.com products, go to www.chilifresh.com.

See the following topic:

- “[Set up enriched data - ChiliFresh](#)” on page 234

1-2-3

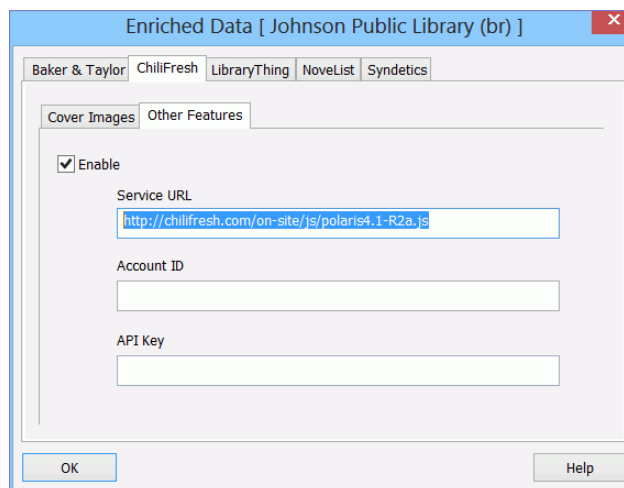
Set up enriched data - ChiliFresh

Follow these steps to set up Polaris PowerPAC to use patron ratings and reviews from ChiliFresh.com.

Note:

You can enable and receive enriched data from more than one vendor, except cover images. These must be enabled for one vendor only.

1. Contact your vendor's customer support department for help in obtaining your library's connection and authentication information for this enriched data provider.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
3. Double-click **Enriched Data**.
The Enriched Data dialog box opens.
4. Click the **ChiliFresh** tab.
5. To set up patron reviews and ratings, follow these steps:
 - a) Click the **Other Features** sub-tab.

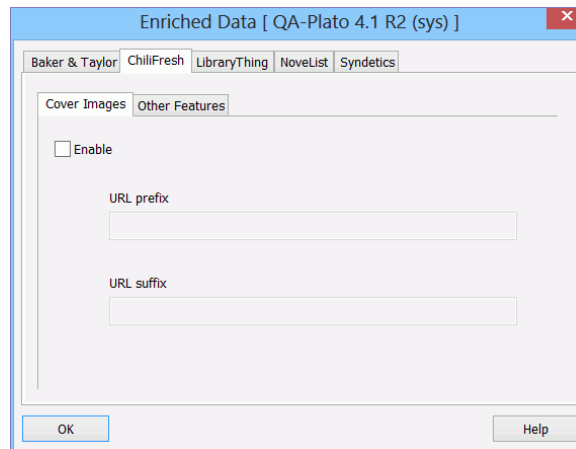


- b) Select (check) **Enable**.
- c) In the **Service URL** box, type your ChiliFresh service URL as follows:
`http://chilifresh.com/on-site/js/polaris4.1-R2a.js`
Obtain your specific URL from ChiliFresh.

Note:

ChiliFresh supports SSL (Secure Socket Layer). If you use SSL to secure the entire PowerPAC site, change the beginning of the ChiliFresh URL setting from `http://chilifresh.com` to `https://secure.chilifresh.com`. For more information about securing the PowerPAC site, see "[Set the entire PowerPAC site to https only](#)" in the *Polaris Administration Guide 4.1R2*.

- d) In the **Account ID** box, type your account identification code.
Obtain your specific account code from ChiliFresh.
 - e) In the **API Key** box, type your API key.
Obtain your specific API key from ChiliFresh. The key is unique for your account ID.
6. To set up cover images, follow these steps:
- a) Click the **Cover Images** sub-tab.



- b) Select (check) **Enable**.
- c) Type the URL prefix and suffix for your ChiliFresh cover images account in the appropriate fields.

Note:

Mobile PAC also uses ChiliFresh cover images when these are enabled.

7. Click **OK**.

Related Information

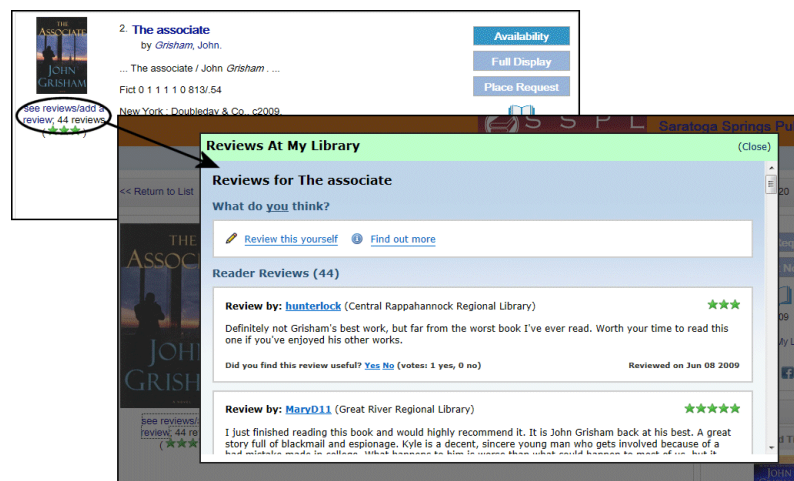
- **ChiliFresh Connections integration** - Polaris Social, a separately licensed product, offers ChiliFresh Connections features integrated in Polaris PowerPAC. See "[Polaris Social with ChiliFresh Connections](#)" on page 271.

LibraryThing Enriched Data

LibraryThing for Libraries offers tag “clouds” and similar tagged titles to patrons, available from the product page for a title in PowerPAC search results. Patrons can browse for titles by clicking tags and links to other editions. Tags are based on LibraryThing’s database. Tags features appear in a lightbox (an inline frame dialog box). The illustration shows an example of tag cloud links and Tag Browser lightbox that appears when the patron clicks a link.



You can also offer reader reviews from the LibraryThing database. When this feature is enabled, a link to reviews appears under the book jacket image for the title in PowerPAC brief search results and in the full display for a title.



You can determine the text of this link when you specify your configuration on the LibraryThing Web site. You can configure your LibraryThing settings to display reviews from all participating libraries, from specific selected libraries, or from your library only.

Notes

For LibraryThing port access requirements, see “[Enriched Data Domains Requiring Port 80/443 Access](#)” on page 223.

You can export your catalog data to LibraryThing in MARC21 format using Polaris Export Express, a separately licensed feature of Polaris SimplyReports. Using SimplyReports scheduling features, you can run exports periodically to update LibraryThing content for your new titles. See your SimplyReports documentation for more information.

See the following topic:

- “[Set up enriched data - LibraryThing](#)” on page 237

1-2-3

Set up enriched data - LibraryThing

Follow these steps to set up Polaris PowerPAC to use tags, other edition, and similar title links from LibraryThing.

Note:

You can enable and receive enriched data from more than one vendor, except cover images. These must be enabled for one vendor only.

1. Contact your vendor’s customer support department for help in obtaining your library’s connection and authentication information for this enriched data provider.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
3. Double-click **Enriched Data**.
The Enriched Data dialog box opens.
4. Click the **LibraryThing** tab.

Enriched Data [Johnson Public Library (br)]

Baker & Taylor | ChiliFresh | **LibraryThing** | NoveList | Syndetics

Enable tags and related titles Enable user reviews

Service URL

Account ID

OK Help

5. Select (check) **Enable tags and related titles** to display tags and related title links in PAC search results.
6. Select (check) **Enable user reviews** to display reader ratings and the link to reader reviews.

You can select either or both of these features.

7. Be sure the **Service URL** setting is
<http://ltfl.librarything.com/connector/connector.php?systype=polaris&id=>
8. Type your account number in the **Account ID** box.
Obtain your specific site setting from LibraryThing.
9. Click **OK**.

Enabling Online Book Purchases



You can set up either or both of two features to give patrons the ability to purchase materials through Polaris PowerPAC and Mobile PAC.

- You can set up **Purchase** links for titles in PAC search results. When a patron clicks the link, a search for the title is launched at a specified online bookstore site.
- You can set up Polaris Bookstore by specific contract, and receive back a portion of the sales as a donation to the library. The patron can click a **Buy It Now** link for titles available at the Bookstore, or browse the Bookstore through a **Shop Now** link.

If you have a Polaris Bookstore contract and you enable both options, the **Buy It Now** link is displayed when the title is available at the Bookstore, and the **Purchase** link is displayed when the title is unavailable at the Bookstore and the title has an ISBN.

See the following topics:

- [“Setting Up Purchase Links”](#) on page 240
- [“Setting Up Polaris Bookstore”](#) on page 242

Setting Up Purchase Links

You can provide **Purchase** links for titles in Polaris PowerPAC and Mobile PAC search results. When a patron clicks the link, a search for the title is launched at a specified online bookstore site, based on the ISBN or ISSN of the title. You can specify a local book store that offers online purchasing, or one of the larger online merchants such as Amazon.com[®]. Any purchase transaction takes place between the patron and the book vendor; the library does not mediate the transaction in any way. Each branch may define a different online book store.

In Polaris PowerPAC, when the patron clicks **Purchase** on the title product page, the vendor's site is displayed in a new browser window.

The screenshot illustrates the workflow from a library catalog to an online bookstore. In the top window, the library catalog displays the book record for "Blue Shoes and Happiness" by Alexander McCall Smith. A red circle highlights the "Purchase" button, which is linked to the Amazon.com search results shown in the bottom window. The Amazon results page shows the book title, author, price, and availability, with a "LOOK INSIDE!" button and a "Buy Now" option.

Note:

For information about Purchase links in Mobile PAC, see “Title Link: Purchase or Buy It Now” on page 357.

See the following topic:

- “Set up Purchase links” on page 241

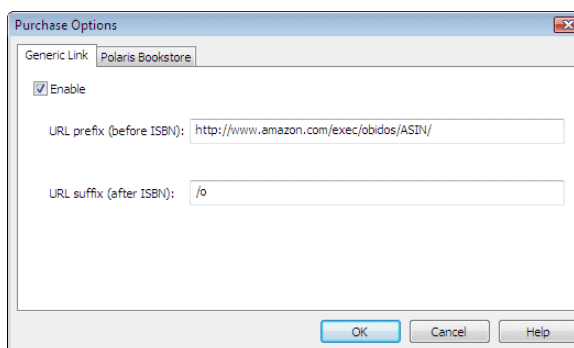
1-2-3

Set up Purchase links

Follow these steps to set up **Purchase** links for titles listed in Polaris PowerPAC and Mobile PAC search results.

1. Use a Web browser to display the search page for the online book store to which you want to direct your patrons for their purchases.
2. Do an ISBN search for any title and retrieve the title information, leaving your browser window open.
3. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
4. Double-click **Purchase Options**.

The Purchase Options dialog box opens. The Generic Link tabbed page is displayed.



5. On the Generic Link tabbed page, select (check) **Enable**.
The other data fields become available.
6. In the Address (or Location) box on your browser, copy everything before the ISBN of the title you found, and paste it into the **URL prefix (before ISBN)** box.

Note:

Depending on the vendor's search methods, you may not be able to extract the information from the URL at the vendor's Web site. In this case, check the vendor's online Help file or contact the vendor for instructions.

7. In the Address (or Location) box on your browser, copy everything after the ISBN, and paste it into the **URL suffix (after ISBN)** box.
8. Click **OK**.

Related Information

Polaris Bookstore - You can set up Polaris Bookstore by specific contract, and receive back a portion of the sales as a donation to the library. See ["Setting Up Polaris Bookstore"](#) on page 242.

Setting Up Polaris Bookstore

Through Polaris Bookstore and Baker & Taylor Inc., your library can establish an online bookstore where patrons can purchase materials at a discount comparable to other major online retailers, and your library receives a portion of the sales as a donation. The Bookstore is customized for your library, with your own graphics, URL prefix, and custom packing slip text. Polaris Bookstore is available to your library by specific contract with Polaris Library Systems.

When a title in a patron's search results is available in the Bookstore, the patron can click a **Buy It Now** link in the title product page to purchase the title. (If the title is not available at the Bookstore, no link is displayed.)

Note:

For information about Buy It Now links in Mobile PAC, see [“Title Link: Purchase or Buy It Now”](#) on page 357.

You can also place a “shop now” button on your library's Web site, or promote the bookstore with a link in the custom content area of the portal page. Patrons can search or browse the store and order any available title, placing their purchases in an online shopping cart and paying by credit card.

Baker & Taylor maintains the bookstore site and handles any returns. You receive your portion of the proceeds at regular intervals from Polaris Library Systems, as determined by your Polaris Bookstore contract. You work with your Polaris Site Manager to set up your bookstore profile. When the bookstore is implemented, ongoing support is provided by Polaris Library Systems.

Polaris Bookstore works well for library consortia, because each organization that wants to participate can have its own bookstore. The proceeds are distributed to the appropriate organizations. (If the consortium office itself set up a bookstore for the whole consortium, the consortium office is responsible for dividing the proceeds appropriately.)

See the following topic:

- [“Set up Polaris Bookstore”](#) on page 243

1-2-3

Set up Polaris Bookstore

You can set up Polaris Bookstore at the system, library, or branch level. Follow these steps to make Polaris Bookstore available from Polaris PowerPAC and Mobile PAC.

Important:

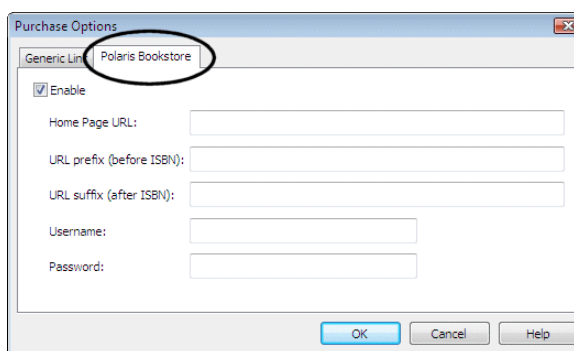
This procedure is included for your information only. Your Polaris Site Manager enters the appropriate Polaris Bookstore settings for your site.

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

2. Double-click **Purchase Options**.

The Purchase Options dialog box opens.

3. Click the **Polaris Bookstore** tab.



4. Select (check) **Enable**.

The other data fields become available.

5. In the **Home Page URL** box, type the value specified by Baker & Taylor.

This profile is the Bookstore home page link, typically displayed when the patron clicks **Shop Now**. The patron can browse the Bookstore from this page.

6. In the **URL prefix (before ISBN)** box, type the value specified by Baker & Taylor.

The prefix and suffix settings control the Bookstore search result page that appears when the patron clicks **Buy It Now**.

7. In the **URL suffix (after ISBN)** box, type the value specified by Baker & Taylor.

8. Type your site's user name in the **Username** box.

9. Type your site's password in the **Password** box.

10. Click **OK**.

Related Information

- **Shop Now dashboard link** - You can easily place a link to the library's Polaris Bookstore site on the Polaris PowerPAC dashboard. See ["Defining Web Parts for Dashboards"](#) on page 36.
- **Polaris Bookstore on the portal page** - You can promote the Polaris Bookstore on your Polaris PowerPAC portal page using custom content. See ["Set up custom portal page content"](#) on page 30.
- **Vendor purchase links** - You can offer a **Purchase** link to another vendor's site. See ["Setting Up Purchase Links"](#) on page 240.

Setting Up Patron Account Access



If you permit access to patron accounts from the PAC, patrons can log on to view and cancel requests, view and renew items out, estimate fines on currently overdue items, and view fines and fees. Depending on the features you offer, they can also manage messages, view their reading histories, pay fines or make donations by credit card, work with saved search agent searches, or view transcripts of sessions with a virtual reference service. Additional Administration settings allow users to set up a new patron account from the PAC, create and change user names and passwords, and request address changes. You can also offer e-mail communication with the library (Ask Us) to registered patrons and guests.

Important:

Certain patron account settings apply to both Polaris PowerPAC and Mobile PAC. You may need to clear the page cache to see the results of some changes in either PAC. See [“Updating Page Caches”](#) on page 9.

See the following topics:

- [“Allowing Patron Account Access”](#) on page 246
- [“Setting Patron Access Options”](#) on page 258
- [“Setting Up Patron E-Mail \(Ask Us\)”](#) on page 268

Allowing Patron Account Access

You can allow access to patron accounts from Polaris PowerPAC, Mobile PAC, or both. If you allow access to patron accounts, you can set which features are available when patrons log on and view their accounts. All the profiles that control patron account access are available at the system, library, and branch levels. See [“Setting Patron Access Options”](#) on page 258.

Note:

Patrons cannot access their accounts from Polaris PowerPAC Children’s Edition.

See the following topics:

- [“Patron Log-In”](#) on page 246
- [“Active Directory Log-On to PAC”](#) on page 250
- [“Enable patron account access - PowerPAC”](#) on page 252
- [“Set up a privacy statement link \(Polaris PowerPAC\)”](#) on page 255
- [“Limit log-in attempts”](#) on page 255
- [“Set an inactivity timeout for in-house workstations”](#) on page 256
- [“Set Up PAC Active Directory Log On”](#) on page 257

Patron Log-In

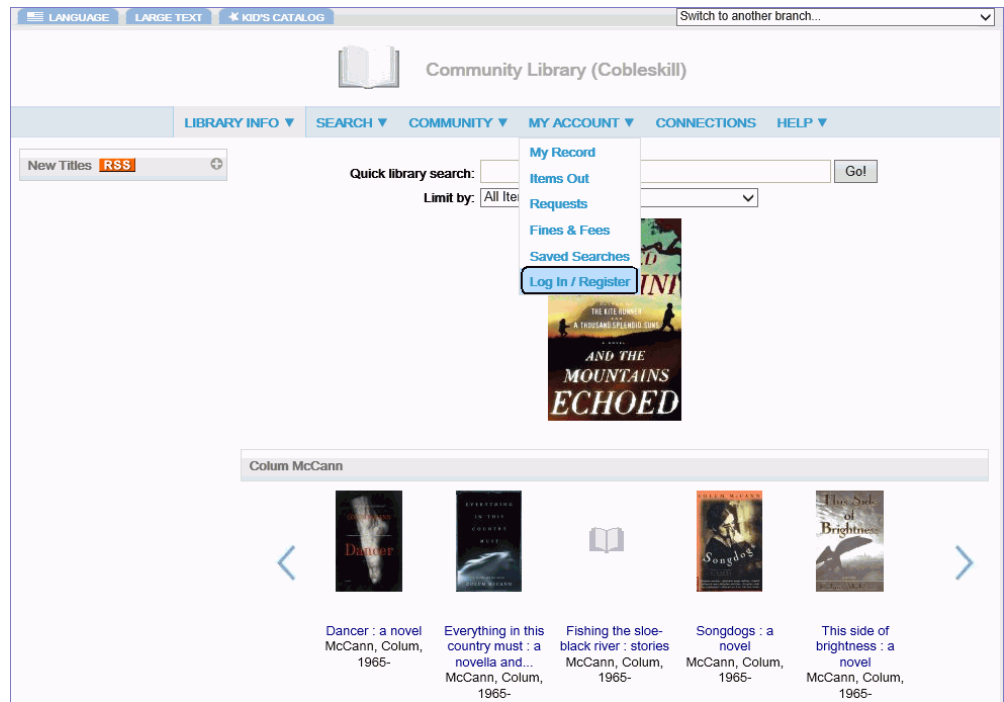
To view the account and use any features that store information in association with the account, a patron logs in by supplying an account number or user name and password.

Single Log-In Per Session - Polaris PowerPAC

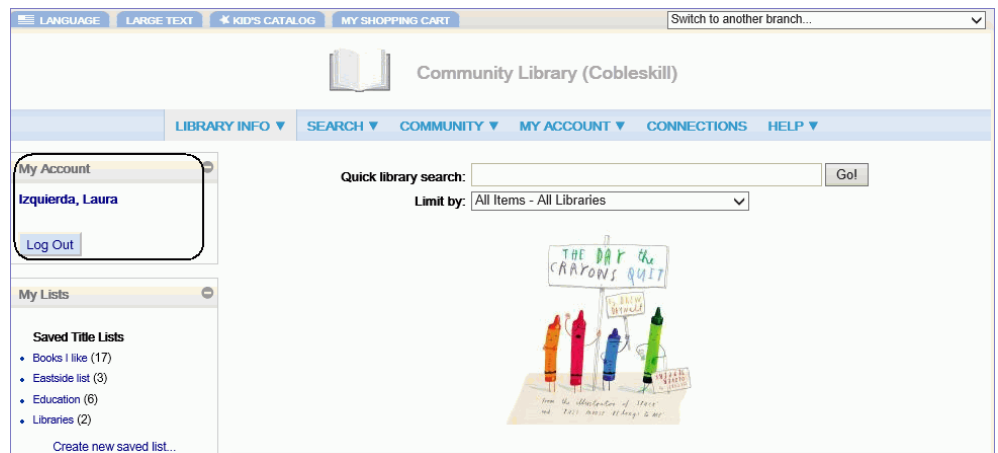
If the PowerPAC profile **Single Login: Enable** profile is set to **Yes**, a **Log In/ Register** option is displayed in the My Account menu and in the page footer. This allows a patron to log in once for a session, instead of each time she selects a function that requires identification. When patrons provide log-in information for the first time (for example, in requesting a hold), they remain logged in until they select a log-out option, or until Polaris PowerPAC session times out.

Important:

If you change this profile, you must clear the page cache. See [“Updating Page Caches”](#) on page 9. If you do not, you may see unexpected results, and it may be possible for a patron to see another patron’s account information at a library workstation.



When the patron has logged in, the PowerPAC page displays the patron's name and the **Log Out** option in the dashboard.



The patron can select an option under My Account to see their record, the items they have checked out, hold requests, fines and fees, and saved searches. Logging in from any page except My Account pages returns the patron to the portal page, if the library uses it, or to the main search page. Logging in to a My Account page displays that page.

Note:

The Single Login profile also allows Polaris to cache patron log-in information for e-sources authentication. See “Setting Up E-Source Targets” on page 115.

Single Log-In Per Session - Mobile PAC

Polaris Mobile PAC allows a single log-in until the patron deliberately logs out, disconnects from the Mobile PAC site, or is inactive for 20 minutes. See [“Patron Log-In Settings for Mobile PAC”](#) on page 383.

Privacy Policy Link

You can make the library’s privacy policy available as a link from all patron log-in points when Single Login is enabled and the patron has not yet logged in. See [“Set up a privacy statement link \(Polaris PowerPAC\)”](#) on page 255. The link is also displayed on the patron self-registration pages. See [“Set up online patron self-registration”](#) on page 258.

Limiting Log-In Attempts

You can set a limit on the number of times a patron can attempt to log in to the PAC without success. At the first unsuccessful attempt, the system starts timing the attempts to log-in. When the limit is reached within 5 minutes of the first unsuccessful attempt, a message appears and the patron must wait 5 minutes before trying to log in again.

In the library, a staff member can use the staff override password (see [“Set patron password and user name options”](#) on page 262) within the initial 5-minute “window” to log the patron in. If a staff member resets the patron’s password from the staff client after at least one log-in attempt, the patron may have to wait 5 minutes before attempting to log in with the new password.

In Polaris Administration, use the system-level PAC profile **Login retries** to enable or disable the limit and set the number (5-99) of attempts allowed. By default, the limit is enabled and 5 attempts are allowed. See [“Limit log-in attempts”](#) on page 255.

Patron Inactivity Timeout at In-House Workstations

You can set a period of inactivity after which a logged-in patron at a library (in-house) workstation is automatically logged out. A logged-in patron’s activity consists of any of the following actions:

- Clicking Polaris product buttons
- Clicking links
- Clicking cover images
- Clicking in the PowerPAC portion of the browser window
- (Credit card payment form only) Text entry

Note:

When a credit card payment is submitted, the Patron Inactivity Timeout value is calculated by adding it to the credit card gateway timeout set in the Credit Card parameter **Online payments: Configure** plus 90 seconds.

When any of these actions occur, activity is registered and the inactivity timer is restarted. When this feature is enabled, the browser status bar displays a count-down timer when 60 seconds are left before automatic logout. The count-down timer text can be edited in Polaris Language Editor (string ID `PACML_TIMEOUTMSG`).

In addition, an alert box displays the following message 30 seconds before the session is due to time out: **Your session will end in 30 seconds**. The following language strings can be edited in Polaris Language Editor:

Note:

The number of seconds cannot be modified.

- `PACML_TIMEOUTALERT`
- `PACML_TIMEOUTALERT2`
- `PACML_CONTINUESESSION`
- `PACML_TIMWINTITLE`
- `PACML_TIMEOUTCLICK`
- `PACML_TIMEOUTSECONDS`

If the user clicks the **Continue session** button in the timeout alert box, the session timeout clock restarts, and the user remains on the current page. If a lightbox was open, it remains open. If the user does not click the **Continue session** button, the session ends, and the page defined in the **Patron inactivity timeout profile** displays.

Note - Secure Socket Layer (SSL):

If SSL is enabled for the entire site, the 60-second countdown timer appears in the status bar only if you add the site to the trusted sites list in Internet Explorer. For more information about SSL, see [“Secure Socket Layer \(SSL\)”](#) in the *Polaris Administration Guide 4.1R2* and [“Set the entire PowerPAC site to https only”](#) in the *Polaris Administration Guide 4.1R2*.

Note - Firefox browsers:

You may need to clear the browser history to make the timer work correctly.

To display the count-down timer in the status bar, select **Tools, Options, Content** tabbed page, and click **Advanced**. On the Advanced JavaScript Settings dialog box, select (check) **Change status bar text**.

Actions that are not counted as activity include resizing or moving the browser window, accessing browser menu options, scrolling, or accessing any third-party resource that opens in a lightbox, frameset, or new browser window.

The automatic logout applies only to in-house workstations. A workstation is typically considered to be in-house if it is registered in Polaris Administration (staff client workstations) or if the workstation’s IP address is listed in the In-House IP Addresses database table. If you use Polaris PowerPAC on workstations within the library and you are enabling the patron inactivity timeout, be sure to list them in the In-House IP Addresses database table.

- For information about registering client workstations in Polaris Administration, see [“Setting Up Workstations”](#) in the *Polaris Administration Guide 4.1R2*.

- For information about listing PowerPAC workstations in the In-House IP Addresses database table, see [“Identifying In-House Computers”](#) in the *Polaris Administration Guide 4.1R2*.
- You can determine whether the system checks both the In-House IP Addresses table and the registered workstations (the default setting), or only the In-House IP Addresses table, to determine whether a workstation is in-house. See [“Set criteria for determining in-house location”](#) in the *Polaris Administration Guide 4.1R2*.

To set the inactivity timeout, see [“Set an inactivity timeout for in-house workstations”](#) on page 256.

Active Directory Log-On to PAC

You can allow log-on to PAC using Active Directory credentials instead of the Polaris patron barcode or username and password. This feature is particularly suitable in academic settings, enabling students to authenticate into Polaris PowerPAC and Mobile PAC using their campus network credentials established in Active Directory. The user must have a Polaris patron record, but the authentication uses the user’s network ID, contained in a Polaris patron record User Defined Field (UDF), rather than the patron record barcode and password. Although a patron record barcode is required by Polaris, it will not be used for any PAC authentication. When the user attempts to log in from Polaris PowerPAC or Mobile PAC, the log-in page prompts for the network credentials instead of the usual Polaris barcode/username and password. For set-up instructions, see [“Set Up PAC Active Directory Log On”](#) on page 257.

Requirements and Limitations - PAC Active Directory Log-On

- The Polaris production server must be in the same domain as the Active Directory service.
- The library must designate a user-defined field (UDF) to contain the network ID in the patron record. Staff can search for patron records by this UDF if trouble-shooting is necessary. For information about setting up UDFs, see [“User-Defined Fields in Patron Records”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.
- The Polaris patron record barcode and password will not work to log on to the patron record in PAC. Because the network ID is the standard for access and the Polaris patron barcode/password cannot be used to log on, the library must limit the user’s ability to manage this Polaris patron data by suppressing certain options from PAC. In Polaris Administration, suppress the following options with the PAC profile **Patron access options** (see [“Setting Patron Access Options”](#) on page 258):
 - Create a username - On the Log In tabbed page (system level only), deselect (clear) the **Enable patron username** check box.

- Change passwords - On the Log In tabbed page, deselect (clear) the **Patron can change password** check box.
- Manage forgotten passwords - On the Log In tabbed page (system level only), deselect (clear) the **E-mail forgotten password** check box.
- Create a password for an existing account where no password exists - On the Log In tabbed page, deselect (clear) the **Display prompt for new password** check box.
- Register for a patron account online - On the Self-registration tabbed page, deselect (clear) the **Patron can self-register** check box.
- SIP applications, such as third-party self-check, will not work with the Active Directory credentials. They require the Polaris patron record barcode and password.
- Offline Polaris will not work with the Active Directory credentials. It requires the Polaris patron record barcode and password.

Active Directory Log On in PAC

When the Active Directory option is enabled, the PAC log-on page displays **Username** and **Password** fields. The user enters the network ID (username) and password. If the password is correct and the username matches that entered in a single patron record UDF, the user is logged on. The **Username** field label can be edited in Polaris Language Editor (WebAdmin).

Authentication fails in the following situations:

- The credentials cannot be validated according to network validation rules (for example, the user has entered a Polaris patron barcode instead of the network username). A message is displayed: **You have entered an invalid ID or password. Please try again.**
- The ID (username) entered does not match the designated UDF in any patron record. A message is displayed: **Your library account cannot be verified. Please contact the library for assistance.**
- The ID entered matches the designated UDF in more than one patron record. A message is displayed: **Your ID matches more than one library record. Please contact the library for assistance.**

These messages can be edited in Polaris Language Editor (WebAdmin). The language strings are:

- **PACML_ADLOGON_FAILED** (invalid ID or password)
- **PACML_ADLOGON-NOPATRON** (library account cannot be verified)
- **PACML_ADLOGON_MULTPATRON** (more than one library record)

1-2-3

Enable patron account access - PowerPAC

Follow these steps to allow patrons to view their accounts from Polaris PowerPAC, and to specify what account features are available.

Note:


Separate Mobile PAC profiles control patron account access, navigation, and features in Mobile PAC. See [“Patron Account \(My Account\) in Mobile PAC”](#) on page 387.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Navigation: Patron Account**, and set the value to **Yes**.

When this profile is set to **Yes**, the **My Account** option is displayed on the Polaris PowerPAC menu bar.

3. Set the following PowerPAC profiles to control what features you offer when patrons access their accounts:
 - **Navigation: Fines & Fees** - Specifies whether patrons can view the fines and fees associated with their library accounts. When the profile is set to **Yes**, the **Fines & Fees** option is displayed on the **My Account** menu. The system uses the setting for the patron’s registered branch.

Note:

Patrons can select an information icon  to see detailed information about an individual fine or fee. The history section on the details page includes the date, type, amount, payment, and staff name associated with the fine or fee. If you prefer to suppress the history section, set the PAC profile **Fines & Fees: Show history in detailed view** to **No**.

Note:

If you plan to accept online credit card payments, set **Navigation: Fines & Fees** to **Yes**. See [“Setting Up E-Commerce”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Navigation: Items Out** - Specifies whether patrons can view a list of the items checked out to their account. When the profile is set to **Yes**, the **Items Out** option is displayed on the **My Account** menu and summary information is displayed in the patron account page dashboard. The system uses the setting for the patron’s registered branch.

Note:

If you want to allow patrons to renew items from the **Items Out** page, set this option using the PAC profile **Patron Access: Renewal Permitted**. See step 5.

- **Navigation: My Record** - Specifies whether patrons can view their library registration information. When the profile is set to **Yes**, the **My Record** option is displayed on the **My Account** menu.

- **Navigation: Requests** - Specifies whether patrons can view a list of the titles they have requested. When the profile is set to **Yes**, the **Requests** option is displayed on the My Account menu, summary information is displayed in the patron account page dashboard, and a link to the list of requests is displayed when a request is placed. The system uses the setting for the patron's registered branch. The page shows the status of each request, and allows the patron to cancel, suspend and reactivate requests. From the Requests page, the patron can also see detailed information about each request.
- **Patron access: Display hold queue information** - Specifies whether the position of a patron's request in the holds queue is displayed on the Requests page of the 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 profile setting for *the patron's registered branch* controls whether the holds queue information is displayed.

Note:

You may want to suppress the holds queue information because it can be confusing in certain circumstances. For example, a request may be first in the queue, but if it is overridden for some reason, it may not be filled first. Also, if a branch uses primary and secondary routing groups, the queue position of a request may change if the request is sent to the secondary routing group. For more information about holds processing, see "[Setting Up Holds and ILL Request Processing](#)" in the *Polaris Patron Services Administration Guide 4.1R2*.

4. To allow patrons to renew items from Polaris PowerPAC and Mobile PAC, do these steps:
 - a) Click the **PAC** tab in the details view of the Administration Explorer.
 - b) Double-click **Patron Access: Renewal**, and select (check) **Renewal permitted**.

When this option is checked, patrons can renew all or selected items from the Items Out page in the patron account. (When the profile is set to **No**, the renewal links are not displayed on the Items Out page.)

Note:

Even when you permit renewals, renewal options are not displayed for items that cannot be renewed.

- c) To allow renewals where the patron registration will expire before the renewal due date, select **Allow renewal if patron registration will expire**.

If this option is selected, the patron sees the expiration message in PAC but the renewal is allowed. The system uses the setting of the governing library for patron blocks.

5. Select **File, Save**.

Related Information

- **Patron messages** - You can allow staff to post library-defined or free-text messages to patron accounts. Patrons can then read and delete the messages from the PowerPAC or Mobile PAC patron account. For more information about setting up patron messages, see [“Setting Up Patron Messages”](#) in the *Polaris Patron Services Administration Guide 4.1R2*. For more information about posting patron messages in the staff client, see [“Posting Patron Messages”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Blocks on renewals and ebook circulation** - You can set blocking conditions that apply to renewals and ebook circulation from the PAC or renewals by telephone. See [“Defining Patron-Initiated Circulation Blocks”](#) in the *Polaris Patron Services Administration Guide 4.1R2*. You can also block renewal from PAC if an associated patron has exceeded the 2nd level fine amount as determined by the governing library for patron blocks, or if the associated patron has exceeded the maximum overdue limit as determined by the governing library for patron blocks. For more information about setting up blocking relationships, see [“Patron Associations”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Hold/ILL requests** - You set conditions for requests from PAC with Requests parameters. See [“Defining Hold Processing Options”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Online registration, password changes, and account updates** - See [“Setting Patron Access Options”](#) on page 258.
- **Setting a staff override password** - See [“Set patron password and user name options”](#) on page 262.
- **Allowing credit card payments** - See [“Setting Up E-Commerce”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Search agent (saved searches)** - If you offer search agent functionality, patrons can view and work with their saved searches from the patron account pages. See [“PAC Search Agent \(Saved Searches\)”](#) on page 87.
- **Ask Us** - Using Ask Us, registered patrons can log in and send an e-mail message to designated library staff members. See [“Setting Up Patron E-Mail \(Ask Us\)”](#) on page 268. You can optionally offer this feature to guest users (no log-in required).
- **3M PAMS** - 3M™ Public Access Management System “smart cards” allow patrons to log in by placing a smart card in a reader. See [“Set up Polaris PowerPAC”](#) on page 11.
- **Polaris® ExpressCheck™** - Use the SelfCheck Unit parameter **Polaris ExpressCheck: Options** to control access to the patron account from ExpressCheck.

1-2-3

Set up a privacy statement link (Polaris PowerPAC)

You can display a link to the library's privacy policy (For more information on our privacy policy, [click here](#)) on 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. Follow these steps to display the link in Polaris PowerPAC.

1. In the Administration Explorer tree view, open the **Profiles** folder for the branch, and click the **PAC** tab in the details view.
2. Double-click **Patron Access: policy statement hyper text link permitted**, and set the value to **Yes**.
3. Double-click **Patron Access: policy statement hyper text link**, and type the complete URL to the Web page for the library privacy policy.
4. Select **File, Save**.

1-2-3

Limit log-in attempts

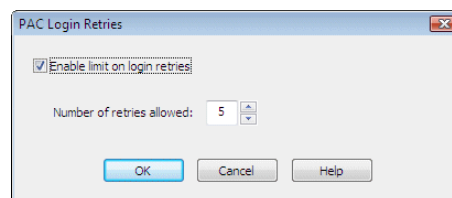
You can limit the number of times a patron can attempt to log in before being forced to wait 5 minutes. For details, see "[Limiting Log-In Attempts](#)" on page 248. Follow these steps to limit the number of times a patron can attempt to log in before the waiting period is enforced.

Note:

These settings apply to the following PAC applications:
Polaris PowerPAC - Main log-in page, hold request page
Polaris PowerPAC Children's Edition - Hold request page
Mobile PAC - Main log-in page

1. In the Administration Explorer tree view, open the **Profiles** folder at the system level, and click the **PAC** tab in the details view.
2. Double-click **Login retries**.

The PAC Login Retries dialog box appears.



3. Select (check) **Enable limit on login retries**.
4. Set the number of attempts (5-99) allowed before the patron must wait 5 minutes.
5. Click **OK**.

1-2-3

Set an inactivity timeout for in-house workstations

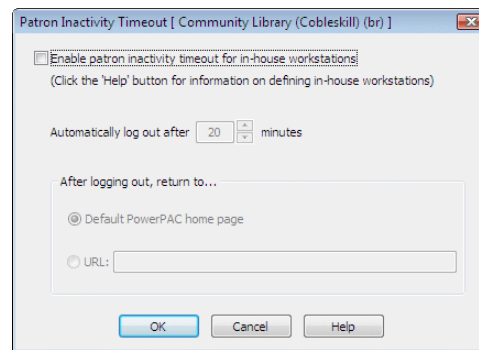
Follow these steps to automatically log out patrons from in-house workstations after a specified period of inactivity. For details, see “[Patron Inactivity Timeout at In-House Workstations](#)” on page 248.

Note:

These settings do not apply to patrons who are not logged in or those working outside the library.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Patron inactivity timeout**.

The Patron Inactivity Timeout dialog box appears.



3. Select (check) **Enable patron inactivity timeout for in-house workstations** to enable the inactivity timeout.
4. Set the time after which the patron is logged out and the specified page (see step 5) is displayed.

You can specify a time from 1 to 20 minutes.

5. Specify the page to display after the inactivity period and automatic logout:
 - Select **Default PowerPAC home page** to return to the page you have specified as the PowerPAC home page. See “[Set up Polaris PowerPAC](#)” on page 11.
 - Select **URL** and type the *complete* URL of the page that should be displayed (255 characters maximum).
6. Click **OK** to save your settings.

Related Information

“[Identifying In-House Computers](#)” in the *Polaris Administration Guide 4.1R2*

1-2-3

Set Up PAC Active Directory Log On

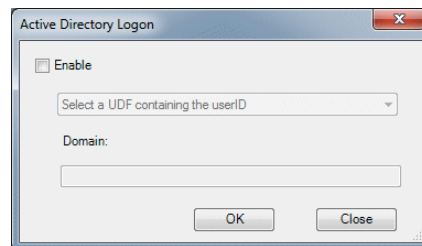
Follow these steps to allow users to log on to PAC using network credentials instead of the Polaris patron record barcode/username and password. For details, see [“Active Directory Log-On to PAC”](#) on page 250.

Note:

These settings apply to both Polaris PowerPAC and Mobile PAC .

1. In the Administration Explorer tree view, open the **Profiles** folder for the system, and click the **PAC** tab in the details view.
2. Double-click **Active directory logon**.

The Active Directory Logon dialog box appears.



3. Select (check) **Enable**.
4. Select the UDF that contains the network ID from the list.
The options are the UDFs defined for the system. See [“User-Defined Fields in Patron Records”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.
5. Enter the network domain name (maximum 25 characters).
6. Click **Save**.
7. Suppress user name, password, and self-registration options from display in PAC, using the PAC profile **Patron access options**. See [“Requirements and Limitations - PAC Active Directory Log-On”](#) on page 250.

Important:

There are no programmatic relationships between the **Active Directory Logon** settings and the **Patron access options** settings that control patron usernames, passwords, or self-registration. You must suppress these options in Polaris Administration as described here.

8. Using Polaris Language Editor (WebAdmin), reload Polaris PowerPAC and Mobile PAC.

Setting Patron Access Options

You can make available a range of options that allow patrons to set up and change their account information from Polaris PowerPAC or Mobile PAC:

- **Self-registration** - Patrons can submit information to set up a new library account.
- **Passwords and user names** - Patrons can change their passwords, and the library can set a staff override password. You can restrict passwords to numeric characters (PINs). You can also allow patrons to set up user names, create passwords, and receive e-mail messages for forgotten passwords.
- **Update account information** - Patrons can submit changes in their account information to a designated library e-mail address.

See the following topics:

- [“Set up online patron self-registration”](#) on page 258
- [“Set patron password and user name options”](#) on page 262
- [“Set up online patron account updates”](#) on page 264

1-2-3

Set up online patron self-registration

When a patron registers for a new library account online, a patron record is created. Polaris issues the patron a temporary barcode that allows the patron to do certain operations online, such as request a hold, but blocks the patron from checking out materials until the new record is verified by staff. You can also set Polaris to send an automatic notification e-mail to a library staff account. When the notification arrives, staff members can review the registration information and create the library card.

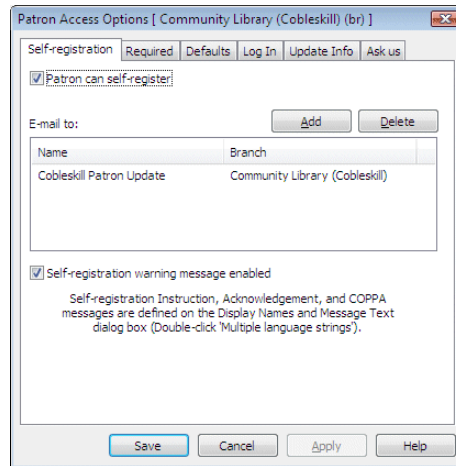
Follow these steps to allow patrons to register for a library account using Polaris PowerPAC or Mobile PAC.

Important:

Do this procedure for each branch that allows patron self-registration.

1. In the Administration Explorer tree view, open the **Profiles** folder for the branch, and click the **PAC** tab in the details view.
2. Double-click **Patron Access options**.

The Patron Access Options dialog box opens.



3. On the Self-registration tabbed page, select (check) the **Patron can self-register** check box to make online registration available.

When this option is selected, patrons see a **register now** link on PAC log-on pages such as the Patron Account log-on page and the Ask Us log-on page. Clearing the check box removes the link, and self-registration is not available.

4. To specify a staff address for automatic notification e-mail, do the following steps:

- a) Click **Add**.

The Polaris Find Tool appears.

- b) Search for the staff member or members who should receive the registration notification messages, and select their names in the results list.

- c) Right-click the highlighted names, and choose **Select** from the context menu.

The Patron Access Options dialog box appears, and the selected names are displayed in the **E-mail to** list.

5. To enable a message regarding self-registration, select the **Self-registration warning message enabled** check box.

This message allows the library to comply with the Children's Online Privacy Act. For information about editing the text of this message, see ["Editing Messages and Labels"](#) on page 288.

