



# Public Access Administration Guide

7.2

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## Setting Public Access Profiles and Parameters

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

**Note:**

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

Your library may use multiple Polaris public access applications:

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

**Note:**

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

See also:

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

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## Review and set public access profiles and parameters

To review and set public access profiles and parameters:

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

**Note:**

**Search Agent Parameters** is the only organization PAC parameter. It controls the ability to set up and save automatic searches in the PAC. See [Setting Up Saved Searches in the PAC](#).

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

The selected tabbed page appears.

4. Double-click the parameter or profile you want to set. The option value is highlighted for editing, or a dialog box appears.

**Tip:**

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

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

**Important:**

To see the effects of your changes, you may need to update page caches.

See [Updating Page Caches](#).

See also:

- [PAC Profiles Reference](#)
- [Polaris PowerPAC Profiles Reference](#)
- [Children's PAC Profiles Reference](#)
- [Mobile PAC Profiles Reference](#)

## 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](#)
- [Customizing Language Strings](#)

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 following topics in the *Public Administration Guide*:

- "Set Polaris PowerPAC features on the menu bar"
- "Customize the page header"
- "Add text to the Events page"
- "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"
- "Prompting PowerPAC Users to Accept Cookies"

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## 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.

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## 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. Search the Polaris online help for "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.

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## Polaris PowerPAC and JavaScript™

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

The default message is

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

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

## Polaris PowerPAC Accessibility

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

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

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

**Note:**

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

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

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

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

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## 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. Search Polaris online help for "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

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## Set up basic operating features for Polaris PowerPAC

To set basic operating features for Polaris PowerPAC:

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

**Note:**

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

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

This setting displays the **Portal** option on the Library Info menu. Set this profile to **Yes** if you are using the portal page as the Polaris PowerPAC home page. For more information, see [Customizing Portal Page Features](#). Set this profile to **No** if the home page is a library page from which patrons access the public catalog. When you turn off the portal button, the default Polaris PowerPAC home page is the keyword search page.

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

**Note:**

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

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

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

If you set **Branch switching: Enable** to **Yes**, select **Profiles**, select the PAC tab, and set the PAC profile **Branch list Order** to specify the display order of the branches: select **Yes** to display the branch names in ascending

alphabetical order by name, or **No** to display the branch names in ascending numerical order by internal organization ID.

With either setting, the system organization is always first. This profile also controls the display order of branches on the search options page, the self-registration page, and the donations page. The setting for the current connection branch is used. The profile also controls the display order of the list of pick-up libraries for requests, but in this case the setting for the patron's registered branch is used.

**Note:**

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

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

**Note:**

This setting is available at the system level only.

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

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

- You offer e-sources that require patron log-in. See [Setting Up E-Source Targets](#).
- You offer the ability to save searches, and want patrons to be able to work with a list of their saved searches in the dashboard. See [Setting Up Saved Searches in the PAC](#).
- Your library uses 3M™ Public Access Management System smart cards. See step 10.

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

**Note:**

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

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

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

**Note:**

Polaris PowerPAC workstations with readers must be listed in the In-House IP Addresses table. See [Setting Public Access Profiles and Parameters](#).

