polaris

PAC Customization Guide

6.6

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Contents

PAC Customization

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

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

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

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

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

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

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

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

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

See also:

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

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

PowerPAC Directory Structure

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

> **Note:**
> For a list of specific pages and their functions, see Standard PAC Pages Reference.

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

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

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

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

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

Customizing PAC Themes

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

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

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

See also:

- Theme Structure
- Header Logo
- Creating a Custom Theme for Polaris PowerPAC
- Creating a Custom Theme for Polaris PowerPAC Children's Edition
- Creating Custom Mobile PAC Themes

Theme Structure

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

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

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

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

Header Logo

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

Creating a Custom Theme for Polaris PowerPAC

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

To create a custom theme for Polaris PowerPAC:

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

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

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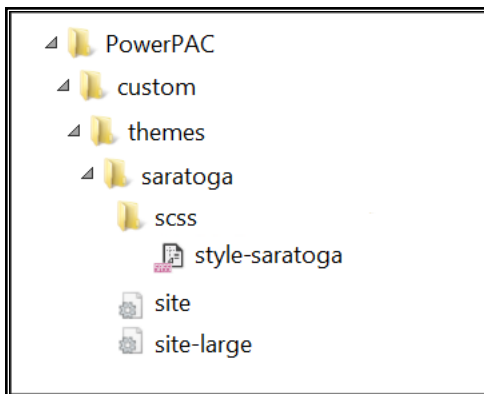
Note:
If you want to modify a standard theme, you may want to use the simple Gray theme as the basis for your changes.

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

> overrides, the custom chilifresh.css page must contain all the CSS classes from the default version.

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

   > PowerShell -File ScssCompile.ps1 -Theme Saratoga

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

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

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

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

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

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

   d. Select **File** > **Save**.

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

   > **Note**:
   > Hosted customers should contact their Site Manager to perform an IIS reset.

Creating a Custom Theme for Polaris PowerPAC Children's Edition

When you enable Children's Edition themes in Polaris Administration for an organization, children can choose a theme from the options you specify. Polaris provides three standard Children's Edition themes: Treasure, Antique, and Ocean. You can offer some or

all of these as well as your custom themes. Themes are developed at the system level, but you can assign them at the system, library, or branch level, so that each branch can control which (if any) theme options are available. The default theme—the theme that is displayed when users first connect to Polaris PowerPAC Children's Edition—can also be set at the system, library, or branch level.

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

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

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

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

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

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

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

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

b. Double-click **Theme construction**. The **Theme Construction** dialog box lists the default themes and any custom themes that have already been defined. You cannot edit the default themes.

c. Select the theme you copied as a basis for your custom theme in step 1, and click **Copy**. The copy is added to the list as **Copy of theme**.

d. Select the copy and click **Edit**. The **Edit Theme** dialog box opens.

e. Type a name for the theme in the **Display Name** box. The display name identifies the theme in Polaris Administration profiles and on the Polaris Power-PAC Children's Edition interface.

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

f. In the appropriate **File Name** boxes, if you changed any filenames in the custom theme folder, type the new filenames for the page graphic elements and for the stylesheet. The system constructs the appropriate URL. Type only the new filename (case-sensitive).

g. Type the name of the theme folder you created in step 1 in the **Default Image Path** box. Type only the folder name (case-sensitive). The system constructs the appropriate URL for the theme files to **Polaris\[version]\PowerPAC\children\themes\language folder\your folder** on the server, based on the theme folder you specify.

h. Click **OK** on the dialog box. The dialog box closes, and your settings are saved.

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

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

   b. Double-click **Theme Assignment**.

   c. Select the custom theme in the Unassigned Themes list, and click **Assign**. The theme is added to the Assigned themes list.

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

   e. Click **OK** on the dialog box. The dialog box closes, and your settings are automatically saved.

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

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

> **Note:**
> Polaris Hosted customers should contact Polaris Customer Support to perform an IIS reset.

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

Customizing Layouts

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

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

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

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

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

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

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

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

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

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

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

Section- and Page-Specific Customizations

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

Example:

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

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

Navigation Menu Options

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

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

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

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

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

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

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

Menu Classes for PAC Usage Statistics

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

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

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

Example:

```
<li class="nav__item-level-1 dropdown">
    <a href="#" class="nav__link-level-1 menu-1 dropdown-toggle" data-toggle="dropdown" role="button" aria-haspopup="true" aria-expanded="false">Library Info <span class="caret"></span></a>

        <ul class="nav__list-level-2 dropdown-menu">

            <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/default.aspx?ctx=90.1033.0.0.2" class="nav__link-level-2 menu-1-1">Portal</a></li>

            <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/library/hours.aspx?ctx=90.1033.0.0.2" class="nav__link-level-2 menu-1-2">Hours</a></li>

            <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/library/events.aspx?ctx=90.1033.0.0.2" class="nav__link-level-2 menu-1-3">Events</a></li>

            <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/library/policies.aspx?ctx=90.1033.0.0.2" class="nav__link-level-2 menu-1-4">Policies</a></li>

            <li class="nav__item-level-2"><a href="http://QA-Polaris.polarislibrary.com/polaris/library/website.aspx?ctx=90.1033.0.0.2" class="nav__link-level-2 menu-1-5">Web Site</a></li>

            <li class="nav__item-level-2"><a href="https://QA-Polaris.polarislibrary.com/polaris/library/askus.aspx?ctx=90.1033.0.0.2" class="nav__link-level-2 menu-1-6">Ask Us</a></li>

        </ul>
    </li>
```

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

Customizing Pages

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

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

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

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

Site Master Page

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

> **Note:**
> You can include a custom version of **site.master** in the **/custom directory**. See Customizing Layouts.

CSS and JavaScript References

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

Polaris PowerPAC Accessibility Tags

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

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

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

User-Defined Templates

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

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

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

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

Note:

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

Adding Web Parts to Custom Pages

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

Adding Menu and Submenu Options

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

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

Suppressing Context

Standard query parameters are appended to most PowerPAC URLS. They identify the relevant organization and the appropriate language file. An example is shown below.
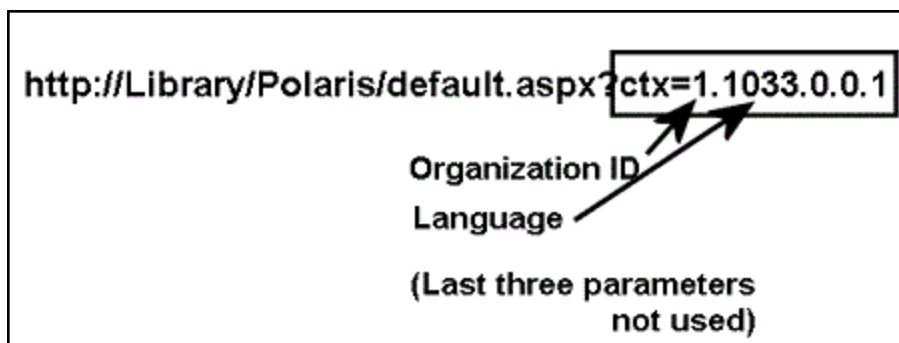
For each of the nodes in the primary and secondary navigation links defined in **HeaderData.xml**, you can specify a **SuppressCTX** node for custom tabs and secondary menu options. Set **SuppressCTX** to **Y** for any custom tab or menu option in the header for which the link is going to some page other than a PowerPAC page. For example, a library adds additional custom tabs for **Visual Search** and **Digital Catalog**, applications outside Polaris PowerPAC that the library wants patrons to be able to use. By including

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

Customizing Search By and Sort By Options

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

Search By Options

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

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

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

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

Sort By Options

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

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

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

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

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

Customizing PowerPAC Help Links

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

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

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

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

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

Removing Help Links

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

Rearranging the Order of Help Links

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

Adding Help Links

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

The newly added node should contain the following:

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

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. Separate settings control the display of community information search results. See the *Community Profiles Guide*.

See also:

- Configuring the PowerPAC Title Display
- Configuring the PowerPAC Product Page
- Setting Up Recently Viewed Titles
- Managing Feature It Promotions
- Setting PowerPAC Narrow/Related Search Options
- Suppressing Request and Availability Options
- Cross-Reference Display in Browse Search Results
- Setting Up Local and System Availability
- Sending Call Numbers by Text Message
- Suppressing Items from Search Results
- Naming Shelf Locations
- Highlighting Titles with Local Items (PowerPAC)
- Map It (Google Maps) in PAC
- Google Preview for PowerPAC Search Results
- Enabling PAC Title Lists
- Bulk Hold Requests from Polaris PowerPAC Title Lists
- Social Bookmarking for Search Results (AddThis™)

Setting PowerPAC Narrow/Related Search Options

When a user's search results are returned, the Polaris PowerPAC dashboard can display two web parts 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. By default, both web parts and all their available elements are enabled and set to an expanded initial display.

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.

> **Note:**
> This profile does not affect course reserve or community information search results. A separate profile is available for community information search results. See the *Community Profiles Guide*.