6. Click the **Required** tab, and select any of the **User defined fields** check boxes to identify which of the user-defined fields in patron records should be displayed on the online self-registration form. See ["User-Defined Fields in Patron Records"](#) in the *Polaris Patron Services Administration Guide 4.1R2*. Once you have selected a field to display, you can select the **Required** check box to require the information for self-registration.

7. To require a birth date for self-registration, select the **Birth date is required** check box.

When a birth date is included in PAC self-registration, the system uses the birth date to check for duplicate patron records, in addition to the first name and last name. If no birth date is supplied, duplicate checking uses only the first and last names.

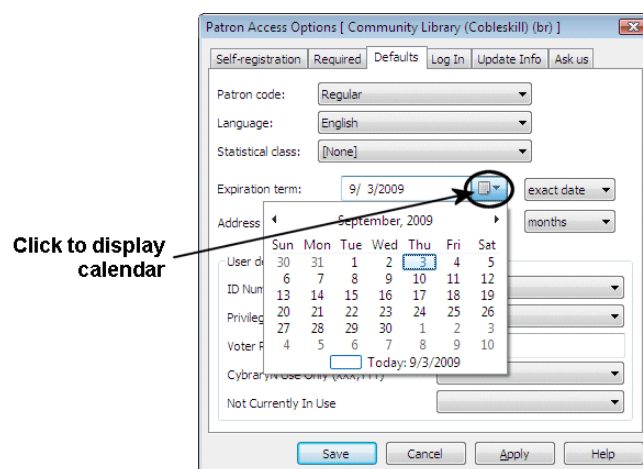
8. Click the **Defaults** tab, and specify the default values for patron records created through self-registration:

Notes:

Library staff members can change the default values when they review the online registration.

The default notification method is set by the Patron Services parameter **Express patron registration options**. See [“Set express registration default values and required fields”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Patron code** - Select the patron code to assign to all self-registered patrons. You may want all self-registered patrons to have the same code assigned to the majority of your patrons, or you may have a patron code specifically identifying self-registered patrons.
- **Language** - Select the default language for self-registered patrons.
- **Statistical Class** - Select the default statistical classification for self-registered patrons.
- **Expiration term** - Set the default period of time before the library card expires. To set a date according to the current date (such as two years from today), select **months** or **years** in the second **Expiration term** box, and type a number in the first box. To set a precise date, select **exact date** in the second **Expiration term** box; then click the calendar icon and choose a date from the calendar in the first box (or type the date in the format shown in the **Expiration term** box).



- **Address check term** - Set the default period of time when the registration address should be verified. To set a date according to the current date (such as two years from today), select **months** or **years** in the second **Address check term** box, and type a number in the first box. To set a precise date, select **exact date** in the second **Address check term** box; then click the calendar icon and choose a date from the calendar in the first box (or type the date in the format shown in the **Address check term** box).
9. For free-text UDFs, type text in each UDF box for which you want to specify default text.

10. (Optional) For drop-menu UDFs, select an option in each UDF drop-menu for which you want to specify a default option.

Note:

If you require a drop-menu UDF (see step 6) but do not specify a default option, the field is blank in a new record but the user must select an option.

11. Click **Apply** to apply your settings and continue working with Patron Access options, or click **Save** to save your settings and close the Patron Access options dialog box.

Related Information

- **Remove block on self-registered patron record** - See [“Resolve a Verify Patron block”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Notification preference** - The default notification preference for self-registered patrons is the notification setting for the Patron Services parameter **Express patron registration options (General defaults tab)**. The patron can choose another method from the drop-down list during self-registration, and the notification preference can be changed when the registration is verified. You can filter the methods available for selection; see [“Set up notification methods, e-mail options, and export location”](#) in the *Polaris Patron Services Administration Guide 4.1R2*. If the patron chooses **Phone**, the patron must indicate the phone number to use for

notification. If the patron chooses **TXT Messaging**, the patron must indicate the phone number to be used for TXT messages, and select a carrier for that number.

- **EReceipts** - If the patron's registered branch has enabled eReceipts (see "Setting Up eReceipts" in the *Polaris Patron Services Administration Guide 4.1R2*), that organization can also offer the option to receive e-mail receipts, TXT receipts, or both for renewals from PAC. The option is available from both patron self-registration and account updates from PAC. To enable eReceipt preference options in PAC, use the PAC profile **Patron eReceipts**, available at the system, library, or branch level.
- **Registered branch** - The patron chooses a registered branch from a list during self-registration. The order of branches in the list is controlled by the PAC profile **Branch list order**. The setting for the current connection branch is used. When the profile is set to **Yes**, the branch names are displayed in ascending alphabetical order by name. When the profile is set to **No**, the branch names are displayed in ascending numerical order by internal organization ID. With either setting, the system organization is always first.

1-2-3

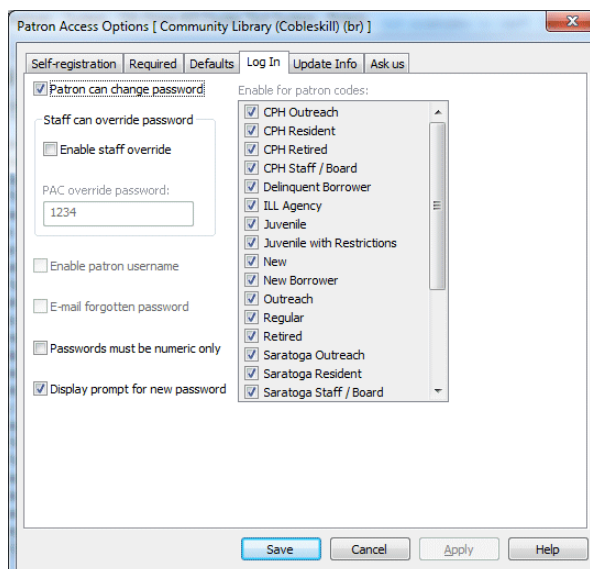
Set patron password and user name options

Follow these steps to set the password and user name options offered to patrons using Polaris PowerPAC or Mobile PAC.

Important:

Do this procedure for each branch that allows patron self-registration.

1. In the Administration Explorer tree view, open the **Profiles** folder for the branch, and click the **PAC** tab in the details view.
2. Double-click **Patron Access options**.
The Patron Access Options dialog box appears.
3. Click the **Log In** tab.



4. To enable patrons to change their passwords online, select the **Patron can change password** check box.
5. To specify an override password for staff, do these steps:

Note:

A staff member can use the staff override password to help a patron access the account in case the password has been forgotten. Once in the account, if the **Patron can change password** box is selected, the patron can specify a new password by clicking a link on the PAC patron account page.

- a) Select the **Enable staff override** check box.
 - b) Type a password in the **PAC override password** box. The password can be 4 to 16 characters (letters and numbers), but cannot include spaces.
6. (System level only) To allow patrons to set up and change user names, select (check) **Enable patron username**.

A patron can enter her user name instead of a barcode when logging in to use PAC functions such as viewing the patron account or placing a hold request. The user name is displayed in the patron account in PAC, and the patron barcode is masked to display only the last four digits. The user name is also accepted for logging in to third-party self-service devices (devices that rely on SIP or SIP2) and in Polaris ExpressCheck. The user name must be a minimum of 4 alpha-numeric characters, not more than 50 characters, and cannot contain spaces. It must begin with an alpha character. The following special characters are also allowed: - (dash), _ (underscore), . (period), and @ (at). The user name must not contain two adjacent special characters, and cannot match an existing patron barcode.

Note:

Patron user names are not available to staff. Staff cannot assign them during patron registration, they are not searchable or available for reports, and they are not displayed in the patron record. Only patrons can create or change user names.

7. (System level only) To allow patrons to receive an e-mail message containing a forgotten password, select (check) **E-mail forgotten password**.

When this option is set, the PAC and Polaris ExpressCheck log-in pages include a **Forgot password?** link. When the patron clicks the link, an e-mail message containing the patron password is sent to both the primary and alternate e-mail addresses in the patron record. If no e-mail address is present in the patron record, the system displays an error message.

Note:

If the patron has forgotten both user name and password, the patron must contact the library. Staff can assign a new password. Using this and the barcode, the patron can set up a new user name.

8. To restrict passwords to numeric characters (PINs), select (check) **Passwords must be numeric only**.

This option is useful if you use Polaris Phone Attendant and allow patrons to log in by telephone to hear information about their accounts. (Alternatively, you can allow alpha-numeric passwords from the Phone Attendant. See “[Set Phone Attendant options for specific lines](#)” in the *Polaris Telephony Administration Guide 4.1*.) If you choose to enable this option, existing alphanumeric passwords will continue to work but only numeric passwords are accepted when a new account is created or when a patron password is changed from the staff client or from PAC.

9. To allow patrons to create a password for an existing account where no password exists (a situation that may occur when accounts were created before passwords were necessary), select (check) **Display prompt for new password**.

This setting displays a link on the Polaris PowerPAC and Mobile PAC log-in pages that allows patrons to set up and verify a password.

10. Click **Apply** to apply your settings and continue working with Patron Access options, or click **Save** to save your settings and close the Patron Access options dialog box.
11. Select **File, Save**.

1-2-3

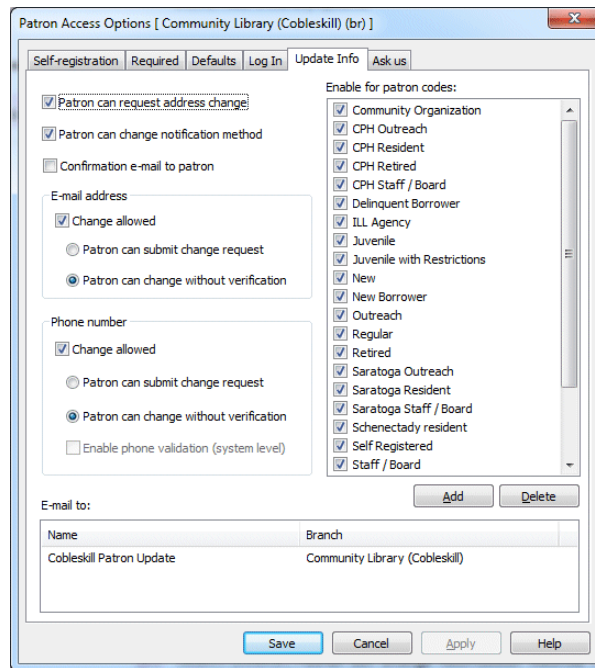
Set up online patron account updates

Follow these steps to allow patrons to request updates to their patron account information online, using Polaris PowerPAC or Mobile PAC, and to set Polaris to send an automatic notification e-mail to a staff member.

Note:

When patrons request certain updates to their account information online, Polaris blocks the patron from checking out materials until staff verify the update. See “[Resolve a Verify Patron block](#)” in the *Polaris Patron Services Guide 4.1R2*.

1. In the Administration Explorer tree view, open the **Profiles** folder for the branch, and click the **PAC** tab in the details view.
2. Double-click **Patron Access options**.
The Patron Access Options dialog box appears.
3. Click the **Update Info** tab.



4. Select (check) **Patron can request address change** to allow patrons to request mailing address changes online.

This update request places a verification block on the patron account and an e-mail message is sent to the address specified on this tabbed page.

5. Select (check) **Patron can change notification method** to allow patrons to change their notification method online.

This option does not place a verification block on the patron account.

Note:

If the preferred notification method is set to e-mail, an e-mail address must be supplied. If the preferred method is text message, the patron must supply a phone number, indicate that it is to be used for text messages, and select a carrier for that number.

6. Select (check) **Confirmation e-mail to patron** to have the system send an acknowledgement message by e-mail to the patron when he or she submits a request to change account information.

When this option is enabled, a single e-mail message is sent soon after the patron clicks **Submit Change Request**. The message is sent to both the primary and alternate e-mail addresses. If the patron record does not have an e-mail address, no message is sent.

7. Select (check) **E-mail address - Change allowed** to allow patrons to change an e-mail address online, then select one of the following options:
 - **Patron can submit change request** - This option places a verification block on the patron account when the patron requests a change, and an e-mail message is sent to the address specified on this tabbed page.
 - **Patron can change without verification** - This option allows a patron to change the e-mail address online without incurring a verification block.
8. Select (check) **Phone number - Change allowed** to allow patrons to change a contact telephone number online, then select one of the following options:
 - **Patron can submit change request** - This option places a verification block on the patron account when the patron requests a change, and an e-mail message is sent to the address specified on this tabbed page.
 - **Patron can change without verification** - This option allows a patron to change the phone number online without incurring a verification block.
 - **Enable phone validation** (system level only) - Specifies whether Polaris validates phone numbers when they are entered in the Update Preferences page in Polaris PowerPAC or Mobile PAC. Libraries that require their patrons to enter an initial 1 with the phone number should leave this option unchecked.

Note:

In Mobile PAC, when validation is not enabled, each phone number option is one entry field, similar to Polaris PowerPAC. When validation is enabled, each phone number option has three entry fields (area code/prefix/four-digit number).

9. Select (check) the patron codes that can request account updates online. (Clear the appropriate patron code check boxes to prevent these patrons from requesting account updates online.)
10. To specify an address for automatic notification e-mail, do the following steps:
 - a) Click **Add**, and use the Find Tool to search for the staff member or members who should receive the account update messages.
 - b) Select the names in the results list, right-click the highlighted names, and choose **Select** from the context menu.

The Patron Access Options dialog box appears, and the selected names are displayed in the **E-mail to** list.
11. Click **Apply** to apply your settings and continue working with Patron Access options, or click **Save** to save your settings and close the Patron Access options dialog box.
12. Select **File, Save**.

Related Information

- **Verify borrower blocks** - Patrons who have requested the specified account updates online are automatically blocked from check-out and renewal at the staff circulation desk until a library staff member has reviewed the change. (The block is not applied if you have chosen to allow the change without verification.) In addition, you can set Polaris to block renewals online or by telephone. See [“Defining Patron-Initiated Circulation Blocks”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.
- **EReceipts** - If the patron’s registered branch has enabled eReceipts (see [“Setting Up eReceipts”](#) in the *Polaris Patron Services Administration Guide 4.1R2*), that organization can also offer the option to receive e-mail receipts, TXT receipts, or both for renewals from PAC. The option is available from both patron self-registration and account updates from PAC. To enable eReceipt preference options in PAC, use the PAC profile **Patron eReceipts**, available at the system, library, or branch level.

Setting Up Patron E-Mail (Ask Us)

Using the Ask Us feature, patrons can use Polaris PowerPAC or Mobile PAC to send a reference question to a designated library e-mail address. You set up a receiving e-mail address on the branch level, then enable the feature in PowerPAC, Mobile PAC, or both. You can require a patron log-in, or bypass the log-in and allow anyone to send a question via Ask Us.

The Sent From e-mail address on the message to the library is the e-mail address the user has specified in the Ask Us form, if any. If no address is specified, the user has logged in as a patron, and the patron account includes an e-mail address, that address is used. If no e-mail address is specified in the Ask Us form or the patron account, or the patron has cleared the address from the form, the Sent From address is that specified in the PAC profile **Email notification: Email address of sender**.

Note:

Any e-mail from PAC, including Ask Us messages, requires you to specify the SMTP server in Polaris Administration. Double-click the PAC profile **Email notification: Server running SMTP service**, and type the domain name of the e-mail SMTP server.

See the following topic:

- [“Set up and start Ask Us”](#) on page 268

1-2-3

Set up and start Ask Us

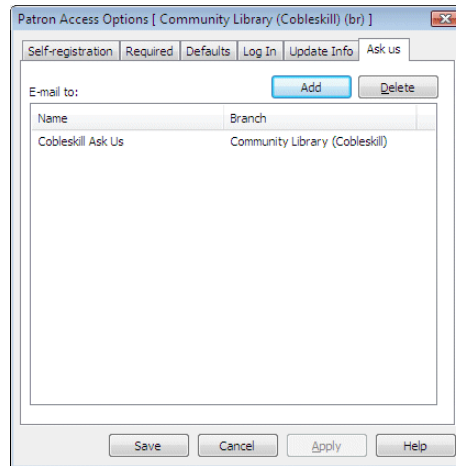
Follow these steps to set up the e-mail addresses to receive questions sent by e-mail from the PAC, and to start the Ask Us function.

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

2. Double-click **Patron Access options**.

The Patron Access Options dialog box appears.

3. Click the **Ask Us** tab.



4. To specify the receiving address for Ask Us e-mail messages, do these steps:
 - a) Click **Add**, and use the Find Tool to search for the staff member or members who should receive the Ask Us messages.
 - b) Select the names in the results list, right-click the highlighted names, and choose **Select** from the context menu.

The Patron Access Options dialog box appears, and the selected names are displayed in the **E-mail to** list.

5. Click **Apply** to apply your settings and continue working with Patron Access options, or click **Save** to save your settings and close the Patron Access options dialog box.

The Profiles tabbed pages appear in the Administration Explorer details view.

6. To make the Ask Us feature available in Polaris PowerPAC, do these steps:
 - a) Click the **PowerPAC** tab in the details view of the Explorer.
 - b) Double-click **Navigation: Ask us**, and select **Yes**.
 - c) To require a patron log-in for Ask Us, double-click **Ask Us: Require Login**, and set the value to **Yes**.

If this value is set to **No**, a **Guest** button is displayed on the Ask Us login page in Polaris PowerPAC. The user can click **Guest** to send a question without logging in.

7. To make the Ask Us feature available in Mobile PAC, do these steps:
 - a) Click the **MobilePAC** tab in the details view of the Explorer.
 - b) Double-click **Navigation: Ask us**, and select **Yes**.
 - c) To require a patron log-in for Ask Us, double-click **Ask Us: Require Login**, and set the value to **Yes**.

If this value is set to **No**, a **Guest** button is displayed on the Ask Us login page in Mobile PAC. The user can click **Guest** to send a question without logging in.

Note:

Libraries that use Polaris Community Profiles and ContentXChange should set this option to **No** so that log-on is not required. Organizations can place the Ask Us feature on their own Web sites, where any visitor to the site can send a question to the library. For more information, see [“Using ContentXChange”](#) in the *Polaris Community Profiles Guide 4.1R2*.

8. Select **File, Save**.

Polaris Social with ChiliFresh Connections



With Polaris Social, the library's catalog becomes a gateway to a worldwide network of readers, allowing patrons to share the books they read, see what others are reading, and discover new books based on the social network connected to a title. Polaris Social offers integrated social functions in Polaris PowerPAC through a collaboration with ChiliFresh Connections, with interactions embedded in Polaris PowerPAC. Navigation to and from each ChiliFresh Connections feature is seamless, and users enjoy a single, unified interface in Polaris PowerPAC. Features include single sign-on through PAC; the ability to set up a patron profile; create lists of books that other readers can see; follow what readers with similar tastes are reading; see the network of patrons connected to a title; add recommendations, reviews and tags to titles, and more. For information about ChiliFresh Connections, see <http://www.chilifresh.com/html/connections.php>

While ChiliFresh provides the library system administration options for controlling feature display and functionality, Polaris designates the placement of the ChiliFresh Connections features in Polaris PowerPAC. Accessing ChiliFresh Connections features from PowerPAC requires no further authentication once patron log-in occurs in Polaris PowerPAC, and the patron has registered for the first time in ChiliFresh Connections. Patrons can manage Connections user account information as part of My Account in Polaris PowerPAC. For any catalog items in the ChiliFresh database, patrons can add tags and view library users.

Note:

The font type and color scheme for ChiliFresh Connections information displayed in Polaris PowerPAC matches the PowerPAC theme. The PowerPAC display does not use any font or color customizations created by patrons in ChiliFresh Connections.

In the Polaris themes/shared folder, ChiliFresh Connections has its own style sheet (`chilifresh.css`). Customers who have a custom theme and wish to override some of the default `chilifresh.css` file should copy the 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.

Polaris Social with ChiliFresh Connections is a separately licensed feature at the branch level. You can also offer reviews from ChiliFresh under a separate ChiliFresh contract, without offering the full features of ChiliFresh Connections. However, ChiliFresh reviews without ChiliFresh Connections require separate patron authentication. See “[ChiliFresh Enriched Data](#)” on page 233.

See the following topics:

- [“Exporting Records to the ChiliFresh Database”](#) on page 272
- [“Patron Log-In and ChiliFresh Connections Registration”](#) on page 272
- [“Social Features in the PowerPAC Patron Account”](#) on page 275
- [“Social Features in Search Results”](#) on page 282
- [“Set Up ChiliFresh Connections in Polaris Administration”](#) on page 287

Exporting Records to the ChiliFresh Database

To display Chilifresh Connections content in PAC, you must initially export a file containing all your library’s MARC bibliographic information to ChiliFresh. Use the Polaris staff client **Utilities, Export** function to upload the records, using the default option **Extract All Final MARC 21 Records**. Instructions are available on the ChiliFresh Connections Admin page; for details about the Polaris staff client export utility, see [“Exporting Cataloging Records”](#) in the *Polaris Cataloging Guide 4.1R2*. For subsequent exports of newly acquired titles, define the appropriate date range for the export using the **Extract Only MARC 21 Records Added / Changed from Date** option.

Patron Log-In and ChiliFresh Connections Registration

Within PowerPAC, a patron can easily link his or her library account to a new or existing ChiliFresh account. Once the link is established, the patron logs in with library account credentials to access Connections features within PowerPAC.

A patron who has not logged in can start this process by clicking any Connections function that requires login. For example, the registration process can be initiated from search results Connections functions in the patron’s search results, or by clicking **Connections** on the menu bar and logging in.

JohnsonPublicLibrary

LIBRARY INFO ▾ SEARCH ▾ MY ACCOUNT ▾ CONNECTIONS ▾ HELP ▾

Help

If you are not registered for library services, click here to register now

Please enter your username or barcode, and password.

Username or Barcode:

[Create Username](#)

Password:

[Forgot your password?](#)

Don't forget to log out...

Once logged in, the patron receives a sign-up message for social features, and can click a link to connect the library account to a new or existing ChiliFresh account.

JohnsonPublicLibrary

LIBRARY INFO ▾ SEARCH ▾ MY ACCOUNT ▾ CONNECTIONS ▾ HELP ▾

My Account

Farsaci, Timothy James

• \$2.80 owed on your account

My Record

Connections

Items Out (2)

Requests

Fines & Fees (\$2.80)

Reading History (45)

Saved Searches (2)

Courses

Community

My Lists

Saved Title Lists

- freeling (3)
- Grafton (1)
- Hillerman (4)

Create new saved list...

Saved Searches

You have not yet signed up for the social features of the catalog.
Click here to sign up.

JohnsonPublicLibrary

LIBRARY INFO ▾ SEARCH ▾ MY ACCOUNT ▾ CONNECTIONS ▾ HELP ▾

My Account

Farsaci, Timothy James

My Lists

Saved Title Lists

- freeling (3)
- Grafton (1)
- Hillerman (4)
- New List (1)

Create new saved list...

Saved Searches

Create a nickname to use social features

Nickname:

Birthdate: Jan 1 1900

Use an existing ChiliFresh Connections account

Email:

Password:

What is ChiliFresh Connections?

For new accounts, the patron clicks the **Create a nickname** option, supplies a nickname, and specifies the birth date. The nickname is the public name exposed to other users of Polaris Social functions. If the library's setup with ChiliFresh requires a birth date and the patron is under 13, a message is

displayed and the sign-up is canceled. To link an existing ChiliFresh account, the patron clicks the **Use an existing ChiliFresh Connections account** and supplies the email address and password associated with the account.

A similar process occurs when a patron who has not logged in clicks a ChiliFresh feature such as **Rate or review** in search results.

The image illustrates the process of linking a ChiliFresh account to a library account through three sequential screenshots:

- Search Results:** A search for "grisham" yields results for "A Time To Kill" by Grisham. A button labeled "Rate or review" is circled in red, with an arrow pointing to the next step.
- Account Logon:** A modal window titled "Account Logon" is displayed. It prompts the user to enter a "Username or Barcode" and "Password". The "Log In" button is circled in red, with an arrow pointing to the final step.
- Account Logon (Social):** The "Account Logon" modal is shown again, but with the "Use an existing ChiliFresh Connections account" radio button selected. The "Sign up" button is circled in red, with an arrow pointing to the final step.

After the library account and the ChiliFresh account are linked, the patron who is logged into PAC does not have to log in to ChiliFresh Connections to use those Connections features in PAC that require log-in.

Logging out in PowerPAC also logs the patron out of the ChiliFresh Connections account.

Note:

Logging into ChiliFresh Connections from outside PowerPAC does not log the user into the PowerPAC (library) account.

When the library account and the ChiliFresh account are linked, deleting an existing Connections account from the ChiliFresh Connections site removes the shared login credential from PAC. The patron can create a new shared login credential between the PAC patron account and Connections by re-registering with Connections via PAC, as described above.

Social Features in the PowerPAC Patron Account

Social features are available to logged-in patrons from the PowerPAC patron account. The patron can click **Connections** in the dashboard or **Connections** in the menu bar to display these features.

The screenshot shows the Johnson Public Library website interface. At the top, there is a navigation bar with links for LANGUAGE, LARGE TEXT, KID'S CATALOG, MY SHOPPING CART, and a dropdown for switching branches. The main header features the library's name and a red chili pepper logo. Below this is a secondary navigation bar with links for LIBRARY INFO, SEARCH, MY ACCOUNT, CONNECTIONS (highlighted), and HELP. The main content area is divided into two columns. The left column, titled 'My Account', lists options like My Record, Connections (highlighted), Items Out, Requests, Fines & Fees, Saved Searches, My shopping cart, and Log Out. The right column, titled 'Joe John', displays a profile picture, age (57), location (Seattle, Washington, United States), and links for Invitations, Comments, Messages, Recommendations, and Suggested Connections. Below this is a 'What's Happening' section with recent activity from other users, such as 'LisaR added Carrie' and 'Diane Methfessel Shade added The return of the king'. At the bottom, there are five expandable content drawers: My Bookshelves, Friends and Followers, Reviews, Edit My Profile, and Link to Connections.

The Connections account page offers links for invitations, comments, messages, recommendations, and suggested connections. Each of these features opens in a lightbox. Below, five content “drawers” contain

ChiliFresh Connections user account data. They are initially displayed as collapsed, but the user can choose to expand individual drawers, expand all, or collapse all.

ChiliFresh Connections notifies patrons by e-mail when they receive a new message, recommendation, invitation, or comment. The e-mail message contains a login link to the e-mail recipient's PAC branch. ChiliFresh Connections defines this notification functionality, including text of the e-mail message and which Connections actions will initiate a notification.

Bookshelves Drawer

Bookshelves may include **My library**, **My current reads**, **My wishlist**, and any custom bookshelves (lists) the patron has created.

The screenshot displays the ChiliFresh Connections user interface. At the top, there are navigation tabs: LIBRARY INFO, SEARCH, MY ACCOUNT, CONNECTIONS, and HELP. The user's profile is shown as Joe John, 57 years old, from Seattle, Washington, United States. Below the profile, there are links for Invitations, Comments, Messages, Recommendations, and Suggested Connections. The 'What's Happening' section shows recent activity, such as 'bob-bcpl added Catching fire' on 16 April 2013 and 'greenreader added Mary Poppins' on 19 June 2013. The 'My Bookshelves' section is currently displaying 'My library' and shows a book titled 'Thomas Mann's Death in Venice' by Ellis Shookman (0313311595). The bookshelf is currently sorted by 'Latest Author Title' and 'Ascending'.


Books can be added to any bookshelf by clicking the **Search for more books** link. (Books can also be added to bookshelves from the patron's search results. See [“Social Features in Search Results”](#) on page 282.) If a bookshelf currently has contents, the list can be sorted by **Latest**, **Author**, **Title**, **Ascending** alphabetical, or **Descending** alphabetical.

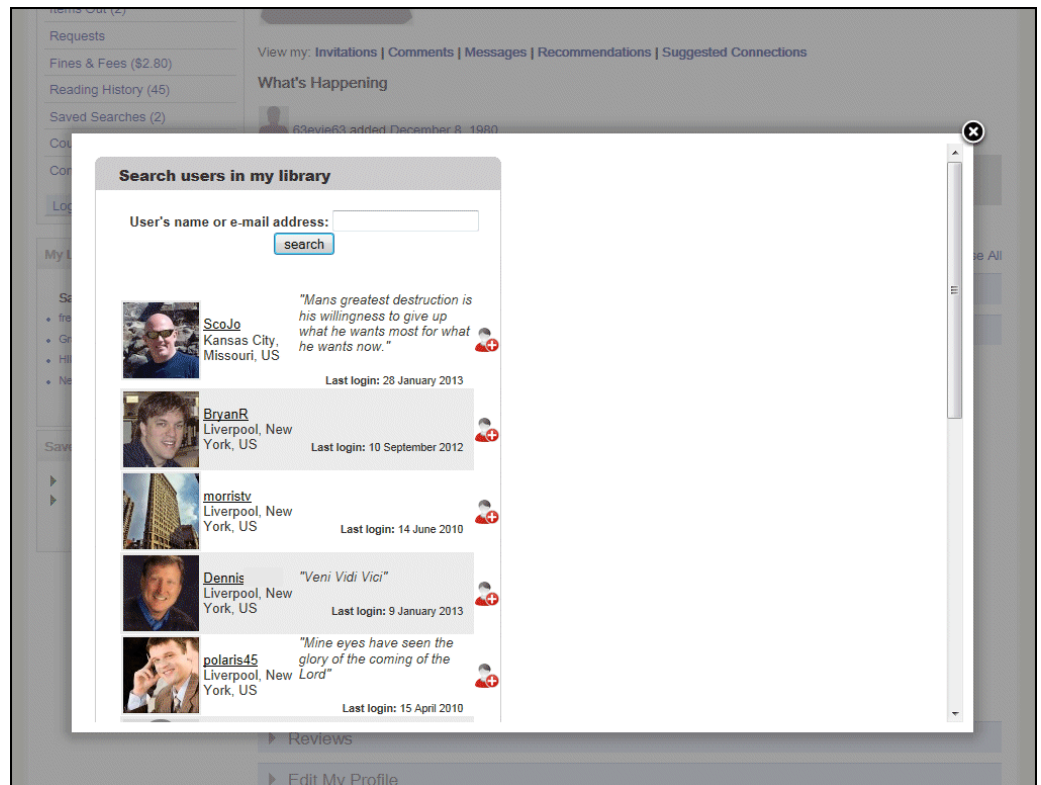
Icons next to each title offer options to remove the title from the bookshelf, set the title as a current read, or move to the title to another shelf. The illustration shows the interface when the patron chooses to move the title to another shelf.

Friends and Followers Drawer

The screenshot shows a user profile page with a sidebar on the left and a main content area on the right. The sidebar contains navigation links: Items Out (2), Requests, Fines & Fees (\$2.80), Reading History (45), Saved Searches (2), Courses, Community, and a Log Out button. Below these are sections for My Lists (Saved Title Lists: freeing (3), Grafton (1), Hillerman (4), New List (1); Create new saved list...) and Saved Searches (Carl Haassen, Evanovich; Show All). The main content area shows a user profile with a name, navigation links (Invitations, Comments, Messages, Recommendations, Suggested Connections), a 'What's Happening' section with a post from Administrator about Harry Potter, and a 'Friends and Followers' section. This section includes 'My friends' (Invite a friend!, See all friends, Browse library users), 'Users following me' (No users are following you yet), and 'Following users' (View recent updates). At the bottom, there is a 'Find users' search bar with a text input and a Search button. The drawer is currently expanded to show the 'Friends and Followers' section.

This drawer displays five sections:





- **My friends** - The patron's ChiliFresh Connections friends. The patron can invite friends, see all friends, or browse library users to find other Connections users registered at the library. Each library user's name is accompanied by an Add Friend icon . The illustration shows an example.



- **Users following me** - Users who follow the logged-in patron.
- **Following users** - Users whom the logged-in patron follows. You can also select **View recent updates** to see recent activity.
- **Find users** - The logged-in patron can search for any ChiliFresh Connections user by user name or email address. When the patron selects the link for another ChiliFresh Connections user, that user's profile page is displayed.

The screenshot shows the Johnson Public Library website interface. At the top, there is a search bar labeled "Find users" with the text "User's name or e-mail address: schrier" and a "Search" button. Below the search bar, a user card for "Bob.S" is displayed, featuring a profile picture, the name "Bob.S", the location "Liverpool, New York, US", and the quote "If you listen to the old, you will understand the new." A callout box with a black border and an arrow points from this user card to the main profile page. The main profile page for "Bob.S" includes a larger profile picture, the same quote, and a "Currently Reading:" section with a book cover. Below the profile information are three icons: a person with a plus sign, an envelope, and a speech bubble with a plus sign. At the bottom of the profile are three expandable sections: "Reviews", "Friends and Followers", and "My Bookshelves". On the left side of the page, there are sections for "My Account" (showing "Farsaci, Timothy James" and a "Log Out" button), "My Lists" (with "Saved Title Lists" including "freeing (3)", "Grafton (1)", "Hillerman (4)", and "New List (1)"), and "Saved Searches" (with "Carl Haassen" and "Evanovich").

On that page, the logged-in patron can click a title to display the brief title information in PowerPAC, as in the patron's own profile. The social drawers are also the same. The following features are available by clicking the icons:

- **Add to friends**  - Sends a friend request to the ChiliFresh user; if the user accepts, he or she is added to the patron's friends list.
- **Send message**  - Sends a message to this user
- **Add comment to cork board**  - This option adds a comment to the user's Comments list, and sends the user an e-mail alert.
- **Follow/unfollow this user**  - Adds the patron to the Followers list on the ChiliFresh user's profile and adds the ChiliFresh user to the Following list on the patron's profile (or reverses the operation).

Reviews Drawer

This drawer displays the reviews the patron has already submitted. The patron can select a title to display search results for that title in PowerPAC. Reviews can be added from search results. See “Social Features in Search Results” on page 282.

The screenshot shows the Johnson Public Library website interface. At the top, there is a navigation bar with "LARGE TEXT", "KIDS CATALOG", and a "Switch to another branch..." dropdown. The library's name "JohnsonPublicLibrary" is prominently displayed in red and green, with a red chili pepper icon to the right. Below the name is a navigation menu with "LIBRARY INFO", "SEARCH", "MY ACCOUNT", "CONNECTIONS", and "HELP".

The "My Account" section on the left lists the user's name "Farsaci, Timothy James" and shows "\$2.80 owed on your account". Other options include "My Record", "Connections" (highlighted), "Items Out (2)", "Requests", "Fines & Fees (\$2.80)", "Reading History (45)", "Saved Searches (2)", "Courses", and "Community". A "Log Out" button is at the bottom of this section.

The "My Lists" section below shows "Saved Title Lists" with items like "freeling (3)", "Grafton (1)", "Hillerman (4)", and "New List (1)". There is a "Create new saved list..." link.

The main profile area shows the user's name "Moon", a silhouette profile picture, and their location: "69 Liverpool, New York, United States". It includes links for "Invitations", "Comments", "Messages", "Recommendations", and "Suggested Connections".

The "What's Happening" section features a review by "Scifiali" titled "Extremely loud and incredibly close" dated "14 August 2011", with a "Show more" link. There are "Expand All" and "Collapse All" options.

The "Reviews" drawer is expanded, showing a review for "John Grisham" with a 4-star rating. The review text is "Interesting bio" and "Seattle, Washington (US)". It includes a link "How does he do it?> Read to find out." and a "Was this review useful? Yes | No" prompt. The review date is "Feb 6, 2013".

Edit My Profile Drawer

The patron can edit the Connections profile picture, nickname, “My Interests” (favorite authors, books, movies), and Facebook or Twitter link settings. The ChiliFresh site provides more information about these link settings.

Saved Title Lists

- feeling (3)
- Grafton (1)
- Hilleman (4)
- New List (1)

[Create new saved list...](#)

Saved Searches

- ▶ ✕ Carl Haaasen
- ▶ ✕ Evanovich

[Show All](#)


▶ My Bookshelves

▶ Friends and Followers

▶ Reviews

▼ Edit My Profile

Current picture:



[Delete Picture](#)

Please note: GIF, JPG and PNG images of up to 2MB supported.

Current nickname: Moon

New nickname:

Favorite authors

Favorite books

Favorite movies

Twitter settings

You have to authorize with your Twitter account to enjoy our integrated services such as posting your Connections events, showing a link to your Twitter account on your Connections profile, etc.

[Authorize with Twitter](#)

Facebook settings


[Authorize Facebook](#)

Link to Connections Drawer

This drawer is a link to the ChiliFresh Connections site, which opens in lightbox. The system uses the linked ChiliFresh Connections authentication for the logged-in patron to log in to the ChiliFresh Connections site.

Search:
Books
Home | [Edit my profile](#) | [My widgets](#) | [Feedback](#) | [Where do I start?](#)

Moon ?



59
Liverpool, New York,
United States

View My: [Reviews](#) | [Recommendations](#) | [Invitations](#) | [Comments](#) | [Messages](#)

Manage My: [Profile](#) | [Interests](#) | [Friends](#)

Statistics: ?

Friends: 0	<input type="text"/>	0.00
Books read: 2	<input type="text"/>	0.00
Reviews written: 1	<input type="text"/>	0.00
Recommendations: 0	<input type="text"/>	0.00
Comments: 0	<input type="text"/>	0.00

[Tracking list \(0\)](#)

My bookshelf ?

On bookshelf: # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Title (descending) | Author

←
→

[Add/remove books](#) | [Manage bookshelves](#) | [Show bookshelf on blog or website](#)

My friends ?

- Invite a friend!
- See all friends
- Find more friends

My discussion groups: ?

- List favorite groups
- List all groups
- Create groups

My cork board ? See all comments

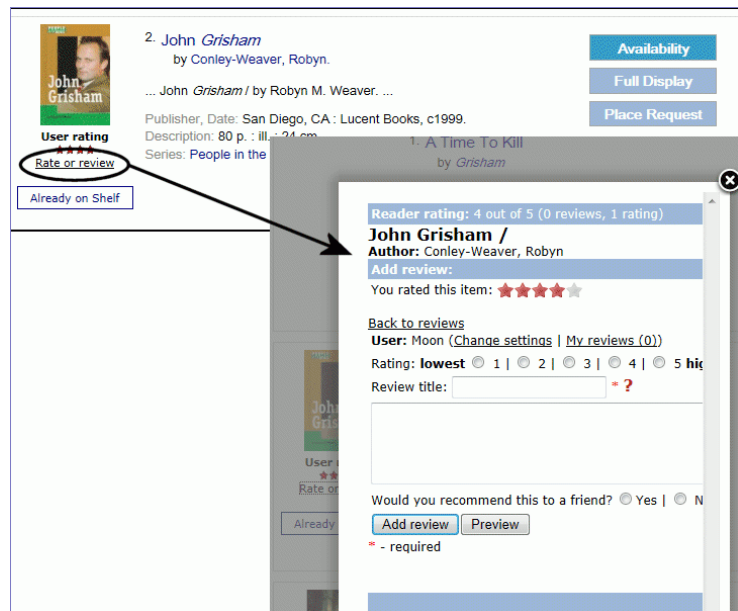
No comments

After the patron makes account changes in the Chilifresh Connections lightbox window, the PowerPAC patron account drawer content is refreshed when the account page is refreshed.

Social Features in Search Results

Ratings and Reviews

Logged-in users can rate titles, add reviews, and read reviews from other readers. The user clicks **Rate or review** (for titles with no previous reviews) or **Review** (for titles with previous ratings or reviews) to open this feature in a lightbox. This illustration show the sequence for a title with no previous reviews.

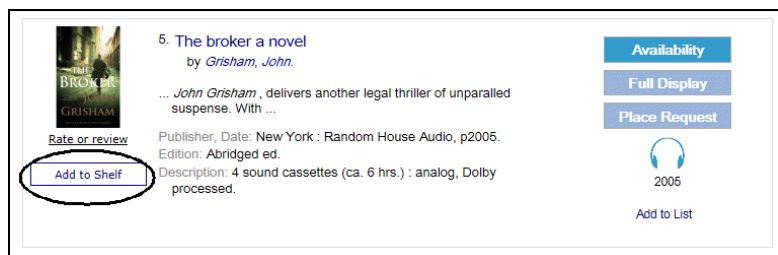


This illustration shows the sequence for a title with existing reviews.



Add to Shelf

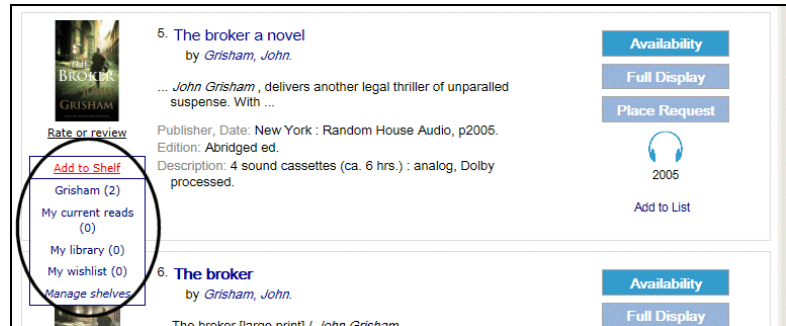
In PowerPAC initial (brief) search results, an option to add the title to a ChiliFresh Connections bookshelf is displayed under other Chilifresh content, such as the book jacket image and the ratings/reviews link.



When the logged-in patron selects **Add to Shelf**, a list of bookshelves associated with the patron's account is displayed (see “[Bookshelves Drawer](#)” on page 276).

Note:

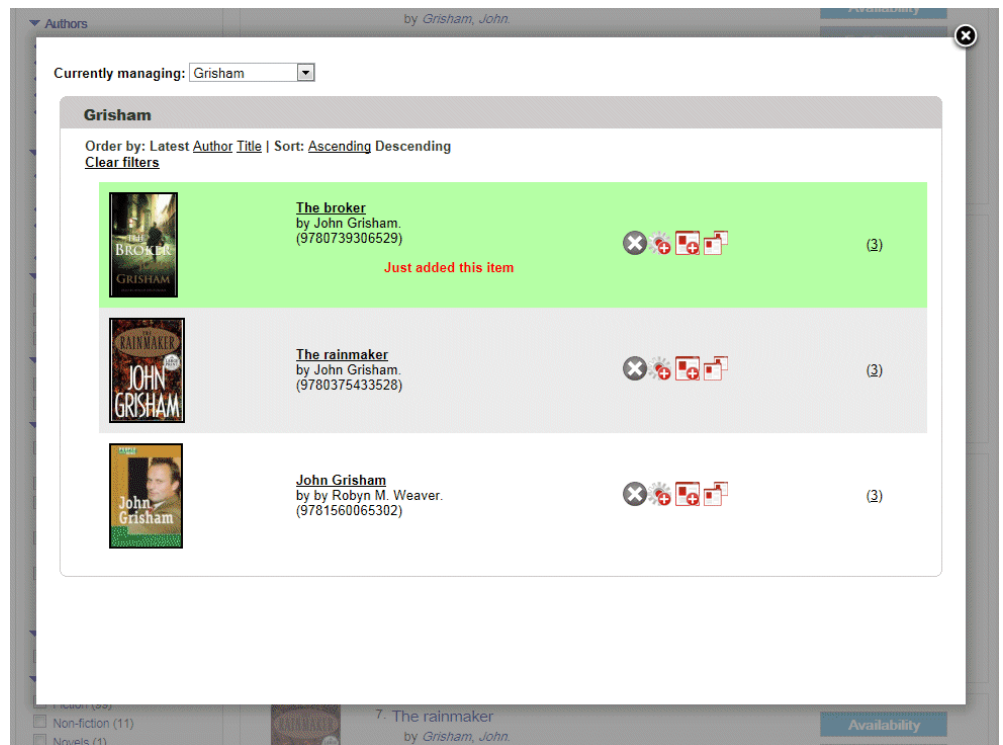
If the patron is not logged in, he or she is prompted to do so.