11. Select **File > Save**.

**Related Information**

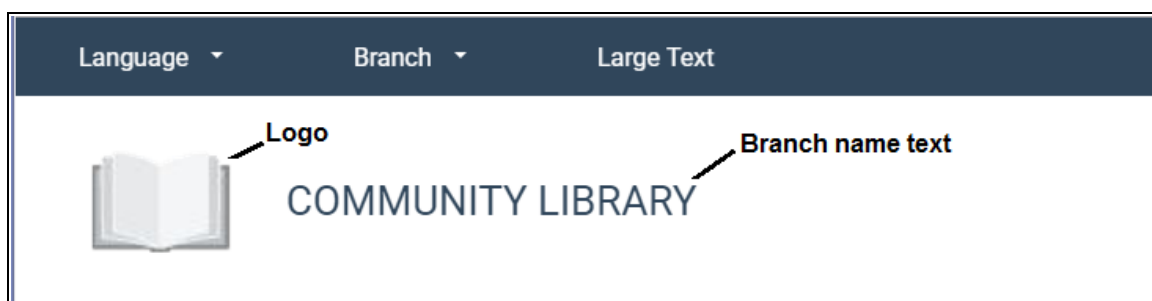
- Page header - You can specify colors and your own logo image and position for the page header. See [Customize the page header](#).
- Page themes - You can choose the overall appearance of Polaris PowerPAC pages from several ready-made themes. See [Setting Polaris PowerPAC Themes](#).
- Portal page - See [Customizing Portal Page Features](#).
- Main menu bar features - See [Set Polaris PowerPAC features on the menu bar](#).
- Messages - Certain messages and labels on the portal page are stored in your database, and you can edit them in Polaris Administration. If you have Polaris PowerPAC Multilingual Version, you can edit them for each supported language. See [Edit PowerPAC messages and labels](#).
- Dashboards - See [Defining Web Parts for Dashboards](#).
- Searching options - See [Setting Available Search Types](#).
- Search results display - See [Displaying PAC Search Results](#).
- Patron help - See [Polaris PowerPAC Help](#).
- Patron log-on and access to patron accounts - See [Setting Up Patron Account Access](#).
- Email from PAC - Set the following PAC profiles for patron email:

- Double-click **Email notification: Email address of sender**, and type the address that should appear on patron email from the library (such as when a patron sends a title list by email). You can use a real address or a fictitious account. It must contain the @ symbol.
- Double-click **Email notification: Server running SMTP service**, and type the domain name of the email service.
- Editing text on Polaris PowerPAC pages - You can edit most of the text on Polaris PowerPAC pages, and preserve your changes from being overwritten if the application is updated and reinstalled. See [Customizing Language Strings](#).
- PowerPAC profiles - For reference information about each Polaris PowerPAC profile, see [Polaris PowerPAC Profiles Reference](#). For basic information about setting profiles, see [Setting Public Access Profiles and Parameters](#).
- Server settings - Certain parameters at the server level determine how Polaris PowerPAC works in the context of the system network. See [Setting Public Access Profiles and Parameters](#)

## Customize the page header

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

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



To customize the PowerPAC page header:

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

Page Header Options [Community Library (br)]

Retrieved from: Community Library (br)

Options for medium and wide screens

Alternate logo (URL)

Header logo and branch name alignment: ☐ Left ☒ Center ☐ Right

☐ Exclude the branch name (logo only display - all widths)

Options for all screen widths (narrow, medium, wide)

Return link URL for header

☐ Customize background color ☐ Customize branch name text color

OK Cancel Help

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

If none is specified, the default logo image is used. Any standard graphic file format, such as .gif or .jpg, is acceptable. The maximum image width is 1500 pixels. The system scales the image for the medium display.

**Example:**

[PACWebServer]/Polaris/custom

**Note:**

You can place the graphic file in a different location. In this case, type the complete URL for that location. Be sure the security settings for the



directory allow access to the file. The location must have a security (SSL) certificate.

4. Select **Left**, **Center**, or **Right** to position the logo and branch name in the header. The default position is center. This setting applies to medium and wide screen displays only.
5. If your logo image already includes your branch name, check **Exclude the branch name** to suppress the branch name text string from the header. Narrow width display: When this option is checked, the logo is displayed in the narrow width header, appropriately scaled. If you leave this option unchecked, only the branch name is displayed in the narrow width header.