See also:

- [Narrow Search Web Part](#)
- [Availability and Assigned Branch Facets in the Narrow Your Search Web Part](#)
- [Related Searches Web Part](#)
- [Set up the Narrow your search Web part](#)
- [Set up the Related searches Web part](#)
- [Translate labels for Narrow/Related web parts (Polaris PowerPAC)](#)


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.
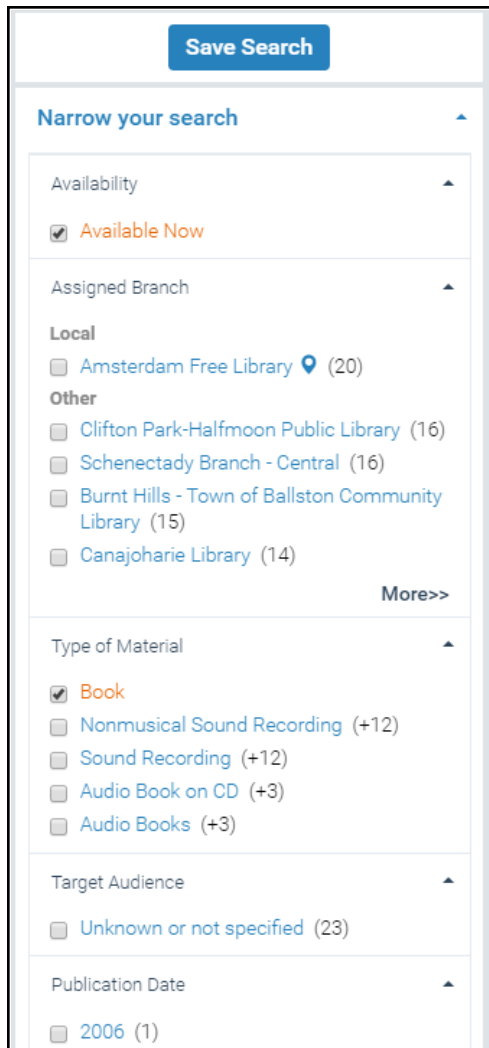
- Bulleted facets represent "and" filters for the results set. When you select a bullet facet, it is also placed at the top of its list. The filtered results set is now restricted to results that match any already selected facet and the selected bullet facet.
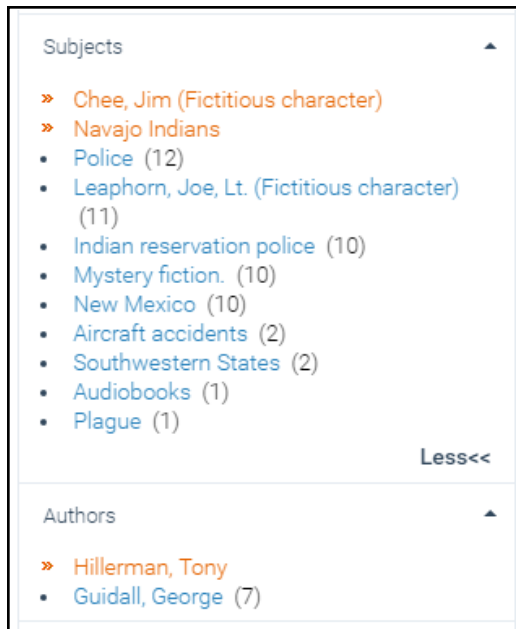
The following elements are available for narrowing search results:

- **Related words** - See Setting PowerPAC Narrow/Related Search Options for information about this element.
- **Availability** - See Availability and Assigned Branch Facets in the Narrow Your Search Web Part for information about this element.
- **Database** - See Develop the remote targets display for PAC for information about setting up remote databases for searching.
- **Type of Material** - See Setting Up Search Filters (Limit By) 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**
- **Lexile Reading Level** - The Lexile facets allow filtering by reading level. Lower ranges indicate easier reading levels, while higher ranges indicate more advanced reading levels. For more information about Lexile numbers and reading level equivalents, see https://lexile.com. The Lexile number for a title is derived from the 521 tag in the MARC record, subfield $a. The first indicator must be 8; the second indicator is undefined (#). Subfield $b should always contain **Lexile**. When multiple tags exist in the bibliographic record, all tags meeting the criteria are considered. The system normalizes the data from the MARC tag and groups the facets into Lexile ranges; for example, **521 $a1150** is included in the displayed range facet **1100-1195**.

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.

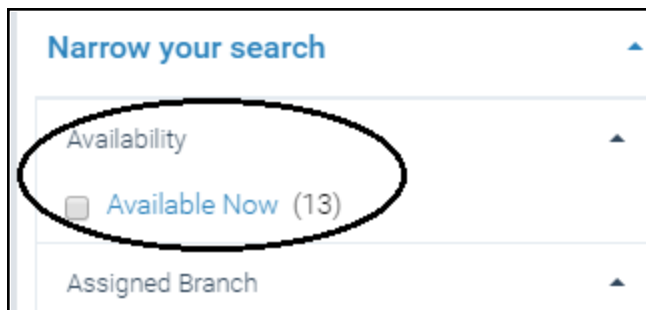## Availability and Assigned Branch Facets in the Narrow Your Search Web Part

You can display an Availability facet under the Narrow Your Search dashboard. Used in conjunction with the Assigned Branch facet, your patrons can filter their search results to identify items that are available anywhere or at specific branches. Item availability for most titles is updated in real time. The Assigned Branch facet consults the system administration Item Availability Display Order policy table for the connection branch to show local libraries first in the list of assigned branches, making it simple for patrons to find available titles that are nearby.

Libraries that have "availability" or "assigned branch" limits configured for the **Limit By** search drop-down list [see Setting PowerPAC Narrow/Related Search Options] may want to consider using the Availability and Assigned Branch facets instead. The Availability facet works much like the "availability" **Limit By** feature, but PowerPAC users can

combine the facet with multiple assigned branches to retrieve a narrow or wide range of available titles from their search results.

Libraries whose branches all connect at the system level can take advantage of the new Availability facet since both local and system organizations (as defined in the Item Availability Display Order table) are included in the Availability facet results. For more information about the Item Availability Display Order table, see Setting Up Local and System Availability.

When you enable the facet, an **Available now** check box is displayed in the Narrow Your Search dashboard for search results. The **Available now** line also displays the number of titles that will be in the search results list if **Available now** is checked.

Libraries listed under the **Assigned Branch** facet are divided into two categories: **Local** and **Other**. **Local** lists those branches defined as local in the Item Availability Display Order policy table for the connection branch. **Other** lists those branches defined as system in the Item Availability Display Order policy table. You can edit the **Local** and **Other** labels in Polaris WebAdmin; the string mnemonics are **PACML_DASHBOARD_ LOCAL** and **PACML_DASHBOARD_OTHER**.

A branch appears in the Assigned Branch list only if it has at least one item on at least one title in the search results. Within each category, organizations are listed in descending order by the number of titles that will be retrieved if the facet is selected. The connection branch appears at the top of the local list. An icon indicates the connection branch. See the example below.
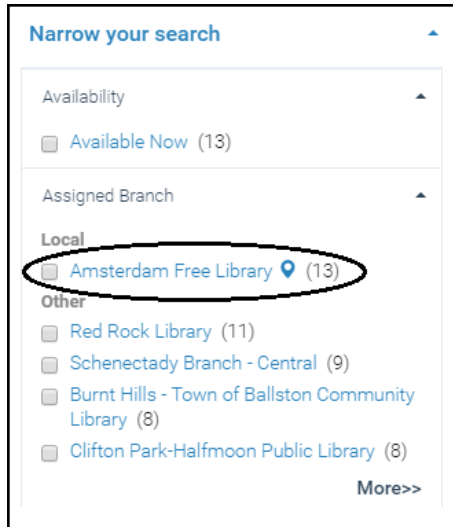
If the assigned branch in an item record is changed, the change is reflected in the results the next time a search is done.

The **Assigned Branch** facet uses the **Minimum to Show** and **Maximum to Show** settings in the PowerPAC profile **Dashboards: Narrow your search & Related searches**. The settings are applied to the list as a whole, regardless of where the local/other cut-off point may occur for any given set of search results. The system limit on the number of entries for the web part is 99.

A title is available for a connection branch when these conditions are met:

- **Display in PAC** is checked in the bib record, and either:
  - There is at least one linked item record where the item record status is Final, and
  - The item circulation status is In, and
  - The assigned branch is in the Item Availability Display Order policy table for the connection branch, and
  - **Display in PAC** is checked in the item record, and
  - The item's circulation status is *not* checked in the PAC profile **Suppress Item Display** for the connection branch (for example, shelving or non-circulating).
- Or **Display in PAC** is checked in the bib record, there is an issue record, the issue is not linked to an item, and the issue is linked to a subscription Serial Holdings record and is retained.

> **Note:**
> Bib records that do not typically have linked item records (for example,

> titles from remote databases, non-integrated eContent titles, digital collections, and cataloged web sites) have an availability count of 0, and are not included in the filtered search results list when **Available Now** is checked.

> **Note:**
> For integrated eContent, the availability results reflect the status of the Polaris eContent item records and are accurate unless a checkout or checkin has taken place in the last few minutes.