Note:

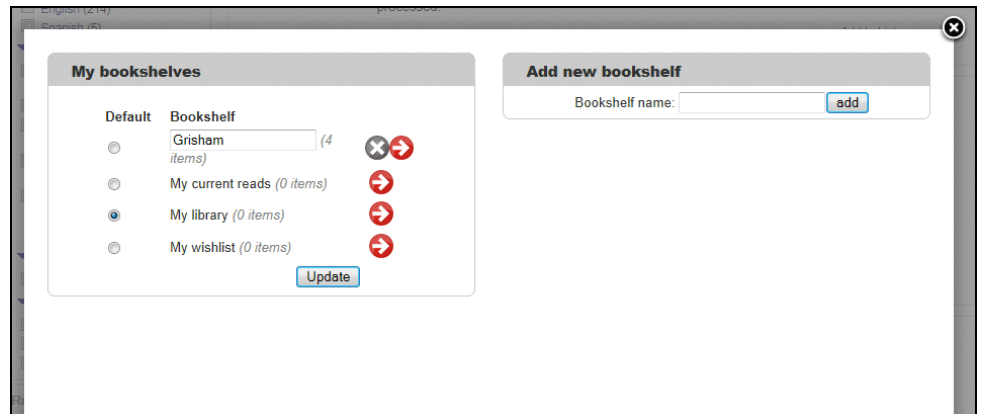
If the title has already been added to one of patron's bookshelves, the displayed link is **Already on Shelf**.

When the patron selects a bookshelf, the bookshelf opens in a lightbox, with the newly-added title at the top.



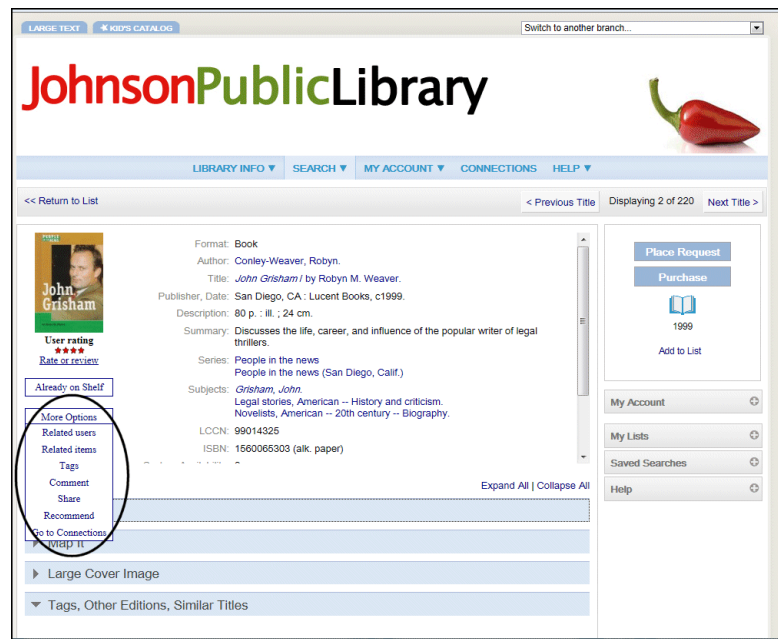
Icons next to each title offer options to remove the title from the bookshelf, set the title as a current read, recommend the title to a friend, or move to the title to another shelf.

The patron can also click **Manage shelves**. This option opens a light box where the patron can set up a new bookshelf, specify a default bookshelf, delete custom bookshelves, and choose a bookshelf for display in the lightbox.



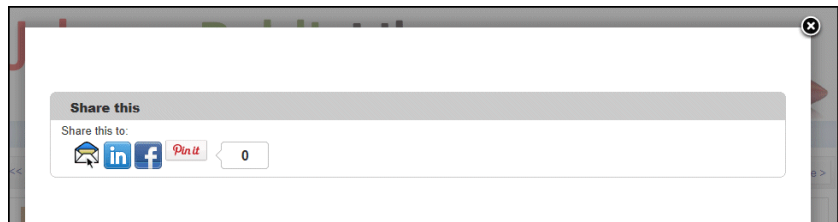
More Options

More options are available from the product page (full display) of a title in PAC. The product page includes the **Add to Shelf/Already on Shelf** option. In addition, the patron can click **More Options** to display additional ChiliFresh Connections options:

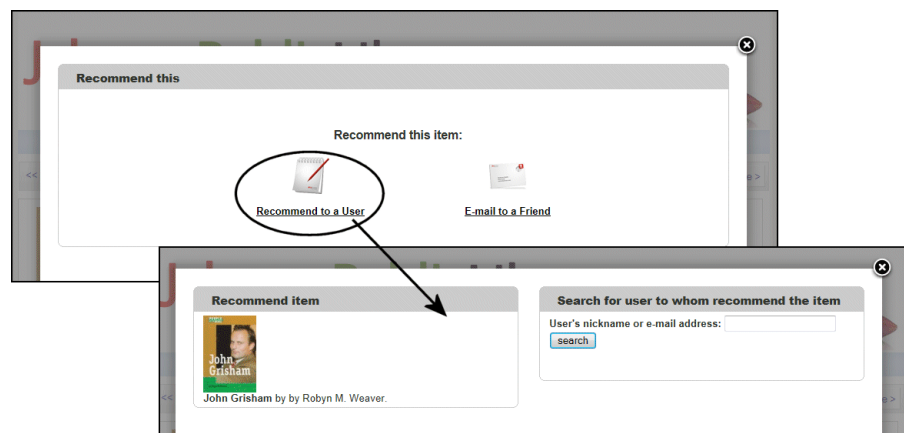


- **Related Users** - Selecting this link displays a lightbox that lists users who have taken an action on the item, such as adding it to their shelf or reviewing it. Selecting a Connections user in the lightbox opens the public profile display of that user (see “Friends and Followers Drawer” on page 277).

- **Related Items** - This option displays a lightbox with “you might also like” titles related to the currently displayed title. ChiliFresh determines what titles are “related.” Selecting any item from the list of related items launches a search in PowerPAC and displays the product page for the selected title.
- **Tags** - Selecting **Tags** opens the Connections tags widget in a lightbox. The patron may add a new tag or select an existing one. Selecting a tag in the lightbox navigates within the lightbox to the ChiliFresh Connections list of titles associated with that tag; selecting a title launches a search and displays the brief result for the title.
- **Comment** - The patron can select this option to add the title as a favorite or post a comment. The Playback option shows any existing discussion (comment thread).
- **Share** - Selecting any of the options in the Share this lightbox shares a deep link to the PowerPAC product page for the title via e-mail or on the appropriate social media site.



- **Recommend** - The patron can recommend the title to another Connections user, or e-mail the recommendation to a friend.



- **Go to Connections** - This option opens the ChiliFresh Connections site in a lightbox. See “[Link to Connections Drawer](#)” on page 281.

Set Up ChiliFresh Connections in Polaris Administration

Open the PAC profile **Enriched data** for the PowerPAC connection organization. On the ChiliFresh - Other Features tabbed page, select **Enable** and supply your ChiliFresh Service URL, account ID, and API key. See [“Set up enriched data - ChiliFresh”](#) on page 234.

For information about port 80/443 access requirements, see [“Enriched Data Domains Requiring Port 80/443 Access”](#) on page 223.

Editing Messages and Labels



Many messages and labels that appear in Polaris PowerPAC are stored in your database. You can easily edit these and save your changes in Polaris Administration, using the PAC profile **Multiple language strings**. If you have Polaris PowerPAC Multilingual Version, you can edit the messages for each supported language. Using the same method, you can also edit and translate the labels for the **Narrow** and **Related** Web parts that are displayed with search results.

Note:

You can also use Polaris WebAdmin (Language Editor) to edit language strings in Polaris PowerPAC, Mobile PAC, and several other Polaris products. WebAdmin is installed by default with Polaris Web Server software. The server must be registered as a workstation in Polaris Administration, and both the workstation and staff user must have the System Administration **WebAdmin access: Allow** permission. Access WebAdmin through your browser and click **Help** for more information. See [“Customizing Language Strings”](#) on page 57 for a more detailed description.

See the following topic:

- [“Edit PowerPAC messages and labels”](#) on page 288
- [“PAC Messages and Labels Reference”](#) on page 290

1-2-3

Edit PowerPAC messages and labels

You can edit messages on the system, library, or branch level. Follow these steps to edit messages and news headings for Polaris PowerPAC.

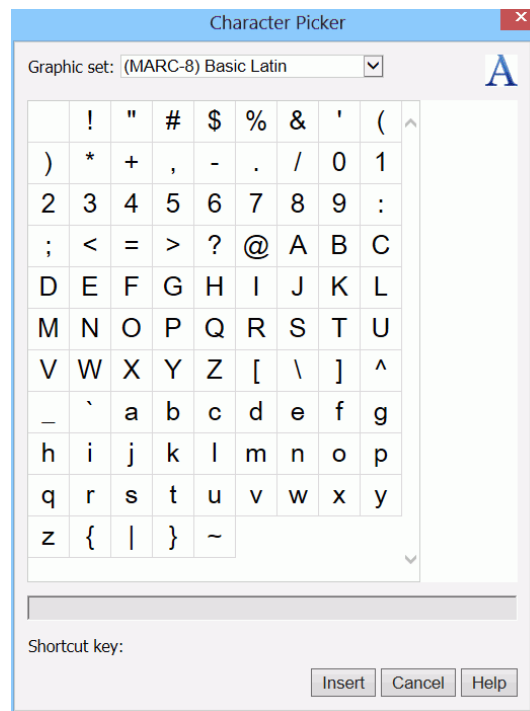
1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
2. Double-click **Multiple language strings**.
The Language Strings dialog box appears. The **Field Name** column lists the messages and labels. The **Display Text** column lists the text that has been defined for each message or label.
3. If you have Polaris PowerPAC Multilingual Version, select the language you want to edit in the **Choose Language** box.
4. Highlight the text you want to change.
5. Open the text box by pressing **ENTER** or double-clicking the text.
6. Type the text for the message, label, or news heading. See [“PAC Messages and Labels Reference”](#) on page 290 for detailed information about where the text appears in the PAC interface. You can use letters, numbers, and spaces. Polaris PowerPAC can display approximately 150 characters and spaces in a single line for messages. Text strings work well as plain text. You can format messages to have up to four

lines of text, with up to 250 characters. In this case, you can use well-formed XML or HTML tags to place bold and italic formatting in your messages. Use the tag `
` to designate the start of a new line in the message. The formatting tags count as characters and there is a 255-character maximum.

7. To insert a diacritic character, follow these steps:

- a) Click **Diacritics**.

The Character Picker dialog box opens.



- b) Select a graphic character set.

For details on choosing diacritic characters, see [“Choose characters/diacritics from a chart”](#) in the *Polaris Cataloging Guide 4.1R2*.

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

The Character Picker dialog box closes.

8. Press **ENTER** or select another message.
9. Repeat steps 4-8 for each message you want to edit.
10. Click **OK** on the dialog box.
11. Select **File, Save**.

PAC Messages and Labels Reference

You can edit the following messages and labels:

- Hours of operation message** The message you specify here is displayed on the Polaris PowerPAC Hours page and the Mobile PAC Hours & Contact Info page. For more information about the PowerPAC Hours page, see [“Set Polaris PowerPAC features on the menu bar”](#) on page 18. For more information about the Mobile PAC Hours & Contact Info page, see the *Polaris Mobile PAC Administration Guide*.
- **Default:** None specified
- Item Availability text: Available** Indicates an item is available to request or check out. This text is used instead of the circulation status when you do not display the detailed item status in the Availability view.
- **Default:** Available
 - **Requirement:** PAC profile settings **Item Availability: Display status** (Yes); **Item Availability: Display detailed item status** (No).
- Item Availability text: No items found** Indicates that a title does not have any items associated with it anywhere in the entire Polaris system.
- **Default:** No items available
- Item Availability text: No local items found** Displayed when a selected title does not have linked items within the local area. The local area is defined by branches designated as local in the Item Availability Display Order policy table. See [“Setting Up Local and System Availability”](#) on page 176. This message displays if items do exist elsewhere in the Polaris system; otherwise, the message for the **Item Availability text: No items found** message is displayed.
- **Default:** No items available locally
- Item Availability text: Non-circulating** Indicates that an item does not circulate.
- **Default:** Non-circulating
- Item Availability text: Not available** Indicates an item is not available for check-out. This text is used as a status replacement when you do not display the detailed item status in the Availability view.
- **Default:** Not Available
 - **Requirement:** PAC Profile settings **Item Availability: Display status** (Yes); **Item Availability: Display detailed item status** (No).

Narrow search dashboard labels	<p>These labels apply to the elements that appear in the Narrow Web part, which can be displayed with the Polaris PowerPAC search results pages. For details about specifying bibliographic elements and their labels, see “Setting PowerPAC Narrow/Related Search Options” on page 159. For details about specifying community information elements and their labels, see “Community Search Results Facets in Polaris PowerPAC” in the <i>Polaris Community Profiles Guide 4.1R2</i>.</p>
Patron Access: Patron self-registration brief instruction	<p>Displayed at the top of the patron self-registration form in Polaris PowerPAC. You can use this text to tell a new patron how to fill out the form, or include any message considered important to the self-registration process.</p> <ul style="list-style-type: none"> • Default: Please fill in the fields on this form and click Submit to register. Your online registration will be forwarded to the library. You can pick up your library card at the branch you specify in the form.
Patron Access: Privacy Message	<p>Confirmation message displayed when a patron initiates an action that saves information in connection with the patron account, such as saving a search or starting a reading history.</p> <ul style="list-style-type: none"> • Default: The feature you have selected is associated with personal data in your patron account. Such data may be accessed by law enforcement personnel without your consent. Do you wish to continue?
Patron Access: Self-registration acknowledgment message	<p>Displayed when a patron successfully completes the self-registration form.</p> <ul style="list-style-type: none"> • Default: Thank you! Your registration has been recorded. Your library card will be ready for you at the library you designated in your registration.
Patron Access: Self-registration warning message	<p>Displays when a patron selects click here to register now on the PowerPAC patron logon pages. This message allows the library to comply with the Children’s Online Privacy Act.</p> <ul style="list-style-type: none"> • Requirement: Self-registration warning message enabled (PAC profile Patron Access Options) • Default: In compliance with the Children’s Online Privacy Protection act, you must be 13 or older in order to complete this registration. <p>Note: In the default message, the apostrophe character is preceded by a backslash \ for programmatic purposes. In your custom text, you do not need to use the backslash before an apostrophe.</p>
Related search dashboard labels	<p>These labels apply to the elements that appear in the Related Web part, which can be displayed with the Polaris PowerPAC search results pages. For details about specifying bibliographic elements and their labels, see “Setting PowerPAC Narrow/Related Search Options” on page 159. For details about specifying community information elements and their labels, see “Community Search Results Facets in Polaris PowerPAC” in the <i>Polaris Community Profiles Guide 4.1R2</i>.</p>

Polaris PowerPAC Children's Edition



Polaris PowerPAC Children's Edition is the public access Web interface designed specifically for children's use. Children can connect to the library's catalog and services from within the library, or from a remote location such as home or school.

Polaris PowerPAC Children's Edition is available by specific contract to your library. If your Polaris installation does not include Polaris PowerPAC Children's Edition, the features described in this unit are not available.

Important:

When you change Polaris PowerPAC Children's Edition settings, you may need to update page caches to see the effects of your changes. See ["Updating Page Caches"](#) on page 9.

Note:

Polaris PowerPAC and Polaris PowerPAC Children's Edition are based on ASP.NET programming code. All .aspx page files are editable, and other advanced customizations are available. For more information, see the *Polaris PAC Customization Guide*, available on the Customer Extranet (www.polaristown.com) and the Polaris Developers Network.

See the following topics:

- ["Administering PowerPAC Children's Edition"](#) on page 293
- ["Managing Themes"](#) on page 297
- ["Managing Children's Dashboards"](#) on page 301
- ["Setting Children's Search Limits"](#) on page 302
- ["Managing Search Categories"](#) on page 305
- ["Customizing the Children's Results Display"](#) on page 319

Administering PowerPAC Children's Edition

Through Polaris Administration settings, you can set up and customize the following kinds of functions in Polaris PowerPAC Children's Edition:

- Themes (general appearance of the pages)
- Dashboards, including library-defined lists
- Pre-defined search limits, such as target audience=juvenile and designated collections (for example, children's periodicals)
- Search categories
- Item availability information
- Feature availability, such as online Help and Events page

An organization's settings control the features and functions the patron sees when connected to that organization. You can set most Children's PAC profiles at the system, library, and branch levels. If you are making settings unique to an organization, the Children's PAC URL must include the organization ID.

Example:

<http://library/Polaris/children/default.aspx?SessionOrgID=33>

See the following topics:

- [“Set up Polaris PowerPAC Children's Edition”](#) on page 294
- [“Add text to the children's Events page”](#) on page 296

1-2-3

Set up Polaris PowerPAC Children's Edition

Follow these steps to set basic operating features for Polaris PowerPAC Children's Edition.

1. Set up the Polaris PowerPAC Web server in Polaris Administration. See [“Setting Web Server Parameters”](#) in the *Polaris Administration Guide 4.1R2*.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Children's PAC** tab in the details view.
3. To allow remote connections to Polaris PowerPAC Children's Edition, double-click **Remote user: Enable**, and select **Yes**.

If you use Polaris PowerPAC Children's Edition only in the library, and you do not offer remote access, set this profile to **No**.

4. To allow patrons to select a theme for the pages, double-click **Select theme: Enable**, and select **Yes**.

Note:

This setting displays theme options in the dashboard area of the Polaris PowerPAC Children's Edition pages. If you want to display theme options, you must also set **Dashboards: Enable** to **Yes**. See step 5.

Polaris PowerPAC Children's Edition includes several default themes, and you can define your own. For more information, see [“Managing Themes”](#) on page 297.

5. To display the dashboard on Polaris PowerPAC Children's Edition pages, double-click **Dashboards: Enable**, and select **Yes**.

Polaris PowerPAC Children's Edition includes automated Web parts for dashboards, and you can define your own. For more information, see [“Managing Children's Dashboards”](#) on page 301.

6. To allow users to view an events page, double-click **Navigation: Events**, and select **Yes**.

This setting displays the **Events** link in the upper right portion of the Polaris PowerPAC Children's Edition pages. When the user selects the link, the Events page is displayed. For information about editing this page, see [“Add text to the children's Events page”](#) on page 296.

7. To allow users to get quick help with searches, double-click **Navigation: Help**, and select **Yes**.

This setting displays the **Help** bookworm link in the upper right portion of the Polaris PowerPAC Children's Edition pages.

Note:

Polaris PowerPAC Children's Edition uses Did You Mean search suggestions. See [“Setting Up Did You Mean Term Checking”](#) on page 92.

8. To display a link to Polaris PowerPAC on Polaris PowerPAC Children's Edition pages, double-click **Navigation: PowerPAC**, and select **Yes**.

This setting displays the **Go to Polaris** link at the bottom left corner of the Polaris PowerPAC Children's Edition pages. If the user selects this link on the home page, the Polaris PowerPAC home page is displayed. If the user selects this link on the search results page, the same search is launched in Polaris PowerPAC.

9. Select **File, Save**.

Related Information

- **Themes** - You can offer default appearance themes for Polaris PowerPAC Children's Edition pages, or create your own. See "[Managing Themes](#)" on page 297.
- **Searching** - You can set search filters to focus search results for children. See "[Setting Children's Search Limits](#)" on page 302. In addition, categories offer predefined searches or links. See "[Managing Search Categories](#)" on page 305.
- **Search performance** - Searches with large results sets may decrease performance if your server capacity is limited. To improve performance, you can adjust the maximum number of records to return. The Children's PAC profile **Result set: Maximum number of records to return**, available at the system, library, and branch levels, controls this limit.

Note:

If you lower the maximum number of records to return, relevancy ranking may be less effective.

- **Results Display** - See "[Customizing the Children's Results Display](#)" on page 319.
- **Requests** - You set requests options (enable requests, specify whether item-level requests are offered, and select a default pickup branch) for Polaris PowerPAC Children's Edition with the Request parameter **Hold options**. For more information, see "[Setting Up Holds and ILL Request Processing](#)" in the *Polaris Patron Services Administration Guide 4.1R2*. If the library charges fees for hold requests, patrons cannot request holds from Polaris PowerPAC Children's Edition.
- **Editing text on Polaris PowerPAC Children's Edition pages** - You can edit most of the text on Polaris PowerPAC Children's Edition pages, and preserve your changes from being overwritten if the application is updated and reinstalled. See "[Customizing Language Strings](#)" on page 57.

1-2-3

Add text to the children's Events page

The Events page is displayed when a patron selects the **Events** link on the Polaris PowerPAC Children's Edition pages. Since Polaris PowerPAC Children's Edition uses an Events page distinct from Polaris PowerPAC, you can focus the page on events specifically for children. Follow these steps to add events or other text to the events page.

1. On the Web server, open the file **Polaris [version]/PowerPAC/children/events.aspx** in any HTML or text editor.

The text of the file is displayed.

2. Find the following section:

```
SessionObject.GetLanguageString("CPACML_EVENTS_1000")%>:</div>
```

```
<p>&nbsp;</p>
```

```
<p>&nbsp;</p>
```

```
<p>&nbsp;</p>
```

Each segment `<p> </p>` creates a separate line on the Events page.

Note:

If you need more than three lines, copy the segment `<p> </p>` and paste it after the last segment `<p> </p>`, pasting once for each additional line you require.

3. For each line, insert your text between ` ` and `</p>`.

You can format the text with basic HTML tags.

4. Save the file.

Note:

To display the Events link on the Polaris PowerPAC Children's Edition pages, set the Children's PAC profile **Navigation: Events** to **Yes**.

Managing Themes

Themes determine the page appearance (background, icons, and other page elements) of Polaris PowerPAC Children's Edition. When you enable themes, children can choose a theme from the options you specify. You can offer some or all the themes that are shipped with Polaris PowerPAC Children's Edition, and you can develop your own 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.

Themes are stored in folders that contain sets of image files and a style sheet (.css) file that controls aspects of general page appearance, such as fonts, links, and colors. Each theme has a unique folder on the Web server (**Polaris/PowerPAC/children/themes/language folder**). For example, files for the default Treasure theme (English) are located in the folder **Polaris/PowerPAC/children/themes/1033/treasure**. If you are constructing your own theme, set up a unique folder for your files on the Web server, in **Polaris/PowerPAC/children/themes/language 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/PowerPAC/children/themes/1033**. If you have Polaris PowerPAC Children's Edition Multilingual Version, and you want to offer the same theme in other language versions, place the theme folder in all the appropriate language folders.

Theme folders also contain the image files specified for category and format icons, since these images can change when a different theme is chosen. Categories contain predefined targets, such as searches or Web site URLs. For more information about setting up categories, see “[Managing Search Categories](#)” on page 305. Format icons identify the type of material of a title listed in search results, such as a book or a musical sound recording.

See the following topics:

- “[Construct a theme](#)” on page 298
- “[Assign themes](#)” on page 300

1-2-3

Construct a theme

Follow these steps to construct a theme.

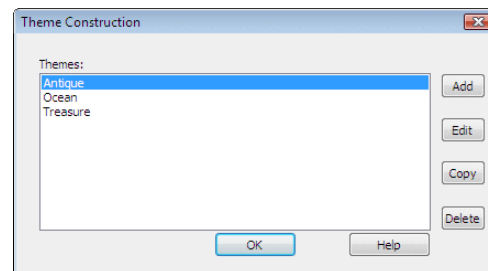
1. Set up a unique folder for the theme on the Web server, in **Polaris/PowerPAC/children/themes/language folder**.
2. Create the subfolders **categories** and **formats** in the new theme folder (or copy them from an existing theme folder).

Note:

You may want to copy the style sheet (.css) file from a default theme to your own theme folder and then edit the file as you wish, rather than constructing a style sheet from scratch.

3. In the Administration Explorer tree view, open the **Profiles** folder at the system level, and select the **Children's PAC** tab in the details view.
4. Double-click **Theme Construction**.

The Theme Construction dialog box is displayed.



Note:

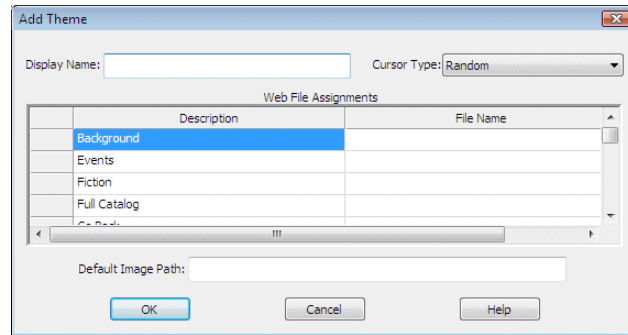
The Theme Construction dialog box lists the default themes that are included with Polaris (**Antique**, **Ocean**, and **Treasure**), and any custom themes that have already been defined. You cannot edit the default themes.

Tip:

To use an existing theme as the basis of a new theme, select the theme and click **Copy**. Then select the copy and click **Edit**.

5. Click **Add**.

The Add Theme dialog box is displayed.



6. 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.

7. In the appropriate **File Name** boxes, type the filenames for the page graphic elements and for the stylesheet, as listed in the Description column.

Note:

The system constructs the appropriate URL. Type only the filename. For example, for the page background image, you might type the filename **background.gif**. For the style sheet, you might type the filename **stylesheet.css**.

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

Note:

Type only the folder name. The system constructs the appropriate URL for the theme files to **Polaris/PowerPAC/children/themes/language folder/your folder** on the server, based on the theme folder you specify. All the files for the theme must be located in the same folder.

9. Click **OK** on the dialog box.

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

Related Information

Making themes available - See "[Assign themes](#)" on page 300 for information about making the new theme available for selection in Polaris PowerPAC Children's Edition.

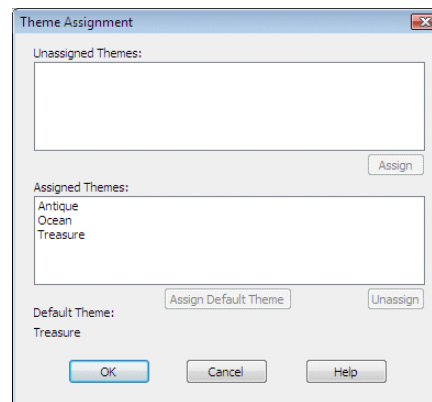
1-2-3

Assign themes

When you assign themes, you make them available as choices from the Children's PAC. You can assign the themes that are provided with Polaris, or your own custom themes (see "Construct a theme" on page 298). Follow these steps to assign themes at the system, library, or branch level.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Children's PAC** tab in the details view.
2. Double-click **Theme assignment**.

The Theme Assignment dialog box is displayed.



3. To make a theme available for selection in Polaris PowerPAC Children's Edition, select the theme in the Unassigned Themes list, and click **Assign**.
4. To designate an assigned theme as the default theme, select the theme in the Assigned Themes list, and click **Assign Default Theme**.
5. Click **OK** on the dialog box.

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

Note:

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

Managing Children's Dashboards

Web parts on the dashboard can provide links to pre-defined searches or Web sites or deliver messages or instructions. They are displayed in the dashboard at the side of the pages in Polaris PowerPAC and Polaris PowerPAC Children's Edition. Different Web parts can be displayed on different pages. You set up Web parts at the system level for use by any or all branches.



Note:

The Select a Theme Web part is displayed on all pages when the Children's PAC profiles **Select theme: Enable** and **Dashboards: Enable** are set to **Yes**.

Separate Polaris Administration profiles control Web parts for Polaris PowerPAC and Polaris PowerPAC Children's Edition, but the process for setting up Web parts is the same for both PACs (see ["Defining Web Parts for Dashboards"](#) on page 36):

- Using the Children's PAC profile **Dashboards: Web Part Construction**, you define limits for automated lists and set up custom Web parts at the system level. See ["Create a custom Web part"](#) on page 39.
- Using the Children's PAC profile **Dashboards: Web Page / Web Part Assignment**, you assign Web parts to specific children's pages at the branch level. See ["Assign Web parts to public pages"](#) on page 43. For a summary of Polaris PowerPAC Children's Edition pages, see ["Polaris PowerPAC Children's Edition Pages"](#) on page 403.

Web parts set up for Polaris PowerPAC are available to be assigned to children's pages, and Web parts set up for Polaris PowerPAC Children's Edition are available to be assigned to Polaris PowerPAC pages. However, the New Titles Web part provided by Polaris may not be useful for Polaris PowerPAC Children's Edition, since the New Titles Web part elements are links that launch searches for recent additions to your catalog, regardless of the titles' target audience.

Setting Children's Search Limits

In Polaris PowerPAC Children's Edition, users can search for a title in the library catalog by typing a word or words and selecting a field to search (Anywhere, Subjects, Titles, Authors, or Series). You control which of these choices are available. In addition, you can display Fiction and Non-Fiction buttons that launch subject searches for the search text, scoped to fiction or non-fiction. See [“Set children's search buttons”](#) on page 303.



You can also filter all searches to make the results more useful for children by setting a free-text filter (expressed as a Common Query Language search term), by specifying which collections should be searched, or by using a combination of the two strategies. See [“Filter children's searches”](#) on page 304.

Note:

Polaris PowerPAC Children's Edition also offers targets (predefined searches or Web links), organized in categories and subcategories. Children can use categories to find information without typing a search string. See [“Managing Search Categories”](#) on page 305.

Important:

In addition to the filtering and scoping options you set, Polaris PowerPAC Children's Edition is designed to display item availability information only if there are items available at the local branch. You can set it so that item availability information is displayed for items at other branches if there are no items assigned to the local branch. See [“Customize the children's item availability display”](#) on page 320.

See the following topics:

- [“Set children's search buttons”](#) on page 303
- [“Filter children's searches”](#) on page 304

1-2-3

Set children's search buttons

Follow these steps to set which search buttons are available for text searches in Polaris PowerPAC Children's Edition.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Children's PAC** tab in the details view.
2. Double-click the following profiles and set them to **Yes** or **No**:
 - **Search button visibility: Anywhere button** - Launches keyword search in all fields
 - **Search button visibility: Authors button** - Launches keyword search for author
 - **Search button visibility: Fiction button** - Launches search term subject search scoped to fiction
 - **Search button visibility: Non-Fiction button** - Launches search term subject search scoped to non-fiction
 - **Search button visibility: Series button** - Launches keyword search for series name
 - **Search button visibility: Subject button** - Launches keyword search for subject
 - **Search button visibility: Title button** - Launches keyword search for title

By default, each is set to **Yes** (search button is displayed).

If all seven profiles are set to **No**, the **Look for** text field remains displayed although no buttons appear. However, you can type text in the field and press **ENTER**. A keyword search in all fields (**Anywhere**) is launched. This feature is available regardless of what buttons are displayed.

3. Select **File, Save**.

Related Information

Did You Mean - When you enable "did you mean" search term checking, the search results page includes a suggested alternate search term if one can be identified. You can click the alternate term to launch a search on that term. The Did You Mean function applies to quick, keyword, phrase, and exact phrase searches in Polaris PowerPAC, and to searches typed in the **Look for** bar in Polaris PowerPAC Children's Edition when there are no results. See "[Setting Up Did You Mean Term Checking](#)" on page 92.

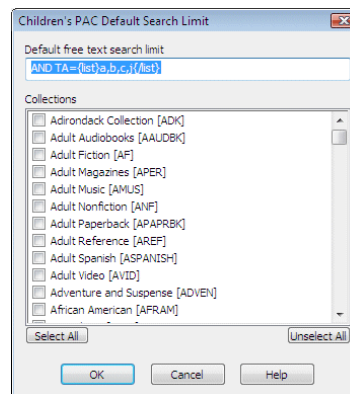
1-2-3

Filter children's searches

Follow these steps to set filters on searches from Polaris PowerPAC Children's Edition, and to allow subject searches scoped by fiction or non-fiction.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Children's PAC** tab in the details view.
2. Double-click **Default search limits**.

The Children's PAC Default Search Limit dialog box is displayed.



3. To filter searches with a free-text filter, type the Common Query Language command in the **Default free text search limit** box, beginning with the Boolean operator **and**.

The system constructs the full search command when the user launches a search. The first part of the command (before **and**) is determined by the user's selection in the interface. Your filter determines the second part. The default filter is **AND TA=j**, which limits the results to titles with a juvenile target audience.

Note:

Structure multi-part filters in either of these two ways:

AND TA=j OR TA=a OR TA=b

AND TA={list}j, a, b {/list}

Not valid:

AND TA= j, a, b

4. To limit search results to titles in certain collections, select the collections in the Collections list.

Combining free-text and collections filters works best if you select only the collections intended for children. If all collections are selected, and you specify a free-text filter, the search applies the free-text filter but ignores the collections. If no free-text filter is specified, all the collections are searched, but records that do not specify a collection are ignored.

5. Click **OK** on the dialog box.
6. Select **File, Save**.

Tip:

If you have collections set up for children's periodicals, this is a good way to include the periodicals in Children's PAC search results, since serials records do not include target audience information. The results include titles from the collection **OR** the specified target audience filter.

Managing Search Categories

Polaris PowerPAC Children's Edition offers targets (predefined searches or Web links), organized in categories and subcategories. Children can use categories to find information without typing a search string. When the Children's PAC profile **Categories: Enable** is set to **Yes**, the default page of the Children's PAC displays the defined search categories.



Polaris PowerPAC Children's Edition includes a set of default categories and targets that you can use as they are, or edit to suit your purposes. You can also set up your own categories at the system, library, and branch levels. Using the Children's PAC profile **Category construction**, you define the categories and subcategories, and the targets to include in the categories and subcategories. You can offer the following types of search targets:

- **Search** - Launches a defined search in the Polaris database, and displays the results.
- **Bibliography** - Launches a search for titles you specified when you set up the target.
- **URL** - Connects to a Web site, which opens in a new browser window. The Polaris PowerPAC Children's Edition session is maintained.

Note:

To allow live-link Web targets, set the Children's PAC profile **Web access: Enable** to **Yes**. If this profile is set to **No**, the URL targets appear as text only.

A search target or subcategory can belong to as many categories as you wish. You can copy and paste search targets and categories to organize them in any way that suits the needs of your users. If you have Polaris PowerPAC Children's Edition multilingual version, you can translate category and target names so that they are displayed in the language the user has selected.

You can display a category or subcategory as a text link, an image link, or both. When a category link is selected, all the subcategory and target links are displayed. If icons are defined for search targets, these are organized in a matrix of links. If no icons are defined, the search targets are also displayed as a list of text links.

See the following topics:

- “Add a new category” on page 306
- “Add a new search target to a category” on page 309
- “Copy a category or target” on page 314
- “Translate a category or target” on page 315
- “Translate all categories and targets” on page 317

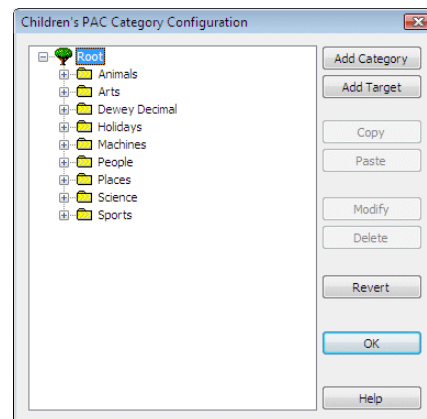
1-2-3

Add a new category

Follow these steps to add a category or subcategory for Children's PAC searches. You can define categories at the system, library, or branch level.

1. In the Administration Explorer tree view, open the Profiles folder for the organization, and select the **Children's PAC** tab in the details view.
2. Double-click **Category construction**.

The Children's PAC Category Configuration dialog box appears.



Note:

Existing categories and subcategories are represented by folder icons. Click the plus sign by a category to display its contents (subcategories and targets). To view specific characteristics of any category, subcategory, or target, select the item and click **Modify**.

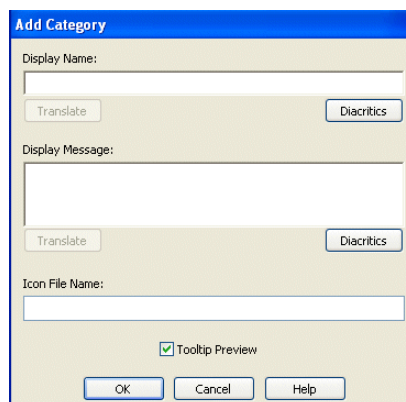
3. Select (highlight) the folder to which you want to add a category.

Note:

The top-level Root category is always listed. The link for any category or target on the next level under Root is displayed directly on the Children's PAC home page. If you do not select an existing folder, the category is added directly under the Root group.

4. Click **Add Category**.

The Add Category dialog box appears.



5. In the **Display Name** box, type a category name.

The Display Name identifies the new category in the Category Configuration dialog box. If no category icon is defined, the Display Name is directly displayed as a link on the Children's PAC home page. If an icon is defined for the category, the category is displayed as a link when the icon is selected. (See step 8.)

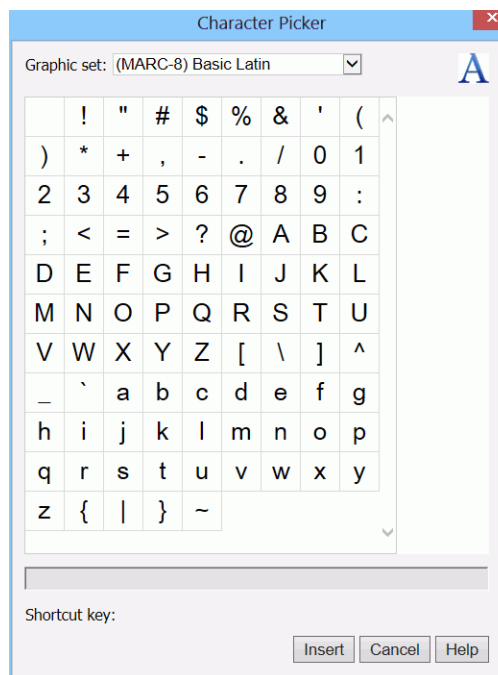
Tip:

If you frequently enter diacritics, you can add Input Method Editor (IME) keyboards and switch back and forth from the English keyboard to the international keyboards. See “Enter diacritics/characters using an IME keyboard” in the *Polaris Cataloging Guide 4.1R2*.

6. To insert a diacritic character in the display name, follow these steps:

a) Click **Diacritics**.

The Character Picker dialog box opens.



b) Select a graphic character set.

For details on choosing diacritic characters, see [“Choose characters/diacritics from a chart”](#) in the *Polaris Cataloging Guide 4.1R2*.

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

The Character Picker dialog box closes.

7. (Optional) Type any text in the **Display Message** box that should be displayed below the category **Display Name** and above the matrix or list of targets.

The illustration shows an example.



Tip:

You can insert diacritic characters in the display message. See step 6.

8. Type the file name for the category icon graphic in the **Icon File Name** box. In the Children's PAC interface, the patron can click the category icon to see subcategories or targets.

Type only the file name. Polaris constructs the appropriate URL to the **categories** folder of the theme the patron has selected, or to the default theme if you do not allow theme selection.

Important:

Be sure to place the category icon graphic file in the **categories** folder for *each theme you offer*. Although the actual image can be different, the filename must be the same in each theme. For example, if you specify a category icon graphic file **pets.gif**, the **categories** folder for each theme must contain a graphic file called **pets.gif**. Otherwise, if a theme is chosen that does not include the appropriate category icon graphic file, the interface displays a missing link. For more information about themes, see [“Managing Themes”](#) on page 297.

9. Select or clear the **Tooltip Preview** check box.

If the **Tooltip Preview** box is checked, targets for this category are displayed when the cursor hovers over the category link in the Children's PAC interface. To display tooltip previews, you must also specify an icon file name for the category (see step 7).

Note:

Use the Children's PAC profile **Number of tooltip entries displayed** to set the maximum number of tooltip entries to display. You must also check the **Preview Search Target** box for each target you want to display in the tooltip. See [“Add a new search target to a category”](#) on page 309 for more information about setting up targets.

10. Click **OK** on the Add Category dialog box.

The Add Category dialog box closes. The new category is displayed in the Category Configuration dialog box.

11. Click **OK** on the Category Configuration dialog box.

Note:

To display categories in the Children's PAC interface, be sure the Children's PAC profile **Categories: Enable** is set to **Yes** for the organization.

12. Add targets to the new category. See "[Add a new search target to a category](#)" on page 309.

Related Information

- **Copy a category** - See "[Copy a category or target](#)" on page 314.
- **Delete a category or subcategory** - Select the category, and click **Delete**.
- **Edit the settings for a category** - Select the category, and click **Modify**.
- **Translate category names** - If your library system has purchased other language versions of Polaris PowerPAC Children's Edition, you can translate the category name or all category names. See "[Translate a category or target](#)" on page 315 and "[Translate all categories and targets](#)" on page 317.

1-2-3

Add a new search target to a category

Within a category, a target may be displayed as a text link in a list of links, or as a graphic link in a matrix of target graphics. Follow these steps to set up a new search target of either display type, and add it to a category.

1. Double-click **Category construction** on the Children's PAC Profiles tabbed page for the organization.
The Children's PAC Category Configuration dialog box appears.
2. Select the category (folder) to which you want to add the new search target.

Note:

You can add a target directly under the Root level. In this case, the target link displays directly on the home page.

3. Click **Add Target**.

The Add Children's PAC Search Target dialog box appears.

Tip:

You can view the structure of default targets to get ideas about how to set up targets. Select a default target and click **Modify** to view the target.

4. In the **Display Name** box, type a target name.

The Display Name identifies the new target in the Category Configuration dialog box and on the home page.

Tip:

If you frequently enter diacritics, you can add Input Method Editor (IME) keyboards and switch back and forth from the English keyboard to the international keyboards. See “Enter diacritics/characters using an IME keyboard” in the *Polaris Cataloging Guide 4.1R2*.

5. To insert a diacritic character in the display name, follow these steps:
 - a) Click **Diacritics**.

The Character Picker dialog box opens.

- b) Select a graphic character set.

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

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

The Character Picker dialog box closes.

6. If you want this target to be part of a matrix of search targets for the category, do these steps:

- a) Type the name of the target icon file in the **Icon File Name** box.