**Note:**

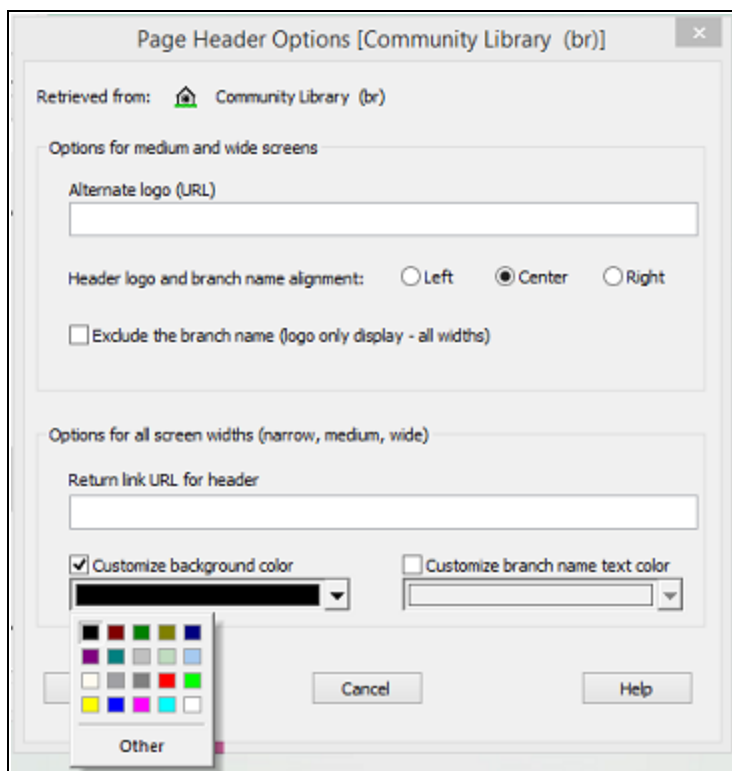
If you suppress the branch name at the system level, and all connection branches inherit the system setting, users cannot readily determine their connection branch after switching branches if the branch logo does not include the branch name. To avoid this problem, you can suppress the organization name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

6. In the **Return link URL for header logo** box, type the URL for the page that should appear when the user clicks the header logo or branch name. If this setting is left blank, the link destination is the portal page if you choose to use it, or the keyword search page if you do not use the portal page.
7. Set custom background and/or branch name text colors:
  - a. Select **Customize background color**, **Customize branch name text color**, or both.

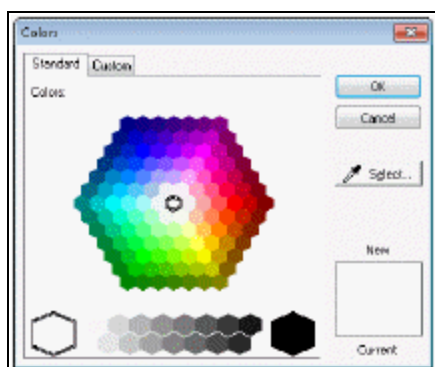
**Note:**

You can suppress the branch name text from the header, which you may want to do if your logo image includes the organization name. See step 5 above.

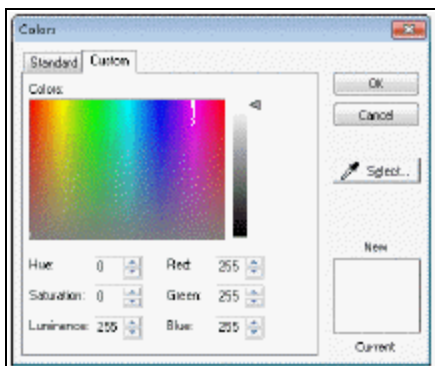
- b. Select the drop-down arrow for each selected option to access the color picker.



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



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



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

**Tip:**

Reload Polaris PowerPAC to see your changes. See [Updating Page Caches](#).

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

**Related Information**

- Page themes - You can choose the overall appearance of Polaris PowerPAC pages from several ready-made themes. See [Setting Polaris PowerPAC Themes](#).
- Portal page - See [Customizing Portal Page Features](#).
- Basic setup - See [Set up basic operating features for Polaris PowerPAC](#).
- Advanced customization - See the *PAC Customization Guide*.