When the patron checks **Available now**, but does not check an **Assigned Branch** facet, the search results list is filtered to display the titles that meet the requirements for displaying in PAC and have at least one item record that is "available" at a branch listed in the organization's Item Availability Display Order table. Bib records that do not meet those requirements are no longer in the search results list. The **Assigned Branch** facet lists only organizations that have at least one item record that is available at a branch listed in the organization's Item Availability Display Order table. The assigned branch facet count for an organization is the number of titles that will be in the search results list if that assigned branch facet is selected.

If the patron checks both **Available Now** and an **Assigned Branch** facet, the search results list is filtered to display only the titles that meet all current requirements for displaying in PAC and have at least one item record that is available at the selected assigned branch. The **Assigned Branch** facet count on the remaining assigned branch facets includes a plus sign and the number of records that will be added to the search results list if the patron selects the branch facet.

When the **Availability** facet is combined with another dashboard facet, each title in the results list matches both facet selections. When the **Availability** facet is combined with a CQL filter from the **Limit By** drop-down list, each title in the results list matches both the CQL filter and the availability facet. When the availability facet is combined with title-level **More Search Options** (Publication Dates, Target Audiences, Languages), each title in the results list matches both the selected options and the availability facet. When the availability facet is combined with item-level **More Search Options** (Libraries, Detailed Material Types, Collections), each title in the results list matches the selected item-level search options and the selected facets, but the selected options and facets are not necessarily on the same item record.

Once **Available now** is checked, it remains checked if the user navigates to the full display for a title or logs in to place a request, then returns to the search results. The

facet checkbox is cleared when a new search is launched, the PAC times out, the user clicks **Reset** after setting **More Search Options**, or the user logs in from the **My Account** menu.

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).

> **Note:**
> The Related browse search options (**Subject**, **Author**, or **Series**) are not displayed when remote databases have been selected.

Save Search

Narrow your search ▾

Related searches ▲

Other Searches ▲

- Any Field Search
- Title Search
- Author Search
- Subject Search
- General Notes Search
- Publisher Search
- Genre Search
- Series Search

Other Databases ▲

- Local Polaris PAC DB
- Amazon (Books)
- ContentDM (EPLS)
- Directory of Community Services (Carroll County)
- Gale (Expanded Academic ASAP)
- Google (Web)
- Miami (PAC)
- WindowsLive (Web)
- Yahoo (Web)

Subjects ▲

- Navajo Indians
- Leaphorn, Joe, Lt. (Fictitious character)
- Chee, Jim (Fictitious character)

Managing Integrated EContent in the PAC

EContent titles provided by integrated vendors can be displayed in the Polaris PowerPAC, Mobile PAC, and PowerPAC Children's Edition. Patrons can search for and view eContent title information using the same features and functions that are available for searching for physical material titles. For information on setting up integrated eContent in Polaris, see the *Integrated EContent Administration Guide*.

> **Note:**
> RBdigital titles display in the patron's account in Polaris Mobile PAC, but patrons cannot take action on RBdigital titles from Mobile PAC.

Many Polaris Administration settings are used for both physical and eContent titles. These include settings for search types, access points, limit by options, facets, and title display configuration. Advanced search options are supported to the extent that the data is present in the eContent item and bibliographic records.

> **Note:**
> If your library offers a Limit By filter for currently available items, the system uses the information currently in the Polaris database. Selecting this filter does not trigger real-time synchronization with the integrated eContent vendor.

Other Polaris Administration settings apply only to eContent in the PAC. These settings are used to: limit title display and access based on the resource group that shares the vendor account; manage eContent availability and hold counts; and track eContent circulations separately from physical items. The library can also customize the text for the **Check Out** and **Place Hold** buttons in WebAdmin.

> **Important:**
> Be sure to reload both PowerPAC and Mobile PAC (if your library uses Mobile PAC) each time you: add or change a resource group; add or change a vendor account; or change the **Resource Groups: Search results settings** profile in Polaris Administration. See Updating Page Caches.

See also:

- EContent in PAC Search Results
- EContent Availability and Holds Counts
- EContent Product Page Display in the PAC

- [Patron-Initiated EContent Circulation from PAC](#)
- [EContent in the PAC Patron Account](#)

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 also:

- [Setting Up Purchase Links](#)
- [Setting Up Polaris Bookstore](#)

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 for details.

See also:

- Edit PowerPAC messages and labels
- PAC Messages and Labels Reference

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.

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 WebAdmin online help.

> **Note:**
> You can also edit certain messages and labels in Polaris Administration. See Editing Messages and Labels.

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 section 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](#).

> **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 *PAC Customization Guide*.

> **Note:**
> Polaris PowerPAC version 5.5 and later features responsive web design that adapts to the user's device (desktop computer, tablet, or smart phone). Polaris PowerPAC Children's Edition does not use responsive design, and is best used from a desktop computer or tablet.

See also:

- [Administering PowerPAC Children's Edition](#)
- [Managing Themes](#)
- [Managing Children's Dashboards](#)
- [Setting Children's Search Limits](#)
- [Managing Search Categories](#)
- [Customizing the Children's Results Display](#)

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 www.chilifresh.com.

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 logon 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 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.

See also:

- Exporting Records to the ChiliFresh Database
- Patron Log-In and ChiliFresh Connections Registration
- Social Features in the PowerPAC Patron Account
- Social Features in Search Results
- Set Up ChiliFresh Connections in Polaris Administration

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 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 Login 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 on with library account credentials to access Connections features within PowerPAC.

A patron who has not logged on can start this process by clicking or tapping any Connections function that requires logon. For example, the registration process can be initiated from search results Connections functions in the patron's search results, or by clicking or tapping **Connections** on the menu bar and logging on.
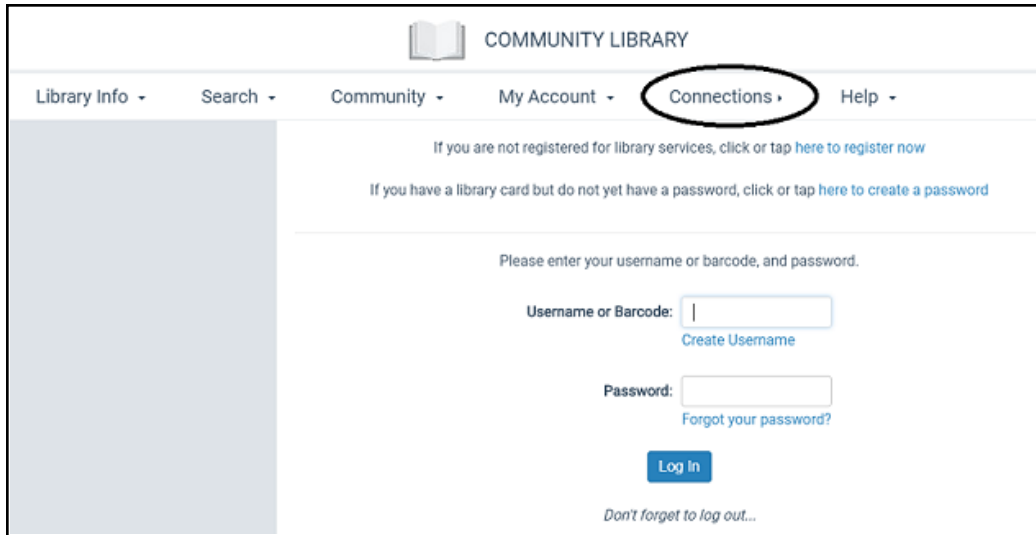
Once logged on, the patron receives a sign-up message for social features, and can click or tap a link to connect the library account to a new or existing ChiliFresh account.

For new accounts, the patron clicks or taps 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 or taps **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 on clicks or taps a ChiliFresh feature such as **Rate or review** in search results.

After the library account and the ChiliFresh account are linked, the patron who is logged into PAC does not have to log on to ChiliFresh Connections to use those Connections features in PAC that require logon.

Logging off in PowerPAC also logs the patron off the ChiliFresh Connections account.