The search target icon is displayed in Polaris PowerPAC Children's Edition as a link, which you can click to launch the search. All targets with icons in a specific category are grouped together in the matrix. If you do not specify an icon, the target is displayed as a simple text link in a list with any other text-link targets.

Important:


Be sure to place the target icon graphic file in the **categories** folder for *each theme you offer*. Although the actual image can be different, the filename must be the same in each theme. For example, if you specify a target icon graphic file **dogs.gif**, the **categories** folder for each theme must contain a graphic file called **dogs.gif**. Otherwise, if a theme is chosen that does not include the appropriate target icon graphic file, the interface displays a missing link. For more information about themes, see “Managing Themes” on page 297.

- b) If you want to display text along with the target icon in the matrix, type the text in the **Icon Display Name** box. (If you specify an Icon Display Name, be sure you specify an Icon File Name.)

Note:



You can insert diacritic characters in the icon display name. See step 5.

7. Select a target type:

- **Search** - Launches a defined search in the Polaris database. This target type is identified by a database icon  in the Category Configuration dialog box. If you select this target type, also do step 8.

Note:

If you want all search targets in this category to be organized in a matrix, specify both an Icon Display Name and a corresponding Icon File Name for each search target. Otherwise, the search target is displayed as a text link.

- **Bibliography** - Displays a search link. The link launches a search for titles you specify. This target type is identified by a book icon  in the Category Configuration dialog box. If you select this target type, also do step 9.
- **URL** - Displays a text link that connects to a Web site. This target type is identified by a globe icon  in the Category Configuration dialog box. If you select this target type, also do step 10.

8. If you selected **Search** as the target type, input the search command as a Common Query Language (CQL) command in the **Search** box.

If the search string does not begin with **FIND**, the system automatically adds **Find** before the search is launched. For more information about using CQL search commands, see “[PAC CQL Commands & Access Points](#)” on page 404.

Exception: You cannot set up a phrase search with quotation marks in the **Search** box; instead, use the AND operator. For example, if you are setting up a subject search for the subject heading \$aAnimals\$xAdaptation\$vJuvenile films, type **su=animals AND su=adaptation AND su=juvenile films** (not su= “Animals--Adaptation--Juvenile films”).

9. If you selected **Bibliography** as the target type, add titles to the bibliography by following these steps:
- a) Click **Add** next to the Bibliography box.

The Polaris Find Tool is displayed.

- b) Use the Find Tool to locate and select the bibliographic record for the title you want to add to the bibliography. For more information about using the Find Tool, see “[Finding Polaris Records](#)” in the *Polaris Basics Guide 4.1R2*.

Note:

When the search is launched in the Children's PAC, any search filters you defined in the Children's PAC profile **Default search limits** are applied. If a title you selected does not meet the search filter criteria, it is not displayed in the search results.

- c) Repeat these steps to add each title to the bibliography. You can add up to 120 titles.

You can multi-select records from the Find Tool results.

- 10.** If you selected **URL** as the target type, input the complete URL for the Web page search target in the **URL** box.

To allow live-link Web targets, set the Children's PAC profile **Web access: Enable** to **Yes**. Libraries where children's Internet access is a concern should use lockdown software or set this profile to **No**. In this case the URL target appears as text only, and does not allow Web access.

- 11.** Select or clear the **Preview Search Target** check box.

If you are adding a target directly under the Root level, the **Preview Search Target** box is not available, since the interface does not display the preview target link if it is not associated with a category.

If the **Preview Search Target** box is checked, the target Display Name is displayed as a link under the category to which the target belongs.

Note:

The preview search target does not automatically display once the category is selected. If you want the same target link to be displayed once the category is selected, set it up again under the appropriate category, leaving **Preview Search Target** unchecked. You can copy and edit a target. See ["Copy a category or target"](#) on page 314.

To display preview search targets, you must also specify an icon file name for the *category* (see [""](#) on page 306).

The illustration shows an example of preview search targets:



Note:

If the **Preview Search Target** box is checked for a target, the target icon is displayed with a small red flag in the Category Configuration dialog box.

For example, the search target icon  changes to .

- 12.** Click **OK** on the Add Children's PAC Search Target dialog box.

The Add Children's PAC Search Target dialog box closes. The new target is displayed in the Category Configuration dialog box.

- 13.** Click **OK** on the Category Configuration dialog box.

Note:

To display the categories in the Children's PAC interface, be sure the Children's PAC profile **Categories: Enable** is set to **Yes** for the organization.

Related Information

- **Copy a target, and place the copy in another category** - See [“Copy a category or target”](#) on page 314.
- **Remove a target from a category** - In the Category Configuration dialog box, select the target you want to remove from the category, and click **Delete**.
- **Edit the settings for a target** - In the Category Configuration dialog box, select the target you want to edit, and click **Modify**.
- **Translate categories and targets** - If your library system has purchased other language versions of Polaris PowerPAC Children's Edition, you can translate the category and target names. See [“Translate a category or target”](#) on page 315, and [“Translate all categories and targets”](#) on page 317.

1-2-3

Copy a category or target

You can copy categories and targets you have already defined, and place the copies in any categories you choose. When you copy a category, you also copy the contents (subcategories and targets) of the category. Follow these steps to copy a category or target into another category.

1. Double-click **Category construction** on the Children's PAC Profiles tabbed page for the organization.

The Children's PAC Category Configuration dialog box appears.

2. Select the category or target you want to copy.
3. Click **Copy**.
4. Select the category folder into which you want to place the copy of the category or target.
5. Click **Paste**.

The copied category or target is displayed in the selected folder.

6. Click **OK** to save your settings.

Tip:

Click the plus sign by any category folder to display the contents of the folder.

1-2-3

Translate a category or target

If your library system has other language versions of Polaris PowerPAC Children's Edition, you can translate the names of categories and targets. Follow these steps to translate categories or targets one at a time.

1. Double-click **Category construction** on the Children's PAC Profiles tabbed page for the organization.

The Children's PAC Category Configuration dialog box appears.

2. Select the category or target you want to translate.
3. Click **Modify**.

If you selected a category, the Edit Category dialog box opens. If you selected a target, the Edit Children's PAC Search Target dialog box opens.

Tip:

Click the plus sign by any category folder to display the contents of the folder.

4. Click **Translate** by the name you want to translate.

If you selected a category, you can translate the category name and the display message, if any (see "" on page 306). If you selected a target, you can translate the display name and the icon display name, if any (see "Add a new search target to a category" on page 309).

The Language Strings dialog box opens.

5. Select a language from the **Choose Language** box.

The options are determined by the language versions of Polaris PowerPac Children's Edition purchased by your library system.

6. Click the box in the language column next to the target or category name you want to translate, and type the translated word in the box.

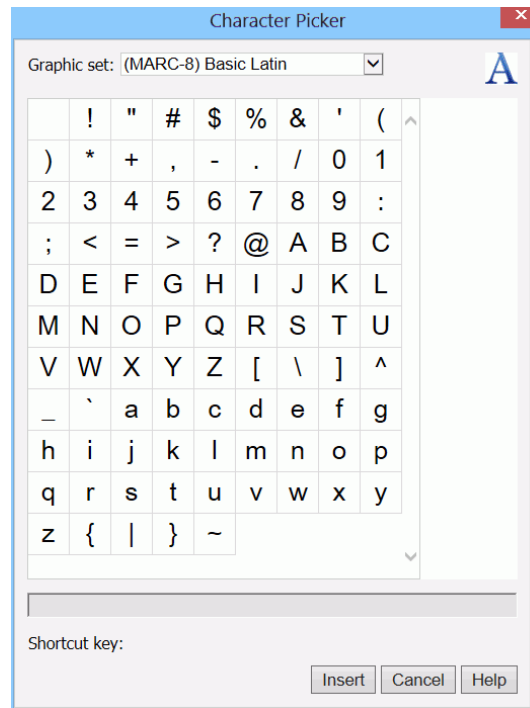
7. To insert a diacritic character, follow these steps:

- a) Click **Diacritics**.

The Character Picker dialog box opens.

Tip:

If you frequently enter diacritics, you can add Input Method Editor (IME) keyboards and switch back and forth from the English keyboard to the international keyboards. See "Enter diacritics/characters using an IME keyboard" in the *Polaris Cataloging Guide 4.1R2*.



- b) Select a graphic character set.

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

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

The Character Picker dialog box closes.

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

9. Click **OK**.

The Language Strings dialog box closes.

10. Click **OK** on the Edit dialog box.

11. Click **OK** on the Children's PAC Category Configuration dialog box.

1-2-3

Translate all categories and targets

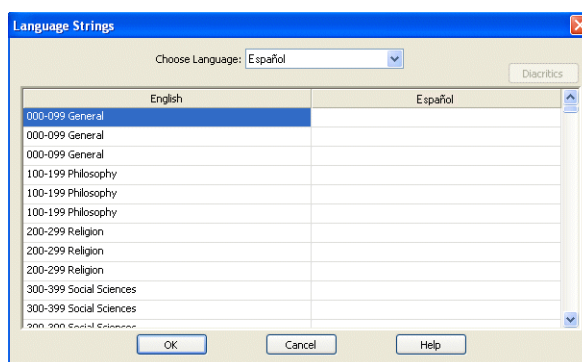
If your library system has purchased other language versions of Polaris PowerPAC Children's Edition, you can translate all the names of categories and targets to a language of your choice. Follow these steps to view and translate categories and targets.

Note:

You must set the translations at the system level.

1. In the Administration Explorer tree view, open the **Profiles** folder for the system, and select the **Children's PAC** tab in the details view.
2. Double-click **Multiple language strings**.

The Language Strings dialog box appears. The dialog box lists all the category names, category display messages, target display names, and icon display names defined for your Polaris PowerPAC Children's Edition.



3. Select a language from the **Choose Language** box.

The options are determined by the language versions of Polaris PowerPac Children's Edition purchased by your library system.
4. Click the box in the language column next to each name you want to translate, and type the translated word in the box.

Note:

You can also edit the English names. Click the English word you want to edit, and type a new word in the space.

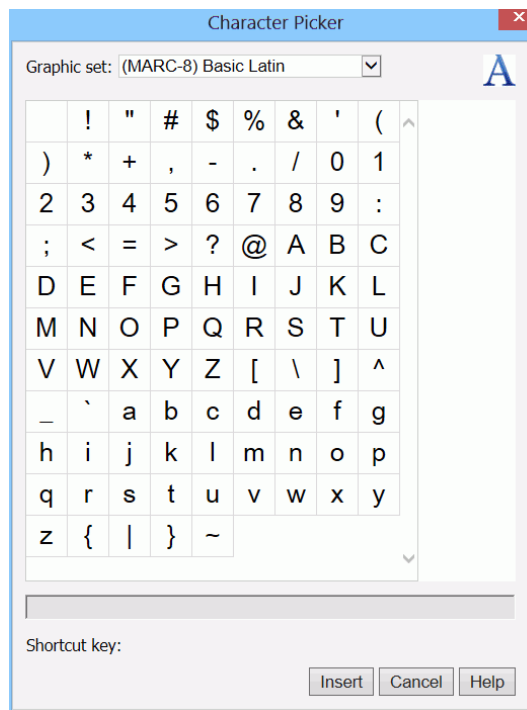
5. To insert a diacritic character, follow these steps:

- a) Click **Diacritics**.

The Character Picker dialog box opens.

Tip:

If you frequently enter diacritics, you can add Input Method Editor (IME) keyboards and switch back and forth from the English keyboard to the international keyboards. See [“Enter diacritics/characters using an IME keyboard”](#) in the *Polaris Cataloging Guide 4.1R2*.



b) Select a graphic character set.

For details on choosing diacritic characters, see [“Choose characters/diacritics from a chart”](#) in the *Polaris Cataloging Guide 4.1R2*.

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

The Character Picker dialog box closes.

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

The Language Strings dialog box closes.

7. Select **File, Save**.

Customizing the Children's Results Display

When a patron selects a title or the **More** link for a title in the search results, Polaris PowerPAC Children's Edition displays detailed information about the title and the items associated with it.



Title: Clifford : where is the big red doggie?
 Author: Bridwell, Norman.
 Publisher, Date: New York : Scholastic, 1998.
 Series: Clifford the big red dog
 Subjects: Dogs -- Juvenile fiction.
 Board books.

Save This For Me

	Location	Collection	Shelf Location	Call Number	Status	Type
	Clifton Park-Halfmoon Public Library	Children's Board Books		JP Fict Bri BB	Out	Book
	Galway Public Library	Children's Board Books		JP Fict Bri BB	Out	Book
	Margaret Reaney Memorial Library (St. Johnsville)	Children's Board Books		jP Fict Bri (D)	On Shelf	Book
	Northville Public Library	Children's Board Books		jP Fict Bri	On Shelf	Book
	Pember Library and Museum (Granville)	Children's Fiction		JP Fict Bri [Board Book]	Out	Book
	Richards Library (Warrensburg)	Children's Fiction		JP Fict Bri	On Shelf	Book
	Round Lake Library	Children's Board Books		JP Fict Bri	On Shelf	Book

Note:

The format/type of material icons in Polaris PowerPAC Children's Edition are the same as those used in Polaris PowerPAC. For a list, see ["Setting Up Search Filters \(Limit By\)"](#) on page 70.

Using Children's PAC profiles, you can specify what information displays about the associated items, including branch location, collection, shelf location, call number, status, and material type. You can set these profiles at the system, library, or branch level.

See the following topics:

- ["Web Access from Children's PAC"](#) on page 320
- ["Integrated Econtent in Children's PAC Results"](#) on page 320
- ["Customize the children's item availability display"](#) on page 320

Web Access from Children's PAC

If the title information includes a Web link, you can specify whether children can access the associated Web site. Web links are indicated by the globe icon next to a title, and by the URL link text in the detailed information for the title. To allow Web access, set the Children's PAC profile **Web access: Enable** to **Yes** at the system, library, or branch level. When the patron clicks the globe icon, the Web site opens in a new browser window.

Important:

Libraries concerned about children's Internet access should use lockdown software or set the profile **Web access: Enable** to **No**. If this profile is set to **No**, the globe icon and URL links are not "live."

Integrated Econtent in Children's PAC Results

Polaris PowerPAC Children's Edition supports integrated econtent, such as 3M ebooks. For details on this licensed feature, see "[Integrated Econtent in PAC](#)" on page 202.

1-2-3

Customize the children's item availability display

Follow these steps to customize the item availability display in Polaris PowerPAC Children's Edition.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **Children's PAC** tab in the details view.
2. To display the item's owning branch, double-click **Item Availability: Display branch location**, and select **Yes**.

Note:

Single-branch libraries may want to set this profile to **No** to save space in the availability display.

3. Double-click **Item Availability: Display local and system levels** to set which items are shown in the availability display. Select **Yes** or **No**:
 - **Yes** - If the logged-on branch is the system, information about items that are designated to display in PAC and owned throughout the system is displayed. If the logged-on branch is a local branch, only items held by that branch are displayed. If none are owned by the local branch, the system-level items are displayed.
 - **No** - If the logged-on branch is the system, information about items owned throughout the system is displayed. If the logged-on branch is a local branch, only the local items are displayed. If none are owned by the local branch, no items are displayed.

The Item Availability Display Order table determines which branches' items should be displayed as "system" and which should be displayed as "local." See "[Set up the local/system item availability display](#)" on page 177.

4. To display the items' shelf locations, double-click **Item Availability: Display shelf location**, and select **Yes**.
5. To display the items' circulation status, double-click **Item Availability: Display status**, and select **Yes**.
6. If you chose to display item status, specify the status text:
 - Double-click **Item availability text: Available**, and type the text that indicates an item is available. The default is **In Library**.
 - Double-click **Item availability text: Not available**, and type the text that indicates an item is not available. The default is **Checked Out**.
7. To display item-level call numbers, double-click **Item Availability: Display call number**, and select **Yes**.
8. To display the items' collection information, double-click **Item Availability: Display collection**, and select **Yes**.

If the library does not use collections, you may want to set this profile to **No** to save space in the availability display.

9. To display the items' material types, double-click **Item Availability: Display type**, and select **Yes**.
10. To make public notes from the item record available, double-click **Item Availability: Display notes**, and select **Yes**.

This setting displays a note icon for items whose records include public notes. Patrons can click the icon to read the note.

11. Select **File, Save**.

Setting Up Mobile PAC



Polaris[®] Mobile PAC[™] is a Web-based public access catalog that has been optimized for mobile devices, providing simplified access to most of the features available in Polaris[®] PowerPAC[™]. Any device with a Web browser can access the site, including mobile devices with browsers optimized for mobile use and computers with standard Web browsers.

Polaris Mobile PAC works best with mobile devices where users navigate the interface in either of two ways: with a pointing device, where user touches the desired option or selects it with a stylus; or with navigation keys, where the user presses keys (such as arrow keys) on the device key pad to move the focus up or down in a list. Full functionality may not be available for cell phones without full keyboards or pointing devices.

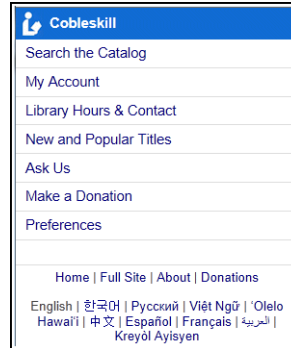
Mobile PAC must be installed on a Polaris Web server and the library must have a current, valid license to make Mobile PAC available. Mobile PAC also offers a multilingual version, where users can select the display language on any page or set a language preference that persists from session to session. Polaris Administration settings control the features available in Mobile PAC. Mobile PAC shares some settings with Polaris PowerPAC. Other settings apply only to Mobile PAC.

See the following topics:

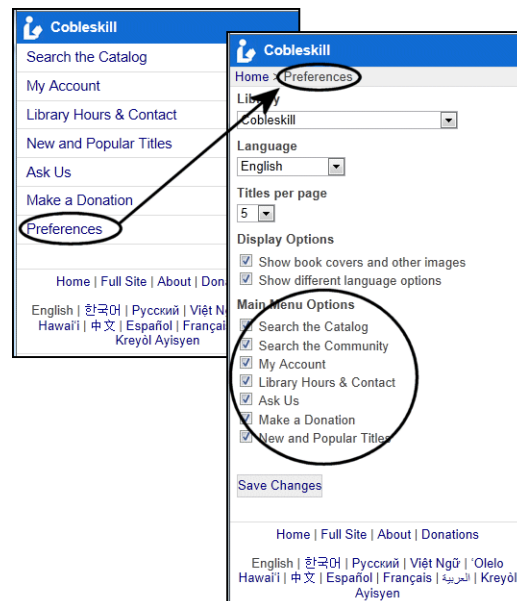
- [“Mobile PAC Basics”](#) on page 323
- [“Setting Up Mobile PAC Connections”](#) on page 328
- [“Setting Up Mobile PAC Library Information”](#) on page 334
- [“New & Popular Titles in Mobile PAC”](#) on page 337
- [“Setting Up Ask Us in Mobile PAC”](#) on page 340
- [“Mobile PAC Search Settings”](#) on page 343
- [“Mobile PAC Results Settings”](#) on page 348
- [“Configuring the Mobile PAC Title Display”](#) on page 363
- [“Polaris[®] Fusion[™] Results”](#) on page 366
- [“Saved Searches \(Search Agent\) in Mobile PAC”](#) on page 370
- [“Title Lists in Mobile PAC”](#) on page 373
- [“Patron Registration in Mobile PAC”](#) on page 381
- [“Patron Log-In Settings for Mobile PAC”](#) on page 383
- [“Patron Account \(My Account\) in Mobile PAC”](#) on page 387
- [“Credit Card Payments from Mobile PAC”](#) on page 396

Mobile PAC Basics

Polaris Mobile PAC provides a simple interface that has been optimized for mobile devices. Basic functions are available directly from the home page.



Users can click **Preferences** to set which links appear on the home page, and other preferences such as connection organization, language, and display options. These settings persist from session to session for one year, so that common selections are already made when the user connects to Mobile PAC.



See the following topics:

- “Installation” on page 324
- “Secure Socket Layer (SSL)” on page 324
- “Updating Page Caches” on page 324
- “Analyzing Polaris Mobile PAC Use” on page 325
- “Customizing Mobile PAC” on page 326
- “Mobile PAC Device Compatibility” on page 326
- “Trouble-Shooting” on page 327

Installation

You select Mobile PAC for installation when you install Polaris Web Server software. (By default, Mobile PAC is not selected for installation.) For more information, see the *Polaris Installation Guide* or contact your Polaris Site Manager.

Secure Socket Layer (SSL)

Mobile PAC works without using SSL protocols (https:) to encrypt data, but personal data sent over the Internet is exposed to potential interception. If you have the appropriate site certificate, you can encrypt the entire Mobile PAC site. To enable data encryption, set the **SSL: Enable: Mobile PAC** parameter for the Web server to **Yes**. For more information about SSL and Polaris, see “[Setting Web Server Parameters](#)” in the *Polaris Administration Guide 4.1R2*. (You can set SSL for Polaris PowerPAC with a separate parameter.)

Note:

Some older mobile phones do not support SSL.

Updating Page Caches

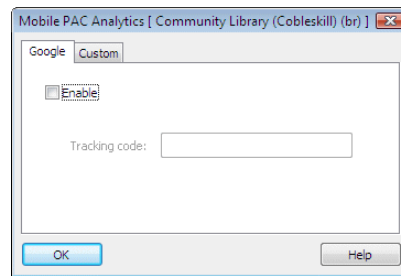
When you change Polaris Mobile PAC settings, you may need to update page caches to see the effects of your changes. Most cached information is stored at the application level on the Web server. You can update that information with the **Reload** tool in Polaris WebAdmin (Language Editor). For more information, see the *Polaris Language Editor Guide* or Language Editor help file.

Note:

The Reload function reloads settings only for those organizations whose settings have already been cached. You may have to do an IIS reset to see changes applied to other organizations.

Analyzing Polaris Mobile PAC Use

Google™ Analytics is a free tool from Google that allows Web site administrators to record and analyze traffic on their sites. Like Polaris PowerPAC, Mobile PAC includes the JavaScript code for Google Analytics in the page footer. To use this feature, open the Polaris Administration Mobile PAC profile **Mobile PAC 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.

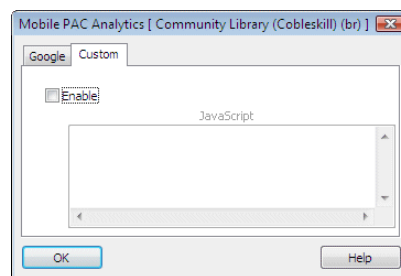


For more information about Google Analytics, and to obtain a tracking code, go to: <http://code.google.com/apis/analytics>

Note:

If you have already enabled Google Analytics for Polaris PowerPAC, you can use the same tracking code for Mobile PAC.

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



Note:

Cell phones that do not support JavaScript ignore the JavaScript code, so these connections are not calculated in your site analysis.

Customizing Mobile PAC

- **Text customization** - You can edit language strings for Mobile PAC pages in English and any licensed language using Polaris WebAdmin (Language Editor). For instructions, see the *Polaris Language Editor Guide* or Language Editor Help file.
- **Page customization** - With appropriate knowledge of XML, you can also customize Mobile PAC at the program level. For more information, see the *Polaris PAC Customization Guide*, available on the Customer Extranet (www.polaristown.com) and the Polaris Developers Network.

Mobile Device Detection

Checks in Polaris code help to ensure that mobile device users are automatically redirected to the Mobile PAC site if they connect to the Polaris PowerPAC site. However, the definitions of mobile devices and browser combinations are constantly changing. In case a device is not detected as mobile, the Polaris PowerPAC page header displays a **Mobile Site** link, so that mobile device users can easily access the mobile site. For details, see “[Set the connection URL](#)” on page 328.

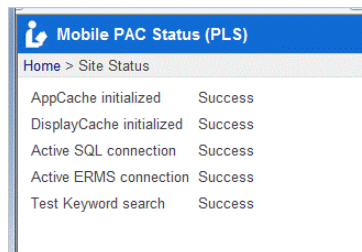
Mobile PAC Device Compatibility

To ensure compatibility with most mobile devices, Mobile PAC does not use any HTML syntax, such as HTML 5 or CSS3, that requires a more modern browser. Also, unlike PowerPAC, Mobile PAC's core functionality (searching, accessing the patron account, etc.) does not rely on JavaScript. Therefore, if a mobile device has JavaScript disabled, the user should be able to perform the majority of Mobile PAC functions, with the exception of some third-party products that require JavaScript, specifically NoveList and Google Maps. In some cases, the mobile device and/or browser may be too old to support Mobile PAC.

Trouble-Shooting

You can get a quick idea of whether Mobile PAC is installed and running properly by viewing a status page. Go to:

[http://\[Your PAC site\]/mobile/plsstatus](http://[Your PAC site]/mobile/plsstatus)



The Mobile PAC status page lists five status items, each with a **Success** or **Failure** rating:

- AppCache initialized
- DisplayCache initialized
- Active SQL connection
- ActiveERMS connection
- Test Keyword search

If you see a **Failure** status for any of these five items, check for details in the Mobile PAC logs in **C:\ProgramData**. For assistance, contact your Polaris Site Manager.

Setting Up Mobile PAC Connections

To set up Mobile PAC connections, define the connection URL that the user enters to connect to your Mobile PAC; set the link to the full site; and specify whether patrons can switch branches.

See the following topics:

- “Set the connection URL” on page 328
- “Set the Full Site link” on page 331
- “Enable branch switching and set branch display order” on page 332

1-2-3

Set the connection URL

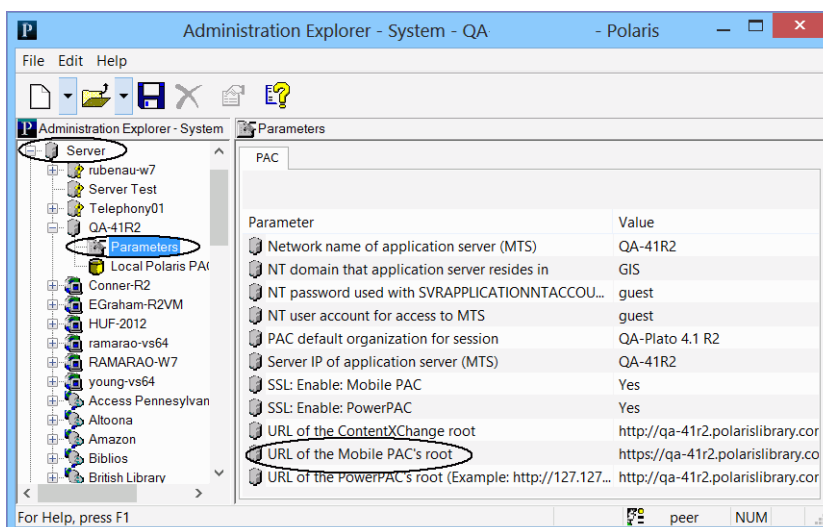
The connection URL is the address the user enters to connect to your Mobile PAC catalog, or the destination address when the mobile device user is automatically re-directed from Polaris PowerPAC.

Follow these steps to specify the connection URL for Mobile PAC.

1. In the Administration Explorer tree view, open the **Server** folder and expand the server for which you want to set Web parameters.
2. Select **Parameters** under the server.

The PAC parameters tabbed page is displayed in the details view.

3. Double-click **URL of the Mobile PAC's root** and type the full URL.



The default connection URL is `http://[localhost]/mobile`, which is the system organization.

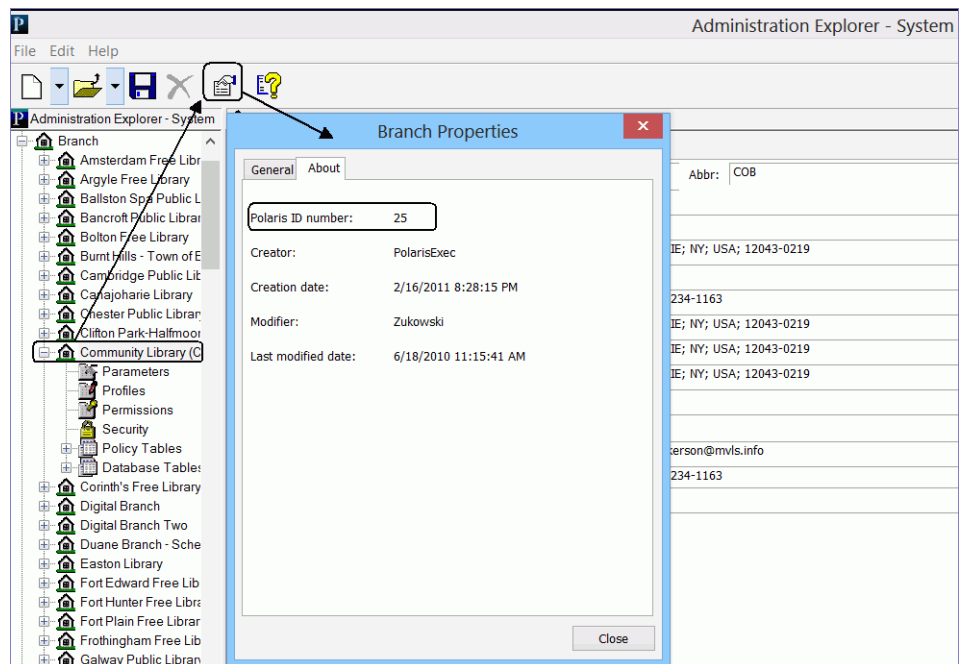
If you plan to disable branch switching (see “[Enable branch switching and set branch display order](#)” on page 332) and you want to specify a connection organization other than the system organization, add

`/org/{orgid}`

to the end of the URL. For example, if the organization ID number is 25, type the URL in this format:

`http://[localhost]/mobile/org/25`

The organization ID is the number in the title bar of the organization workflow. It is also available on the Properties dialog box - About tabbed page for the organization, which you can open from the Polaris Administration Explorer.



Note:

If you specify an organization that is suppressed from display in PAC, the connection organization defaults to the system. The system-level PAC profile **Suppress branches** controls which branches are suppressed from display. This profile also affects Polaris PowerPAC.

4. Select File, Save.

Related Information

- **Link from PowerPAC - A Mobile Site link** is displayed in the Polaris PowerPAC header if Mobile PAC is licensed for your library and you have set a value for **URL of the Mobile PAC's root** in Polaris Administration.

Note:

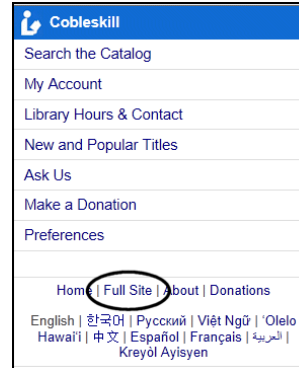
This feature does not apply to in-house workstations, as defined by the setting for patron actions in the PowerPAC profile **In-house access definitions**. This protects patron privacy if a PowerPAC user on an in-house workstation follows the **Mobile Site** link, perhaps logs into the patron account, and then leaves the workstation in Mobile PAC. (There is no inactivity timeout in Mobile PAC.) Staff members who need to access Mobile PAC can enter the URL directly into their workstation browsers. If you want the **Mobile Site** link to appear in PowerPAC for staff workstations, you must set the in-house definition to **In-house IP Addresses Table** only, and then make sure that no staff workstations appear in the In-House IP Address Table. For more information about in-house definition settings, see [“Identifying In-House Computers”](#) in the *Polaris Administration Guide 4.1R2*.

- **Connection organization from PowerPAC redirect** - When a redirection to Mobile PAC is made automatically or with the PowerPAC header link, the PowerPAC connection organization is retained for the Mobile PAC connection. If the PowerPAC connection organization was the system, Mobile PAC uses the organization saved in the user's Mobile PAC **Preferences** settings. See [“Enable branch switching and set branch display order”](#) on page 332.
- **Display language from PowerPAC redirect** - For multilingual versions, when a redirection to Mobile PAC is made automatically or with the PowerPAC header link and the PowerPAC display language is not English, the language setting is retained for the Mobile PAC connection. If the PowerPAC display language was English, Mobile PAC uses the language saved in the user's Mobile PAC **Preferences** settings.
- **Automatic redirection** - PAC users with mobile devices are automatically redirected to Mobile PAC if they attempt to connect to Polaris PowerPAC on the home (portal) page, default search page, or patron account page. This feature accommodates libraries that have direct links from their library Web sites to search and patron account pages.

1-2-3

Set the Full Site link

The **Full Site** link on the Mobile PAC home page is the URL specified in the parameter **URL of the PowerPAC's root** for the Web server in Polaris Administration. This destination is typically your library Web site. Do not change this setting unless your Polaris PowerPAC root URL changes.



The **Full Site** link retains the user's preference settings for connection organization and display language when connecting to Polaris PowerPAC. See "Enable branch switching and set branch display order" on page 332.

When a user clicks the **Full Site** link, a message sets user expectations regarding the full site (Polaris PowerPAC) display on mobile devices, and offers browser tips for BlackBerry® smart phone users.



You can edit both parts of the message in Polaris WebAdmin (Language Editor). The default text for the first part of the message (string ID **MP_MSG_FULLSITE**) is:

You are about to leave the mobile catalog to access the main online catalog (full site). Since the full site is not optimized for all mobile devices, you may encounter errors on some pages.

The default text for the second part of the message (string ID `MP_MSG_FULLSITE_TIPS`) is:

Users of some BlackBerry devices may be better able to view the full site by installing and using the 'Opera Mini' browser or by setting the default BlackBerry browser's emulation mode to 'Windows IE' in the browser's 'Options' screen.

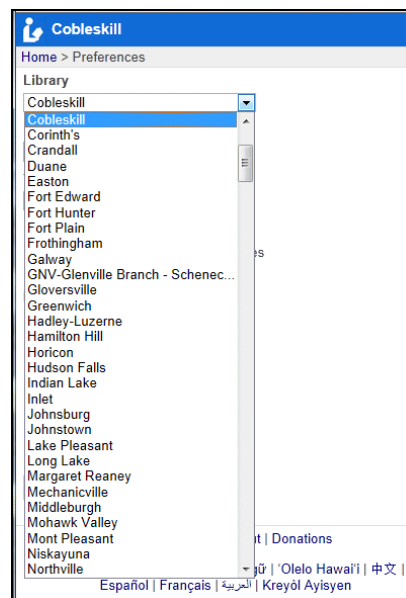
Related Information

Using Polaris Language Editor - See the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

1-2-3

Enable branch switching and set branch display order

The Mobile PAC home page includes a **Preferences** link. You can allow Mobile PAC users to change the connection branch on the Preferences page, and you can set a display order for the branch names.



Follow these steps to set up branch switching.

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

Note:

Except where noted in this procedure, you can set these profiles at the system, library, or branch level.

2. Double-click **Branch Switching: Enable**, and select **Yes**.

This setting allows patrons to choose branches in the **Branch** list on the Mobile PAC Preferences page. The chosen branch's Mobile PAC settings become effective. If you set this to **No**, the patron can connect only to the organization represented by the Mobile PAC connection

URL. See “Set the connection URL” on page 328.

3. If you set **Branch switching: Enable** to **Yes**, set the PAC profile **Branch list Order** to determine the display order of the branches:
 - Select **Yes** to display the branch names in ascending alphabetical order by name.
 - Select **No** to display the branch names in ascending numerical order by internal organization ID.

Important:

This setting also affects Polaris PowerPAC.

With either setting, the system organization is always first. The setting for the current connection branch is used. The profile also controls the display order of the list of pick-up branches for requests, but the setting for the patron’s registered branch is used for the pick-up branch list.

Note:

Use the system-level PAC profile **Suppress branches** to suppress a branch from display in the **Switch to another branch** list. This setting also affects Polaris PowerPAC.

Related Information

Organization names - Mobile PAC uses the **Display Name** defined in the organization record. For more information about setting organization display names, see “Setting Up Organizations” in the *Polaris Administration Guide 4.1R2*.

Administration Explorer - System -

File Edit Help

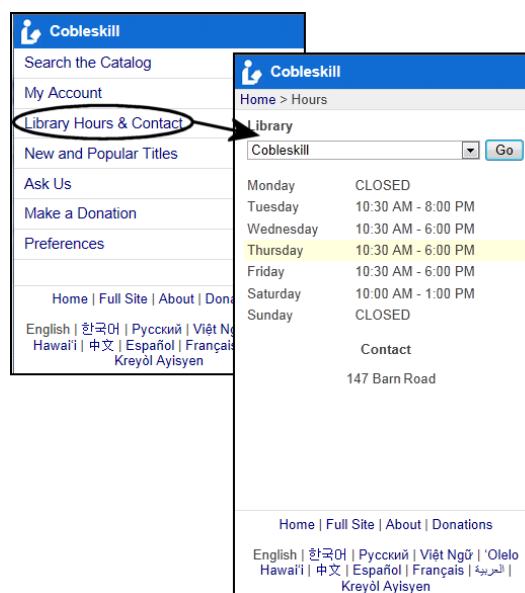
Administration Explorer - System Community Library (Cobleskill)

Branch Information

Name:	Community Library	Abbr:	COB
Display Name:	Community Library		
Parent Library:	Cobleskill		
Primary Address:	147 Barn Road; Cobleskill; SCHOHARIE; NY; USA; 12043-0219		
Phone:		Email:	
Alt Phone:		Fax:	
Shipping Address:	147 Barn Road; Cobleskill; SCHOHARIE; NY; USA; 12043-0219		

Setting Up Mobile PAC Library Information

The Mobile PAC home page displays a link for library hours and contact information. When the connection organization is a library or branch, the link opens information about the current connection organization.



When the connection organization is the system, the link opens a page where the user selects a library or branch to see that organization's information.

The specific hours are set in the Patron Services parameter **Hours of operation** for the connection organization. The address and telephone number are taken from the organization record.

Note:

The system-level PAC profile **Suppress branches** controls whether a branch is listed in the drop list of organizations. If you choose to suppress a branch, it is also suppressed from display on the **Preferences** page. See [“Enable branch switching and set branch display order”](#) on page 332.

You can choose to display a message in addition to, or instead of, the formatted hours table. You can also choose to display a link to the library's Web site along with the address and telephone number.

See the following topic:

- [“Set up the Library Hours & Contact page”](#) on page 335

1-2-3

Set up the Library Hours & Contact page

Follow these steps to specify the information that should appear on the Library Hours & Contact page.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PAC** tab in the details view.
2. To display the organization's hours formatted in a table, set the profile **Hours of operation: Display** to **Yes**.

Note:

This setting also applies to Polaris PowerPAC.

Important:

The hours listed in the table on the Hours & Contact page are controlled by the settings in the Patron Services parameter **Hours of operation**. Even if you do not want to display the table on the Hours & Contact page, you must set up the organization's schedule in the Patron Services parameter **Hours of operation**, because these settings also affect due dates and other circulation processes.

Tip:

The **Hours of operation message** option is useful for organizations with split hours or other conditions that the usual Hours of Operation table does not accommodate.

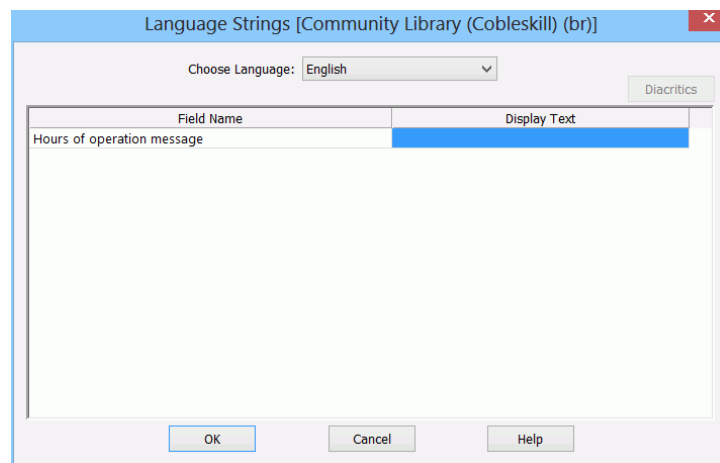
3. To specify a message to display on the Hours & Contact page, follow these steps:

- a) Double-click the **Hours of operation message** profile.

Note:

This setting also applies to Polaris PowerPAC.

The Language Strings dialog box opens.



- b) Select a language from the list of those licensed for Polaris PowerPAC.
- c) Double-click the message field in the **Display text** column and type the message (up to 500 characters).

Note:

You can insert diacritic characters in your message. Click **Diacritics**. In the Character Picker dialog box, select a graphic character set. Then select the character, and click **Insert**.

- d) Click **OK**.

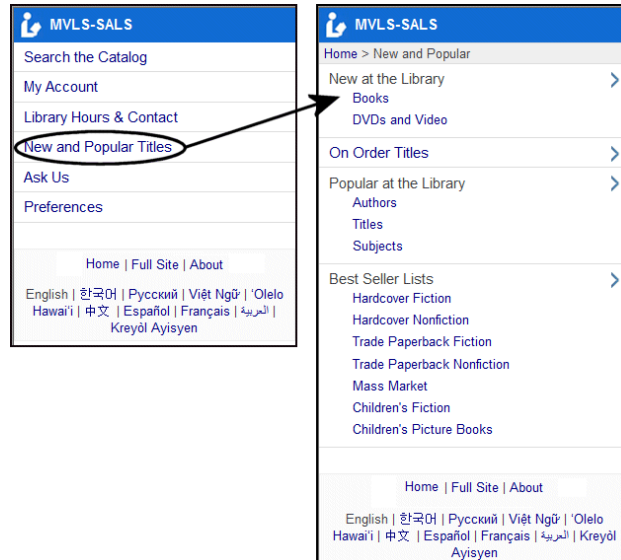
4. To include a link to the library's Web site along with the address and telephone number, follow these steps:
 - a) Open the **Profiles** folder for the organization, and select the **Mobile PAC** tab in the details view.
 - b) Double-click **Navigation: Web site URL** and type the complete URL, beginning with **http://**
5. Select **File, Save**.

Related Information

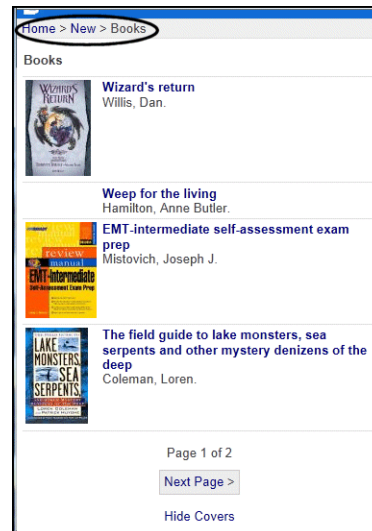
You can also use the PAC profile **Multiple language strings** to specify the Hours of Operation message. This method may be more convenient if you have multiple PAC messages to customize. For more information, see [“Editing Messages and Labels”](#) on page 288.

New & Popular Titles in Mobile PAC

The Mobile PAC home page displays a New and Popular Titles link. When the user clicks this link, **New at the Library**, **On Order Titles**, **Best Seller**, and **Popular at the Library** (most circulated) lists are displayed.



When the user clicks a link in a list, such as **Books** under **New at the Library**, the appropriate search is launched in the library catalog.