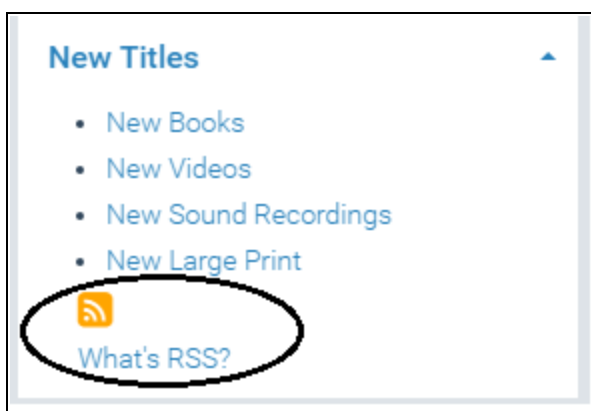
---

## Set Polaris PowerPAC features on the menu bar

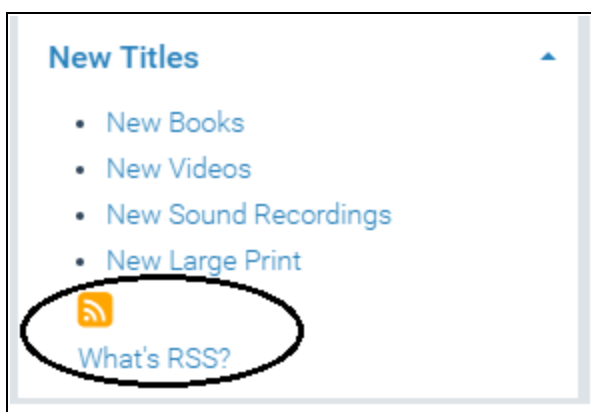
All menu features are available regardless of screen size, but certain options shift to accommodate display on a narrow phone screen. The example below shows main menu options on a desktop or tablet screen.



For the narrow screen size (phone), certain options move from the default desktop/tablet position to a menu.



When the user taps **Menu**, a "flyout" menu displays the main menu options .



To set Polaris PowerPAC features on the menu bar:

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

**Note:**

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

2. To allow access to an events page, double-click **Navigation: Events**, and select **Yes**. This setting displays the **Events** option on the Library Info menu. When the patron selects **Events**, the events page on the Web server, **Polaris/PowerPAC/library/events.aspx**, is displayed. For information about editing the events page, see [Add text to the Events page](#).
3. To allow access to a policies page, double-click **Navigation: Policies**, and select **Yes**. This setting displays the **Policies** option on the Library Info menu. When the patron selects **Policies**, the policy page on the Web server, **Polaris/PowerPAC/library/policies.aspx**, is displayed. For information about editing the policies page, see [Add text to the Policies page](#).
4. To allow patrons to send an e-mail message to a designated library address, double-click **Navigation: Ask Us**, and select **Yes**. This setting displays the **Ask Us** option on the Library Info menu. For information about setting up the Ask Us feature, see [Set up and start Ask Us](#).
5. To allow access to patron accounts, double-click **Navigation: Patron Account**, and select **Yes**. This setting displays the **My Account** option on the main menu bar. See [Setting Public Access Profiles and Parameters](#).
6. To offer access to help topics, double-click **Navigation: PAC Help**, and select **Yes**. This setting controls access to the html help files that Innovative Interfaces provides with Polaris PowerPAC. See [Polaris PowerPAC Help](#).
7. To allow access to the e-Sources page, double-click **Navigation: E-Sources**, and select **Yes**. This setting displays the **E-Sources** option on the Search menu. E-sources are non-Z39.50, proprietary databases that may require authentication for use. See [Setting Public Access Profiles and Parameters](#). When the patron selects this option, the e-Sources page is displayed.
8. To allow access to an Hours page, double-click the PowerPAC profile **Navigation: Hours**, and select **Yes**. This setting displays the **Hours** option on the Library Info menu. When the patron selects **Hours**, the hours page on the Web server, **Polaris/PowerPAC/library/hours.aspx**, is displayed. The Hours page includes location information and optional schedule information for the current connection organization. The schedule information is drawn from settings in the Patron Services

parameter **Hours of operation** for the connection organization. The location information comes from the organization administration record. For formatting options, see step 10.