> **Note:**
> Logging on to ChiliFresh Connections from outside PowerPAC does not log the user on to 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 logon credential from PAC. The patron can create a new shared logon 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 on patrons from the PowerPAC patron account. The patron can click or tap **Connections** in the dashboard or **Connections** in the menu bar to display these features.
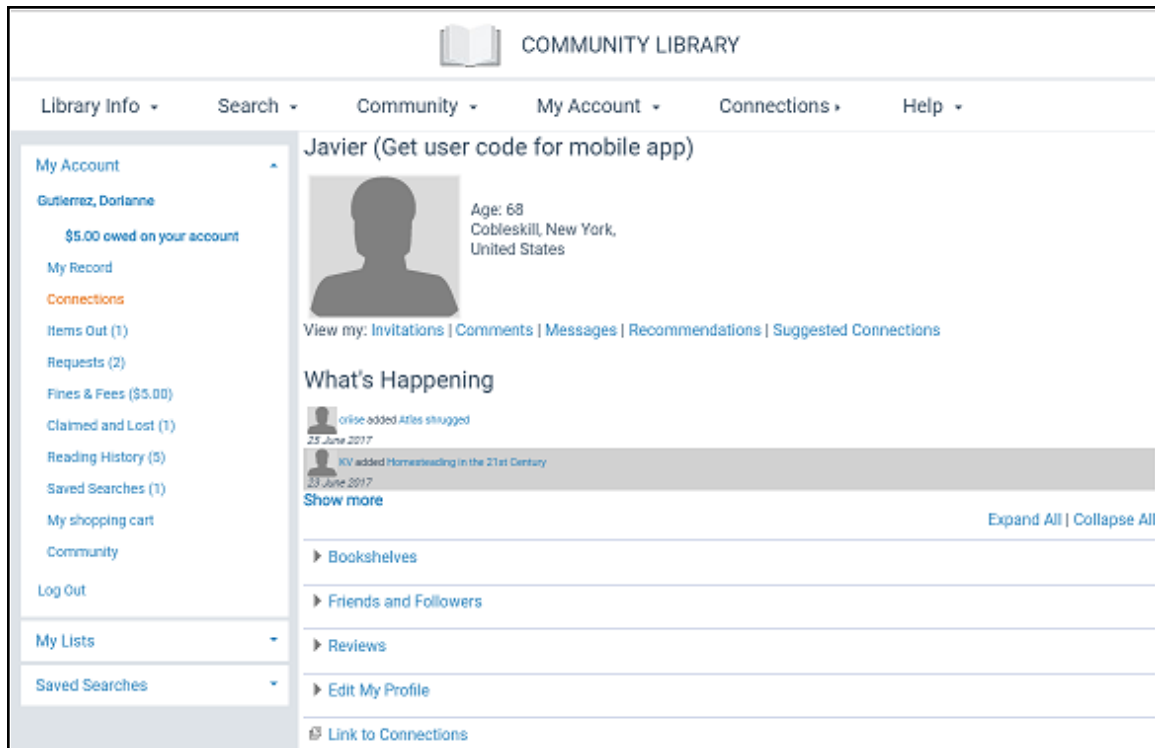
The Connections account page offers links for invitations, comments, messages, recommendations, and suggested connections. Each of these features opens in a lightbox. Below, five content "drawers" contain ChiliFresh Connections user account data. They are initially displayed as collapsed, but the user can choose to expand individual drawers, expand all, or collapse all.

ChiliFresh Connections notifies patrons by email when they receive a new message, recommendation, invitation, or comment. The email message contains a logon link to the email recipient's PAC branch. ChiliFresh Connections defines this notification functionality, including text of the email 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.
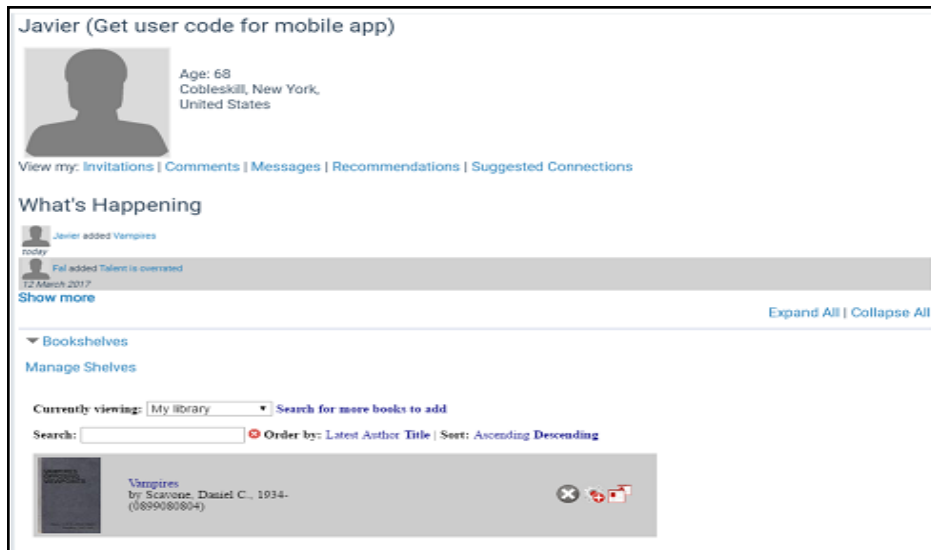
Books can be added to any bookshelf by clicking or tapping the **Search for more books**link. (Books can also be added to bookshelves from the patron's search results. See Social Features in Search Results.) If a bookshelf currently has contents, the list can be sorted by **Latest**, **Author**, **Title**, **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 the title to another shelf. The illustration above shows the interface when the patron chooses to move the title to another shelf.

Friends and Followers Drawer
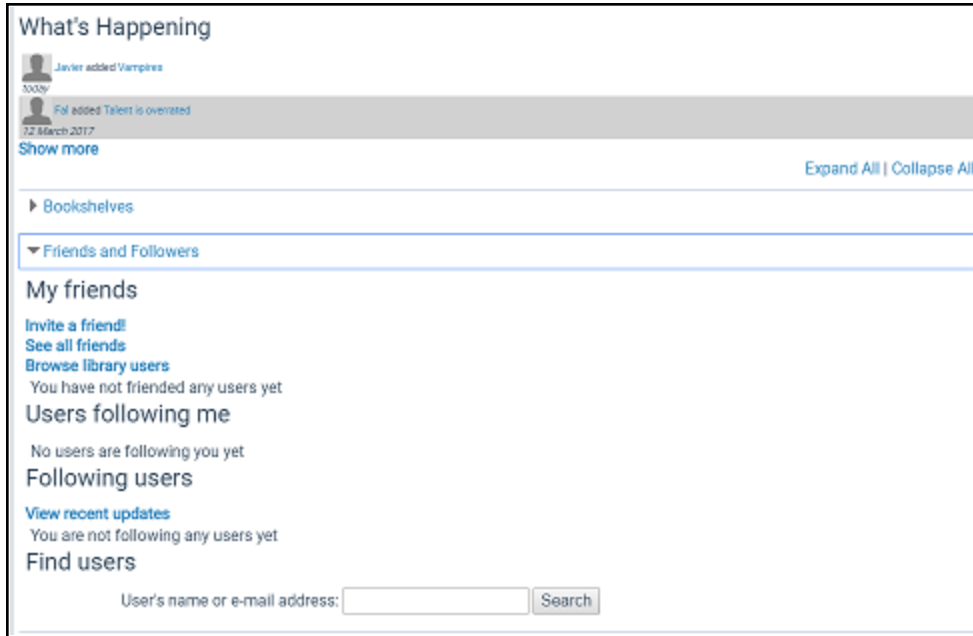
This drawer displays five sections:

- 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 .

- 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.

On that page, the logged-in patron can click or tap 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 ![icon] - 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 ![icon] - Sends a message to this user.

- Add comment to corkboard ![icon] - This option adds a comment to the user's Comments list, and sends the user an e-mail alert.

- Follow/unfollow this user ![icon] - 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.

Edit My Profile Drawer

The patron can edit the Connections profile picture, nickname, "My Interests" (favorite authors, books, movies), and Facebook, Twitter, or LinkedIn link settings. The ChiliFresh site provides more information about these link settings.

Link to Connections Drawer

This drawer is a link to the ChiliFresh Connections site, which opens in a lightbox. The system uses the linked ChiliFresh Connections authentication for the logged on patron to log on to the ChiliFresh Connections site.
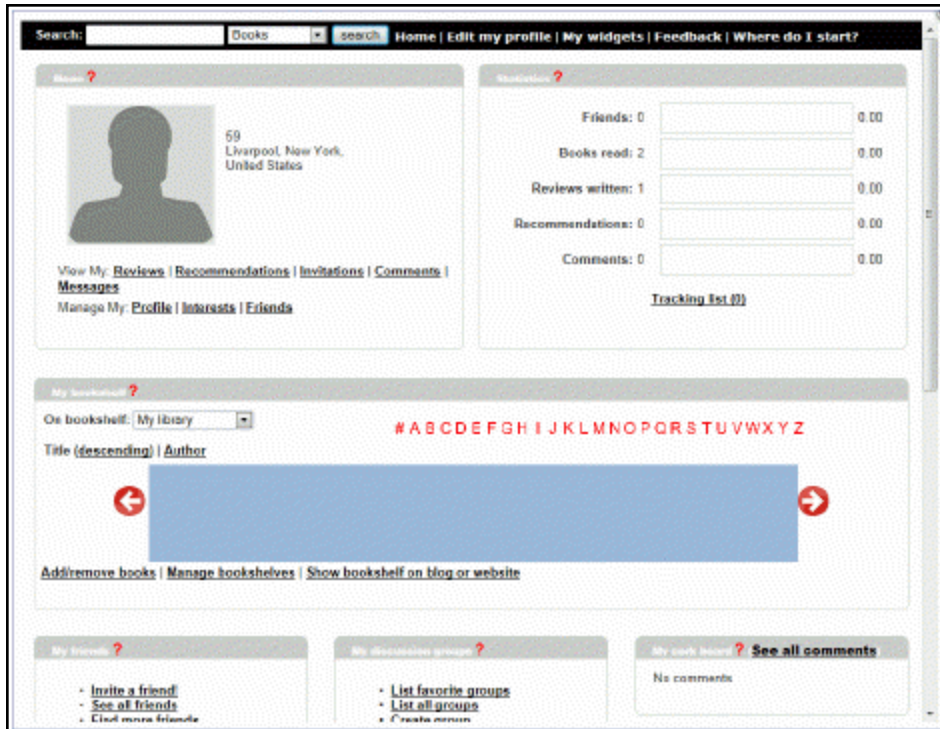
After the patron makes account changes in the Chilifresh Connections lightbox window, the PowerPAC patron account drawer content is refreshed when the account page is refreshed.