See the following topic:

[“Set up New and Popular Titles” on page 338](#)

1-2-3

Set up New and Popular Titles

Follow these steps to set up New and Popular Titles options.

Note:

You can set the **New and Popular Titles** profile at the system, library, or branch level. The connection organization's settings determine the options available to Mobile PAC users.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Mobile PAC** tab in the details view.
2. Double-click **New and Popular Titles**.

The New and Popular Titles dialog box opens.



3. Select (check) the **New at the Library** categories to include on the New and Popular page in Mobile PAC.

When the patron clicks a **New at the Library** category, the search is launched for titles in that category that have recently been added to your catalog. This feature uses the same processing as the New Titles Web part in Polaris PowerPAC. For details, see [“Defining Web Parts for Dashboards”](#) on page 36.

Note:

When the Mobile PAC connection is to a branch, the patron sees only new titles for that branch. When the Mobile PAC connection is to the system, the patron sees new titles for the whole system.

4. Select (check) the **Best Seller Lists** categories to include on the New and Popular page in Mobile PAC.

When a patron selects a title from one of these lists, a search for the title is launched in the Polaris database. The lists are updated automatically with content from IndieBound (formerly Book Sense), using the same process as Polaris PowerPAC. For details, see [“Defining Web Parts for Dashboards”](#) on page 36.

Important:

If a title in the Best Seller list is not in the catalog, the list item for the title is not a live link. As best-seller titles are added to the catalog, the links are updated when MobilePAC is reloaded using the Reload tool in Polaris Language Editor, or when an IIS reset is performed on the server.

5. Select (check) the **Popular** categories to include on the New and Popular page in Mobile PAC.

These categories use the same processing as the Most Circulated Web part in Polaris PowerPAC; that is, the **Popular** links launch searches for popular titles, authors, or subjects in the Polaris database, based on circulation statistics for the past 31 days.

6. Select (check) **Show on-order items** to provide links that launch searches for titles in the Polaris database that have linked items with a status of On-Order.

This feature uses the same processing as the On-Order Items Web part in Polaris PowerPAC. For details, see [“Defining Web Parts for Dashboards”](#) on page 36.

Setting Up Ask Us in Mobile PAC

As in Polaris PowerPAC, Mobile PAC users can send an “Ask Us” reference question to a designated library e-mail address. When the user clicks the **Ask Us** link on the home page, and the library requires patrons to log on to use this feature, the log-on page appears.



Once logged on, the user can type the question and send it to the library.

The image shows the 'Ask Us' form in the Cobleskill mobile PAC interface. The form is titled 'Home > Ask Us' and contains the following fields:

- Barcode:** 987654321
- Patron Name:** Farsaci, Timothy James
- Phone:** 315 -451-3639
- Email:** liverpoolhistorian@yahoo.
- Response Needed by:** 6/15/2012
- What is your Question:** A text input field with a dropdown arrow on the right.

At the bottom of the form, there are 'Send' and 'Reset' buttons, and a 'Log Out' link.

You set up a receiving e-mail address on the branch level with the PAC profile **Patron access options**, then enable the feature specifically for Mobile PAC. As with Polaris PowerPAC, you can require a patron log-in for Ask Us in Mobile PAC, or bypass the log-in and allow anyone to send a question via Ask Us. In this case, a Guest button is displayed on the log-on page.

The Sent From e-mail address on the message to the library is the e-mail address the user has specified in the Ask Us form, if any. If no address is specified, the user has logged in as a patron, and the patron account includes an e-mail address, that address is used. If no e-mail address is specified in the Ask Us form or the patron account, or the patron has cleared the address from the form, the Sent From address is that specified in the PAC profile **Email notification: Email address of sender**.

Note:

Any e-mail from PAC, including Ask Us messages, requires you to specify the SMTP server in Polaris Administration. Double-click the PAC profile **Email notification: Server running SMTP service**, and type the domain name of the e-mail SMTP server. This setting applies to all Polaris PAC applications and is also used by other Polaris processes, such as e-mail notification.

See the following topic:

- [“Set up and start Ask Us”](#) on page 341

1-2-3

Set up and start Ask Us

Follow these steps to set up the e-mail addresses to receive questions sent by e-mail from the PAC, and to enable the Ask Us function in Mobile PAC.

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

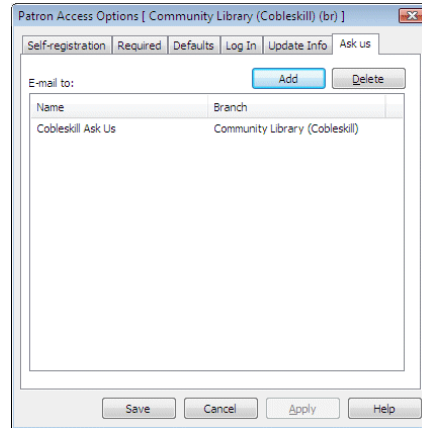
Important:

These settings also affect Polaris PowerPAC.

2. Double-click **Patron Access options**.

The Patron Access Options dialog box appears.

3. Click the **Ask Us** tab.



4. To specify the receiving address for Ask Us e-mail messages, do these steps:

- a) Click **Add**, and use the Find Tool to search for the staff member or members who should receive the Ask Us messages.
- b) Select the names in the results list, right-click the highlighted names, and choose **Select** from the context menu.

The Patron Access Options dialog box appears, and the selected names are displayed in the **E-mail to** list.

5. Click **Apply** to apply your settings and continue working with Patron Access options, or click **Save** to save your settings and close the Patron Access options dialog box.

The Profiles tabbed pages appear in the Administration Explorer details view.

6. To make the Ask Us feature available in Mobile PAC, do these steps:

- a) Click the **MobilePAC** tab in the details view of the Explorer.
- b) Double-click **Navigation: Ask us**, and select **Yes**.
- c) To require a patron log-in for Ask Us, double-click **Ask Us: Require Login**, and set the value to **Yes**.

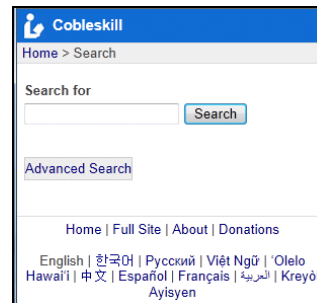
If this value is set to **No**, a **Guest** button is displayed on the Ask Us login page in Mobile PAC. The user can click **Guest** to send a question without logging in.

7. Select **File, Save**.

Mobile PAC Search Settings

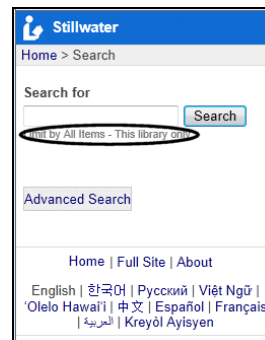
Mobile PAC offers a quick search and an advanced search. Both are keyword searches.

Quick Searches - When the user clicks **Search the Catalog** on the main page, the quick search page opens.

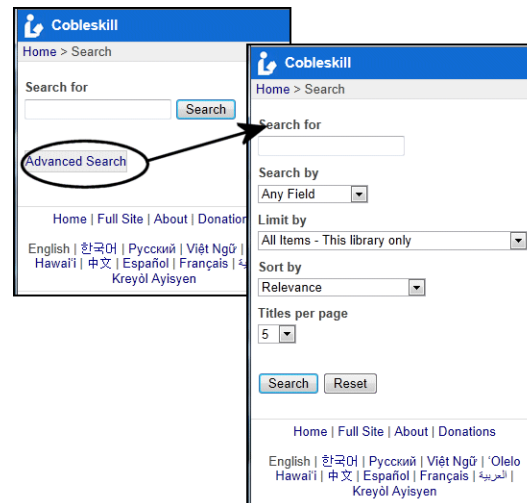


In this type of search, the user simply types a search term in the **Search for** box and clicks **Search**. This search uses the search by, limit by, and sort by settings for quick searches from the PAC profile **Search settings defaults**. See [“Set default search selections”](#) on page 345.

If the **Search by** setting in Polaris Administration is other than the default **Any Field** and the **Limit by** setting is other than the default **All formats (TOM=*)**, the settings currently in effect appear below the **Search for** text box in Mobile PAC.



Advanced Search - When the user clicks **Advanced Search** on the **Search** page, the advanced search page opens.



On this page, users can select the **Search by** field, the **Limit by** filter, and a sort order. The default values for **Search by**, **Limit by**, and **Sort by** are taken from the advanced search settings in the PAC profile **Search settings defaults**. See [“Set default search selections”](#) on page 345. The selections in the drop-down list for the **Limit by** filter are taken from the PAC **Limit by display** policy table. The user can also set the number of titles per page in the search results. The options are 5 (default), 10, 25, and 50.

The user’s selected search settings are retained until the user closes the browser, clicks **Reset**, or reopens the Advanced Search page by selecting the **Advanced Search** link on the quick search page. The **Reset** button resets all controls in the Advanced Search page to their default values and clears the text from the **Search for** box.

When search results are displayed, if the user selects the **Search** link in the breadcrumb trail at the top of the window, the options set for the user’s most recent search are retained on the Advanced Search page.

See the following topic:

- [“Set default search selections”](#) on page 345

1-2-3

Set default search selections

Follow these steps to specify the default selections for quick and advanced searches.

Important:

These settings also affect Polaris PowerPAC.

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

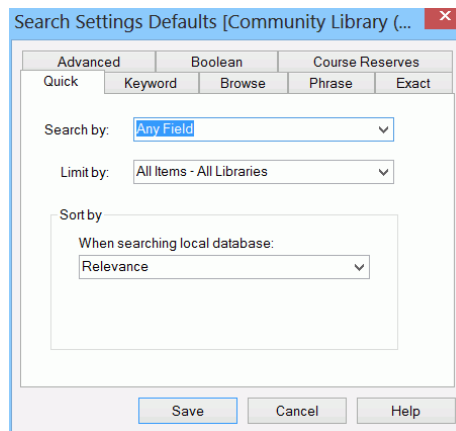
Mobile PAC uses the settings for the user's current connection branch.

Note:

For information about allowing branch switching, see [“Setting Up Mobile PAC Connections”](#) on page 328.

2. Double-click **Search settings defaults**.

The Search Settings Defaults dialog box opens.



3. Set the quick search defaults:

- a) Click the **Quick** tab.
- b) Select the default search field in the **Search by** list.

The setting applies to every quick search. The default is **Any Field**.

- c) Select the default search filter in the **Limit by** list.

The available selections depend on the organization's settings in the PAC Limit By Display policy table. The default selection is **All formats** (that is, no filter; TOM=*).

Note:

You can change the labels of existing filters and set up custom filters. See [“Setting Up Search Filters \(Limit By\)”](#) on page 70.

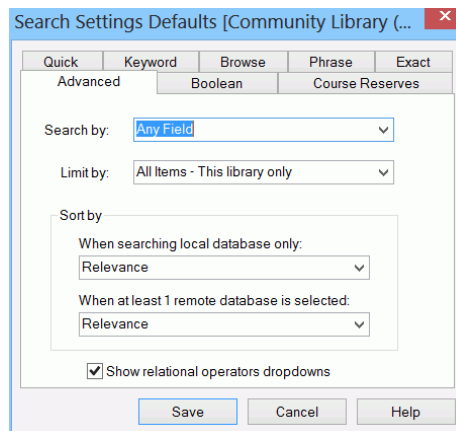
- d) Select the default sort order for search results in the **Sort by** list.

The setting applies to every quick search. The default selection is **Relevance**. This selection sorts results based on weighted keyword frequency and proximity, so that those most likely to meet the user's needs appear first in the list. **Most Popular** sorts titles in the search results so that the titles most frequently checked out or requested over the past 120 days appear first in the list.

Options that include two categories sort results by the first category, then by the second category. For example, with **Author, then Title**, the titles are sorted alphabetically by author then, within each author's works, alphabetically by title.

4. Set the advanced search defaults:

- a) Click the **Advanced** tab.



- b) Select the default search field in the **Search by** list.

The default selection is **Any Field**.

- c) Select the default search filter in the **Limit by** list.

The default selection is **All formats** (that is, no filter; TOM=*).

Note:

You can change the labels of existing filters and set up custom filters. See [“Setting Up Search Filters \(Limit By\)”](#) on page 70.

- d) Select the default sort order for search results in the **Sort by - When searching local databases only** list.

The default selection is **Relevance**.

5. Click **Save**.

6. (Optional) To set automatic subsorting by title for certain sort types, set the PAC profile **Search: Sub-sort-by-title** to **Yes**. This allows patrons to quickly find a known title in a large results set.

When the profile is set to **Yes**, the records are first sorted by the selected sort option and then sorted alphabetically by title, ignoring nonfiling characters (respecting the value of the 245 second indicator). The setting does *not* affect these sort types: relevance, most popular, title, author then title, title then author, title then publication date, title then format, publication date then title, call number then title.

Note:

This setting affects both Polaris PowerPAC and Mobile PAC. The profile is available at the system, library, and branch levels. It is set to **No** by default; you may want to leave this setting if you find the automatic subsort impacts performance.

Related Information

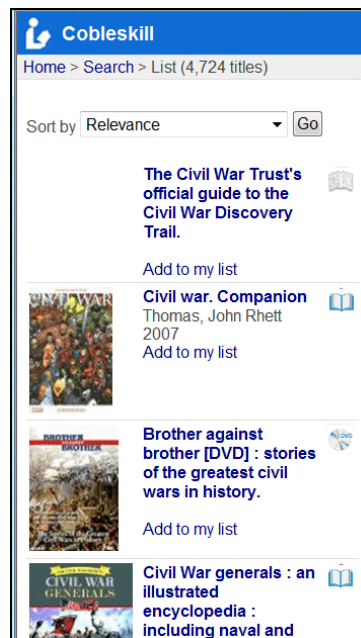
- **TOM (Type of Material)** - For more information about Type of Material and format icons in Polaris PAC applications, see [“Type of Material Codes \(TOMs\)”](#) in the *Polaris Cataloging Guide 4.1R2* and [“Setting Up Search Filters \(Limit By\)”](#) on page 70.
- **Community Information** - Mobile PAC supports keyword searches for community information for libraries that use Polaris Community Profiles, a separately licensed feature. For more information, see [“Community Setup for PAC Display”](#) in the *Polaris Community Profiles Guide 4.1R2*.

Mobile PAC Results Settings

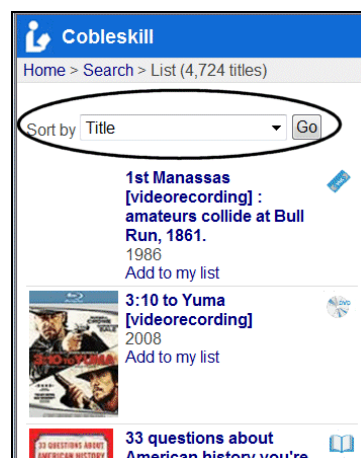
From the search results set, users can locate items, see more bibliographic information, and place hold requests. The initial search results display is a list of titles, with format icons and cover images if these are enabled.

Note:

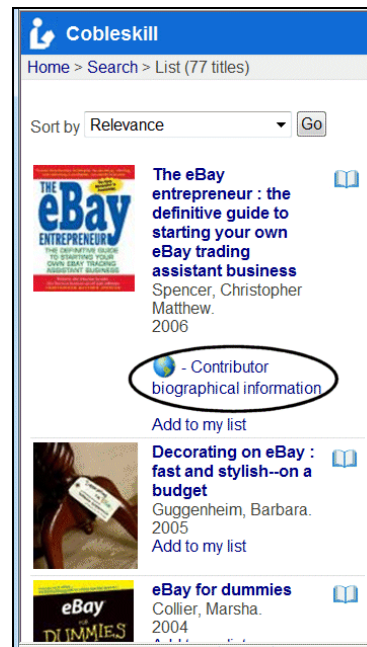
You can configure the title information displayed in this view. See “Configuring the Mobile PAC Title Display” on page 363.



By default, five titles are displayed per page, but the user can change this number on the Preferences page. The user can also sort the results list.



The initial search results display also includes links from the 856 MARC tag.



The link text is displayed according to the following logic:

Note:

If there is text in the 856\$z, it displays as a note but not as part of the Web link.

- **856\$y - Link Text** - If the bibliographic record has an 856\$y, the text in the first occurrence of this tag is used for the Web link display instead of the URL in the 856\$u.
- **856\$3 - Material Specified** - If the bibliographic record does not have an 856\$y, but it does have an 856\$3, the text in the first occurrence of this tag is used for the Web link display instead of the URL in the 856\$u.
- **856\$u - URL** - If the bibliographic record does not have an 856\$y or an 856\$3, the default Web link text is **Web Site**. You can change the label using the Mobile PAC profile **Title Display: Configure**. For more information, see [“Configuring the Mobile PAC Title Display”](#) on page 363.

Mobile PAC supports integrated econtent, such as 3M ebooks. For details on this licensed feature, see [“Integrated Econtent in PAC”](#) on page 202.

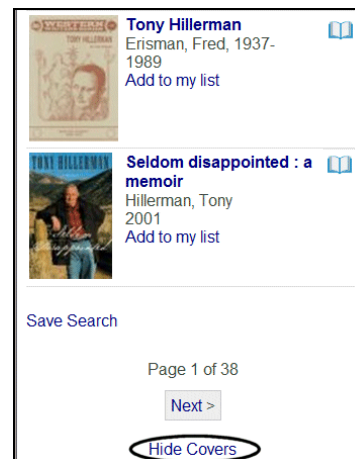
See the following topics:

- “Cover Images” on page 350
- “Title (Product) Page Links” on page 351
- “Title Link: Find It” on page 352
- “Title Link: Details” on page 355
- “Title Link: Request It” on page 356
- “Title Link: Purchase or Buy It Now” on page 357
- “Title Links: Enriched Content” on page 358
- “Title Link: Map It” on page 359
- “Title Link: Librarian’s (MARC) View” on page 361
- “Set up the Mobile PAC title (product) page” on page 361

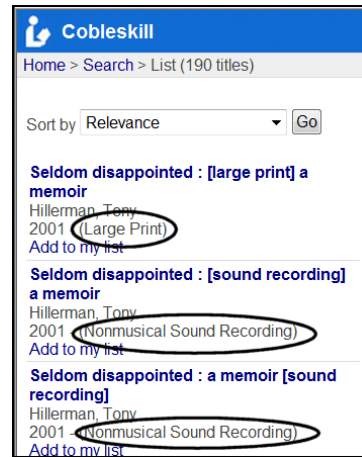
Cover Images

Cover images are displayed according to the connection organization’s settings for the content provider in the PAC profile **Enriched data**. For more information, see “[Enabling Enriched Data](#)” on page 222. These settings also affect Polaris PowerPAC.

In Mobile PAC, when cover images are enabled, the user can choose to hide them. The **Hide Covers** option appears at the bottom of each search results page.



This may improve the display on certain mobile phones. When cover images are hidden, the title format (Type of Material, or TOM) is also displayed as text instead of an icon.

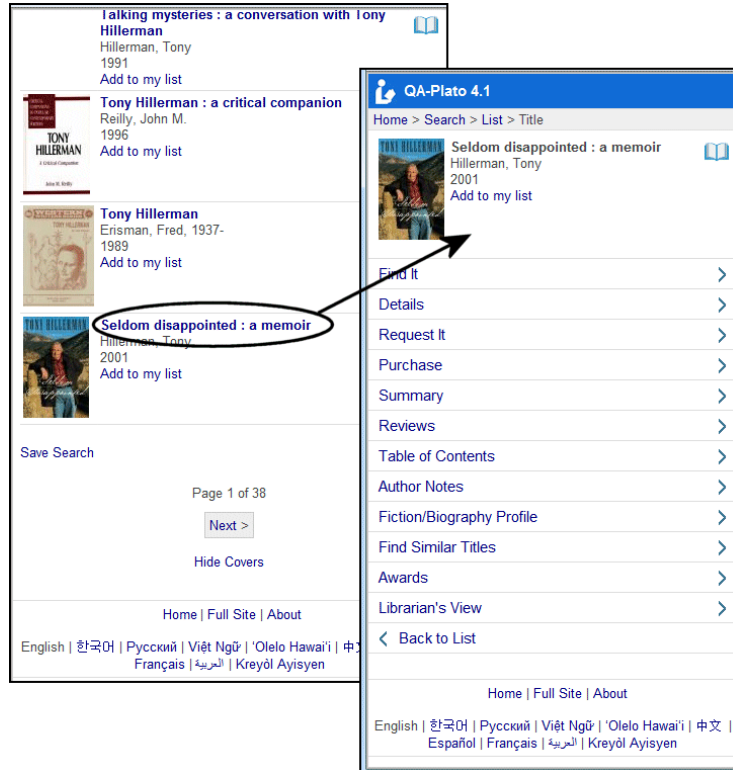


This setting is saved on the device until the user chooses to display the images again.

Title (Product) Page Links

Users click a title in the search results list to see more choices related to the individual title. The following links may be displayed on the title (product) page:

- **Find It** - Availability information. See [“Title Link: Find It”](#) on page 352.
- **Details** - Bibliographic information. See [“Title Link: Details”](#) on page 355.
- **Request It** - Place a hold request. See [“Title Link: Request It”](#) on page 356.
- **Purchase** - Purchase the title from a vendor’s Web site. See [“Title Link: Purchase or Buy It Now”](#) on page 357.
- **Enriched content links** - Third-party content such as summaries and reviews. See [“Title Links: Enriched Content”](#) on page 358.
- **Librarian’s View** - Display the MARC view for the title. See [“Title Link: Librarian’s \(MARC\) View”](#) on page 361.

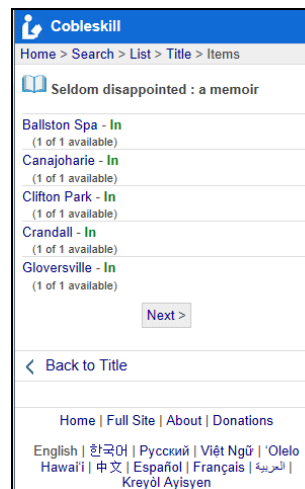
**Note:**

You can configure the title information displayed in this view. See “Configuring the Mobile PAC Title Display” on page 363.

You can set the order of links on this page. See “Set up the Mobile PAC title (product) page” on page 361.

Title Link: Find It

This link displays summary availability information for items linked to the title. Like other Mobile PAC displays, the list uses the branch **Display Name** defined in the organization record.



A branch is listed if it is selected for display as a system holding in the Item Availability Display Order policy table for the connection organization, and the branch is the Assigned Branch for at least one item linked to the title. Settings in the Item Availability Display Order policy table also determine the order in which branches are listed. (If at least one item is In at the branch, the summary availability information also includes the word In.) For more information about these settings, which are shared with Polaris PowerPAC, see [“Setting Up Local and System Availability”](#) on page 176.

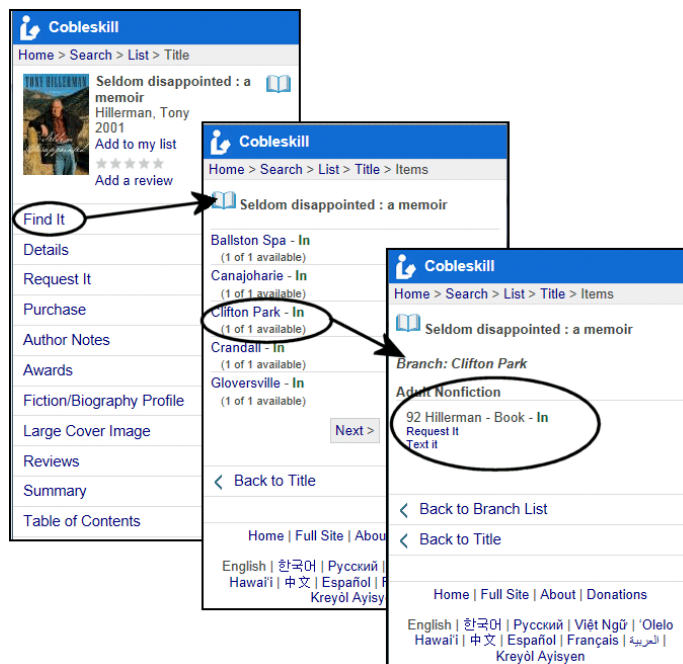
The user can click a branch name to see the call number and other information, if enabled, for that branch’s items. If item-level or first-available-copy requests are enabled, a **Request It** link is also available.

Note:

You can suppress the Find It and Request links for designated types of material. See [“Suppressing Request and Availability Options”](#) on page 169.

Note:

For more information about placing requests from Mobile PAC, see [“Title Link: Request It”](#) on page 356. For information about enabling item-level or first-available-copy requests, see [“Defining Hold Processing Options”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.



The connection organization’s settings for the following PAC profiles determine what information is displayed for each item:

Important:

These settings also affect Polaris PowerPAC.

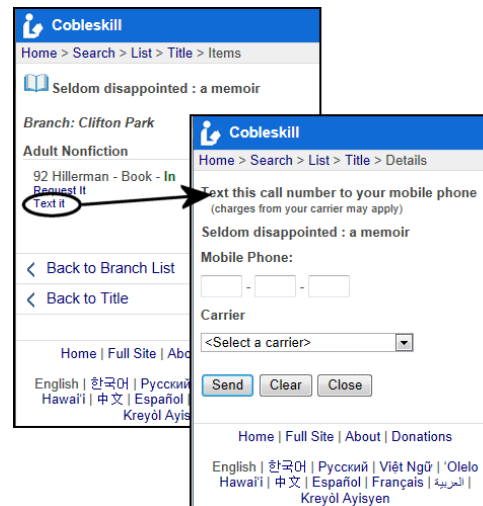
- **Item Availability: Display detailed item status** - Set to **Yes** to display the specific item circulation status of unavailable items, such as **Lost** or **Bindery**. Set to **No** to display **No items available** or your own text for items that are unavailable for circulation for any reason. (You must also set **Item Availability: Display status** to **Yes**.)
- **Item Availability: Display due date in detailed item status** - If you set **Item Availability: Display detailed item status** to **Yes**, you can set this parameter to display or suppress the item's due date. (If you set **Item Availability: Display detailed item status** to **No**, you cannot display the due date.)
- **Item Availability: Display status** - Set to **Yes** to display an item's availability status. If you set this to **Yes**, also review the setting for **Item Availability: Display detailed item status**.
- **Item Availability: Display shelf location** - Set to **Yes** to display an item's shelf location.
- **Item Availability: Display type** - Set to **Yes** to display the item's material type.
- **Suppress item display** - Specify item circulation statuses that should prevent an item from being displayed in search results. When a circulation status is selected, items with this status are not displayed in PAC even when **Display in PAC** is checked in the item record.

For more information, see “[Displaying PAC Search Results](#)” on page 132.

Text It in Mobile PAC

From the Mobile PAC item availability display, a patron can send an e-mail text message containing the item call number to his or mobile phone via the mobile phone carrier's SMTP e-mail service.

When you enable this feature, a **Text It** link appears for each item in the item availability display for Mobile PAC search results. When the patron clicks **Text It**, the Text It form opens.

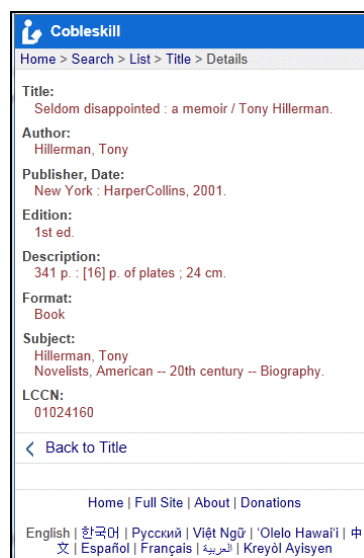


If the user is logged in and the patron record includes a phone number that has been designated for TXT notification, the **Mobile phone number** and **Carrier** fields are already filled in. If the user is not logged in, or is logged in but does not have a phone number designated for TXT notification in the patron record, the user enters the mobile phone number and selects a carrier from the list. The carrier options are set in the system-level database table **Mobile Phone Carriers**. When the patron clicks **Send**, the text message is sent to the specified mobile phone.

To display the Text It link in Mobile PAC, set the PowerPAC profile **Item availability: "Text it" feature enabled** to **Yes** (the default setting). This setting also controls the feature in Polaris PowerPAC. For details, see ["Sending Call Numbers by Text Message"](#) on page 181.

Title Link: Details

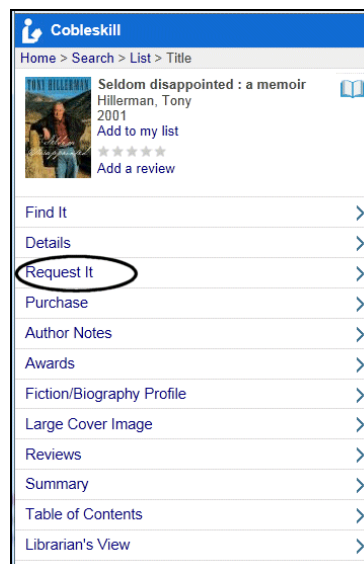
When the user clicks **Details** for a title, more bibliographic information is displayed.



The connection organization's settings for the Mobile PAC profile **Title display configure** control which bibliographic fields are displayed and their label text. For more information, see ["Configuring the Mobile PAC Title Display"](#) on page 363.

Title Link: Request It

The user clicks **Request It** for a title to place a title-level hold request.

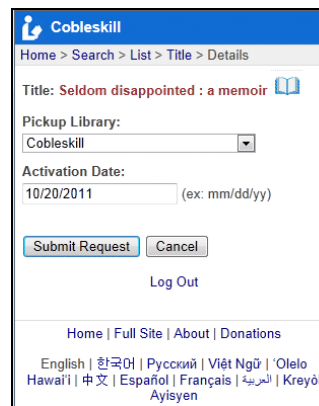


Note:

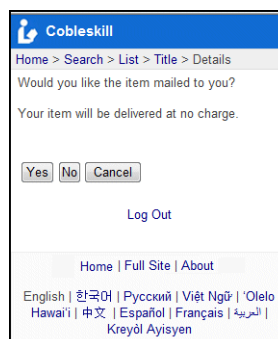
You can suppress the Request It link for designated types of material. See “[Suppressing Request and Availability Options](#)” on page 169.

Hold requests from Mobile PAC are enabled from and use the settings in the **Holds Options Request** parameter. For more information about these settings, see “[Defining Hold Processing Options](#)” in the *Polaris Patron Services Administration Guide 4.1R2*. Rules set for specific patron codes or specific items also apply to Polaris PowerPAC.

When the patron clicks the **Request It** link, the log-on page appears (see “[Patron Log-In Settings for Mobile PAC](#)” on page 383). After logging in, the patron selects a pickup location from a list of locations. The default location is the patron’s home library (registered branch).



Mobile PAC supports Borrow by Mail requests, and if these are enabled the patron can opt to have the requested item mailed instead of selecting a pick-up location. For more information about Borrow by Mail settings, see “[Setting Up Borrow by Mail Circulation](#)” in the *Polaris Patron Services Administration Guide 4.1R2*.



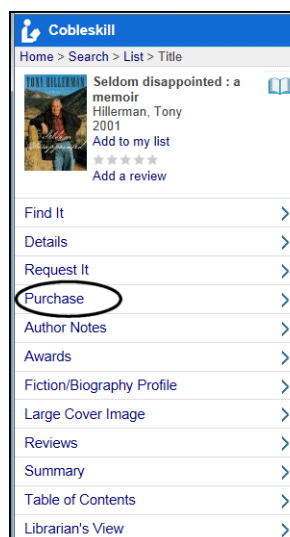
Note:

Item-level or first-available-copy requests can be placed from the detailed item availability page (see “[Title Link: Find It](#)” on page 352) if these types of requests are enabled in the Holds Options Request parameter.

The patron can then submit the request or cancel it. If the patron selects **Submit Request**, a hold request is sent to the library and a confirmation message is displayed if the request is successful. (If the request is not successful, the patron is informed that request cannot be placed and is advised to contact the library for more information.)

Title Link: Purchase or Buy It Now

A **Purchase** link is available in the Title page for a title in Mobile PAC search results. When the user clicks the link, a search is launched for the title in a specified vendor’s Web site. As in Polaris PowerPAC, the purchase transaction takes place on the vendor’s site. For more information, see “[Setting Up Purchase Links](#)” on page 240.



Mobile PAC also supports Polaris Bookstore, available by separate contract. Through Polaris Bookstore and Baker & Taylor Inc., your library can establish an online bookstore where patrons can purchase materials at a discount comparable to other major online retailers, and your library receives a portion of the sales as a donation. As in Polaris PowerPAC, if you enable both links, the **Buy It Now** link is displayed when the title is available at the Bookstore. The **Purchase** link is displayed when the title is unavailable at the Bookstore and the title has an ISBN. For more information about Polaris Bookstore, see “[Setting Up Polaris Bookstore](#)” on page 242.

To enable the **Purchase** link, **Buy It Now** link (if you have a contract), or both, use the PAC profile **Purchase options**. Your settings also apply to Polaris PowerPAC. See “[Enabling Online Book Purchases](#)” on page 239.

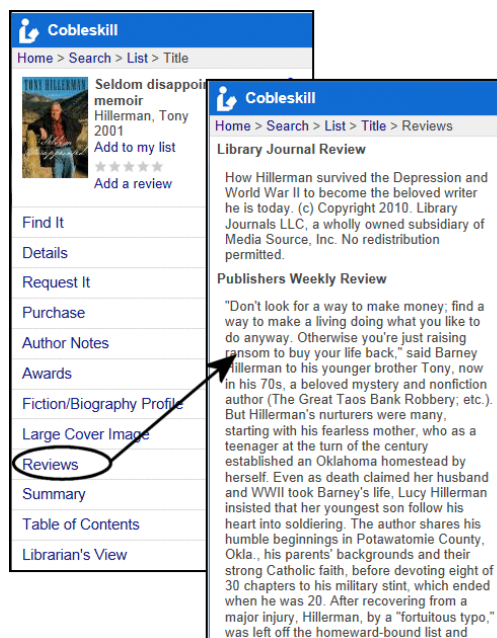
You can edit the **Purchase** and **Buy It Now** link labels using Polaris Language Editor (WebAdmin). The strings IDs are **MP_LBL_SEARCH_PURCHASE** and **MP_LBL_SEARCH_BUY_IT_NOW**.

Title Links: Enriched Content

Enriched content from third-party sources is available in Mobile PAC search results, from links in the title (product) page. The example shows Syndetics™ reviews.

Tip:

If you use NoveList or NoveList Select, and you run Mobile PAC in SSL mode, your NoveList and NoveList URLs must begin with <https://>. See “[Set up enriched data - EBSCO’s NoveList](#)” on page 227 for setup details.

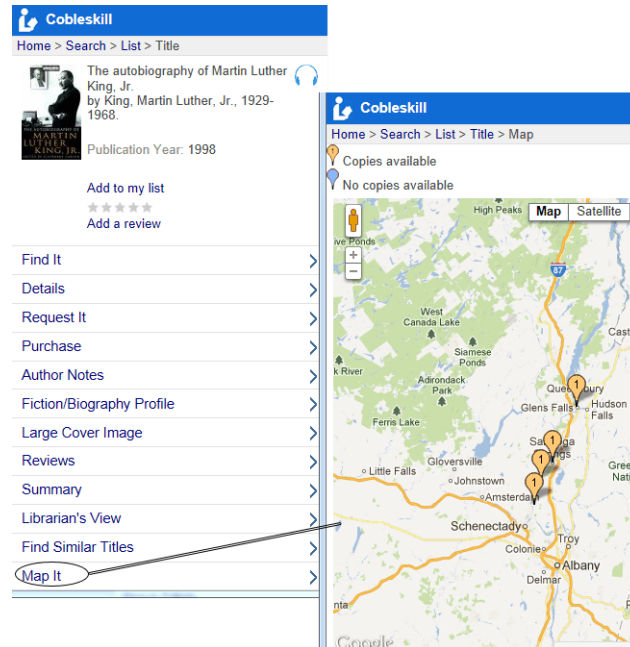


Mobile PAC shares enriched content settings with Polaris PowerPAC. For more information about setting up enriched data for PAC use, see “[Enabling Enriched Data](#)” on page 222.

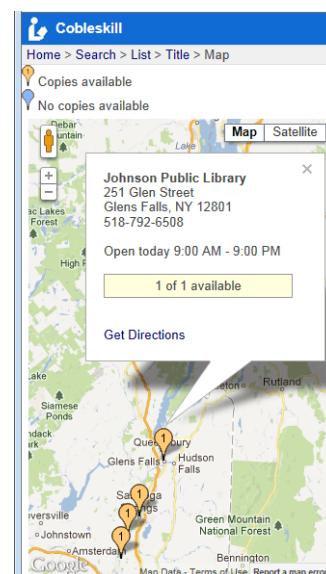
Title Link: Map It

Using the JavaScript interface provided by Google Maps™, Mobile PAC offers the Map It feature (also available in PowerPAC), which provides a visual guide to the location of items linked to titles in the patron's search results list. When you enable this feature, the Mobile PAC Map It link is available to users who have enabled JavaScript on their mobile devices.

When the user clicks **Map It** in the title product page (full display), a map displays bubble markers for branch locations that have linked items.



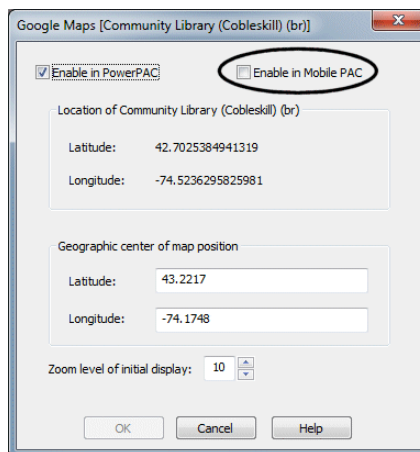
The user can place the cursor over a marker bubble to see the branch name, or click the branch marker to see the branch's address and hours.



When the user clicks **Get Directions** in the hours window, directions to the branch are available from any address. The user enters the address and clicks Go!. (If the user is logged in, the primary address from the patron record is already filled in for convenience, but it can be changed.)

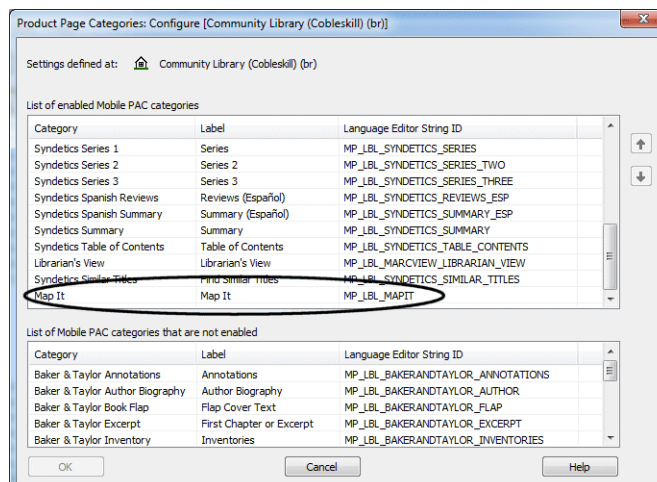
As in PowerPAC, the Mobile PAC Map It link is displayed for titles whose **# system items** count in the PAC brief display is greater than 0.

Use the PAC profile **Google Maps** in Polaris Administration; check the **Enable in Mobile PAC** box to enable Map It in Mobile PAC. The profile is available at the system, library, and branch levels.



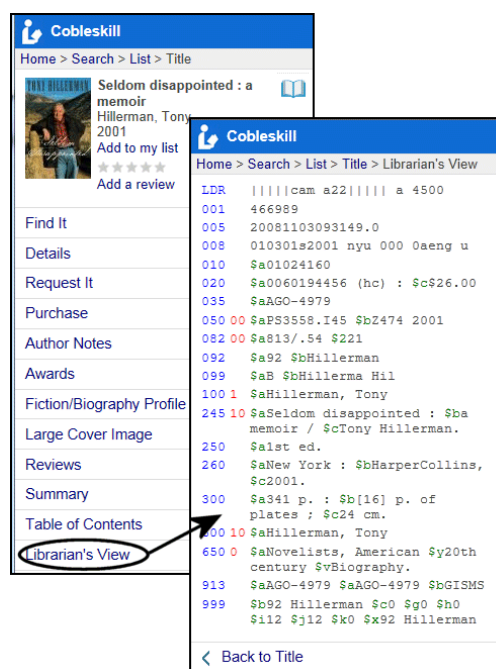
Mobile PAC and PowerPAC share the same geographic center and zoom level settings. For detailed information about these settings, see [“Map It \(Google Maps\) in PAC”](#) on page 189.

When you enable Map It for Mobile PAC, the link is automatically enabled for the Mobile PAC product page and placed by default at the end of the list for the enabled product page categories. You can change the position of the link on the page using the Mobile PAC profile **Product Page categories: Configure**. See [“Set up the Mobile PAC title \(product\) page”](#) on page 361.



Title Link: Librarian's (MARC) View

When the user clicks the **Librarian's View** link in the Title page for a title in Mobile PAC search results, the MARC record view is displayed.



You can choose to display or suppress the **Librarian's View** link with the PowerPAC profile **Librarians (MARC) view: Enable**. (This profile also affects Polaris PowerPAC). You can edit the **Librarian's View** link label using Polaris WebAdmin (Language Editor). The string IDs is **MP_LBL_MARCVIEW_LIBRARIAN_VIEW**.

1-2-3

Set up the Mobile PAC title (product) page

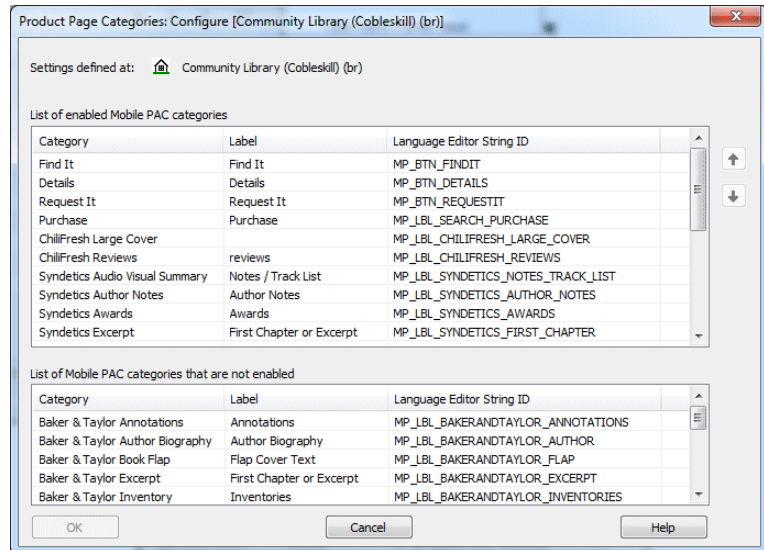
Follow these steps to determine the display order of links on the Mobile PAC title page.