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

**Note:**

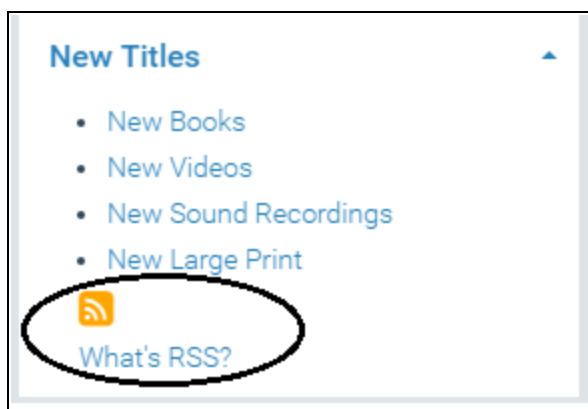
These settings also affect Mobile PAC.

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

**Important:**

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

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



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

**Notes:**

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

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

11. Select **File, Save**.

**Related Information**

- Search options - See [Setting Available Search Types](#).
- Profile list - See [Polaris PowerPAC Profiles Reference](#).

## Add text to the Events page

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

**Note:**

Be sure your custom content displays correctly for wide (computer), medium (tablet), and narrow (phone) screens.

To add events or other text to the events page:

1. On the Web server, open the file **Polaris [version]/PowerPAC/library/userdef/ud\_events.ascx** in any HTML or text editor. The text of the file is displayed in the editor.
2. Insert your text between the elements `</div>` and `<!-- End -->`. For example:  

```
SessionObject.GetLanguageString("PACML_UD_EVENTS_1118") %></div>
<p> event1 </p>
<p> event2 </p>
```

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

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

3. Save the file.
4. Back up your edited file to preserve your changes from being overwritten when Polaris PowerPAC is reinstalled on the server.

**Note:**

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

---

## Add text to the Policies page

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

**Note:**

Be sure your custom content displays correctly for wide (computer), medium (tablet), and narrow (phone) screens.

To add text to the policies page:

1. On the Web server, open the file **Polaris [version]/PowerPAC/library/userdef/ud\_policies.ascx** in any HTML or text editor. The text of the file is displayed in the editor.
2. Insert your text between these elements: **SessionObject.GetLanguageString("PACML\_UD\_POLICIES\_1123") %></asp:panel></p>**and **<!-- End -->**. For example:

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

```
<p> policy1 </p>
```

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



3. Save the file.
4. Back up your edited file to preserve your changes from being overwritten when Polaris PowerPAC is reinstalled on the server.

**Note:**

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

---

## Setting Polaris PowerPAC Themes

You can change the overall appearance of your library's Polaris PowerPAC, without complex coding, by choosing a page theme (skin). You can set themes at the system, library, or branch level. When a patron connects to Polaris PowerPAC, the connection branch's theme is displayed. If you allow patrons to switch branches, the theme changes according to the selected branch's setting. Five themes are available: Ocean (the default), Pomegranate, Mint, Black & Gold, and Gray. You can also set the dashboard position (left or right side of the page) for any theme you select.

To set a Polaris PowerPAC theme and dashboard position:

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

**Note:**

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

4. Select **File | Save**.
5. Reload PowerPAC pages to see your changes. See [Setting Up Polaris PowerPAC - Overview](#).