Social Features in Search Results

Ratings and Reviews

Logged on users can rate titles, add reviews, and read reviews from other readers. The user clicks or taps **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 shows a title with no previous reviews.
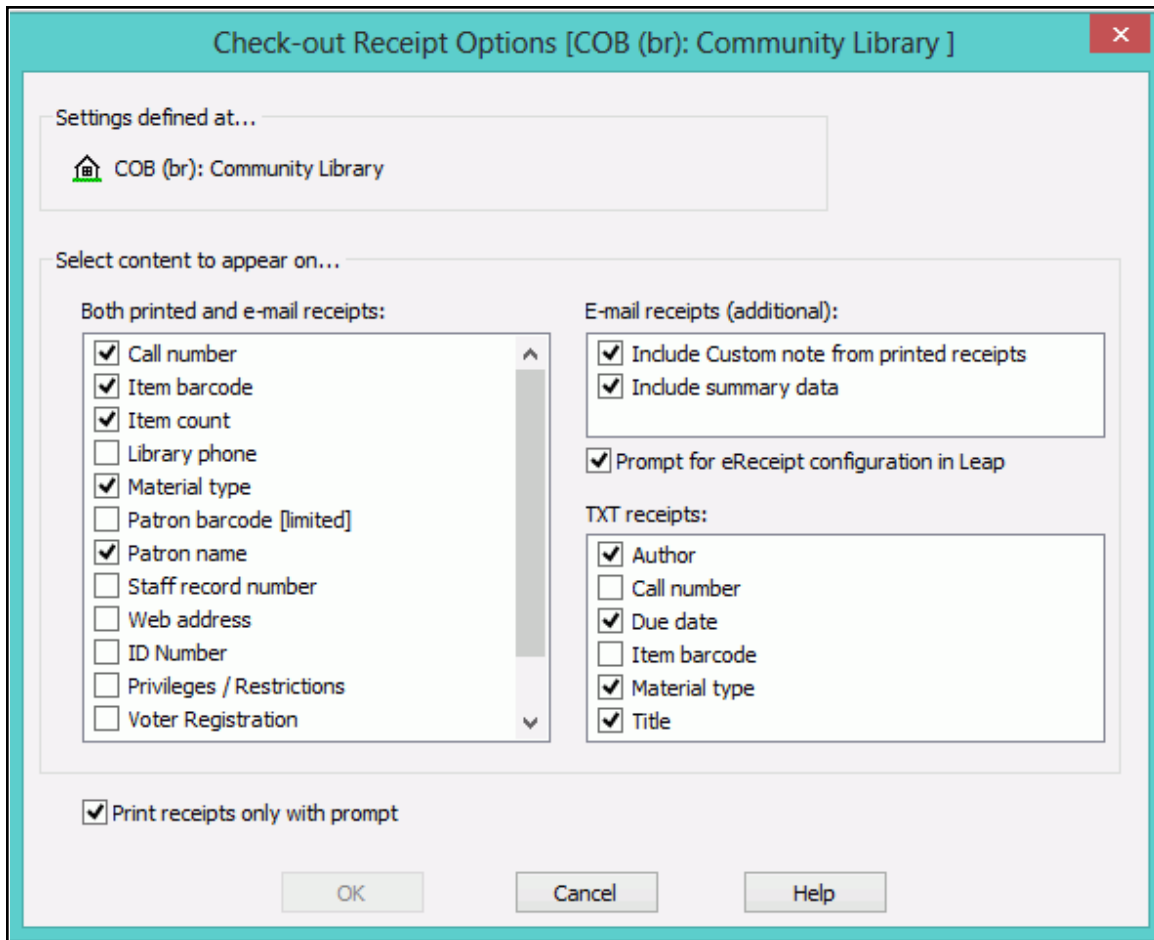
Add to Shelf

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.

Check-out Receipt Options [COB (br): Community Library] ☒

Settings defined at...

🏠 COB (br): Community Library

Select content to appear on...

Both printed and e-mail receipts:

☑ Call number
☑ Item barcode
☑ Item count
☐ Library phone
☑ Material type
☐ Patron barcode [limited]
☑ Patron name
☐ Staff record number
☐ Web address
☐ ID Number
☐ Privileges / Restrictions
☐ Voter Registration

E-mail receipts (additional):

☑ Include Custom note from printed receipts
☑ Include summary data

☑ Prompt for eReceipt configuration in Leap

TXT receipts:

☑ Author
☐ Call number
☑ Due date
☐ Item barcode
☑ Material type
☑ Title

☑ Print receipts only with prompt

OK   Cancel   Help

When the logged-in patron selects **Add to Shelf**, a list of bookshelves associated with the patron's account is displayed (see Bookshelves Drawer).

> **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 or tap **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 select **More Options** to display additional ChiliFresh Connections options:
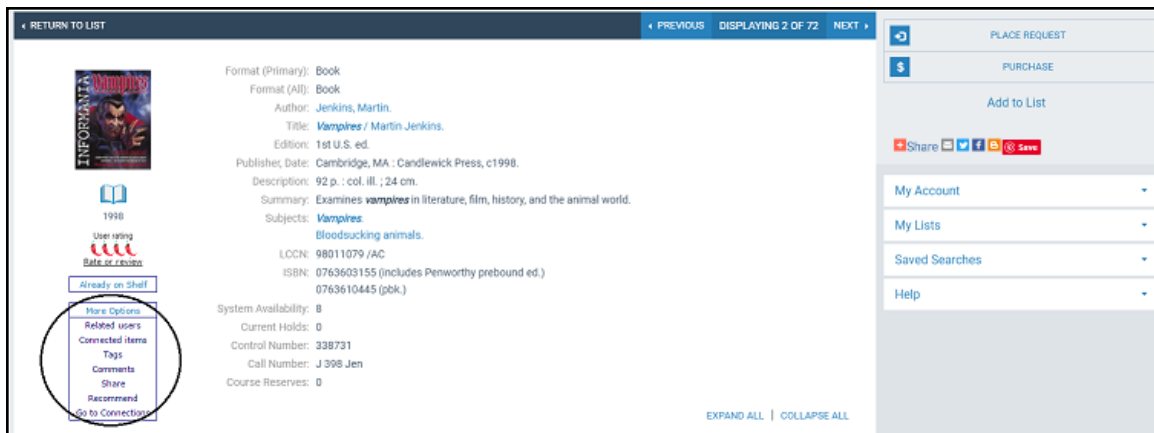
- Related Users - Selecting this link displays a lightbox that lists users who have taken an action on the item, such as adding it to their shelf or reviewing it. Selecting a Connections user in the lightbox opens the public profile display of that user (see Friends and Followers Drawer).

- 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 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 email the recommendation to a friend.
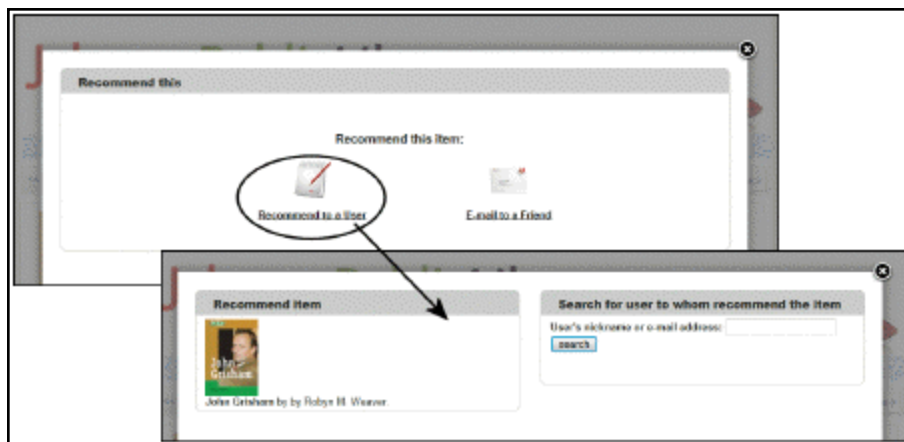
- Go to Connections - This option opens the ChiliFresh Connections site in a lightbox. See Link to Connections Drawer.

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.

For information about port 80/443 access requirements, see Enriched Data Domains Requiring Port 80/443 Access.

Setting Up Mobile PAC - Overview

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.

> **Note:**
> Beginning with Polaris 5.5, Polaris PowerPAC features responsive web design so users can enjoy the same PowerPAC features regardless of device (desktop computer screens, tablets, or phones).