Note:

You need the permission **Modify product page categories: Allow** to do this procedure.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **Mobile PAC** tab in the details view.
2. Double-click **Product page categories: Configure**.

The Product Page Categories: Configure dialog box opens. The top portion lists the categories (features) that have been enabled for the organization.



3. To change the display order, select the category and click the appropriate arrow at the side of the dialog box to move the category up or down in the display order.
4. Click **OK**.

Related Information

- **Editing category labels** - The Product Page Categories: Configure dialog box lists the language string ID for each category for use in Polaris WebAdmin (Language Editor), where you can search for and edit the link labels. For more information, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.
- **Enabling categories** - The bottom portion of the Product Page Categories: Configure dialog box lists the features that are possible to display on the product page, but have not been enabled for the organization. For information about setting up the features that can be displayed on the product page, see the following topics:
 - **Enriched content from third parties** - “[Enabling Enriched Data](#)” on page 222
 - **Librarian’s View** - Set the PowerPAC profile **Librarian’s (MARC) View: Enable** to **Yes**.
 - **Purchase/Buy It Now** - “[Title Link: Purchase or Buy It Now](#)” on page 357

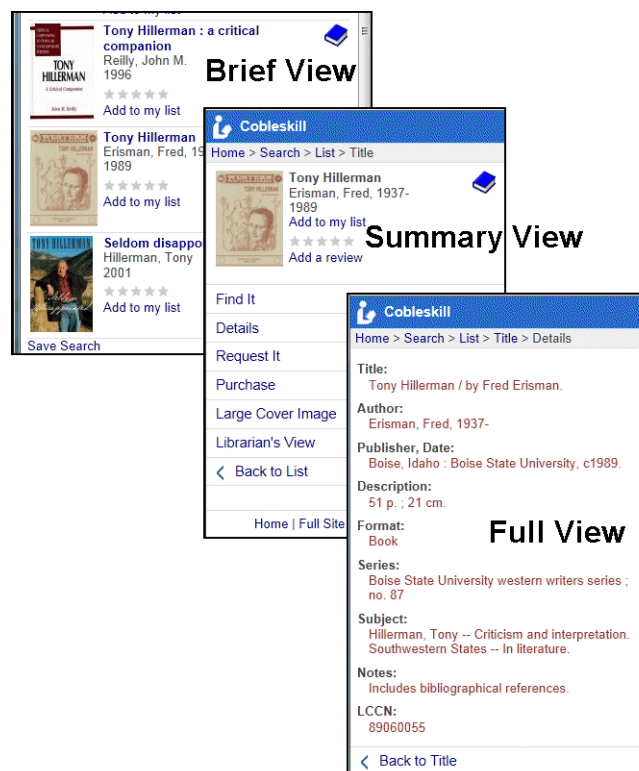
Note:

You can also configure the product page for Polaris PowerPAC, using a separate profile. See “[Configuring the PowerPAC Product Page](#)” on page 150.

Configuring the Mobile PAC Title Display

Using the Mobile PAC profile **Title Display: Configure**, you can do the following:

- Select which data elements (tags, subfields, and indicators) appear in the brief, summary, and full displays. The brief display is the information shown in initial search results. The summary information is displayed on the Mobile PAC product page for title. The full display appears when the user clicks **Details** on the product page.



- Show multiple instances of a single tag in the brief display: for example, multiple 856 fields.
- Specify different elements for monographs and serials.
- Edit existing data elements.
- Set the display order of data elements.
- Specify a custom label for each data element, and create translated versions of the data labels for languages you have licensed.
- Specify additional data elements by selecting the tags, indicator values, and subfields to include in each custom entity.
- Copy all these settings from any organization to any other organization.

The system uses the connection organization's settings for the Mobile PAC profile **Title Display: Configure**, but the setup workflow is the same as that for PowerPAC. For detailed procedures, see [“Configuring the PowerPAC Title Display”](#) on page 133.

For libraries that use Polaris Community Profiles, a separate profile controls the Mobile PAC display of community information results, and a separate set of data elements is available for your community information displays. For details, see [“Configuring the PAC Community Results Display”](#) in the *Polaris Community Profiles Guide 4.1R2*.

The tables show the default title display configuration for Mobile PAC bibliographic search results.

<i>Mobile PAC Brief Display - Monograph</i>			<i>Mobile PAC Brief Display - Serial</i>		
<i>Entity</i>	<i>Display Order</i>	<i>Label</i>	<i>Entity</i>	<i>Display Order</i>	<i>Label</i>
Primary Title	1	Title:	Primary Title	1	Title:
Primary Author	2	Author:	Primary Author	2	Author:
Publication Year	3	Publication Year:	Publication Year	3	Publication Year:
Web Link (Short)	4	Web Site:	Web Link (Short)	4	Web Site:

<i>Mobile PAC Summary Display - Monograph</i>			<i>Mobile PAC Summary Display - Serial</i>		
<i>Entity</i>	<i>Display Order</i>	<i>Label</i>	<i>Entity</i>	<i>Display Order</i>	<i>Label</i>
Primary Title	1	Title:	Primary Title	1	Title:
Primary Author	2	Author:	Primary Author	2	Author:
Publication Year	3	Publication Year:	Publication Year	3	Publication Year:
Web Link (Short)	4	Web Site:	Web Link (Short)	4	Web Site:

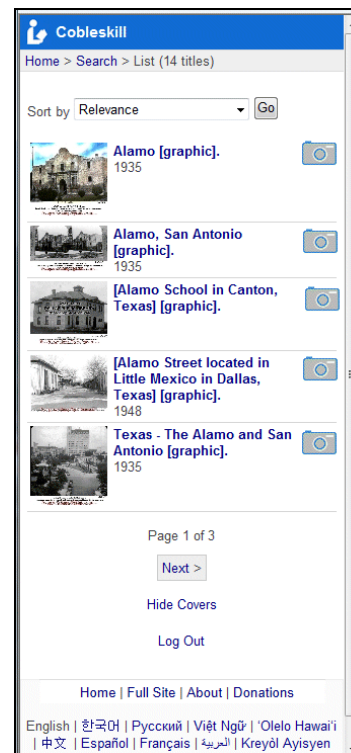
<i>Mobile PAC Full Display - Monograph</i>			<i>Mobile PAC Full Display - Serial</i>		
<i>Entity</i>	<i>Display Order</i>	<i>Label</i>	<i>Entity</i>	<i>Display Order</i>	<i>Label</i>
Type of Material	1	Format:	Type of Material	1	Format:
Uniform Title (Long)	2	Uniform Title:	Uniform Title (Long)	2	Uniform Title:
Author (Long)	3	Author:	Author (Long)	3	Author:
Title (Long)	4	Title:	Title (Long)	4	Title:
Edition (Long)	5	Edition:	Edition (Long)	5	Edition:
Publisher (Long)	6	Publisher, Date:	Publisher (Long)	6	Publisher, Date:

<i>Mobile PAC Full Display - Monograph</i>			<i>Mobile PAC Full Display - Serial</i>		
Description (Long)	7	Description:	Description (Long)	7	Description:
Summary (Long)	8	Summary:	Summary (Long)	8	Summary:
Target Audience Note (Long)	9	Target Audience Note:	Target Audience Note (Long)	9	Target Audience Note:
Series (Long)	10	Series:	Series (Long)	10	Series:
Volume (Long)	11	Volume:	Volume (Long)	11	Volume:
Frequency (Long)	12	Frequency:	Frequency (Long)	12	Frequency:
Subjects	13	Subjects:	Subjects	13	Subjects:
Other Author (Long)	14	Other Author:	Other Author (Long)	14	Other Author:
Other Title (Long)	15	Other Title:	Other Title (Long)	15	Other Title:
Former Title (Long)	16	Former Title:	Former Title (Long)	16	Former Title:
Later Title (Long)	17	Later Title:	Later Title (Long)	17	Later Title:
Web Link (Long)	18	Web Site:	Web Link (Long)	18	Web Site:
LCCN (Long)	19	LCCN:	LCCN (Long)	19	LCCN:
ISBN (Long)	20	ISBN:	ISBN (Long)	20	ISBN:
ISSN (Long)	21	ISSN:	ISSN (Long)	21	ISSN:
OCLC Control Number	22	Other Number:	OCLC Control Number	22	Other Number:
STRN (Long)	23	STRN:	STRN (Long)	23	STRN:
GPO (Long)	24	GPO Item No.:	GPO (Long)	24	GPO Item No.:
CODEN (Long)	25	Label: CODEN:	CODEN (Long)	25	Label: CODEN:
Total System Item Count	26	System Availability:	Total System Item Count	26	System Availability:
Hold Request Count	27	Current Holds:	Hold Request Count	27	Current Holds:
Control Number	28	Control Number:	Control Number	28	Control Number:
Bibliographic Call Number	29	Call Number:	Bibliographic Call Number	29	Call Number:
Course Reserve Count	30	Course Reserves:	Course Reserve Count	30	Course Reserves:
Medium (Long)	31	Medium:	Medium (Long)	31	Medium:

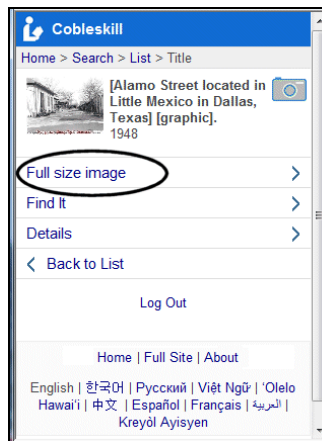
Polaris[®] Fusion[™] Results

Mobile PAC supports Polaris Fusion (digital collection) searches and results. Materials in the digital collections may include images, video clips, sound files, and text files. To limit search results to digital collection materials, the user selects **Digital Collection** in the **Limit by** box on the Advanced search page (see “Advanced Search - When the user clicks Advanced Search on the Search page, the advanced search page opens.” on page 344).

In the search results, the digital collection icon  identifies digital collection materials.



When the user clicks a title, more choices related to the title are displayed. Digital collection titles with a single linked resource, such as one image, offer a link to that resource.



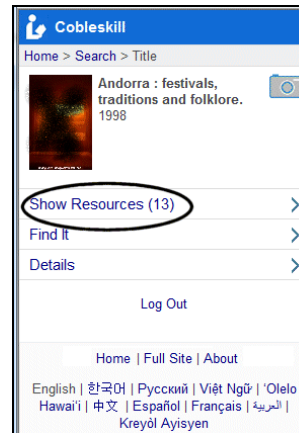
If there are no access restrictions, the user can click the link to see the resource.



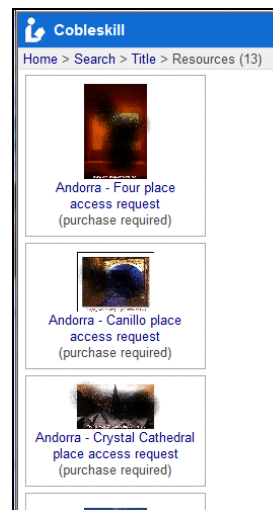
Note:

Image resources open in the same browser window. Other types of digital resources open in a new browser window to ease navigation back to Mobile PAC.

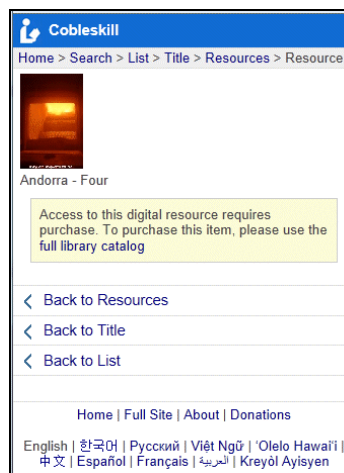
When the user clicks a title with multiple linked resources, the title page displays a **Show Resources** link.



The user clicks this link to see the attached resources.



If a resource has restricted access, the user can request access by clicking the **place access request** link. If purchase is required, the access request page offers a link to the full library catalog.



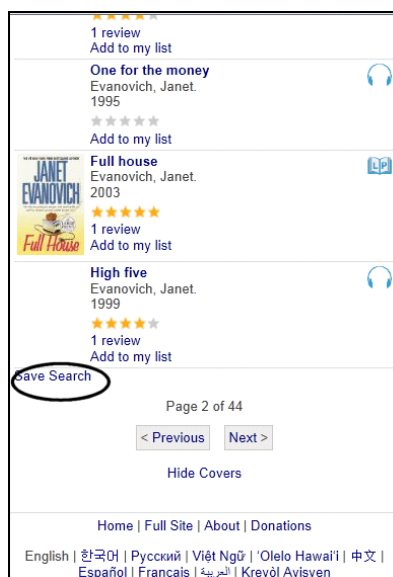
When the user clicks the full catalog link, the same search is launched and the title is displayed in Polaris PowerPAC. Like the **Full Site** link at the bottom of Mobile PAC pages, the **full library catalog** is the address specified in the parameter **URL of the PowerPAC's root** for the Web server in Polaris Administration. See "[Set the Full Site link](#)" on page 331.

For more information about setting up and using Polaris Fusion to manage digital collections, see the *Polaris Fusion Guide*.

Saved Searches (Search Agent) in Mobile PAC

Registered patrons can save searches in Mobile PAC, and have the saved searches run automatically either weekly or monthly. Each search run looks for results that are new since the last run. The results are automatically sent to an e-mail address the patron specifies. By accessing their patron accounts, patrons can view, edit, and delete saved searches, or run them manually. (These features are also available in Polaris PowerPAC).

To save a search, the patron first searches the catalog using the criteria he wants for the saved search, then clicks **Save Search** at the bottom of any page in the search results.



If the patron has not logged on, the Log On page opens. After the patron logs on, he names the search, types an optional note, sets the notification criteria and number of times to run the search, and clicks **Save**.

Cobleskill
Home > My Account > Saved Searches > Saved Search

Name:

Criteria:
FIND AU={freetext}evanovich/{freetext}

Note:

Email:
liverpoolhistorian@yahoo

Format:
HTML

Frequency:
Monthly

Email if no results:

No of times to run:
3

Save

Back to List

Log Out

All saved searches sent to the same patron e-mail address must be in the same e-mail format. If the patron specifies a format different from existing saved searches when saving a new search, a message provides the options to specify a different format for the new search or to change all the others.

Saved searches are available to delete, edit, or run manually from the patron account. On the My Account page, the patron clicks **Saved Searches** to access the list.

Cobleskill
Home > My Account

Farsaci, Timothy James
987654321
Cobleskill
Expiration Date: 2/10/2013
315-451-3639
liverpoolhistorian@yahoo.com
Current blocks:
Patron has exceeded the maximum number of overdue items permitted.
Patron has exceeded the maximum number of overdue items permitted.
Patron has outstanding fines Block

0 Messages

3 Items checked out (3 overdue)

2 Hold Requests

Fines And Fees (owes \$58.19)

2 Saved Searches

17 Reading History

Update Account and Preferences

Change Logon

Saved Lists

Log Out

Cobleskill
Home > My Account > Saved Searches (2 Items)

Carl Hiaasen
Of Results: 21

Evanovich
Of Results: 213

Delete

Page 1 of 1

Log Out

On the Saved Searches page, the patron can check searches to delete, or select a search name to edit the settings or run the search manually.

Cobleskill
Home > My Account > Saved Searches > Saved Search

Name:
Evanovich

Criteria:
FIND AU={(freetext)evanovich/(freetext)}

Note:
Large print

Email:
liverpoolhistorian@yahoo.

Format:
HTML

Frequency:
Monthly

Email if no results:

No of times to run:
3

Save Search Reset Search

[Back to List](#)

Note:

As in Polaris PowerPAC, the patron cannot edit the search criteria. Instead, the patron sets up and saves a new search, and deletes the old one if necessary.

See the following topic:

- [“Set up saved searches for Mobile PAC”](#) on page 372

1-2-3

Set up saved searches for Mobile PAC

Follow these steps to allow patrons to save searches in Mobile PAC.

1. Set the PAC profile **Search agent: Enable** to **Yes**.
2. Set up the PAC parameter **Search agent parameters**.

For detailed information about search agent settings, see [“PAC Search Agent \(Saved Searches\)”](#) on page 87. Search agent settings also apply to Polaris PowerPAC.

You can edit text strings related to Mobile PAC save search functions using Polaris WebAdmin (Language Editor). For more information about using WebAdmin, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

Title Lists in Mobile PAC

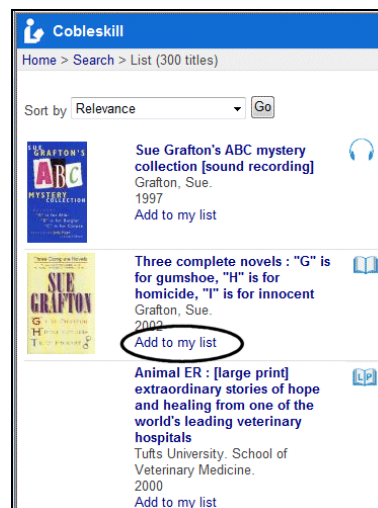
Patrons using Mobile PAC can develop and save title lists from search results. From the working title list, individual title information or the whole list can be sent by e-mail, and working title lists can be saved to the patron account. Individual titles can be copied or moved among a patron's title lists, and patrons can place requests and view availability information and enriched content for titles in a title list, as well as send multiple titles or the entire saved list by e-mail.

See the following topics:

- “Creating a Working List” on page 373
- “E-Mail Options” on page 376
- “Saving Lists” on page 377
- “Copying and Moving Titles Among Lists” on page 378
- “Title Details” on page 379
- “Setting Up Mobile PAC Title Lists” on page 380

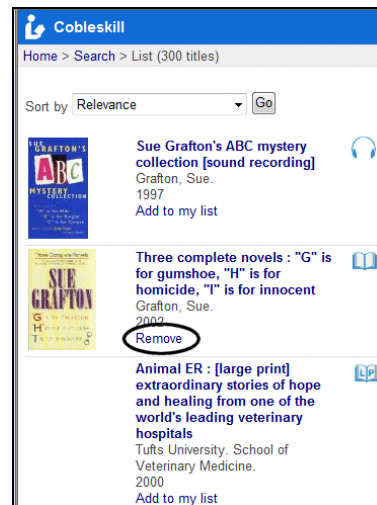
Creating a Working List

To create a working list, the user clicks the **Add to my list** link for a title returned in search results. The link is displayed in the initial results list and in the detailed view for a title.

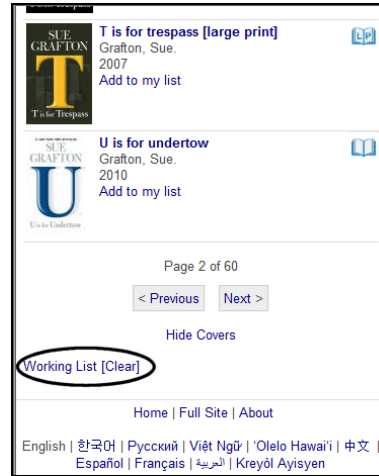




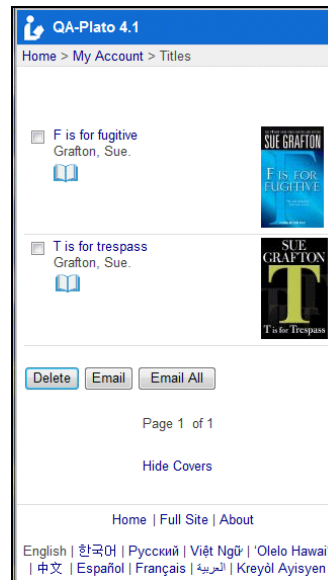
After the title has been added, the link changes to **Remove**, which the user can click to remove the title from the working list.



When at least one title has been added to the working list, the bottom of each search results page displays links to access or clear the working list.

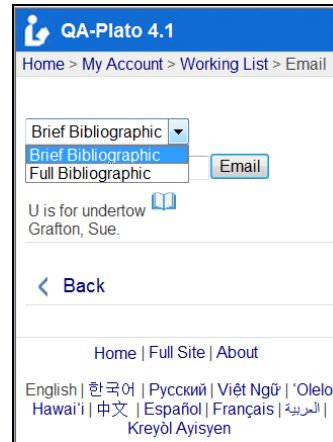


The user clicks **Working list** to display the working list.

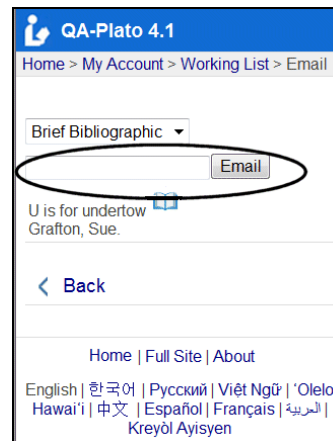


E-Mail Options

From the working list page, the user can check and delete individual titles from the working list, check individual titles and click **Email**, or click **Email All** to send the entire list. When the user clicks **Email** or **Email All**, the e-mail page is displayed. Format options include **Brief Bibliographic** and **Full Bibliographic**.

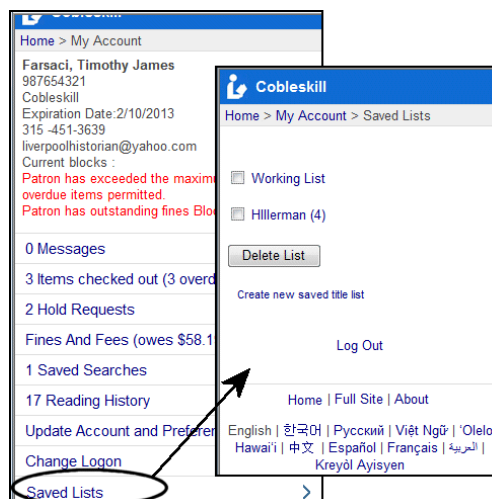


After selecting a format, the user types an e-mail address and clicks **Email**.

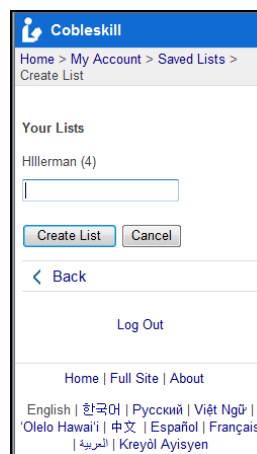


Saving Lists

Logged-in patrons can access the working list and any previously saved lists by clicking **My Lists** on the My Account page. The Saved Lists page is displayed.



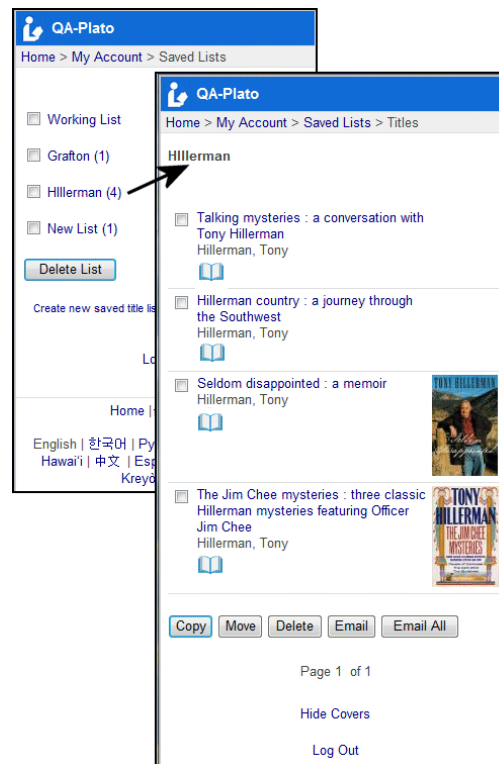
The working list is available for the current session. To create a new saved list, the patron clicks **Create new saved title list**. The Create List page opens, where the patron can name and save the new list.



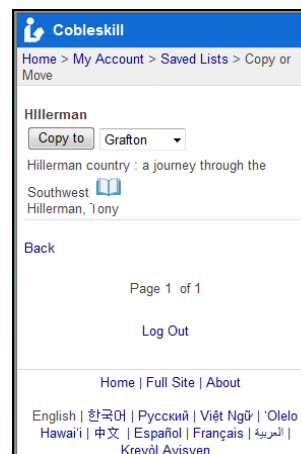
The new list is saved with no titles in it. Titles can be copied or moved from the working list or an existing saved list to the new list (or to any other saved list.)

Copying and Moving Titles Among Lists

From the Saved Lists page, the patron opens the list that contains the title to be copied or moved.



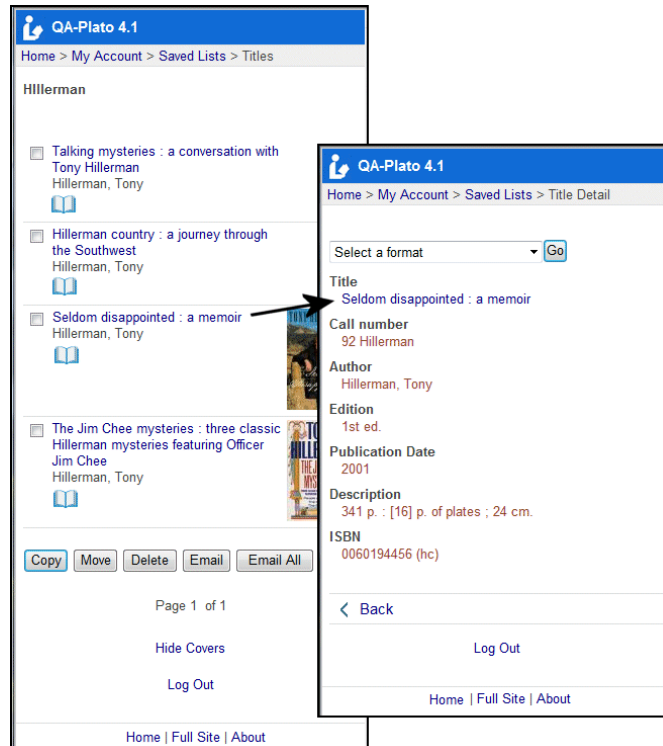
From the list of titles, the patron checks the title or titles and clicks **Copy** or **Move**. The Copy or Move page opens.



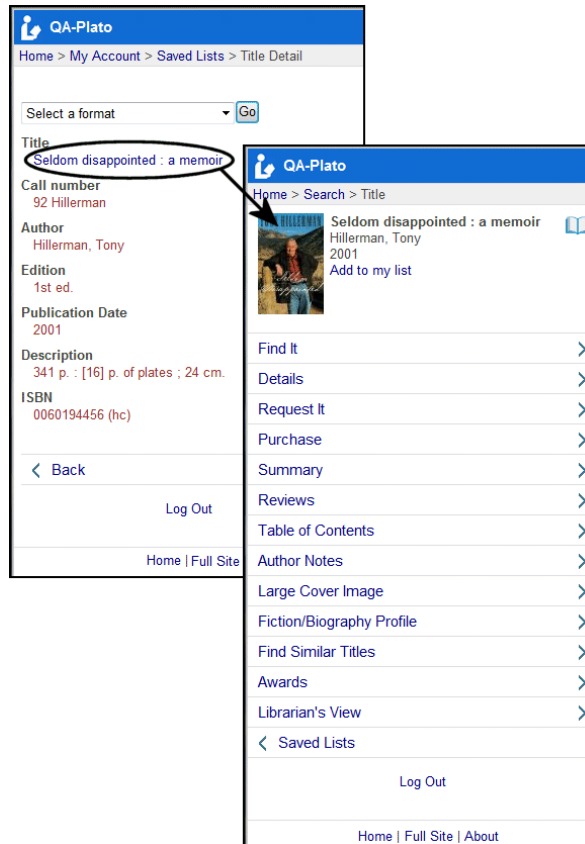
The patron chooses a destination list from the saved lists in the patron account, and clicks **Copy to** or **Move to**. The selected title is copied or moved to the destination list.

Title Details

When the patron clicks a title in the title list, the Title Detail page opens.



From the Title Detail page, the patron can select a display format or click the title link for further options on the product page; for example, viewing availability information, viewing detailed bibliographic information, placing a hold request on the title, viewing enriched data.



Setting Up Mobile PAC Title Lists

To provide the title list option in Mobile PAC, set the PowerPAC profile **Title list: Enable** to **Yes** in Polaris Administration. To allow patrons to e-mail selected titles or entire lists, set the PowerPAC profile **Title list: Email** to **Yes**. These settings also apply to Polaris PowerPAC. See [“Enabling PAC Title Lists”](#) on page 197.

You can edit text strings related to Mobile PAC title lists using Polaris Language Editor (WebAdmin). For more information about using the Language Editor, see the *Polaris Language Editor Guide* or Language Editor online Help.

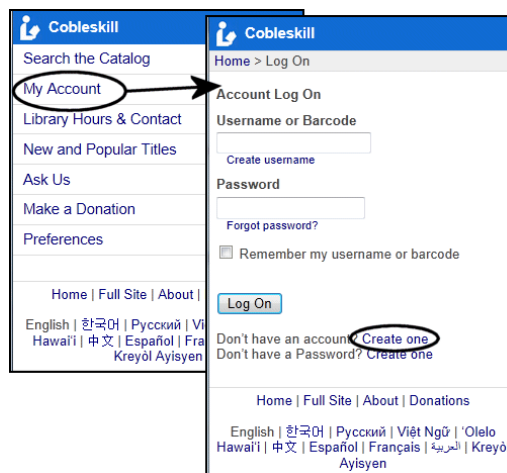
Patron Registration in Mobile PAC

Mobile PAC supports online self-registration. To make this feature available and set self-registration options, use the PAC profile **Patron access options**. (Your settings for this profile also control self-registration for Polaris PowerPAC.) For more information, see “[Set up online patron self-registration](#)” on page 258.

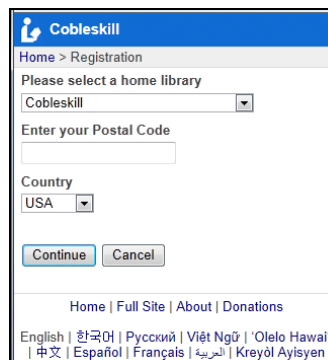
When online self-registration is enabled and the user clicks **My Account**, a **Create one** link is displayed on the log-on page.

Note:

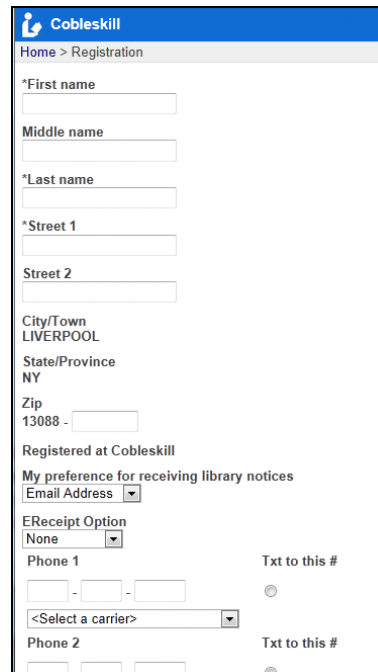
To make the **My Account** link available, set the Mobile PAC profile **Navigation: Patron account** to **Yes**. See “[Patron Account \(My Account\) in Mobile PAC](#)” on page 387.



Self-registration in Mobile PAC is similar to Polaris PowerPAC functionality. When the user clicks the registration link, the first screen displays the home library and postal code page.



The user selects a registration branch, enters the postal code, and selects a country. When the user clicks continue, the registration screen appears. (The illustration shows a portion of this screen.)



The screenshot shows a mobile application interface for Cobleskill. The title bar is blue with the Cobleskill logo and name. Below the title bar, the breadcrumb "Home > Registration" is visible. The form contains the following fields and options:

- *First name (text input)
- Middle name (text input)
- *Last name (text input)
- *Street 1 (text input)
- Street 2 (text input)
- City/Town: LIVERPOOL
- State/Province: NY
- Zip: 13088 - (text input)
- Registered at Cobleskill
- My preference for receiving library notices: Email Address (dropdown menu)
- EReceipt Option: None (dropdown menu)
- Phone 1: (text input) Txt to this # (radio button)
- <Select a carrier> (dropdown menu)
- Phone 2: (text input) Txt to this # (radio button)

Required fields, verification blocks, recipient's e-mail address, and other aspects of self-registration are set in the PAC profile **Patron access options**. (You can also provide the option to receive renewal receipts by e-mail, TXT message, or both. See ["Setting Up eReceipts"](#) in the *Polaris Patron Services Administration Guide 4.1R2*.)

Note:

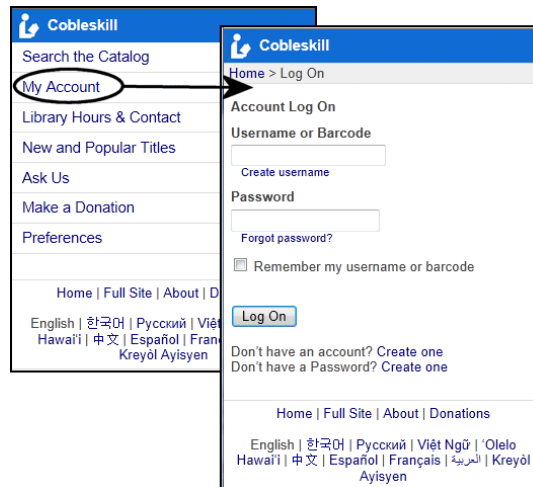
If the preferred notification method is set to e-mail, an e-mail address must be supplied. If the preferred method is phone, the patron must indicate the phone number to use for notification. If the patron chooses TXT Messaging, the patron must indicate the phone number to be used for TXT messages, and select a carrier for that number.

Patron Log-In Settings for Mobile PAC

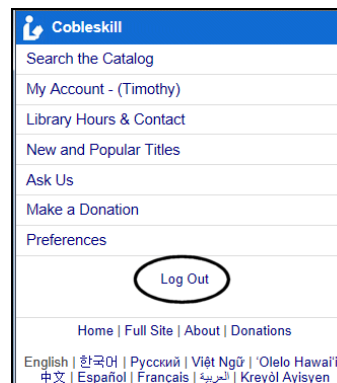
Mobile PAC users must log in to their patron accounts to place a hold request or access account information.

Note:

To make the **My Account** link available, set the Mobile PAC profile **Navigation: Patron account** to **Yes**. See “**Patron Account (My Account) in Mobile PAC**” on page 387.



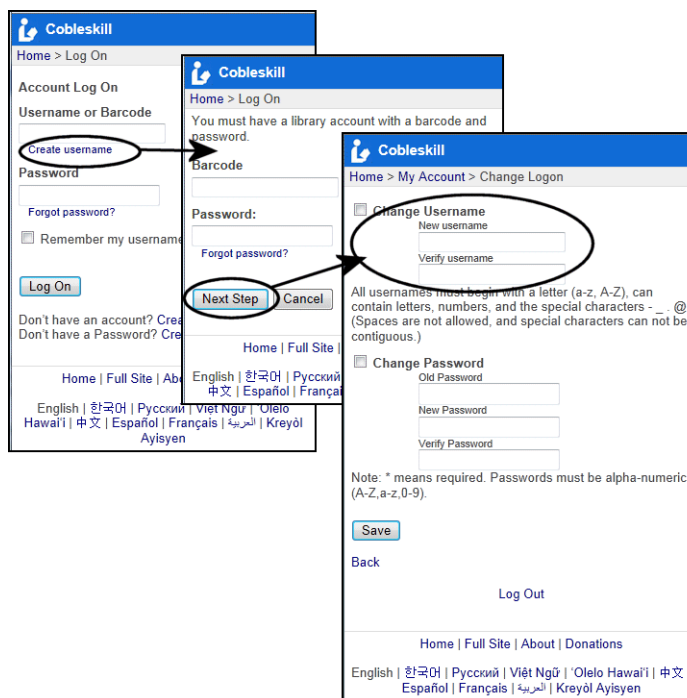
Once logged in, the patron stays logged in until he or she deliberately logs out, disconnects from the Mobile PAC site, or is inactive for 20 minutes. When the patron is logged in, a **Log Out** link is available on every page.



When the patron logs out, the Mobile PAC home page is displayed.

User Names

Mobile PAC accepts user names as well as patron account barcodes, if patron user names are enabled for PAC use in Polaris Administration. For more information, see “[Set patron password and user name options](#)” on page 262. The same PAC setting displays a link on the log-in page to allow patrons who have a barcode and password to set up the user name.



Remember Me

The **Remember me** check box is available on the log-in screen by default. When the patron checks this box and logs in, the user name or barcode the patron entered is preserved from session to session by a cookie on the patron’s device. The next time the patron connects to Mobile PAC and chooses to log in, the information is already filled in. The cookie expires after one month. The patron must always enter the password, and can choose to clear the **Remember me** check box.

Note:

Some browsers may retain the user name or barcode regardless of the Mobile PAC **Remember me** feature, depending on auto-save, auto-fill or other settings in the browser.

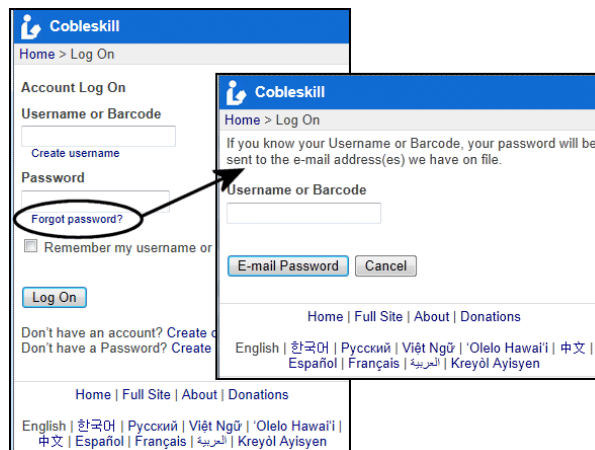
In Polaris Administration, the Mobile PAC profile **Remember me: Enabled** controls whether this feature is available. The profile is available at the system level. If you set the profile to **No**, the **Remember me** check box does not appear on the log-in screen.

Log-In Attempt Limits

You can limit the number of times a patron can attempt to log in before being forced to wait five minutes. In Polaris Administration, use the system-level PAC profile **Login retries** to enable or disable the limit and set the number (5-99) of attempts allowed. By default, the limit is enabled and five attempts are allowed. These settings also apply to Polaris PowerPAC.

Forgotten Passwords

Mobile PAC supports a **Forgot password?** link on the Account Log On page that appears when the patron selects a feature that requires log-on. When the patron selects the link, a page opens where the patron supplies the username or barcode.

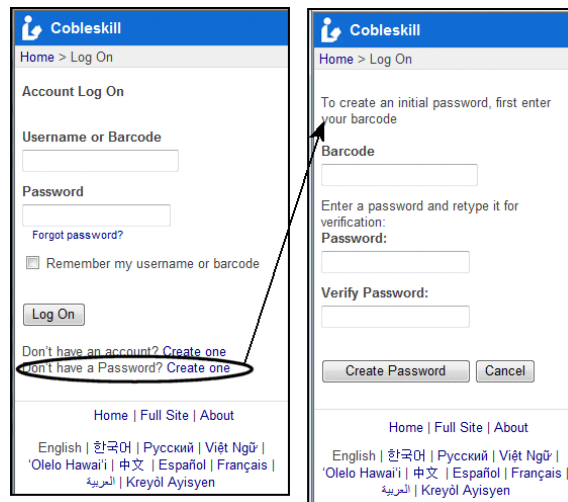


When the patron selects the **E-mail Password** button, an e-mail message containing the patron password is sent to both the primary and alternate e-mail addresses in the patron record. If no e-mail address is present in the patron record, the system displays an error message.

To make this feature available, open the PAC profile **Patron access options** at the system level, and select (check) **E-mail forgotten password** on the Log In tabbed page. Your setting for this feature also applies to Polaris PowerPAC and Polaris ExpressCheck. For more information, see [“Set up online patron self-registration”](#) on page 258.

Creating Passwords

You can allow patrons to create a password for an existing account where no password exists (a situation that may occur when accounts were created before passwords were necessary). A link on the log-in page allows patrons to set up and verify a password.



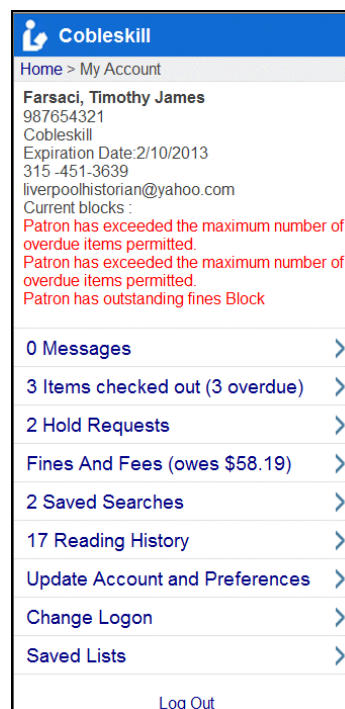
To enable this feature, open the PAC profile **Patron access options** at the system, library, or branch level. On the Log In tabbed page, select (check) **Display prompt for new password**. This setting affects both Polaris PowerPAC and Mobile PAC.

Active Directory Log-On to Mobile PAC

You can allow log-on to PAC using Active Directory credentials instead of the Polaris patron barcode or username and password. This feature is particularly suitable in academic settings, enabling students to authenticate into Polaris PowerPAC and Mobile PAC using their campus network credentials established in Active Directory. For details, see “[Active Directory Log-On to PAC](#)” on page 250.

Patron Account (My Account) in Mobile PAC

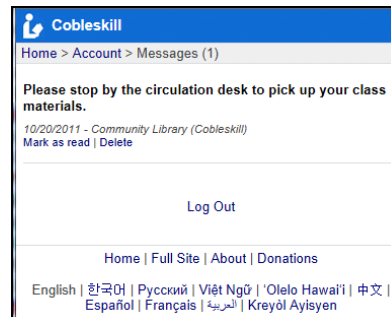
To make the **My Account** link available, set the Mobile PAC profile **Navigation: Patron account** to **Yes**. This profile is available at the system, library, and branch levels. After the patron clicks the **My Account** link and logs in, the Account Summary screen opens.



The top portion of the screen displays account information: patron name, barcode, registered branch, account expiration date, telephone number, e-mail address, and any current blocks on the account. The lower portion displays links to the other patron account pages if these are enabled: messages, items checked out, hold requests, fines and fees, saved searches, reading list (reading history), update account information and preferences, and saved title lists.

Messages

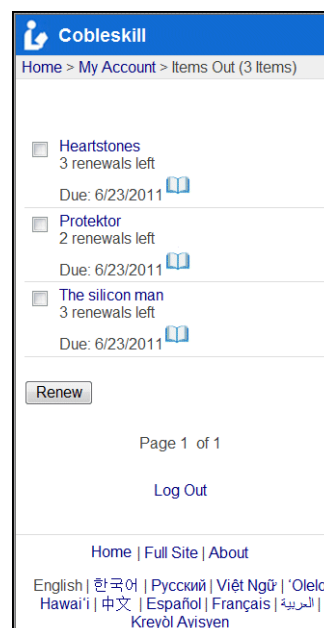
This link appears if you have enabled patron messages in the Polaris staff client. When the patron clicks the **Messages** link, current messages from the library are listed. The patron can mark messages as read and delete them.