### Related Information

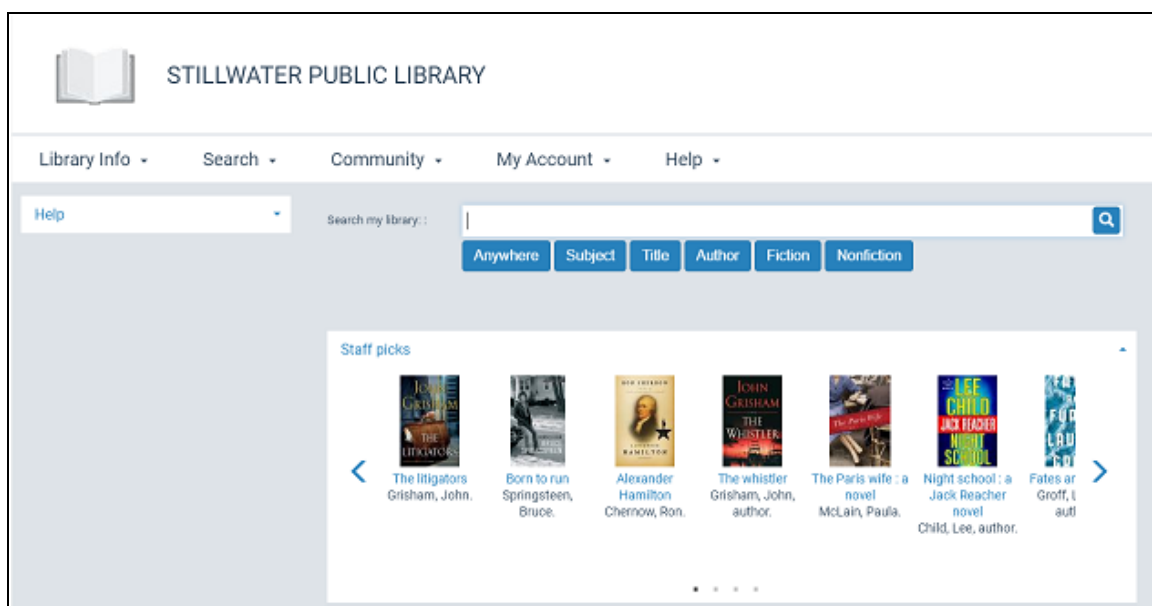
- Editing theme fonts and colors - Theme appearance is controlled by a shared style sheet (.css) file. You can override fonts, colors, and link appearance for a custom

theme. For more information, see [Setting Public Access Profiles and Parameters](#).

- Editing text on Polaris PowerPAC pages - You can edit most of the text on Polaris PowerPAC pages no matter what theme is chosen, and preserve your changes from being overwritten if the application is updated and reinstalled. See [Customizing Language Strings](#).

## Customizing Portal Page Features

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

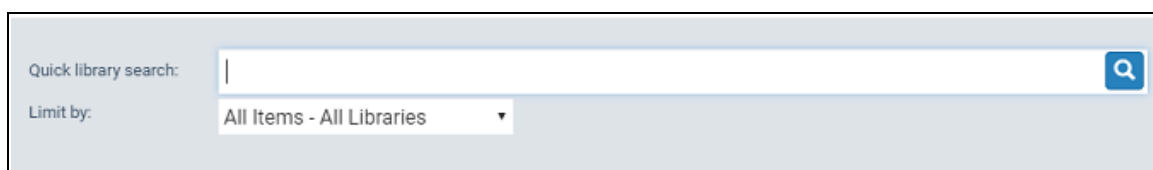


Each branch can use the default portal page or a custom portal page, or all organizations can share a single portal page. You can designate the portal page as the home page, see [Set up Polaris PowerPAC](#).

You can customize the portal page with the following features:

- Default quick search - The default quick search launches a keyword search in any field. You can set the search field, the default search filter (**Limit by**), the database to search, and the sort order for results in Polaris Administration, although patrons

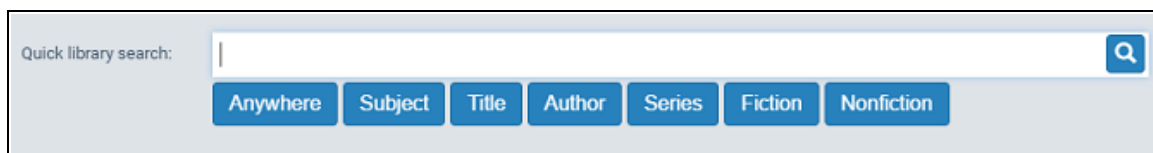
cannot specify these options for the quick search other than selecting a search filter. By selecting an option in the **Limit by** list, a patron can limit the quick search by any filter you offer. For information about search filters, see [Setting Up Search Filters \(Limit By\)](#).