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 also:

- [Mobile PAC Basics](#)
- [Setting Up Mobile PAC Connections](#)
- [Setting Up Mobile PAC Library Information](#)
- [Setting Up New and Popular Titles in Mobile PAC](#)
- [Setting Up Ask Us in Mobile PAC](#)
- [Specifying Mobile PAC Search Settings](#)
- [Mobile PAC Results Settings](#)
- [Saved Searches (Search Agent) in Mobile PAC](#)
- [Title Lists in Mobile PAC](#)
- [Patron Registration in Mobile PAC](#)

- [Patron Log-In Settings for Mobile PAC](#)
- [Patron Account (My Account) in Mobile PAC](#)
- [Credit Card Payments from Mobile PAC](#)

Mobile PAC Profiles Reference

These profiles are available on the Profiles, Mobile PAC tabbed page on the Administration Explorer, at the listed organizational levels.

Profile	Org Levels	Description	Default Setting
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.	Yes - Patrons must log in with a barcode and password to use Ask Us. If set to 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.	Yes
Mobile PAC Analytics	• System • Library • Branch	Specify Google Analytics or custom coding to track site usage. See Analyzing Polaris Mobile PAC Use.	
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	Yes
Navigation: Claimed and Lost	• System • Library • Branch	Specifies whether claimed and lost items are displayed in the patron's Mobile PAC account.	
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	No

Profile	Org Levels	Description	Default Setting
		Payments from Mobile PAC.	
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.	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.	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.	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.	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.	

Profile	Org Levels	Description	Default Setting
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.	
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.	
Remember me: Enable	• System	Displays the **Remember me** check box on the patron login page. See Patron Log-In Settings for Mobile PAC.	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.	

External Logon to PAC Patron Account

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

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

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

Linking to the INN-Reach Central Catalog

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

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

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

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

For details about this method, see:

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

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

Create deep links to the INN-Reach central catalog

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

Step 1: Add a JavaScript file to your PowerPAC server

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

Step 2: Modify your custom PowerPAC theme

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

.irLink {

   cursor:pointer;

   cursor:hand;

   text-decoration: none;

   color: navy;

}

.irLink:hover {

   text-decoration: underline;

   color: red;

}

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

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

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

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

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

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

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

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

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

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

   Click here to search Prospector

The link using the JavaScript looks like this:

   Click here to search Prospector

Step 5: Place your link on PowerPAC pages

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

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

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

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

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

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

```
var searchTerm=getParameterByName("term");

if ((getParameterByName("by") != "CN") && (searchTerm != ")) {

    irURL += '/search/C__S' + getParameterByName("term") + '__Orightresult';

}

window.open(irURL);

}
```

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

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

```
function gotoIRCat() {

    var irURL = '//albert.rit.edu';

    function getParameterByName(name) {

        name = name.replace(/[\[\]]/g, "\\$&");

        var regex = new RegExp("[?&]" + name + "(=([^&#]*)|&|#|$)"), results = regex.exec
        (window.location.href);

        if (!results) return ";

        if (!results[2]) return ";

        return decodeURIComponent(results[2].replace(/\+/g, " "));

    }

var searchTerm=getParameterByName("term");

if ((getParameterByName("by") != "CN") && (searchTerm != ")) {

    irURL += '/search/X?SEARCH=' + getParameterByName("term") ;

}

window.open(irURL);

}
```

Public Access Administration Overview

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

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

> **Note:**
> If your library uses Polaris Community Profiles, you can specify how these records are displayed in the PAC. Search Polaris online help for "Community Setup for PAC Display."

Setting Public Access Profiles and Parameters

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

Setting Up Polaris PowerPAC - Overview

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

Setting Search Options for Polaris PowerPAC

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

Displaying PAC Search Results

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

Managing Integrated EContent in the PAC

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

Enabling Online Book Purchases

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

Editing Messages and Labels

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

Customizing Language Strings

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

Polaris PowerPAC Children's Edition

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

Setting Up Mobile PAC

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

Polaris Social with ChiliFresh Connections

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

PAC Profiles Reference

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

Children's PAC Profiles Reference

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

Mobile PAC Profiles Reference

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

Standard PAC Pages Reference

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

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

Setting Up Polaris PowerPAC - Overview

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

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

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

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

However, the system-level settings for the Patron Services parameter **Consortium Circulation** determine what branch's policies govern due date calculation, loan and

request limits, and fine calculation for renewals. Also, settings for the patron's registered branch control many patron account functions.

For general information about PowerPAC, see:

- Updating Page Caches
- Patron Privacy in the Library - Tips
- Polaris PowerPAC and JavaScript™
- Polaris PowerPAC Accessibility
- Analyzing Polaris PowerPAC Use

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

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

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

- Managing EContent in the PAC.

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

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

Updating Page Caches

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

Patron Privacy in the Library - Tips

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

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

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

Polaris PowerPAC and JavaScript™

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

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

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

Polaris PowerPAC Accessibility

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

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

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

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

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

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

Analyzing Polaris PowerPAC Use

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

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

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

> **Note:**
> This profile also applies to Polaris PowerPAC Children's Edition. A separate profile applies to Mobile PAC. See Analyzing Polaris Mobile PAC Use.

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

Setting Public Access Profiles and Parameters

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

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

Your library may use multiple Polaris public access applications:

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

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

See also:

- The PAC Customization PDF Guide, PAC Administration Profiles Reference topic.

Standard PAC Pages Reference

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

See also:

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

Web Page IDs for User-Defined Pages

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

If you create a custom page with the user-defined template /Custom/CustomPage-template.aspx, you may want to set the PageID value so that the appropriate Web parts

are displayed in the dashboard. The default value is 1, which means that your custom page will display the same Web parts as the default PowerPAC portal page (default.aspx). To get a different set of Web parts on your custom page, you change the default PageID value to that of an existing standard page. Simply search your custom file for PageID and change the value at each occurrence.

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

Polaris PowerPAC Pages Reference

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

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

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

Page	PageID	Function
		erence service.
library\website.aspx	6	Displayed when Web Site on the Library Info menu is selected. The Web Site page is where you can list links to library-selected Web pages in the library or on the Internet. If you add custom html content to this page, be sure that it is responsive.
logon.aspx	17	Displayed when any function is selected that requires the patron to log in. Patrons use this page to supply the patron account number or username and password.
message.aspx	29	Notifies the patron that something has been done, such as changing a password or address, or displays a message when a problem occurs.
patronaccount\claimedandlost.aspx	69	Displayed when Claimed and Lost is selected on the My Account menu. This page displays the patrons claimed and lost items.
patronaccount\coursereserves.aspx	58	Displayed when Courses is selected on the My Account menu and the patron is an instructor for an active course. The page reports circulation statistics for reserved course materials.

Page	PageID	Function
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.
patronaccount\itemsout.aspx	16	Displayed when Items Out is selected on the My Account menu. The Items Out page shows the items currently checked out by the patron.
patronaccount\patroncommunity.aspx	64	Licensed feature. Displayed when an organization representative selects Community on the My Account menu.
patronaccount\readinghistory.aspx	31	Displayed when Reading History is selected on the My Account menu. The Reading History page displays a list of the items the patron has checked out since the reading history began.
patronaccount\registerconnections.aspx	67	Polaris Social. Displayed when a patron clicks the appropriate link on the Power-PAC log-on page. This page provides options for setting up a new ChiliFresh account

Page	PageID	Function
		or linking an existing account to the patron's library account.
patronaccount\requests.aspx	18	Displayed when Requests is selected on the My Account menu. The Request page lists the hold and interlibrary loan requests the patron has made.
patronaccount\searchagent.aspx	40	Displayed when Saved Searches is selected on the My Account menu. The Saved Searches page lists information about saved (automatic) searches and provides links for editing and deleting the searches.
patronaccount\selfregister.aspx	20	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;

Page	PageID	Function
		displayed when the patron clicks Connections in the dashboard or the menu bar.
patronaccount\virtualreference.aspx	33	Displayed when Virtual Reference is selected on the My Account menu. The Virtual Reference page provides access to transcripts of the patron's interaction with a virtual reference service, if the service provides this feature.
search\browse.aspx	52	Displayed in response to a Browse search. This page allows patrons to browse the appropriate index headings.
search\changedatabases.aspx	50	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

Page	PageID	Function
		when the user selects a community entry in the community search results list.
search\communitylist.aspx	65	Licensed feature. The initial search results list for a community information search.
search\default.aspx?type=Advanced (before search)	24	Displayed when Advanced is selected from the Search menu. You set up and launch an advanced search from this page.
search\default.aspx?type=Boolean (before search)	25	Displayed when Boolean is selected from the Search menu. You set up and launch a Boolean (command) search from this page.
search\default.aspx?type=Browse (before search)	22	Displayed when Browse is selected from the Search menu. You set up and launch a browse search from this page
search\default.aspx?type=Course (before search)	48	Displayed when Course Reserves is selected from the Search menu. You set up and launch a search for course reserve records from this page.
search\default.aspx?type=Exact (before search)	30	Displayed when Exact is selected from the Search menu.
search\default.aspxtype=Keyword (before search)	21	Displayed when Keyword is selected from the Search menu. You set up and launch

Page	PageID	Function
		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	search\misc\dictionary.aspx
search\misc\esources.aspx	34	Displayed when E-Sources is selected from the Search menu. The e-Sources page provides links to the pro-prietary, non-Z39.50 data-bases 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.

Page	PageID	Function
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).

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.