For more information about setting up patron messaging in Polaris Administration, see “[Setting Up Patron Messages](#)” in the *Polaris Patron Services Administration Guide 4.1R2*. For information about posting messages to patron accounts, see “[Posting Patron Messages](#)” in the *Polaris Patron Services Guide 4.1R2*.

Items Checked Out

This patron account page lists all items currently checked out to the patron. To make this page available, set the Mobile PAC profile **Navigation: Items out** to **Yes**. This profile is available at the system, library, and branch levels. The system uses the setting for the patron’s registered branch.

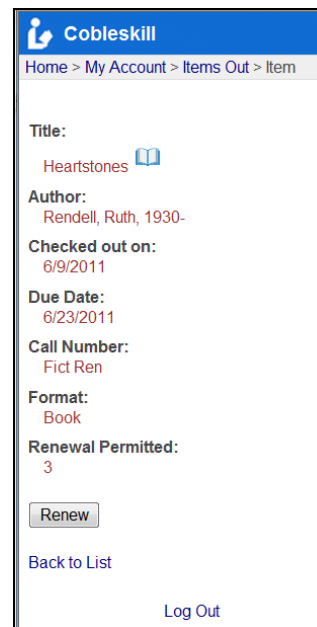


The patron can renew items by selecting the appropriate check boxes and clicking **Renew**. If there is a charge for renewal, the item is marked with a dollar icon \$. As in other Polaris PAC applications, if the renewal is allowed, a message with the new due date appears. If the renewal fails, an appropriate message appears.

Note:

Mobile PAC shares the Polaris Administration settings for renewals, renewal charges, and blocks on renewals with Polaris PowerPAC. To allow renewals, set the PAC profile **Patron access: Renewals**. To set charges for renewals, see “[Charging for Checkout and Renewal](#)” in the *Polaris Patron Services Administration Guide 4.1R2*. To set blocks on renewals from PAC (and ebook circulation), use the Patron Services profile **Patron-initiated circulation: Blocking conditions**. For more information, see “[Defining Patron-Initiated Circulation Blocks](#)” in the *Polaris Patron Services Administration Guide 4.1R2*.

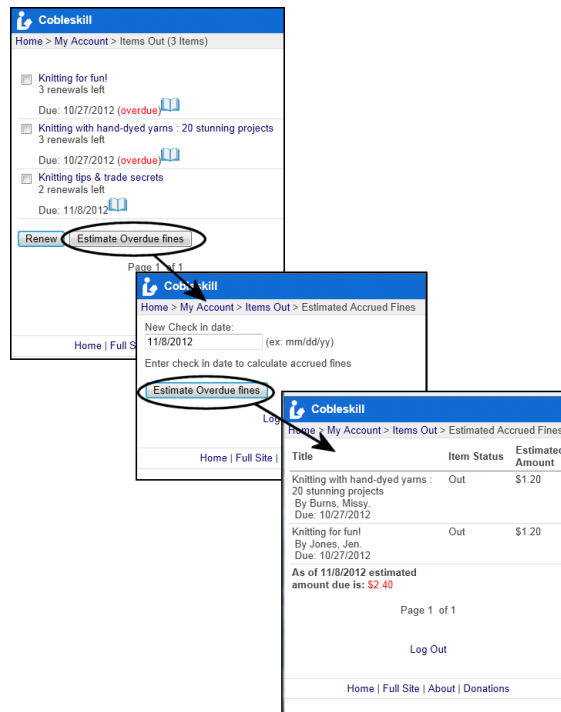
When you click an item in the Items Out list, detailed information about the item is displayed. The patron can also renew the item from this screen if the renewal is allowed.



If the patron has currently checked out overdue items, the Items Out list also offers an option to estimate overdue fines. The patron clicks **Estimate Overdue Fines** to display a view with a date option. The patron leaves today's date or specifies a date in the future and clicks **Estimate Overdue Fines**. The calculated accrued fines are displayed according to the specified date. (This feature is also available from the Fines and Fees page).

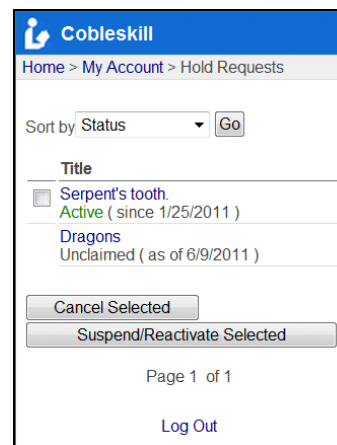
Note:

If the library has opted to include lost or claimed item overdue amounts in the estimate, these are included in the calculation although they are not displayed in the PAC patron account. For details about estimated accrued fines settings, see “[Calculating and Blocking for Estimated Accrued Fines](#)” in the *Polaris Patron Services Administration Guide 4.1R2*.



Hold Requests

This patron account page lists the patron's hold requests. To make this page available, set the Mobile PAC profile **Navigation: Requests** to **Yes**. This profile is available at the system, library, and branch levels. The system uses the setting for the patron's registered branch.



The patron can select requests with the appropriate status and cancel, suspend, or renew them.

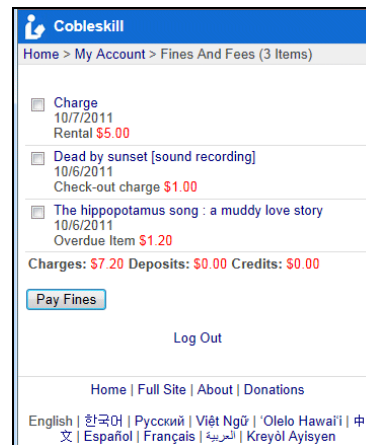
When the patron clicks a title in the Hold Requests list, detailed information about the request is displayed. The patron can also cancel, suspend, or reactivate a request with the appropriate status from this detail page.



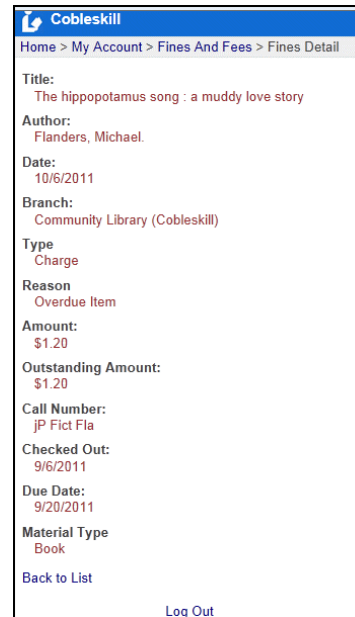
All Polaris Administration settings for PAC hold requests apply to Mobile PAC. For more information, see “[Defining Hold Processing Options](#)” in the *Polaris Patron Services Administration Guide 4.1R2*.

Fines And Fees

This patron account page summarizes fines and fees on the patron account. To make this page available, set the Mobile PAC profile **Navigation: Fines & Fees** to **Yes**. This profile is available at the system, library, and branch levels. The system uses the setting for the patron’s registered branch.



When the patron clicks an item in the Fines and Fees List, detailed information about the transaction is displayed.



If the connection branch and the patron's registered branch accept credit card payments for fines and fees, the patron can select and pay charges from the Fines and Fees page. See ["Credit Card Payments from Mobile PAC"](#) on page 396.

If the patron has overdue items, this page offers an option to estimate accrued fines, also available on the Items Out page. See ["Items Checked Out"](#) on page 388.

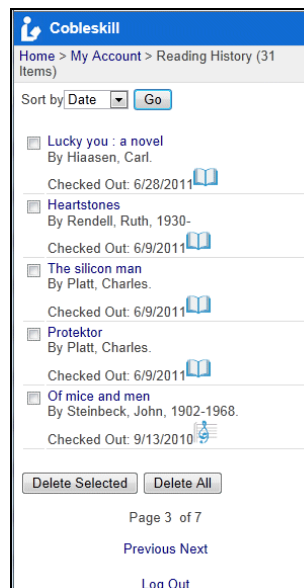
Saved Searches

This page shows the patrons' saved searches, if the Search Agent has been enabled in Polaris Administration. For details, ["Saved Searches \(Search Agent\) in Mobile PAC"](#) on page 370.

The patron can select saved searches and delete them from this page. When the patron clicks a search name, details about the saved search are displayed. The patron can edit the name, notes, notification e-mail address and format, frequency, and number of times to run the search, and save the settings. (The saved search cannot be run manually from Mobile PAC.)

Reading History

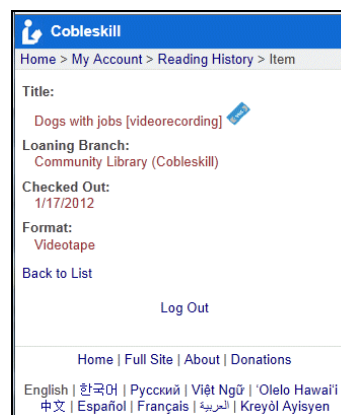
This page shows the patron's reading history, if reading histories have been enabled in Polaris Administration. See “[Setting Reading History Options](#)” in the *Polaris Patron Services Administration Guide 4.1R2*.



Tip:

If you enable reading histories, a patron can start or stop a reading history on the Update Account and Preferences page. See “[Update Account and Preferences](#)” on page 394. Reading histories are always enabled for Outreach Services patrons.

When the patron clicks a title in the reading history, detailed information about the title is displayed.



To allow patrons to remove individual items from the reading history, set the PAC profile **Patrons can remove reading history** to **Yes**. This setting also applies to Polaris PowerPAC. The system uses the setting for the patron's registered branch. The patron can check individual items and click **Delete Selected**, or click **Delete All**. When a patron removes an item from the reading history, the item is also removed from the reading history list in the staff client (Patron Status workform - Reader Services view).

Saved Lists (Title Lists)

This page is available if you allow patrons to create and save title lists. The patron can copy or move titles from list to list, see details about and place requests for titles on a saved list, and e-mail selected titles or entire lists. For details, see “Title Lists in Mobile PAC” on page 373.

Update Account and Preferences

This page is available if you allow patrons to request updates to their accounts in Polaris Administration. Set these features with the PAC profile **Patron access options** (Update Info tabbed page). Your setting also applies to Polaris PowerPAC. For more information, see “Set up online patron account updates” on page 264.

Cobleskill
Home > My Account > Update Account

Please verify your contact information

Address Type
Home ▾

Street one

Street two

City

State/Province
NY ▾

Postal Code

Zip plus four

County

Country

[Update Preferences](#)

[Back](#)

[Log Out](#)

Preferences

The Update Account page also offers a link to update preferences. These options can include e-mail address, phone numbers, the ability to start and stop the reading history, e-mail format, preferred language, preferred notification method, and e-receipts preference.

Note:

If the preferred notification method is set to e-mail, an e-mail address must be supplied. If the preferred method is phone, the patron must indicate the phone number to use for notification. If the patron chooses TXT Messaging or text message e-receipts, the patron must indicate the phone number to be used for TXT messages, and select a carrier for that number.

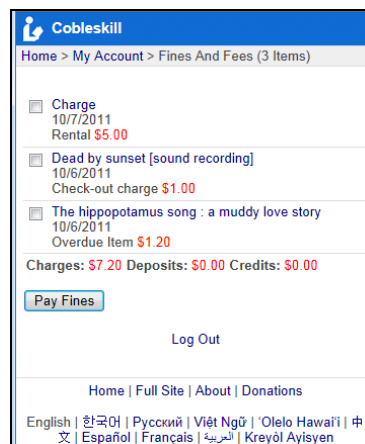
The screenshot shows the 'Cobleskill' library's 'Preferences' page. The breadcrumb trail is 'Home > My Account > Preferences > Preferences'. The page contains the following fields and options:

- Email address:** liverpoolhistorian@yahoo
- Alt.Email address:** (empty text box)
- Phone 1:** 315 - 451 - 3639. Includes a 'Txt to this #' radio button (unselected) and a '<Select a carrier>' dropdown menu.
- Phone 2:** 315 - 123 - 4567. Includes a 'Txt to this #' radio button (selected) and a 'Verizon' dropdown menu.
- Phone 3:** (empty text boxes). Includes a 'Txt to this #' radio button (unselected) and a '<Select a carrier>' dropdown menu.
- Send e-mail notices in:** Radio buttons for 'Basic, Plain text' (unselected) and 'Full, HTML format' (selected).
- Language preference:** 'English' dropdown menu.
- EReceipt Option:** 'E-mail' dropdown menu.
- Preferences to receive library notices:** 'Email Address' dropdown menu.
- Buttons:** 'Submit Change Request' (highlighted in blue), 'Back', and 'Log Out'.

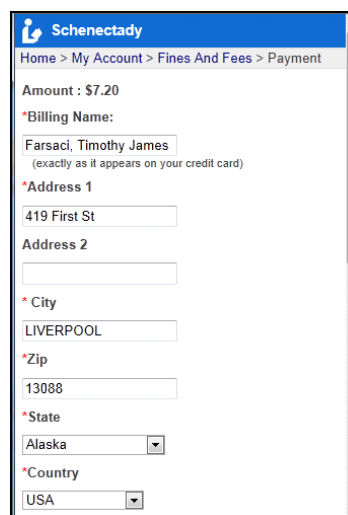
Credit Card Payments from Mobile PAC

Mobile PAC supports credit card payments for patron account charges and donations, using the any Polaris-supported gateway (see “[Setting Up E-Commerce](#)” in the *Polaris Patron Services Administration Guide 4.1R2*). E-commerce for Mobile PAC is a separately licensed feature, but there is no additional cost for the license.

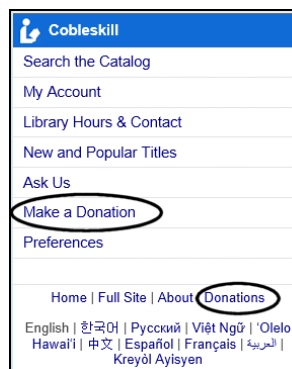
When credit card payments for fines and fees are enabled, patrons can select charges to pay and click **Pay Fines** on the Fines and Fees page of the patron account.



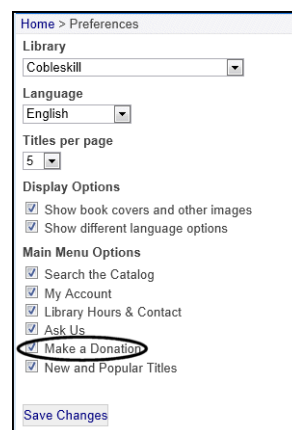
The Payment form opens, where the patron enters and submits billing and credit card information. The illustration shows the top part of the form.



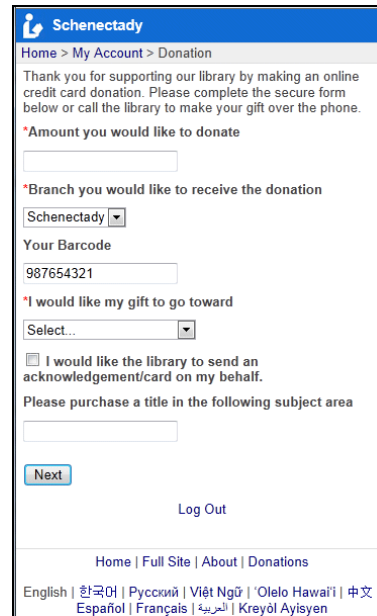
If donations are enabled, the link appears in the footer of Mobile PAC pages and as a **Make a Donation** link on the Home page. To display these links, set the Mobile PAC profile **Navigation: Donations** to **Yes**.



The home page **Make a Donation** link can be displayed or suppressed from the User Preferences page.



When the user clicks the donation link, the donation form opens. Like Polaris PowerPAC, the user does not have to log in to make a donation.



The screenshot shows a web browser window with the Schenectady library logo and navigation links. The page title is "Schenectady" and the breadcrumb trail is "Home > My Account > Donation". The main heading is "Thank you for supporting our library by making an online credit card donation. Please complete the secure form below or call the library to make your gift over the phone." The form contains the following fields and options:

- *Amount you would like to donate: A text input field.
- *Branch you would like to receive the donation: A dropdown menu with "Schenectady" selected.
- Your Barcode: A text input field containing "987654321".
- *I would like my gift to go toward: A dropdown menu with "Select..." selected.
- I would like the library to send an acknowledgement/card on my behalf.
- Please purchase a title in the following subject area: A text input field.
- Next: A blue button.
- Log Out: A text link.

At the bottom, there are navigation links: Home | Full Site | About | Donations, and a language selection menu: English | 한국어 | Русский | Việt Ngữ | 'Olelo Hawai'i | 中文 | Español | Français | العربية | Kreyòl Ayisyen.

The user completes the form and clicks **Next** to open the credit card Payment form, where the user supplies and submits billing and credit card information.

For detailed information about setting up e-commerce in Polaris, see [“Setting Up E-Commerce”](#) in the *Polaris Patron Services Administration Guide 4.1R2*. Once you have set up e-commerce, use the Credit Card Payment parameter **Online payments: Configure** to set up credit card payments from Mobile PAC.

Important:

To accept Mobile PAC online payments, you must enable secure socket layer (SSL) in Polaris Administration. Set the **SSL: Enable Mobile PAC** parameter for the Web server to **Yes**. See [“Setting Web Server Parameters”](#) in the *Polaris Administration Guide 4.1R2*. Patrons must have SSL protocol enabled for their mobile device Web browser.

Standard PAC Pages Reference

This section 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 [“Defining Web Parts for Dashboards”](#) on page 36), or to edit the pages as part of customizing Polaris PowerPAC for your library.

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 the *Polaris PAC Customization Guide*, available on the Customer Extranet (www.polaristown.com) and the Polaris Developers Network.

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.

See [“Polaris PowerPAC Pages”](#) on page 400 and [“Polaris PowerPAC Children's Edition Pages”](#) on page 403 for lists of standard pages with their PageID values.

Polaris PowerPAC Pages

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.

<i>Page</i>	<i>PageID</i>	<i>Function</i>
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.
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 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. For information about editing the Events page, see “Add text to the Events page” on page 22.
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.
library\vrquestion.aspx	43	Displayed after a patron 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.
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\coursereserves.aspx	58	Displayed when Courses is selected on the My Account menu and the patron is an 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\finesfees.aspx	14	Displayed when Fines & Fees is selected on the My Account menu. The Fines page lists the fines and fees the patron owes.

<i>Page</i>	<i>PageID</i>	<i>Function</i>
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\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	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. 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\registerconnections.aspx'	67	Polaris Social. Displayed when a patron clicks the appropriate 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\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	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.
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.

<i>Page</i>	<i>PageID</i>	<i>Function</i>
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 search)	30	Displayed when Exact is selected from the Search menu. You set up and launch an exact phrase search from this page
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)	23	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	Obsolete
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 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

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.

<i>Page</i>	<i>PageID</i>	<i>Function</i>
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 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 CQL Commands & Access Points

This section lists the CQL (Common Query Language) commands and access points you can use to construct custom search filters for Polaris PowerPAC. For more information about this procedure, see [“Setting Up Search Filters \(Limit By\)”](#) on page 70. You can also use CQL commands to construct ready-made searches for search categories in Polaris PowerPAC Children’s Edition. For more information about this procedure, see [“Add a new search target to a category”](#) on page 309.

The CQL search command can include the following parts:

- The text for which you are searching
- The access points (fields) you want to search; for example, author or title (see [“Search Access Point \(Field\) Codes”](#) on page 408)
- Operators (connectors) that link one part of the search with another

Example:

To find the works of author Asimov published in or after 1970, you type the following command:

AU=asimov AND PD >= 1970

AU specifies the access point Author. The search text for this access point is **asimov**. **AND** is the Boolean operator connecting the two conditions of this search (the author and the date). **PD** specifies the access point Publication Date. The search text for this access point is **1970**. The symbol **>=** stands for the relative operator *greater than or equal to*.

Fields that can be searched with CQL search commands fall into one of three categories:

- **Keyword-indexed fields** (for example, author, title, subject, notes)
 - A record must contain all the keywords entered in the field selected for search, in any order. Other words may be present, or the words may be present in different fields of the same type.

To retrieve only records that contain the search words in a specific order with no words in between (that is, to do a phrase search), enter the words in double quotation marks. For example, a search for **TI=french cooking** finds the title *French Provincial Cooking* while **TI=“french cooking”** does not.

- **Fields that are searched with string searches** - A record must contain an exact match on the search characters (for example, a call number or publisher number search). If the field typically includes spacing or punctuation, and you want to find an exact match on the entire string, enter the text within double quotation marks. For example, when searching for a call number: **CALL=“641.5944 Dia”**

- **Fields that require library-specific or Polaris-specific codes** (for example, language, target audience, type of material).

Note:

To see whether fields use keywords or codes, refer to “[Search Access Point \(Field\) Codes](#)” on page 408.

Boolean Operators

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

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

Example:

AU=“isaac asimov” AND TI=planets

Finds only the items written by Isaac Asimov that have the word *planets* in the title.

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

Example:

AU=“isaac asimov” OR TI=planets

Finds all items written by Isaac Asimov and all items with the word *planets* in the title by any author, including Asimov.

If you have a number of terms to combine with OR, type the command this way:

AU={list}asimov, dick, ballard, lem, capek{/list}

You can insert as many terms as you need between {list} and {/list}

- **Not** - A record must match the term before the operator, but not the term after the operator, to be included in the search results.

Example:

AU=“isaac asimov” NOT TI=planets

Finds only those items written by Isaac Asimov that do not have the word *planets* in the title.

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

Search Text That Includes Operators or Special Characters

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

For example, to find the title *Bud, Not Buddy*, type this command:

TI = “bud not buddy”

Put this text in quotation marks because **not** is ordinarily a Boolean operator.

As another example, to find the title *Tim O'Toole and the Wee Folk*, type this command:

TI= “tim o'toole”

Put this text in quotation marks because the apostrophe in the word **o'toole** is a special character.

Relative Operators

Relative operators are symbols that compare search terms:

<i>Symbol</i>	<i>Relative Operation</i>
=	Equal to search term
<>	Not equal to a single search term: PD <> 1970 For a range of dates, use NOT: NOT PD = 1970-1980.
>=	Greater than or equal to search term
>	Greater than search term
<=	Less than or equal to search term
<	Less than search term

Example:

PD >= 1987

This example finds items published in or after 1987. **PD** specifies the publication date access point. See [“Search Access Point \(Field\) Codes”](#) on page 408 for access point codes.

Example:

KW=solar system AND PD < 1932

This example finds items published before 1932 that have the words “solar system” in any record field. **KW** specifies the keyword access point. See [“Search Access Point \(Field\) Codes”](#) on page 408 for access point codes.

Proximity-Distance Operator

With proximity searching, you specify the allowable distance between two terms, which can be keywords or phrases. The proximity-distance operator is **PROX/distance**. The proximity-distance is the difference between the positions of the left and right terms. The distance is never negative, and adjacent terms have a proximity-distance equal to 1. You can use the operator with the relative operators < (less than), <= (less than or equal to), = (equals), >= (greater than or equal to), > (greater than), or <> (not equal to).

You can use the following modifiers:

/ordered - The order of the two terms in the search results must be the same as the order of the terms in the query.

/unordered - The order of the two terms does not matter in the search results.

You can use keyword or phrase search access points (such as **KW**, **AU**, **TI**) but the access point must be the same for both terms. If no access point is specified, **KW** (keyword) is assumed. See [“Search Access Point \(Field\) Codes”](#) on page 408.

Example:

“cat” PROX/distance<=5 “the hat”

Find the keyword **cat** where it appears less than or equal to 5 words before or after the phrase **the hat**. That is, between 0 and 4 words exist between the keyword **cat** and the phrase **the hat**.

Example:

“Harry Potter” PROX/distance<10/ordered “J. K. Rowling”

Find the phrase **Harry Potter** where it appears less than 10 words before the phrase **J. K. Rowling**. That is, between 0 and 8 words must exist between the phrase **Harry Potter** and the phrase **J. K. Rowling**, counting from the first word in each phrase.

Example:

“United States” PROX/distance=2 “Union”

Find the phrase **United States** where it appears exactly 2 words before or after the keyword **Union**. That is, exactly 1 word must exist between the phrase **United States** and the keyword **Union**.

Restrictions

- The proximity operator does not support nested Boolean expressions in either the left or right terms. For example, **((Dog OR Cat) PROX/distance=5 Food) PROX/distance=6 Kennel** is not supported.
- The maximum proximity-distance is 1024. If the proximity-distance in the query is greater than 1024, the search process changes it to 1024.
- The total maximum number of keywords in a proximity expression is 16. That is, the number of keywords on the left side of the proximity operator plus the number of keywords on the right side of the proximity operator is limited to 16. If a proximity expression contains more than 16 words, then the proximity operator will be ignored but up to the first 16 words on the left and the right will be checked for adjacency.
- The keyword or phrase access point (such as **KW**, **AU**, **TI**) used in the left and right terms must be the same. For example, the query **SU=HARRY PROX/distance<=5 AU=POTTER** is not supported and will produce an **Unsupported search error**.
- The left and right terms for each proximity operator must be a keyword or phrase and not a Boolean expression, but there is no limit to the number of proximity operators in a query. For example, this query is valid:
**(AU=“J. K.” PROX/distance<10 AU=“Rowling”)
AND (TI=“Conversations With” PROX/distance<10 TI=“Rowling”)
AND MAT=BKS**

Note:

The Boolean search fields in Polaris PowerPAC and ActivePAC do not limit the number of characters you can enter, but to see long queries, users may have to use the arrow keys on their keyboards.

Search Access Point (Field) Codes

<i>Access Point</i>	<i>Description</i>
AB	Assigned branch (requires library-specific codes)
AU	Author (keyword)
AVAILABILITY	Filters search results to titles that have at least one available item. Type AVAILABILITY > 0 . Example: To find Harry Potter titles with at least one available item, type TI = Harry Potter AND AVAILABILITY > 0 . The AVAILABILITY access point works only for values greater than 0. (AVAILABILITY = 0 is not valid.)
BRS	Polaris bibliographic record set - control number
BRSN	Polaris bibliographic record set - record set name
CALL	Call number
CN	Polaris bibliographic record - control number
CODEN	Identifier for scientific and technical periodicals
COL	Collection (requires library-specific codes)
DD	Dewey classification
GENRE	Genre (keyword)
GOV	Superintendent of Documents classification number for government documents
ISBN	International Standard Book Number
ISSN	International Standard Serial Number
KW	Keyword (any field)
LA	Language (see “LA (Language) Codes” on page 409)
LC	Library of Congress classification
LCCN	Library of Congress Control Number
MAT	Material type of physical items (requires library-specific codes)
NAL	National Agricultural Library classification
NLC	National Library of Canada classification
NLM	National Library of Medicine classification
NOTE	General notes (keyword)
OCLC	Online Computer Library Center (OCLC) control number
OCN	Other system control number (requires library-specific codes)
OWN	Record owner (requires library-specific codes)
PD	Publication date
PN	Publisher’s number
PUB	Publisher (keyword)
SE	Series (keyword)
STATB	Record status (requires library-specific codes)
STRN	Standard Technical Report Number
SU	Subject (keyword)
TA	Target audience (see “TA (Target Audience) Codes” on page 410)
TI	Title (keyword)
TOM	Format/Type of Material (see “TOM (Format/Type of Material) Codes” on page 411)
UDC	Universal Decimal classification
UPC	Universal Price Code number

LA (Language) Codes

These are some common codes to use with the language access point (LA) in a Boolean (CQL) search. Use the code, not the language name. For example, to specify English, type **LA=ENG**.

Note:

You can see a complete list of language codes at the Library of Congress Web site:

www.loc.gov/marc/languages

<i>Language</i>	<i>Code</i>	<i>Language</i>	<i>Code</i>
Arabic	ARA	Korean	KOR
Bosnian	BOS	Latin	LAT
Chinese	CHI	Multiple Languages	MUL
Czech	CZE	Polish	POL
Danish	DAN	Portuguese	POR
Dutch	DUT	Romanian	RUM
English	ENG	Russian	RUS
French	FRE	Serbian	SCC
German	GER	Sign	SGN
Modern Greek	GRE	Spanish	SPA
Hebrew	HEB	Ukrainian	UKR
Hindi	HIN	Vietnamese	VIE
Italian	ITA	Yiddish	YID
Japanese	JPN		

TA (Target Audience) Codes

Use these codes with the target audience (TA) access point in a Boolean (CQL) search. Use the code, not the target audience name. For example, to specify a preschool audience, type **TA=a**.

Note:

Not all bibliographic records include target audience information.

<i>Target Audience</i>	<i>Code</i>
Preschool	a
Primary school	b
Elementary and junior high school	c
Secondary (senior high) school	d
Adult	e
Specialized	f
General	g
Juvenile	j

TOM (Format/Type of Material) Codes

Use these codes with the Type of Material access point (TOM) in a Boolean (CQL) search. Use the format/type of material code, not the name. For example, to specify DVDs, type **TOM=DVD**.

<i>Format/Type of Material</i>	<i>Code</i>	<i>Format/Type of Material</i>	<i>Code</i>
Abstract	abs	Microform	mic
Audio books	abk	Mixed materials	mix
AudioEbook	aeb	Motion picture	mot
Blu-Ray Disc	brd	Music CD	mcd
Book + Cassette	bcs	Musical sound recording	msr
Book + CD	bcd	Newspaper	new
Book	bks	Nonmusical sound recording	nsr
Braille	brl	Periodical	per
Cartographic material	cmt	Printed cartographic material	pcm
Digital media collection	dmc	Printed music	pmu
DVD	dvd	Printed or manuscript music	mus
Ebooks	ebk	Projected medium	pgr
Electronic resources	elr	Serial	ser
Globe	glb	Sound recording	rec
Kit	kit	Three-dimensional object	art
Large print	lpt	Two-dimensional nonprojected graphic	ngr
Manuscript cartographic material	mcm	Videorecording	vid
Manuscript material	mss	Videotape	vcr
Manuscript music	mmu	Visual materials	vis
Map	map		

Deep Links to Polaris PAC

Deep links allow searches for specific bibliographic records in your PAC from external sites. Such searches are launched, for example, when you use the PAC look-up feature on the sites of book and material vendors. This section lists the PowerPAC and Mobile PAC URLs for setting up links to specific bibliographic records in your PAC from an external site.

PowerPAC

All URLs should be prefixed with your site-specific base URL (example: `mylibrary.com/polaris/`). The URL is necessary for each link parameter.

ISBN

`view.aspx?isbn={isbn},{isbn}, ...`

Examples - Single and multiple ISBNs, any branch:

`http://mylibrary.com/polaris/view.aspx?isbn=1234567890`

`http://mylibrary.com/polaris/view.aspx?isbn=1234567890,2222333344,987698765X`

Important: To limit by branch, you must use `searchresults.aspx` instead of `view.aspx`. Be aware of the following points:

- `Searchresults.aspx` is subject to change as Polaris PowerPAC changes. You may need to change your link format accordingly. (`View.aspx` is stable from release to release.)
- You must have already set up a custom “limit by” for assigned branch in Polaris Administration. For instructions, see [“Setting Up Search Filters \(Limit By\)”](#) on page 70.

Example - Branch-specific and limited to titles with linked items at that branch

`http://mylibrary.com/polaris/search/searchresults.aspx?ctx=17.1033.0.0.1&type=keyword&by=ISBN&term=0375750126&limit=AB=17&page=0`

Where 17 is the branch’s organization ID in Polaris. You can use the same format with other link parameters.

LCCN

view.aspx?lccn={lccn},{lccn}, ...

Examples:

<http://mylibrary.com/polaris/view.aspx?lccn=2001627090>

<http://mylibrary.com/polaris/view.aspx?lccn=2001627090,2001336783,85153773>

Control Number

view.aspx?cn={control_number},{control_number}, ...

Examples:

<http://mylibrary.com/polaris/view.aspx?cn=13243>

<http://mylibrary.com/polaris/view.aspx?cn=13243,9999,24354,348>

See also "[Limited Control Number](#)" on page 415

Keyword

view.aspx?keyword={url_encoded_keywords}

Examples:

<http://mylibrary.com/polaris/view.aspx?keyword=cars>

<http://mylibrary.com/polaris/view.aspx?keyword=science+fiction+robots>

Title

view.aspx?title={url_encoded_title}

Examples:

<http://mylibrary.com/polaris/view.aspx?title=Misery>

<http://mylibrary.com/polaris/view.aspx?title=Punishment+Crime>

Title searches are keyword searches, and hits are returned regardless of the word order in the tag. If you want the title search to return only hits that match the order in the tag, you can have your vendor add a **type=phrase** query string parameter to the vendor's template.

Example (type=phrase):

<http://mylibrary.com/polaris/view.aspx?title=Crime+and+Punishment&type=phrase>

Author

`view.aspx?author={url_encoded_author}`

Examples:

`http://mylibrary.com/polaris/view.aspx?author=Shakespeare`

`http://mylibrary.com/polaris/view.aspx?author=John+Grisham`

Author searches are keyword searches to ensure that hits are returned whether the name order is first, last or last, first. If you want the author search to return only hits that match the order in the tag, you can have your vendor add a **type=phrase** query string parameter to the vendor's template.

Example (type=phrase):

`http://mylibrary.com/polaris/view.aspx?author=Grisham+John&type=phrase`

Subject

`view.aspx?subject={url_encoded_subject}`

Examples:

`http://mylibrary.com/polaris/view.aspx?subject=dogs`

`http://mylibrary.com/polaris/view.aspx?subject=History+Civil+War`

Subject searches are keyword searches, and hits are returned regardless of the word order in the tag. If you want the subject search to return only hits that match the order in the tag, you can have your vendor add a **type=phrase** query string parameter to the vendor's template.

Example (type=phrase):

`http://mylibrary.com/polaris/view.aspx?subject=Civil+War+History&type=phrase`

Series

Example:

`http://mylibrary.com/polaris/view.aspx?series=lone+planet`

Combination: Author, Title, Subject

You can combine Author, Title, and/or Subject parameters in the same query.

Examples:

`http://mylibrary.com/polaris/view.aspx?author=King&title=Misery`

`http://mylibrary.com/polaris/view.aspx?title=Harry+Potter&subject=wizard+schools`

`http://mylibrary.com/polaris/view.aspx?subject=cabin+building&author=Thoreau`

UPC

`view.aspx?upc={upc_code},{upc_code}, ...`

Examples:

`http://mylibrary.com/polaris/view.aspx?upc=287986736748`

`http://mylibrary.com/polaris/
view.aspx?upc=289839472834,771826736475,112989783678`

OCLC

`view.aspx?oclc={oclc_number},{oclc_number}, ...`

Examples:

`http://mylibrary.com/polaris/view.aspx?oclc=ocm12384675`

`http://mylibrary.com/polaris/
view.aspx?oclc=ocm768375267,ocm38916725,ocm11286756`

Record Sets (Bibliographic)

See “[Searching Record Sets \(Polaris PowerPAC\)](#)” on page 84.

E-Source Targets

See “” on page 128.

Limited Control Number

Polaris PowerPAC’s full bibliographic product page (`title.aspx`) also supports a deep link by control number for local titles. This limited-function deep link was added because support for link sharing on a social web site did not work well with the more versatile PowerPAC deep link format for `view.aspx` (see “[Control Number](#)” on page 413). The deep link for `title.aspx` supports a control number parameter (`cn={control-number}`) which, if present, searches for and goes directly to the PAC product page for the single, local bibliographic title with that control number.

`{pac-root-url}/search/title.aspx?cn={control-number}&ctx={ctx-value}`

Examples:

- Any branch or language (no `ctx` parameter):
`http://mylibrary.com/polaris/search/title.aspx?cn=12345`
- Branch organization ID is 83 (`ctx=83`):
`http://mylibrary.com/polaris/search/title.aspx?ctx=83&cn=12345`
- Branch organization ID is 83, language is English (`ctx=83.1033`):
`http://mylibrary.com/polaris/search/title.aspx?ctx=83.1033&cn=12345`

Mobile PAC

All URLs should be prefixed with your site-specific mobile base URL (example: mylibrary.com/mobile/). The URL is necessary for each link parameter:

`{Base Mobile PAC URL}/view.aspx?{TYPE}={TERM}`

Because Mobile PAC does not currently support Boolean searching, only single terms are allowed. The following access points {TYPE} are available:

- ISBN
- LCCN
- CN - Control number
- ISSN
- Title
- Author
- Subject
- Series
- Keyword
- brs - Record set ID
- brsn - Record set name

In general, if a mobile device goes to a PowerPAC deep link and Mobile PAC supports the search criteria specified in the URL, the mobile device user is automatically directed to the Mobile PAC search results page. If Mobile PAC does not support the search criteria, the mobile device user is directed to the PowerPAC search results page.

However, if `type=phrase` is part of the PowerPAC deep link, the user is directed to the Mobile PAC search results page. Also, the user is directed to the Mobile PAC search results page when there are multiple terms for author, title, or subject in the PowerPAC deep link.

Examples:

<http://mylibrary.com/polaris/view.aspx?title=time+to+kill&type=phrase>

<http://mylibrary.com/polaris/view.aspx?title=time+to+kill&author=grisham+john>

Note:

Although the user is directed to the Mobile PAC search results page in these cases, if the user then clicks the **Search** breadcrumb in the Mobile PAC page header, the search form does not support the deep link search terms due to their complexity.

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”](#) on page 322.

- Active directory logon (System)** Enables log-on to PowerPAC and Mobile PAC using network credentials instead of the Polaris barcode/username and password. See [“Active Directory Log-On to PAC”](#) on page 250.
- **Default:** No
- Branch list order (System, Library, Branch)** For Polaris PowerPAC and Mobile PAC, sets the display order of branches in the **Switch to another branch** list if 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.
- **Default:** No
- Default Polaris user in PAC (System, Library, Branch)** Specifies a user account for recording and reporting statistics. Leave this profile at the default setting.
- Did you mean: Enabled (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”](#) on page 92.
- **Default:** Yes (suggestions are displayed)
- Email notification: Email address of sender (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.
- **Default:** youemail@yourdomain.com
 - **Settings:** Type an email address (it must contain the @ symbol).

Email notification: Server running SMTP service (System, Library, Branch)	<p>Specifies the Simple Mail Transfer Protocol (SMTP) server to use for PAC e-mail features such as Ask Us or purchase requests from 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> <ul style="list-style-type: none">• Settings: Type the domain name of the e-mail SMTP server.
Enriched data (System, Library, Branch)	<p>Specifies the settings to receive cover images, reviews, ratings, and other enriched data content from your enriched data provider or providers. See “Enabling Enriched Data” on page 222.</p>
Fines and Fees: Show history in detailed view (System, Library, Branch)	<p>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 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. See “” on page 252.</p> <ul style="list-style-type: none">• Default: Yes
Google Maps (System, Library, Branch)	<p>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 “Map It (Google Maps) in PAC” on page 189.</p>
Hours of operation: Display (System, Library, Branch)	<p>(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” on page 18.</p> <ul style="list-style-type: none">• Default: Yes
Hours of operation message (System, Library, Branch)	<p>(Polaris PowerPAC and Mobile PAC) Displays a message on the organization’s Hours page. See “Set Polaris PowerPAC features on the menu bar” on page 18.</p> <ul style="list-style-type: none">• Default: None specified
Item availability: Display detailed item status (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> <ul style="list-style-type: none">• Default: Yes• Requirement: Detailed item status descriptions are specified in the Circulation Statuses table (Database Tables).

Item availability: Display due date in detailed item status (System, Library, Branch)	Specifies whether the Item Availability detailed item status display includes the item's due date. Set the profile to Yes to display the due date. <ul style="list-style-type: none">• Default: Yes• Requirement: The PAC profile Item availability: Display detailed item status must also be set to Yes to display the due date.
Item availability: Display shelf location (System, Library, Branch)	Specifies whether the Item Availability display includes the item shelf location (for example, New Arrivals or Children's Center). <ul style="list-style-type: none">• Default: Yes (displays shelf location)
Item availability: Display status (System, Library, Branch)	Specifies whether the Item Availability display includes item availability status. <ul style="list-style-type: none">• Default: Yes (displays item status)
Item availability: Display type (System, Library, Branch)	Specifies whether the Item Availability display includes the material type (for example, books or audio cassettes) from the item record. <ul style="list-style-type: none">• Default: Yes (displays material type)
Login retries (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 attempt to log in before waiting 5 minutes to try again. See " Limit log-in attempts " on page 255.
Most popular sort settings (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 " on page 68.
Multiple language strings (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 " on page 288.
Patron access options (System, Library, Branch)	Double-click to display the Patron Access Options dialog box. Use this dialog box to set up patron access account and default self-registration features. You can have different setup options for each organization. See " Setting Up Patron Account Access " on page 245.
Patron access: Display hold queue information (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. See " Setting Up Holds and ILL Request Processing " in the <i>Polaris Patron Services Administration Guide 4.1R2</i> .

- Patron access: Policy statement hyper text link (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 pages and at all patron log-in points when Single Login is enabled and the patron has not yet logged in.
- **Settings:** Type the complete path to the privacy policy page.
 - **Requirement:** Set **Patron Access: policy statement hyper text link permitted** to Yes.
- Patron access: Policy statement hyper text link permitted (System, Library, Branch)** 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.
- **Settings:**
 - **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**, specify a URL for the privacy policy Web page using the profile **Patron Access: policy statement hyper text link**.
 - **No (default)** - The privacy policy link is not displayed on any pages.
- Patron access: Renewal (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. See [“Defining Patron-Initiated Circulation Blocks”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.)
- **Defaults:** Renewal permitted - Yes; Allow renewals for expiring accounts - No
 - **Settings:**
 - **Yes** - Displays the renewal option on the PAC Patron Access Items Out page.
 - **No** - Patrons cannot renew items from the PAC.
- Patron eReceipts (System, Library, Branch)** 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. See [“Setting Up eReceipts”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.
- Patron library assigned and free text block default text (System, Library, Branch)** Specifies the text to display in the PAC patron account summary when a patron account has selected library-assigned blocks or free text blocks. See [“Defining Patron Block Descriptions”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Default:** Library assigned block
 - **Settings:** Maximum 255 characters

- Patrons can remove reading history**
(System, Library, Branch) Determines whether patrons can remove individual items from their readings histories from the PAC patron account. See [“Setting Reading History Options”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Default:** No
- Purchase options**
(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”](#) on page 239.
- Resource Groups: Search results settings**
(System, Library, Branch) Sets conditions for the display of econtent in PAC search results. See [“Setting PAC Econtent Search Results Restrictions”](#) on page 203.
- Search agent: Enable**
(System, Library, Branch) Provides patrons the ability to set up and save searches to run automatically at specified intervals. See [“PAC Search Agent \(Saved Searches\)”](#) on page 87.
- **Settings:**
 - **Yes** (default) - The Search Agent option is available to patrons using Polaris PowerPAC and Mobile PAC.
 - **No** - The Search Agent option is unavailable for public access.
 - **Requirement:**
 - Configure **Search Agent Parameters** (in Polaris Administration, PAC Parameters).
 - To allow logged-in patrons to view a list of their saved searches in the Polaris PowerPAC dashboard, set the PowerPAC profile **Single Login: Enable** to **Yes**.
- Search settings defaults**
(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”](#) on page 59.
- Search: Sub-sort-by-title**
(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”](#) on page 59.
- **Default:** No
- Suppress availability and requests**
(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 [“Suppressing Request and Availability Options”](#) on page 169.