Profile	Org Levels	Description	Default Setting
Allow hold requests if charging for holds	System, Library, Branch	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.	No (hold requests cannot be placed from Children's PAC if the system charges for hold requests)
Categories: Enable	System, Library, Branch	Determines whether library-defined categories are available for search-	Yes Requirement: If yes, define categories with

Profile	Org Levels	Description	Default Setting
		ing. See Managing Search Categories.	the profile **Category construction**
Category con-struction	System, Library, Branch	Displays the Category Construction dialog box. Set up subject cat-egories, define search targets within the cat-egories, and edit exist-ing categories and targets. See Managing Search Categories.	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	Determines whether lib-rary-defined elements and theme choices are displayed in lists on the left portion ("dash-board") of the Children's PAC interface. See Managing Children's Dashboards, and Managing Themes.	Yes
Dashboards: Webpage/web part assignment	System, Library, Branch	Displays the Web Page - Web Part Configuration dialog box. Specify which Web parts to dis-play in the dashboard on specific Web pages for the Children's PAC at each branch. See Managing Children's Dashboards.	Requirements: 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.

Profile	Org Levels	Description	Default Setting
Dashboards: Web part construction	System	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.](#)	Requirements: 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	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.](#)	**AND TA=j** (limits results to records where the target audience is juvenile); no collections selected
Item availability text: Available	System, Library, Branch	Specifies the text that indicates an item is available.	In Library Requirement: Set **Item Availability: Display status** to **Yes** (**Children's PAC** profiles)

Profile	Org Levels	Description	Default Setting
Item availability text: Not available	System, Library, Branch	Specifies the text that indicates an item is not available.	Checked Out Requirement: Set **Item Availability: Display status** to **Yes** (**Children's PAC** profiles)
Item availability: Display branch location	System, Library, Branch	Determines whether the item's assigned branch is displayed.	Yes
Item availability: Display call number	System, Library, Branch	Determines whether to show the call number from the item record in the Availability view.	Yes
Item availability: Display collections	System, Library, Branch	Determines whether the collection information from the item record is displayed.	Yes
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.	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. If set to No, if the logged-

Profile	Org Levels	Description	Default Setting
			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.	Yes
Item availability: Display shelf location	System, Library, Branch	Determines whether the item's shelf location is displayed.	Yes
Item availability: Display status	System, Library, Branch	Determines whether the circulation status of an item is displayed in the item information.	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.	Yes
Multiple language strings	System	Displays a dialog box that allows you to spe-	No translations (lists English categories and targets only)

Profile	Org Levels	Description	Default Setting
		cify 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.	
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 Add text to the children's Events page.	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.	Yes
Navigation: PowerPAC	System, Library, Branch	Determines whether a link to Polaris Power-PAC is displayed in the Children's PAC inter-	Yes

Profile	Org Levels	Description	Default Setting
		face.	
Number of tool-tip entries dis-played	System, Library, Branch	For categories, defines the number of targets that display in a tooltip when the cursor hovers over the category link. See Managing Search Categories.	5 Requirements: 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	Allows access to the Children's PAC from workstations outside the library.	Yes. Remote users can access the Children's PAC interface. If set to No, Children's PAC access is available only from workstations defined in the In-House IP Addresses database table.
Results set: Max-imum number of records to return	System, Library, Branch	Sets the maximum num-ber 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	1,000 (maximum = 10,000)

Profile	Org Levels	Description	Default Setting
		number of records to return. However, relevancy ranking may be less effective at lower maximum values.	
Results set: Do not sort if it contains more than this many records	System, Library, Branch	Sets the maximum number of records that a record set can contain and still be sorted. If you experience decreased performance for searches with large results due to limited server capacity, you can lower the maximum number of records that can be sorted.	1,000 (maximum)
Search button visibility: Anywhere button	System, Library, Branch	Displays a search button that launches a keyword search in all fields. See Set children's search buttons.	Yes
Search button visibility: Authors button	System, Library, Branch	Displays a search button that launches a keyword search for author. See Set children's search buttons.	Yes
Search button visibility: Fiction button	System, Library, Branch	Displays a search button that launches a keyword subject search scoped to fiction. See Set children's search buttons.	Yes

Profile	Org Levels	Description	Default Setting
Search button visibility: Non-Fiction button	System, Library, Branch	Displays a search button that launches a keyword subject search scoped to non-fiction. See Set children's search buttons.	Yes
Search button visibility: Series button	System, Library, Branch	Displays a search button that launches a keyword search for series name. See Set children's search buttons.	Yes
Search button visibility: Subjects button	System, Library, Branch	Displays a search button that launches a keyword search for subject. See Set children's search buttons.	Yes
Search button visibility: Titles button	System, Library, Branch	Displays a search button that launches a keyword search for title. See Set children's search buttons.	Yes
Select theme: Enable	System, Library, Branch	Allows users of Children's PAC to select an interface theme from choices you specify. See Managing Themes.	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**

Profile	Org Levels	Description	Default Setting
			PAC profiles), because the theme options are displayed in the dashboard.
Theme assign-ment	System, Library, Branch	Displays the Theme Assignment dialog box, where you can specify which library-defined or system-provided inter-face themes are avail-able as choices from the Children's PAC. You can also set a default theme here. See Managing Themes 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 con-struction	System	Displays the Theme Con-struction dialog box. Set up and edit themes for the Children's PAC inter-face. See Managing Themes for more inform-ation	Requirement: Specify which themes are avail-able to specific organ-izations using the **Children's PAC** profile **Theme assignment**.
Web access: Enable	System, Library,	Allows live Web links in Children's PAC search	No - Web links are text-only, and do not allow

Profile	Org Levels	Description	Default Setting
	Branch	results. See [Customizing the Children's Results Display.](#)	Internet access. If set to Yes, users can click the Web Site icon or a web link to view the site.

Polaris PowerPAC Children's Edition Pages Reference

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

Page	PageID	Function
children\default.aspx	44	The default page appears when you connect to the Children's Edition, and when you click the banner graphic to clear search results.
children\events.aspx	45	The events page appears when you click the Events link on any Children's Edition page. The page lists events specified by the library
children\fulldisplay.aspx	47	The full display page appears when you click the More Information link for a title, or the title name itself, in a search results list. The page displays detailed bibliographic and location information for the selected title.
children\searchresults.aspx	46	The search results page displays the results of a search as a list of titles, with brief information about each title.

PAC Profiles Reference

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

> **Note:**
> For more information about Polaris Mobile PAC, see Setting Up Mobile PAC.

Profile	Org Levels	Description	Default Setting
Active directory logon	System	Enables log-on to PowerPAC and Mobile PAC using network credentials instead of the Polaris barcode/username and password. See Set Up PAC Active Directory Log On.	No
Branch list order	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	No

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Profile	Org Levels	Description	Default Setting
		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 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.	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. Type an email address (it must contain the @ symbol).	youremail@yourdomain.com

Profile	Org Levels	Description	Default Setting
Email notification: Server running SMTP service	System Library Branch	Specifies the Simple Mail Transfer Protocol (SMTP) server to use for PAC e-mail features such as Ask Us or purchase requests from 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. Type the domain name of the e-mail SMTP server.	
Enriched data	System Library Branch	Specifies the settings to receive cover images, reviews, ratings, and other enriched data content from your enriched data provider or providers. See the Public Access Administration PDF Guide, Enabling Enriched Data.	
Fines and Fees: Show history in detailed view	System Library Branch	When set to Yes, displays a history section that includes date, type, amount, payment, and staff name for a selected fine or fee when a logged-in patron clicks 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	Yes

Profile	Org Levels	Description	Default Setting
		display.	
Google Maps	System Library Branch	Enables the Map It! feature in PowerPAC and/or Mobile PAC search results for the connection organization and sets the initial map center and zoom level. See the Public Access Administration PDF Guide, Map It (Google Maps) in PAC.	
Hours of operation: Display	System Library Branch	(Polaris PowerPAC and Mobile PAC) When set to Yes, the organization's Hours page includes a formatted schedule derived from the settings for the Patron Services parameter Hours of operation. See Set Polaris PowerPAC features on the menu bar.	Yes
Hours of operation message	System Library Branch	(Polaris PowerPAC and Mobile PAC) Displays a message on the organization's Hours page. See Set Polaris PowerPAC features on the menu bar.	
Item availability: Display detailed item status	System Library Branch	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. Requirement: Detailed item status descriptions are specified in the Circulation Statuses table	Yes

Profile	Org Levels	Description	Default Setting
		(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. Requirement: The PAC profile Item availability: Display detailed item status must also be set to Yes to display the due date	Yes
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).	Yes
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.	Yes
Item availability: Display status	System Library Branch	Specifies whether the Item Availability display includes item availability status.	Yes
Item avail-ability: Sup-press for integrated	System Library Branch	Specifies whether availability information appears in the PAC for integrated eContent titles. See the Public Access Admin-	No

Profile	Org Levels	Description	Default Setting
eContent titles		istration Guide, Suppress eContent availability display in PAC.	
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.	
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.	
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.	
Patron	System	Double-click to display the	

Profile	Org Levels	Description	Default Setting
access options	Library Branch	Patron Access Options dialog box. Use this dialog box to set up patron account, self-registration features, suppress gender, send patrons a reset password link, and enforce phone number format validation. You can have different setup options for each organization.	
Patron access: Display hold queue information	System Library Branch	Determines whether the holds queue column is displayed in the online patron account, and whether the patron receives a message about the current number of active requests for the material when she places a hold. The system uses the profile setting for the patron's registered branch.	
Patron access: Policy statement hyper text link	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. Type the complete path to the privacy policy page. Requirement: Set Patron Access: policy statement hyper text link permitted to Yes.	

Profile	Org Levels	Description	Default Setting
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. If set to Yes, the privacy policy link For more information on our privacy policy, click here is displayed on the Select a home library page, and at all patron log-in points when Single Login is enabled and the patron has not yet logged in. If you set this profile to Yes, specify a URL for the privacy policy Web page using the profile Patron Access: policy statement hyper text link.	No
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.)	Yes
Patron eReceipts		Provides patrons the option of selecting e-mail renewal receipts, TXT message renewal receipts, or both, during patron	

Profile	Org Levels	Description	Default Setting
		self-registration and account updates. The patron's registered branch must also enable eReceipts.	
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. The maximum number of characters is 255	Library assigned bock
Patrons can remove reading history	System Library Branch	Determines whether patrons can remove individual items from their readings histories from the PAC patron account.	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.	
Reset pass-word link timeout dur-ation	System Library Branch	Specifies the time period, in minutes, during which the time-sensitive password reset link remains valid once a patron ini-tiates the password reset pro-cess from either Polaris PowerPAC or Mobile PAC. Enter	60

Profile	Org Levels	Description	Default Setting
		a value between 1 and 999 minutes. See the Polaris Power-PAC help for more information about the patron workflow for recovering, resetting, or creating a password.	
Resource Groups: Search results settings	System Library Branch	Sets conditions for the display of eContent in PAC search results.	
Search agent: Enable	System Library Branch	Provides patrons the ability to set up and save searches to run automatically at specified intervals. If the profile is set to Yes, the Search Agent option is available to patrons using Polaris PowerPAC and Mobile PAC. See Setting Public Access Profiles and Parameters. Requirements: 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.	Yes

Profile	Org Levels	Description	Default Setting
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.	
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.	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 the Public Access Administration PDF Guide, Suppressing Request and Availability Options.	No TOMs checked (all display)
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	No branches checked (all display)

Profile	Org Levels	Description	Default Setting
		organizations on the Library Hours page and the Mobile PAC Preferences page.	
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]().	No statuses checked (all display)

Customizing Mobile PAC

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

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

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

See also:

- Protecting Mobile PAC Changes
- Customizing Mobile PAC Search By and Sort By Options
- Creating Custom Mobile PAC Links
- Creating Custom Mobile PAC Pages
- Creating Custom Mobile PAC Themes

Protecting Mobile PAC Changes

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

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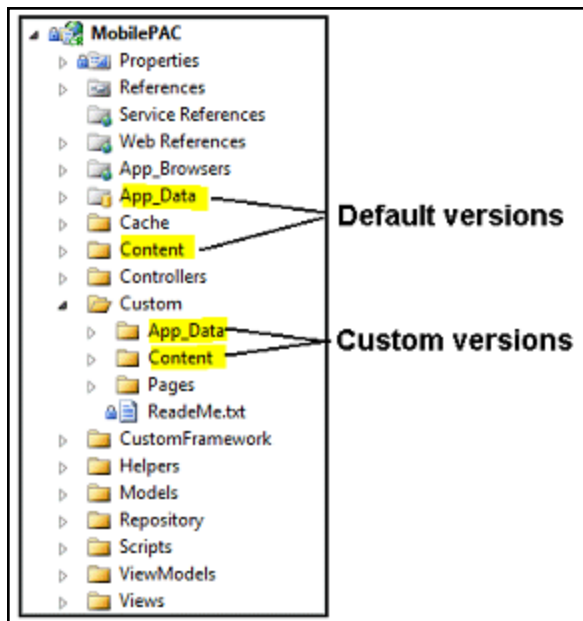
Customizing Mobile PAC Search By and Sort By Options

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

Search By Options

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

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

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

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

Sort By Options

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

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

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

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

Creating Custom Mobile PAC Links

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

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

2. Working in **Links.xml**, define the custom links. The template file **/Custom/Links-template.xml** includes detailed step-by-step instructions for setting up a /Custom/Links.xml file.

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

Pages of Custom Links

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

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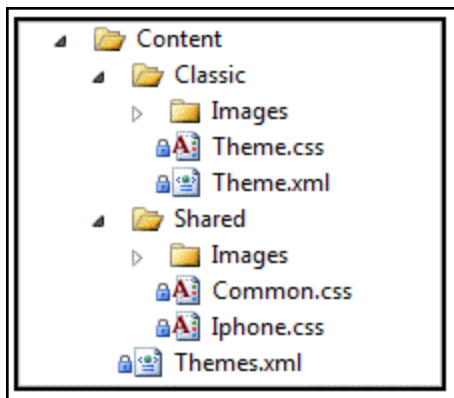3. Follow the examples in the template for creating links in the custom section of the page. See below.

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

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

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

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

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

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

Custom Links in the Mobile PAC Footer

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

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

```
<div id="footer">

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

    <a href="<%= MPUtil.GetFullSiteUrl(SessionCache) %>"><%= SessionCache.ShowText("MP_FOOTER_FULLSITE") %></a> |

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

Creating Custom Mobile PAC Pages

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

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

2. Rename the copied file to the desired file name. The file must have an **.aspx** file extension. Example: **/Custom/Pages/CommunityLinks.aspx**

    Without making any changes, the custom page will look like the illustration:
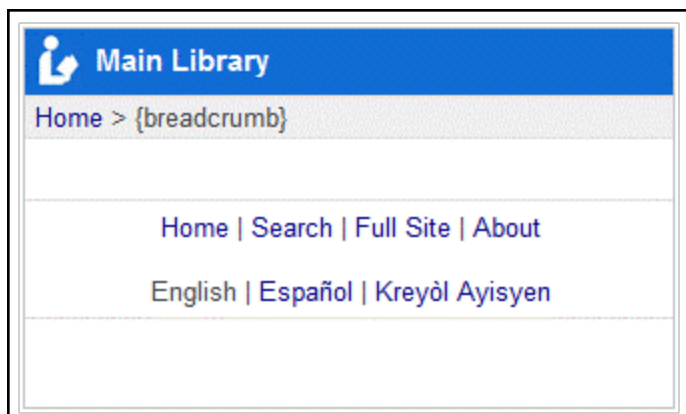
3. Edit the custom page, changing the {title} and {breadcrumb} strings to the display title for your custom page.

4. Add your custom HTML where noted:

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

Creating Custom Mobile PAC Themes

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

```
⊿ 📂 Content
   ⊿ 📂 Classic
      ▷ 📁 Images
        🔒A Theme.css
        🔒 Theme.xml
   ⊿ 📂 Shared
      ▷ 📁 Images
        🔒A Common.css
        🔒A Iphone.css
     🔒 Themes.xml
```

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

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

Any CSS style information included in a specific theme supplies only the values that need to be overridden for that theme, not every style defined in the common files in **Content/Shared**.
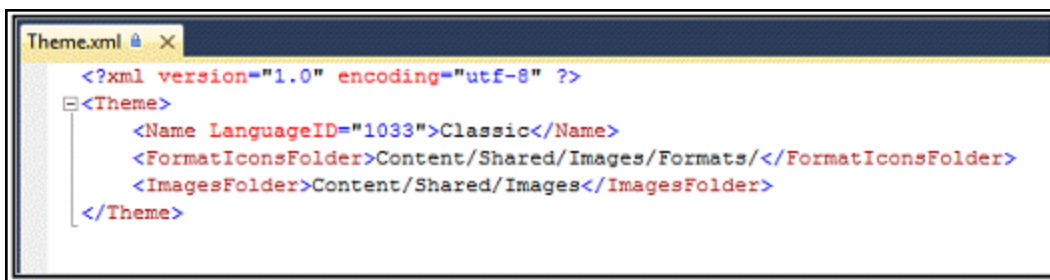
Since custom themes are created in the **Custom** folder, the following steps should only have to be done once, as subsequent upgrades of Polaris Mobile PAC will not overwrite files in the **Custom** folder.

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

To create a custom theme for Mobile PAC:

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

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

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

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

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

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

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

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

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

1033 - English

1042 - Korean

1049 - Russian

1065 - Farsi-Persian

1066 - Vietnamese

1141 - Hawaiian

2052 - Chinese

3082 - Spanish

3084 - French

12289 - Arabic

15372 - Haitian Creole

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

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

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

Glossary

0

006 field

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

007 field

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

008 field

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

A

added entry

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

approval plan

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

ASN (Advanced Shipping Notice)

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

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

B

blanket plan

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

blind reference

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

C

cataloging source

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

chronology

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

content designators

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

D

delimiter

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

deposit account

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

diacritical mark

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

E

enumeration

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

express registration

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

F

first available copy requests

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

form subdivision

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

free days

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

G

geographic qualifier

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

geographic subdivision

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

M

monographic series

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

R

RTF

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

S

SICI

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

SISAC

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

standing order

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

T

trapped

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

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