- Suppress branches (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.
- **Default:** No branches checked (all display)
- Suppress item display (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”](#) on page 183.
- **Default:** No statuses checked (all display)

Polaris PowerPAC Profiles Reference

These profiles are available on the Profiles, PowerPAC tabbed page on the Administration Explorer, at the listed organizational levels.

3M PAMS: Enabled (System, Library, Branch)	<p>Specifies whether 3M™ Public Access Management System “smart cards” are used at public access workstations in the library.</p> <ul style="list-style-type: none"> • Default: No (no smart card use) • Requirement: Set Single Logon: Enable to Yes in PowerPAC Profiles. List workstation with readers in the In-House IP Addresses table (see “Identifying In-House Computers” in the <i>Polaris Administration Guide 4.1R2</i>).
Ask us: Require login (System, Library, Branch)	<p>Determines whether users must be registered patrons to send a question to the library by e-mail, using the Ask Us feature. See “Setting Up Patron E-Mail (Ask Us)” on page 268.</p> <ul style="list-style-type: none"> • Settings: <ul style="list-style-type: none"> • Yes (default) - Patrons must log in with a barcode and password to use Ask Us. • No - The Ask Us log-in page displays a Guest button that bypasses log-in.
Bookmarking & Sharing: Enable (System, Library, Branch)	<p>Enable social bookmarking for titles in PowerPAC search results. See “Social Bookmarking for Search Results (AddThis™)” on page 199.</p> <ul style="list-style-type: none"> • Default: No
Bookmarking & Sharing: Profile ID for AddThis analytics (System, Library, Branch)	<p>Specify your AddThis profile ID for social bookmarking analytics. See “Social Bookmarking for Search Results (AddThis™)” on page 199.</p> <ul style="list-style-type: none"> • Default: None
Branch switching: Enable (System, Library, Branch)	<p>Determines whether the Switch to another branch list is displayed on Polaris PowerPAC pages. The Switch to another branch list allows patrons to select another library in the system. See “Setting Up Polaris PowerPAC” on page 8.</p> <ul style="list-style-type: none"> • Settings: <ul style="list-style-type: none"> • Yes (default) - The Switch to another branch list is displayed in Polaris PowerPAC. • No - Patrons cannot select different connection libraries.
Categorization of ESource targets (System, Library, Branch)	<p>Displays the E-Source Target Categorization dialog box, which is used to set up e-sources (proprietary non-Z39.50 databases) and organize e-source targets as a finding aid. See “Managing E-Sources” on page 114.</p>

Dashboards: Expanded (System, Library, Branch)	<p>Sets the default display of most lists (Web parts) on the dashboard to expanded or closed. Patrons can select the title bar of any list to expand or close the list.</p> <ul style="list-style-type: none">• Settings:<ul style="list-style-type: none">• Yes (default) - Dashboard lists are expanded by default.• No - Dashboard lists are closed by default.
Dashboards: Narrow your search & related searches (System, Library, Branch)	<p>Enables and sets up the Narrow and Related Web parts settings that are displayed with search results. See “Setting PowerPAC Narrow/Related Search Options” on page 159.</p> <ul style="list-style-type: none">• Default: Both Web parts are enabled and all possible elements are displayed.
Dashboards: Web page / web part assignment (System, Library, Branch)	<p>Displays the Web Page - Web Part Configuration dialog box, to specify which Web parts display in the dashboards on specific Web pages for each branch. See “Defining Web Parts for Dashboards” on page 36.</p> <ul style="list-style-type: none">• Requirement: Define Web parts at the system level, using the profile Dashboards: Web Part Construction (PowerPAC profiles).
Dashboards: Web part construction (System)	<p>Displays the Web Part Editor dialog box, to create custom Web parts for dashboards and limit the number of items on automated lists in Web parts. See “Defining Web Parts for Dashboards” on page 36.</p> <ul style="list-style-type: none">• Requirement: Assign the Web parts to specific Polaris PowerPAC pages using the profile Dashboards: Web Page / Web Part Assignment (PowerPAC profiles).
Did you mean: Suggestions are to display even when hits are returned (System, Library, Branch)	<p>For Polaris PowerPAC, specifies whether Did You Mean search suggestions are displayed with search results (Y), or only when a search returns no hits (N). (Profile does not affect Polaris PowerPAC Children’s Edition.) See “Setting Up Did You Mean Term Checking” on page 92.</p> <ul style="list-style-type: none">• Default: No (suggestions are displayed only when a search returns no hits)
Enable logging of transactions (System)	<p>Determines whether transactions (such as hold requests and self-registration) initiated through Polaris PowerPAC are logged.</p> <ul style="list-style-type: none">• Settings:<ul style="list-style-type: none">• Yes - Transactions from Polaris PowerPAC are logged.• No (default) - No recording of activity in Polaris PowerPAC is done.
Feature It: Screen display options (System, Library, Branch)	<p>Enables Feature It promotions in Polaris PowerPAC and specifies the promotion position in the search results display. See “Feature It Promotions” on page 155. For more information about setting up promotions, see the <i>Polaris Cataloging Guide</i>.</p>

Note:

Feature It is available by specific contract to your library.

- Google Preview: Enable on full display (System, Library, Branch)** Enables the Google Preview (book viewer) feature on the product page for a title in PowerPAC search results. See [“Google Preview for PowerPAC Search Results”](#) on page 195.
- **Settings:**
 - **Yes** (default) - Google Preview button is displayed for titles that have previews in Google Book Search.
 - **No** - Google Preview button is never displayed on a title product page.
- Google Preview: Enable on search results pages (System, Library, Branch)** Enables the Google Preview (book viewer) feature on the initial search results pages. See [“Google Preview for PowerPAC Search Results”](#) on page 195.
- **Settings:**
 - **Yes** (default) - On the initial search results page, the Google Preview button is displayed for titles that have previews in Google Book Search.
 - **No** - Google Preview button is never displayed on the initial search results page.
- Highlight local items in matching title view (System, Library, Branch)** Determines whether titles with at least one local item are highlighted in search results. See [“Highlighting Titles with Local Items \(PowerPAC\)”](#) on page 188.
- **Settings: Yes** - Titles with local items are highlighted; **No** (default) - No titles are highlighted.
- In-house access definitions: Setup (System, Library, Branch)** Controls how a workstation’s in-house status is determined for PAC patron actions (patron inactivity timeout, Recently Viewed Titles) and e-source access. The system uses the settings of the Polaris PowerPAC connection organization. If you select **In-House IP Addresses Table only**, a workstation’s IP address must be included in that table to be considered in-house. If you select **In-House IP Addresses Table AND registered workstations** (default), a workstation’s IP address can either be included in the In-House IP Addresses table or the workstation can be registered in Polaris to be considered in-house. See [“Set criteria for determining in-house location”](#) in the *Polaris Administration Guide 4.1R2*.
- Item availability: “Text it” feature enabled (System, Library, Branch)** Allows patrons to send a call number by text message from the item availability view in PowerPAC or Mobile PAC search results. See [“Sending Call Numbers by Text Message”](#) on page 181 (PowerPAC) and [“Text It in Mobile PAC”](#) on page 354 (Mobile PAC).
- **Default:** Yes
- Item availability: Display last circ date (System, Library, Branch)** Specifies whether the Item Availability display includes the last circulation date of the item.
- **Default:** Yes (displays last circulation date)

Item availability: Display local and system levels (System, Library, Branch)	<p>Determines whether all system holdings are displayed in one list (setting is No), or local and system holdings are displayed in separate lists (setting is Yes).</p> <ul style="list-style-type: none"> • Default: Yes
Item availability: Display notes (System, Library, Branch)	<p>Offers options for item/issue public notes display: hover over icon to display note text, display text, or do not display.</p> <ul style="list-style-type: none"> • Default: Icon display
Item availability: Display textual holdings notes (System, Library, Branch)	<p>Offers options for displaying serials textual holdings notes: hover over icon to display note, display text or do not display.</p> <ul style="list-style-type: none"> • Default: Icon display
Item availability: Expand non-serial titles (System, Library, Branch)	<p>Sets the default item availability display to expanded or closed for non-serial items (those with no holdings statement for the branch). Patrons can select branch and collection controls to expand or close the list of items under each branch and collection.</p> <ul style="list-style-type: none"> • Settings: <ul style="list-style-type: none"> • Yes (default) - Branches and collections in the item availability display are expanded by default. • No - Branches and collections in the item availability display closed by default.
Item availability: Expand serial titles (System, Library, Branch)	<p>Sets the default item availability display to expanded or collapsed for serial items (those with a holdings statement for the branch). Patrons can select branch and collection controls to expand or collapse the list of items under each branch and collection.</p> <ul style="list-style-type: none"> • Settings: <ul style="list-style-type: none"> • Yes - Branches and collections in the item availability display are expanded by default. • No (default) - Branches and collections in the item availability display collapsed by default.
Layout selection (System, Library, Branch)	<p>Specifies standard (classic) page layout or any custom layouts that you develop or that are developed for you. For more information about custom layouts, contact your Polaris Site Manager. (Several ready-made themes can also change the appearance of Polaris PowerPAC. See “Setting Polaris PowerPAC Themes” on page 24.)</p> <ul style="list-style-type: none"> • Default: Classic. This is the only option unless you set up custom layouts.
Librarian’s (MARC) View: Enable (System, Library, Branch)	<p>Displays (default) or suppresses the Librarian’s View (MARC record view) in PAC search results when the patron clicks the format icon for a title in Polaris PowerPAC, the Librarian’s View option on the product page for a title in PowerPAC, or the Librarian’s View link for a title in Mobile PAC search results.</p>

- Local call number indexed field: Limit choice (System, Library, Branch)** Specifies whether patrons can browse-search the local (item-level) call number index only, or browse-search the Dewey or LC call number indexes for bibliographic records, as well as the local call number index.
- **Settings:**
 - **Yes** (default) - Allows patrons to browse-search the local item-level call number index only, and suppress the Dewey and LC bibliographic record choices. Set at the system level, when Polaris PowerPAC users are connected to the system organization, this setting suppresses all call number options for browse searching.
 - **No** - Provides choices for call number browse searches: local (item-level), LC (bibliographic record level), and Dewey (bibliographic record level). Set at the system level, when Polaris PowerPAC users are connected to the system organization, this setting offers the Dewey and LC bibliographic record choices for browsing call numbers.
- Navigation: Advanced (System, Library, Branch)** Specifies whether patrons can use the Advanced search dialog box to create complex Boolean searches. See [“Setting Available Search Types”](#) on page 82.
- **Settings: Yes** (default) - The Advanced option is displayed on the Search submenu; **No** - Advanced searching is not available.
- Navigation: Ask us (System, Library, Branch)** Specifies whether patrons can send suggestions, questions, and comments via e-mail message to the library.
- **Settings: Yes** (default) - The Ask Us option is displayed on the Library Info menu; **No** - The Ask Us feature is not available.
- Navigation: Boolean (System, Library, Branch)** Specifies whether patrons can use the Common Query Language (CQL) syntax to create complex searches. See [“Setting Available Search Types”](#) on page 82.
- **Settings: Yes** (default) - The Boolean option is displayed on the Search menu; **No** - Boolean (CQL) searching is not available.
- Navigation: Browse (System, Library, Branch)** Specifies whether patrons can browse the heading indexes. See [“Setting Available Search Types”](#) on page 82.
- **Settings: Yes** (default) - The Browse option is displayed on the Search menu; **No** - Browse searching is not available.
- Navigation: Children’s PAC (System, Library, Branch)** Specifies whether patrons can access Polaris PowerPAC Children’s Edition from Polaris PowerPAC.
- **Settings: Yes** - The Kid’s Catalog link is displayed on the Polaris PowerPAC pages; **No** (default) - The Kid’s Catalog link is not available.
- Note:**
Polaris PowerPAC Children’s Edition is available by specific contract to your library. If your Polaris installation does not include Polaris PowerPAC Children’s Edition, this option is not available.

- Navigation: Course reserves (System, Library, Branch)** Specifies whether patrons can search for course reserve records and reserve item records. See [“Setting Up Course Reserves”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Settings: Yes** - The Course Reserves option is displayed on the Search menu; **No** (default) - Course reserve searching is not available.
- Note:**
Polaris course reserve functions are available by specific contract to your library. If your Polaris installation does not include Polaris course reserves, this option is not available.
- Navigation: E-Sources (System, Library, Branch)** Specifies whether patrons can access E-Sources, which are non-Z39.50, proprietary databases that may require authentication for use. See [“Setting Up E-Source Targets”](#) on page 115.
- **Settings: Yes** (default) - The E-Sources option is displayed on the Search menu; **No** - Suppresses access to e-Sources.
- Navigation: Events (System, Library, Branch)** Specifies whether patrons can display the Events page. For information about editing the Events page, see [“Add text to the Events page”](#) on page 22.
- **Settings: Yes** (default) - The Events option is displayed on the Library Info menu; **No** - The Events page is not available.
- Navigation: Exact (System, Library, Branch)** Specifies whether patrons can search the public catalog with the exact text (including stop words) shown in the Search box. See [“Setting Available Search Types”](#) on page 82.
- **Settings: Yes** (default) - The Exact option is displayed on the Search menu; **No** - Exact phrase searching is not available.
- Navigation: Fines & Fees (System, Library, Branch)** Specifies whether patrons can view the fines and fees associated with their library accounts. The system uses the setting for the patron’s registered branch.
- **Settings: Yes** (default) - The Fines & Fees option is displayed on the My Account menu; **No** - Patrons cannot view their fines and fees.
 - **Requirement:** Set **Navigation: Patron Account** to **Yes** (PowerPAC profile).
- Navigation: Hours (System, Library, Branch)** Specifies whether patrons can display the Hours page. For information about specifying information for the Hours page, see [“Set Polaris PowerPAC features on the menu bar”](#) on page 18.
- **Settings: Yes** (default) - The Hours option is displayed on the Library Info menu; **No** - The Hours page is not available.

- Navigation: Items out (System, Library, Branch)** Specifies whether patrons can view the items checked out to their library card. If you allow renewals from the PAC, patrons select the items on this page. The system uses the setting for the patron's registered branch.
- **Settings: Yes (default)** - The Items Out option is displayed on the My Account menu; **No** - Patrons cannot view the items they have checked out, and cannot renew items from Polaris PowerPAC.
 - **Requirement:** Set **Navigation: Patron Account** to **Yes** (PowerPAC profile). To allow patrons to renew items, set **Patron Access: Renew permitted** to **Yes** (PAC profile). You can block renewals under certain circumstances. See ["Defining Patron-Initiated Circulation Blocks"](#) in the *Polaris Patron Services Administration Guide 4.1R2*.
- Navigation: Keyword (System, Library, Branch)** Specifies whether patrons can do a keyword search. See ["Setting Available Search Types"](#) on page 82.
- **Settings: Yes (default)** - The Keyword option is displayed on the Search menu; **No** - Keyword searching is not available.
- Navigation: My record (System, Library, Branch)** Specifies whether patrons can view their library account information. For example, if you allow patrons to update their registration information, change their passwords from the PAC, or manage reading histories, this page provides the appropriate links.
- **Settings:**
 - **Yes (default)** - The My Record option is displayed on the My Account menu.
 - **No** - Patrons cannot view or update their library registration information, change their passwords, or start reading histories.
 - **Requirement:** Set **Navigation: Patron Account** to **Yes** (PowerPAC profile). For information on allowing patrons to update their accounts from the PAC, see ["Setting Patron Access Options"](#) on page 258. For information on enabling reading histories, see ["Setting Reading History Options"](#) in the *Polaris Patron Services Administration Guide 4.1R2*.
- Navigation: PAC help (System, Library, Branch)** Specifies whether patrons can access the Polaris-supplied Help page. See ["Polaris PowerPAC Help"](#) on page 51.
- **Settings: Yes (default)** - The Help option is displayed on the main menu; **No** - The Help option is not displayed on main menu.
- Navigation: Patron account (System, Library, Branch)** Specifies whether patrons can access their patron accounts. See ["Setting Up Patron Account Access"](#) on page 245.
- **Settings: Yes (default)** - The My Account option is displayed on the menu bar; **No** - Patrons cannot access their patron accounts.
- Navigation: Phrase (System, Library, Branch)** Specifies whether patrons can search the public catalog based on a phrase. See ["Setting Available Search Types"](#) on page 82.
- **Settings: Yes (default)** - The Phrase option is displayed on the Search menu; **No** - Phrase searching is not available.

- Navigation: Policies (System, Library, Branch)** Specifies whether patrons can view the library policy page. See “[Add text to the Policies page](#)” on page 23.
- **Settings: Yes** (default) - The Policy option is displayed on the Library Info menu; **No** - The Policy page is not available.
- Navigation: Portal (System, Library, Branch)** Specifies whether patrons can view the portal page, which may include the quick search feature, content carousels and/or rotating book jacket, and custom content. See “[Setting Up Polaris PowerPAC](#)” on page 8.
- **Settings:**
 - **Yes** (default) - The Portal option is displayed on the Library Info menu. Select this option when you are using Polaris as the library home page.
 - **No** - Patrons cannot display the portal page. Select this option when you want patrons to access the public catalog from an existing home page.
- Navigation: Requests (System, Library, Branch)** Specifies whether patrons can see a list of their hold/ILL requests, and cancel or reactivate requests. The system uses the setting for the patron’s registered branch. You set conditions for requests from PAC, and whether they can be cancelled and reactivated, with the Requests parameter **Holds options**. See “[Defining Hold Processing Options](#)” in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Settings:**
 - **Yes** (default) - The Requests option is available on the My Account menu.
 - **No** - Patrons cannot review or cancel hold/ILL requests. The Requests menu option, summary information in the My Account dashboard, and option to go to list of requests when a request is placed are suppressed.
 - **Requirement:** Set **Navigation: Patron Account** to **Yes** (PowerPAC profile).
- Navigation: Web site (System, Library, Branch)** Specifies whether patrons can access the links of interest page provided by the library in Polaris PowerPAC.
- **Settings: Yes** (default) - The Web Site option is available on the Library Info menu; **No** - Patrons cannot view the Web Site page.
- Navigation: Web site URL (System, Library, Branch)** Specifies an address for the Web page to display when a patron selects Web Site on the Library Info menu.
- **Default:** blank
 - **Requirement:** **Navigation: Web Site - Yes** (PowerPAC profiles).
 - **Settings:**
 - **blank (empty address field)** - The default website.asp page is displayed if this field is empty. The default page allows you to provide links to multiple Web sites.
 - **url (Web page address or path)** - Automatically displays the page when Web Site is selected from the Library Info submenu.

Page header options (System, Library, Branch)	Settings to customize the PowerPAC page header, including the logo image, return link URL for the logo image, background and branch name text colors, logo and branch name position, and suppressing the branch name text. See “Customize the page header” on page 15.
Patron inactivity timeout (System, Library, Branch)	Sets a period of inactivity after which a logged-in patron at a library workstation is automatically logged out. Applies to in-house workstations only. See “Patron Inactivity Timeout at In-House Workstations” on page 248. <ul style="list-style-type: none">• Default: Not enabled
Perform a new search if a cross-reference is selected (System, Library, Branch)	Determines whether the location in the headings display changes to the cross-reference location when the cross-reference is selected. <ul style="list-style-type: none">• Settings:<ul style="list-style-type: none">• Yes (default) - Search from selected cross-reference, so that the display is set to the new location in the browse headings index.• No - Do not change the browse headings display. However, the titles associated with the cross-reference are displayed.
Portal custom content (URL) (System, Library, Branch)	Specifies the URL for custom content you want to include on the Polaris PowerPAC portal page. Type the complete URL, beginning with http:// . See “Customizing Portal Page Features” on page 25. <ul style="list-style-type: none">• Default: Blank
Portal page content carousels (System, Library, Branch)	Sets up content carousels (rotating images of library-specified titles in the library catalog) for display on the Polaris PowerPAC portal page. See “Content Carousels on the PowerPAC Portal Page” on page 31. <ul style="list-style-type: none">• Default: None defined.• Requirement: Navigation: Portal - Yes (PowerPAC profiles).
PowerPAC Analytics (System, Library, Branch)	Enables Google Analytics or custom analytics use in Polaris PowerPAC. The same code is also used in Polaris PowerPAC Children’s Edition. See “Analyzing Polaris PowerPAC Use” on page 11. <ul style="list-style-type: none">• Default: No (no page use analysis)
Product page categories: Configure (System, Library, Branch)	Sets the default state of categories (expanded or collapsed) on the Polaris PowerPAC product page for a title in search results, and determines the display order of the categories. See “Configuring the PowerPAC Product Page” on page 150.
Quick search button configuration (System, Library, Branch)	These settings enable a quick search feature with search option buttons on the Polaris PowerPAC portal page. You can specify which search option buttons to display and what type of search each launches. See “Customizing Portal Page Features” on page 25 and “Set up quick search with search option buttons” on page 27. <ul style="list-style-type: none">• Default: Feature is not enabled. The default quick search feature is used on the portal page.

Recently viewed titles (System, Library, Branch)	Enables the Recently Viewed Titles feature for in-house workstations, remote workstations, or both; sets the maximum number of titles that can be displayed. See “Setting Up Recently Viewed Titles” on page 153.
Remote databases: Categorization of target databases (System, Library, Branch)	Displays the Z39.50 Target Categorization dialog box, to allow an organization to group remote search targets as a finding aid. See “Managing Federated Search Targets” on page 95 for detailed instructions on using target categories. <ul style="list-style-type: none"> • Requirement: Make remote resources available for searching. See “Registering Remote Resource Servers” in the <i>Polaris Administration Guide 4.1R2</i>.
Remote databases: Maximum number that can be searched at once (System, Library, Branch)	Set the number of remote databases that can be searched at one time. See “Maximum Number of Databases Searchable at One Time” on page 105.
Remote databases: Usage settings (System, Library, Branch)	Set usage conditions for specific remote resources, including authentication requirements and search access points. Enable follow-on searches and specify follow-on search targets. Set PAC display name; specify databases for Using drop-down list in PowerPAC search forms. See “Remote Database Usage Settings for PowerPAC” on page 106.
Remote user PowerPAC: Enable (System, Library, Branch)	Specifies whether patrons use Polaris PowerPAC to access the library catalog from remote locations (that is, from computers that are not in the library or are not defined in the In-House IP Addresses table). <ul style="list-style-type: none"> • Settings: <ul style="list-style-type: none"> • Yes (default) - Patrons can use Polaris PowerPAC from remote locations. • No - Polaris PowerPAC access is available only from workstations defined in the In-House IP Addresses database table. See “Identifying In-House Computers” in the <i>Polaris Administration Guide 4.1R2</i>.
Results set: Maximum number of records to return (System, Library, Branch)	Sets the maximum number of records that can be returned in a results set. If you experience decreased performance for searches with large results due to limited server capacity, you can lower the maximum number of records to return. However, relevancy ranking may be less effective at lower maximum values. <ul style="list-style-type: none"> • Default: 100,000 (maximum)
Rotating best seller jacket on Portal page (System, Library, Branch)	Displays a random book jacket image drawn from best-seller lists on the portal page. When the image is selected, a search is launched for the title. See “Set up rotating book jackets” on page 29. <ul style="list-style-type: none"> • Settings: Yes - Book jacket images are displayed on the portal page; No (default) - Book jacket images are not displayed. • Requirement: Set up an enriched data source. See “Enabling Enriched Data” on page 222.

- RSS Feeds: Enable (System, Library, Branch)** Provides RSS feeds from the New Titles dashboard list. See [“Setting Up RSS Feeds”](#) on page 46. When this profile is set to **Yes**, an orange XML icon is displayed by the elements of the New Titles list.
- **Default:** Yes
- RSS Feeds: Maximum new releases (System)** Specifies how many titles should be listed in the RSS feed that the patron receives. This profile is available at the system level only; that is, it controls the number for every branch that enables RSS feeds.
- **Default:** 5
- Scoping: Use MARC language scoping display table (System, Library, Branch)** Determines whether catalog searches can be limited only by certain languages, or by any language defined by the MARC 21 format. This profile controls the languages displayed for selection in the PowerPAC Search Options list.
- **Settings:**
 - **Yes** (default) - Allow language scoping by the languages specified in the MARC Language Scoping Display table.
 - **No** - All languages defined by the MARC 21 format are displayed for search scoping.
 - **Requirement:** Specify languages in Policy Tables, MARC Language Scoping. See [“Setting Language Display”](#) in the *Polaris Administration Guide 4.1R2*.
- Search: Display search criteria in search box for link-produced searches (System, Library, Branch)** Specifies whether search terms such as an ISBN are displayed in the search box when the user clicks a link (for example, in the New Titles list) to launch a search.
- **Default:** No. Only search terms actually typed by the user are displayed in the search box.
- Search options: Limit by collection enabled (System, Library, Branch)** Specifies whether collections are available as a scoping option on the Polaris PowerPAC Search Options page.
- **Default:** No (the Collections list does not appear as a scoping option)
- Single login: Enable (System, Library, Branch)** Displays a Log In option on the My Account menu that allows a patron to log on once for a PAC session, instead of each time the patron selects a function that requires identification. See [“Patron Log-In”](#) on page 246.
- **Default:** Yes (the Login option is displayed on the menu)
- Text: Headings count column for “see from” headings (System, Library, Branch)** Specifies the text to display in the number of titles column of the headings list when the headings entry is a SEE heading.
- **Default:** --
- Theme dashboard position (System, Library, Branch)** Sets the position of the dashboard on Polaris PowerPAC pages. (Does not affect the dashboard position on the product page, which is always on the right.) See [“Setting Polaris PowerPAC Themes”](#) on page 24.
- **Default:** Left

- Theme selection (System, Library, Branch)** Specifies the overall appearance of Polaris PowerPAC pages by providing several ready-made skin choices. See [“Setting Polaris PowerPAC Themes”](#) on page 24.
- **Default:** Classic
- Title Display: Configure (System, Library, Branch)** Specifies the data elements that are displayed in brief, full, and summary search results views for a title in the Polaris PowerPAC. You can customize and order the elements you select, and customize and translate their labels. See [“Configuring the PowerPAC Title Display”](#) on page 133.
- Title list: Email (System, Library, Branch)** Specifies whether patrons can send their title list as an e-mail message from Polaris PowerPAC or Mobile PAC.
- **Settings:** **Yes** (default) - Allows patrons to send their title list as an e-mail message; **No** - Suppresses the e-mail icon on the title list.
 - **Requirement:**
 - Set **Title List: Enable** to Yes (PowerPAC profiles).
 - Specify an e-mail address for sender in **Email Notification: Email address of sender** (PAC Profile)
- Title list: Enable (System, Library, Branch)** Specifies whether patrons can create a bibliography of titles they select from search results. See [“Enabling PAC Title Lists”](#) on page 197. This profile also affects Mobile PAC. See [“Title Lists in Mobile PAC”](#) on page 373.
- **Settings:** **Yes** (default) - Allows patrons to add titles to a bibliography, and view and modify the contents of the list; **No** - Title lists are not available.
- Title list: Print (System, Library, Branch)** Specifies whether patrons can print their title lists.
- **Settings:** **Yes** (default) - Allows patrons to print their title lists to any printer available from the workstation; **No** - Suppresses the Printer icon on the title list.
 - **Requirement:** Set **Title List: Enable** to Yes (PowerPAC profiles).
- Title list: Save (System, Library, Branch)** Specifies whether patrons can save their title list to a file in a network folder or diskette.
- **Settings:** **Yes** (default) - Allows patrons to save the contents of the title list to a text file; **No** - Suppresses the Save icon on the title list.
 - **Requirement:** Set **Title List: Enable** to Yes (PowerPAC profiles).
- Virtual reference: Configure (System, Library, Branch)** If you contract with a virtual reference service, use this dialog box to set up the specific profiles for that service. For more information, see [“Setting Up Live Virtual Reference Services”](#) on page 48.
- **Requirement:** **Virtual reference: Enable** - Yes (PowerPAC profiles)

Virtual reference: Enable (System, Library, Branch) Specifies whether patrons can use a virtual reference service from Polaris PowerPAC. This feature provides interactive, online reference services. See [“Setting Up Live Virtual Reference Services”](#) on page 48.

- **Settings: Yes** - The virtual reference link is available in Polaris PowerPAC; **No** (default) - The virtual reference service is not available, and patrons cannot access session history from patron accounts.
- **Requirement:** The library must subscribe to a virtual reference service.

Virtual reference: Supplier (System, Library, Branch) Specifies your virtual reference service provider. If you contract with a virtual reference service, select the provider here. See [“Setting Up Live Virtual Reference Services”](#) on page 48.

- **Requirement:**
 - **Virtual reference: Enable** - Yes (PowerPAC profiles)
 - **Virtual reference: Configure** - (PowerPAC profiles) Contains specific settings for the provider you selected

Children's PAC Profiles Reference

These profiles are available on the Profiles, Children's PAC tabbed page on the Administration Explorer, at the listed organizational levels.

- | | |
|--|--|
| Allow hold requests if charging for holds
(System, Library, Branch) | <p>Determines whether hold requests are allowed from Children's PAC if the system charges for holds. If set to Yes, hold requests are allowed and a message concerning the charge is displayed when the request is placed. The patron can continue or cancel the request. See "Set Holds options: Enabling, Item Status Restrictions, First Available Copy" in the <i>Polaris Patron Services Administration Guide 4.1R2</i>.</p> <ul style="list-style-type: none">• Default: No (hold requests cannot be placed from Children's PAC if the system charges for hold requests) |
| Categories: Enable
(System, Library, Branch) | <p>Determines whether library-defined categories are available for searching. See "Managing Search Categories" on page 305.</p> <ul style="list-style-type: none">• Default: Yes• Requirement: If yes, define categories with the profile Category construction. |
| Category construction
(System, Library, Branch) | <p>Displays the Category Construction dialog box. Set up subject categories, define search targets within the categories, and edit existing categories and targets. See "Managing Search Categories" on page 305.</p> <ul style="list-style-type: none">• Default: Polaris PowerPAC Children's Edition includes a set of default categories.• Requirement: Set Categories: Enable to Yes (Children's PAC profiles). |
| Dashboards: Enable
(System, Library, Branch) | <p>Determines whether library-defined elements and theme choices are displayed in lists on the left portion ("dashboard") of the Children's PAC interface. See "Managing Children's Dashboards" on page 301, and "Managing Themes" on page 297.</p> <ul style="list-style-type: none">• Default: Yes |
| Dashboards: Web page / web part assignment
(System, Library, Branch) | <p>Displays the Web Page - Web Part Configuration dialog box. Specify which Web parts to display in the dashboard on specific Web pages for the Children's PAC at each branch. See "Managing Children's Dashboards" on page 301.</p> <ul style="list-style-type: none">• Requirement: Define Web parts at the system level, using the profile Dashboards: Web part construction (Children's PAC profiles). Set Dashboards: Enable to Yes (Children's PAC profiles) to display dashboards in the Children's PAC. |

Dashboards: Web part construction (System)	<p>Displays the Web Part Editor dialog box. Create custom Web parts (title searches, URLs, free text, and polls), and limit the number of items on automated Web parts. See “Managing Children’s Dashboards” on page 301.</p> <ul style="list-style-type: none"> • Requirement: <ul style="list-style-type: none"> • Assign the Web parts to specific Children’s PAC pages using the profile Dashboards: Web page / web part assignment (Children’s PAC profiles). • Set Dashboards: Enable to Yes (Children’s PAC profiles) to display dashboards in the Children’s PAC.
Default search limits (System, Library, Branch)	<p>Displays the Children’s PAC Default Search Limit dialog box. Specify a search filter, expressed as a Common Query Language search term, in the free text search limit box. In addition, you can specify which collections defined in the system should be included in Children’s PAC search results. See “Setting Children’s Search Limits” on page 302.</p> <ul style="list-style-type: none"> • Default: AND TA=j (limits results to records where the target audience is juvenile); no collections selected
Item availability text: Available (System, Library, Branch)	<p>Specifies the text that indicates an item is available.</p> <ul style="list-style-type: none"> • Default: In Library • Requirement: Set Item Availability: Display status to Yes (Children’s PAC profiles).
Item availability text: Not available (System, Library, Branch)	<p>Specifies the text that indicates an item is not available.</p> <ul style="list-style-type: none"> • Default: Checked Out • Requirement: Set Item Availability: Display status to Yes (Children’s PAC profiles).
Item Availability: Display branch location (System, Library, Branch)	<p>Determines whether the item’s assigned branch is displayed.</p> <ul style="list-style-type: none"> • Default: Yes
Item Availability: Display call number (System, Library, Branch)	<p>Determines whether to show the call number from the item record in the Availability view.</p> <ul style="list-style-type: none"> • Default: Yes
Item Availability: Display collection (System, Library, Branch)	<p>Determines whether the collection information from the item record is displayed.</p> <ul style="list-style-type: none"> • Default: Yes (display collection)

- Item Availability: Display local and system levels (System, Library, Branch)** Determines which items are included in search results availability information. See [“Customize the children’s item availability display”](#) on page 320.
- **Settings:**
 - **Yes** (default) - If the logged-on branch is the system, information about items that are designated to display in PAC and owned throughout the system is displayed. If the logged-on branch is a local branch, only items held by that branch are displayed. If none are owned by the local branch, the system-level items are displayed.
 - **No** - If the logged-on branch is the system, information about items owned throughout the system is displayed. If the logged-on branch is a local branch, only the local items are displayed. If none are owned by the local branch, no items are displayed.
- Item Availability: Display notes (System, Library, Branch)** Determines whether a note icon is displayed for items that include public notes. Patrons can click the icon to read the note.
- **Default:** Yes
- Item Availability: Display shelf location (System, Library, Branch)** Determines whether the item’s shelf location is displayed.
- **Default:** Yes
- Item Availability: Display status (System, Library, Branch)** Determines whether the circulation status of an item is displayed in the item information.
- **Default:** Yes
- Item Availability: Display type (System, Library, Branch)** Determines whether the material type (information about physical format from the item record) is displayed in the item information.
- **Default:** Yes
- Multiple language strings (System)** Displays a dialog box that allows you to specify a language and translate all search categories and targets from English to the language of your choice. Other languages are available in this dialog box only if your library system has purchased other language versions of Polaris PowerPAC Children’s Edition. You can also edit the English names. See [“Translate all categories and targets”](#) on page 317.
- **Default:** No translations (lists English categories and targets only)
- Navigation: Events (System, Library, Branch)** Determines whether the Children’s PAC interface includes the Events button, which is used to access a library-maintained Events page. See [“”](#) on page 296.
- **Default:** Yes
- Navigation: Help (System, Library, Branch)** Determines whether the Children’s PAC interface includes the Help button, which is used to access online Help for the Children’s PAC.
- **Default:** Yes

Navigation: PowerPAC (System, Library, Branch)	<p>Determines whether a link to Polaris PowerPAC is displayed in the Children's PAC interface.</p> <ul style="list-style-type: none"> • Default: Yes
Number of tooltip entries displayed (System, Library, Branch)	<p>For categories, defines the number of targets that display in a tooltip when the cursor hovers over the category link. See "Managing Search Categories" on page 305.</p> <ul style="list-style-type: none"> • Default: 5 • Requirement: <ul style="list-style-type: none"> • Use the profile Category construction (Children's PAC profiles) to set up search categories. • Set the profile Categories: Enable to Yes (Children's PAC profiles) to display the defined search categories in the Children's PAC.
Remote user: Enable (System, Library, Branch)	<p>Allows access to the Children's PAC from workstations outside the library.</p> <ul style="list-style-type: none"> • Settings: <ul style="list-style-type: none"> • Yes (default) - Remote users can access the Children's PAC interface. • No - Children's PAC access is available only from workstations defined in the In-House IP Addresses database table. See "Identifying In-House Computers" in the <i>Polaris Administration Guide 4.1R2</i>.
Results set: Maximum number of records to return (System, Library, Branch)	<p>Sets the maximum number of records that can be returned in a results set. If you experience decreased performance for searches with large results due to limited server capacity, you can lower the maximum number of records to return. However, relevancy ranking may be less effective at lower maximum values.</p> <ul style="list-style-type: none"> • Default: 1,000 (maximum = 100,000)
Search button visibility: Anywhere button	<p>Displays a search button that launches a keyword search in all fields. See "Set children's search buttons" on page 303.</p> <ul style="list-style-type: none"> • Settings: Yes (default) - Button is displayed in the Children's PAC interface; No - Button is not displayed.
Search button visibility: Authors button	<p>Displays a search button that launches a keyword search for author. See "Set children's search buttons" on page 303.</p> <ul style="list-style-type: none"> • Settings: Yes (default) - Button is displayed in the Children's PAC interface; No - Button is not displayed.
Search button visibility: Fiction button	<p>Displays a search button that launches a keyword subject search scoped to fiction. See "Set children's search buttons" on page 303.</p> <ul style="list-style-type: none"> • Settings: Yes (default) - Button is displayed in the Children's PAC interface; No - Button is not displayed.

- Search button visibility: Non-Fiction button** Displays a search button that launches a keyword subject search scoped to non-fiction. See [“Set children’s search buttons”](#) on page 303.
- **Settings:** **Yes** (default) - Button is displayed in the Children’s PAC interface; **No** - Button is not displayed.
- Search button visibility: Series button** Displays a search button that launches a keyword search for series name. See [“Set children’s search buttons”](#) on page 303.
- **Settings:** **Yes** (default) - Button is displayed in the Children’s PAC interface; **No** - Button is not displayed.
- Search button visibility: Subjects button** Displays a search button that launches a keyword search for subject. See [“Set children’s search buttons”](#) on page 303.
- **Settings:** **Yes** (default) - Button is displayed in the Children’s PAC interface; **No** - Button is not displayed.
- Search button visibility: Titles button** Displays a search button that launches a keyword search for title. See [“Set children’s search buttons”](#) on page 303.
- **Settings:** **Yes** (default) - Button is displayed in the Children’s PAC interface; **No** - Button is not displayed.
- Select theme: Enable (System, Library, Branch)** Allows users of Children’s PAC to select an interface theme from choices you specify. See [“Managing Themes”](#) on page 297.
- **Default:** Yes
 - **Requirements:**
 - Specify which themes are available as choices with the profile **Theme assignment (Children’s PAC profiles)**.
 - Set **Dashboards: Enable to Yes (Children’s PAC profiles)**, because the theme options are displayed in the dashboard.
- Theme assignment (System, Library, Branch)** Displays the Theme Assignment dialog box, where you can specify which library-defined or system-provided interface themes are available as choices from the Children’s PAC. You can also set a default theme here. See [“Managing Themes”](#) on page 297 for more information.
- **Requirements:**
 - Set up and edit themes at the system level, with the Children’s PAC profile **Theme construction (Children’s PAC profiles)**.
 - Set the profile **Select theme: Enable to Yes (Children’s PAC profiles)** to display the assigned themes in the Children’s PAC.
 - Set **Dashboards: Enable to Yes (Children’s PAC profiles)** for the organization, because the theme options are displayed in the dashboard.

- Theme construction (System)** Displays the Theme Construction dialog box. Set up and edit themes for the Children's PAC interface. See "[Managing Themes](#)" on page 297 for more information.
- **Requirement:** Specify which themes are available to specific organizations using the Children's PAC profile **Theme assignment**.
- Web access: Enable (System, Library, Branch)** Allows live Web links in Children's PAC search results. See "[Customizing the Children's Results Display](#)" on page 319.
- **Settings: Yes** - Users can click the globe icon or a Web link to view the site; **No** (default) - Web links are text-only, and do not allow Internet access.

Mobile PAC Profiles Reference

These profiles are available on the Profiles, Mobile PAC tabbed page on the Administration Explorer, at the listed organizational levels.

Ask us: Require login (System, Library, Branch) Determines whether users must be registered patrons to send a question to the library by e-mail, using the Ask Us feature. See [“Setting Up Ask Us in Mobile PAC”](#) on page 340.

- **Settings:**

- **Yes** (default) - Patrons must log in with a barcode and password to use Ask Us.
- **No** - The Ask Us log-in page displays a **Guest** button that bypasses log-in.

Branch switching: Enable (System, Library, Branch) Allows users to change connection branches. See [“Setting Up Mobile PAC Connections”](#) on page 328.

- **Default:** Yes

Mobile PAC Analytics (System, Library, Branch) Specify Google Analytics or custom coding to track site usage. See [“Analyzing Polaris Mobile PAC Use”](#) on page 325.

Navigation: Ask us (System, Library, Branch) Places the **Ask Us** link on the Mobile PAC home page. See [“Setting Up Ask Us in Mobile PAC”](#) on page 340.

- **Default:** Yes

Navigation: Donations (System, Library, Branch) Places the **Donations** link on Mobile PAC pages. The system uses the setting for the patron’s registered branch. See [“Credit Card Payments from Mobile PAC”](#) on page 396. For information about setting up credit card processing in Polaris, see [“Setting Up E-Commerce”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Default:** No

Navigation: Fines & fees (System, Library, Branch) Places the **Fines and Fees** link on the Patron Account page. The system uses the setting for the patron’s registered branch. See [“Patron Account \(My Account\) in Mobile PAC”](#) on page 387.

- **Default:** Yes

Navigation: Items out (System, Library, Branch) Places the **Items checked out** link on the Patron Account page. The system uses the setting for the patron’s registered branch. See [“Patron Account \(My Account\) in Mobile PAC”](#) on page 387.

- **Default:** Yes

- Navigation: Patron account (System, Library, Branch)** Places the **My Account** link on the Mobile PAC home page. See [“Patron Account \(My Account\) in Mobile PAC”](#) on page 387.
- **Default:** Yes
- Navigation: Requests (System, Library, Branch)** Places the **Hold requests** link on the Patron Account page. The system uses the setting for the patron’s registered branch. See [“Patron Account \(My Account\) in Mobile PAC”](#) on page 387.
- **Default:** Yes
- Navigation: Web site URL (System, Library, Branch)** Displays the organization’s Web site address on the Hours and Contact page. See [“Setting Up Mobile PAC Library Information”](#) on page 334.
- New and Popular Titles (System, Library, Branch)** Displays the **New and Popular** link on the home page, and sets up the lists of new, best seller, on-order, and most circulated (popular) titles. See [“New & Popular Titles in Mobile PAC”](#) on page 337.
- Product page categories: Configure (System, Library, Branch)** Determines the display order of links on the Mobile PAC product page for a title in search results. See [“Set up the Mobile PAC title \(product\) page”](#) on page 361.
- Remember me: Enable (System)** Displays the **Remember me** check box on the patron login page. See [“Patron Log-In Settings for Mobile PAC”](#) on page 383.
- **Default:** Yes
- Title Display: Configure (System, Library, Branch)** Specify the data elements that appear in the brief, full, and summary results for Mobile PAC bibliographic searches. You can customize and order the elements you select, and customize and translate their labels. See [“Configuring the Mobile PAC Title Display”](#) on page 363.

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