Quick library search:

Limit by: All Items - All Libraries ▼

- Quick search with search option buttons - You can provide optional buttons with the quick search feature, instead of a search filter. The patron types the search text and selects a button to launch a particular type of search. You can offer Anywhere, Fiction, Nonfiction, My Library, My Library plus Articles, Subject, Title, Author, and Series buttons. Anywhere, Fiction, and Nonfiction, My Library, or My Library plus Articles are always keyword searches. For Subject, Title, Author, and Series, you can specify whether a keyword or browse search should be launched. See [Set up basic operating features for Polaris PowerPAC](#).



Quick library search:

Anywhere Subject Title Author Series Fiction Nonfiction

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

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

## Set Up Quick Search with Search Option Buttons

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

To set up the quick search feature with search option buttons:

### Note:

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

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.
2. Double-click **Quick search button configuration**. The **Quick Search Button Configuration** dialog box opens.
3. Select **Enable quick search buttons**. The remaining options become available for selection.

### Note:

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

4. Select each button option that you want to display for quick search.
5. Select the search type (**Browse** or **Keyword**) that each selected button should launch.

### Notes:

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

**Fiction** and **Nonfiction** also launch keyword searches in any indexed field, but filtered by fiction or nonfiction as appropriate. The system determines

whether a title is fiction or non-fiction by the following bibliographic record information:

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

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

Selecting **My Library** searches only your library's database.

If your library subscribes to EBSCO Discovery Service (EDS) and has [integrated EDS with Polaris](#) PowerPAC, selecting **My Library plus Articles** searches your library's database plus articles from EDS.

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

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

#### 6. Click **OK**.

#### Related Information

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

#### Set up rotating book jackets

If you subscribe to an enriched data service, you can display book jacket images drawn from the enriched data source, randomly selected from the titles in the best-seller lists provided for dashboards. See [Setting Public Access Profiles and Parameters](#). A different image is displayed each time the portal page is accessed or refreshed. When a patron selects the image, a search is launched in the catalog for the title. If the title is not found in the catalog, the patron can click an email link to the library to request that the title be purchased. To set up rotating book jackets (system, library, or branch level):

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

#### Related Information

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

### Set up custom portal page content

You can display your own content on the portal page. To specify the link to your content:

**Tip:**

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

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

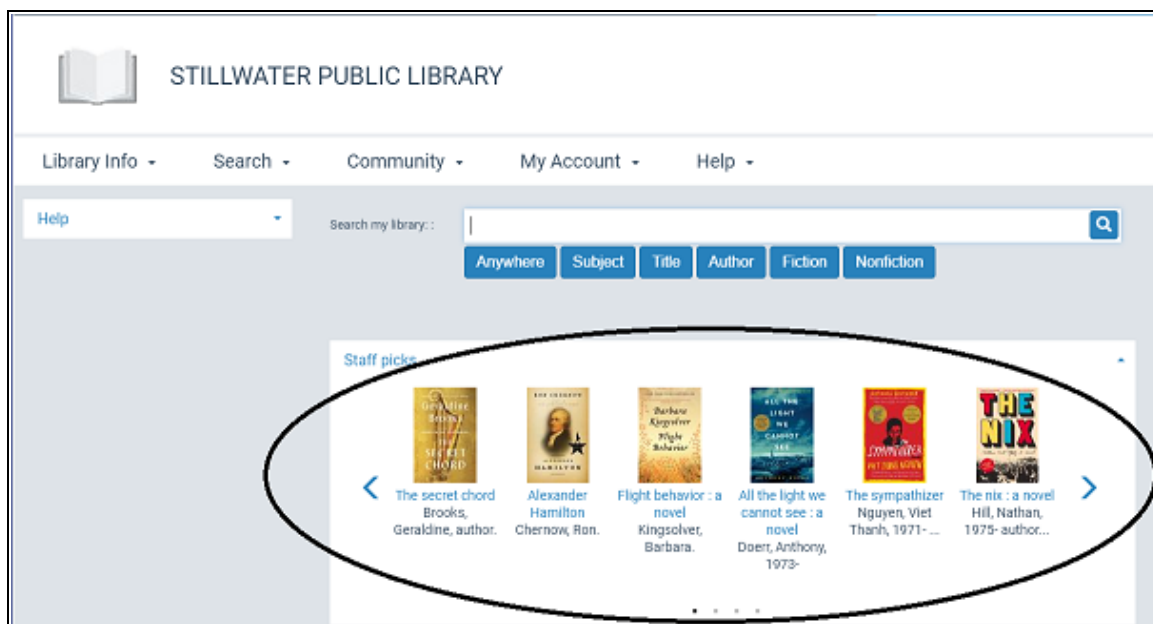
## Custom Portal Page Content Tips

- The HTML content from the page you specify will be displayed in the custom content area on the portal page. You can include elements such as links and graphics, but be sure the source HTML specifies an absolute path for these elements.
- Be sure your custom content displays correctly for wide (computer), medium (tablet), and narrow (phone) screens.
- You do not have to reload Polaris PowerPAC to clear the cache whenever you change your custom content. The HTML is reloaded whenever the portal page is accessed and the content was cached more than five minutes previously. Also, you can enable or disable the custom content by setting or clearing the profile without reloading Polaris PowerPAC.

---

## Content Carousels on the PowerPAC Portal Page

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



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

- Most Circulated Titles
- On-Order Items
- New Books
- New Large Print
- New Sound Recordings
- New Videos
- BookSense best-seller lists:
  - Children's Fiction Series
  - Children's Illustrated
  - Early and Middle Grade Readers
  - Hardcover Fiction
  - Hardcover Non-Fiction
  - Mass Market
  - Trade Paperback Fiction
  - Trade Paperback Non-Fiction
  - Young Adult



**Tip:**

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

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

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

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

**Tip:**

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

- **Carousel title display** - Content carousels display only titles for which there is a bibliographic record in the local database. The record must be set to display in PAC, and the record status must be final. For each title, the carousel contains the cover image if any, and title and author tags and subfields specified in the Primary Display Title and Primary Display Author database tables. When the PAC connection is to a branch, carousels based on new titles include only new titles for that branch. When the PAC connection is to the system, the carousel includes new titles for the whole system.
- **Sort order and entry point** - Carousels based on ranked best-seller lists are sorted in the ranked order provided by the best-seller list supplier. All other carousels are sorted in title order. The carousel "starts" at a random point in the list every time it appears, and the display is circular. That is, the user can scroll endlessly through the carousel. When the carousel reaches the end of the designated sort order

(when the scrolling forward) or the beginning (when scrolling backward), the carousel continues at the beginning (or end) of the sorted list.

- **Maximum entries** - Content carousels display a maximum of 50 titles. If the list that generates the carousel contains more than 50 items, only the first 50 items in the sorted list appear in the carousel, using the sort order described above.
- **Content carousels and rotating book jackets** - You can enable a rotating, random book jacket image on the portal page. The user clicks the book jacket image and if the title is not in the library catalog, the user can request that the library purchase it. For details, see [Set up rotating book jackets](#). While it is possible to enable both rotating book jackets and content carousels on the portal page, the display may confuse the user since the features may appear somewhat similar but serve different purposes. Polaris recommends that you enable one or the other of these features, but not both. If you do enable both, the content carousel appears below the rotating book jacket image.

You can set up content carousels at the system, library, or branch level. The system uses the settings of the PowerPAC connection organization. To set up content carousels:

**Important:**

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

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

Portal Page Content Carousels [Community Library (br)]

Retrieved from: Community Library (br)

Carousels ☒ Enable

Name	Type
Colum McCann	Record Set: Colum McCann

Colum McCann

Children's Fiction Series  
 Children's Illustrated  
 Early and Middle Grade Readers  
 Hardcover Fiction  
 Hardcover Non-Fiction  
 Mass Market  
 Most Circulated Titles

4. Select **Enable**.
5. To add a dashboard carousel, select a dashboard (Web part) from the dashboard list and click **Add New Dashboard Carousel**. The selected dashboard appears in the Carousels list in the upper part of the dialog box. For more information about these lists, see [Defining Web Parts for Dashboards](#).

Portal Page Content Carousels [Community Library (br)]

Retrieved from: Community Library (br)

Carousels ☒ Enable

Name	Type
Colum McCann	Record Set: Colum McCann

Colum McCann

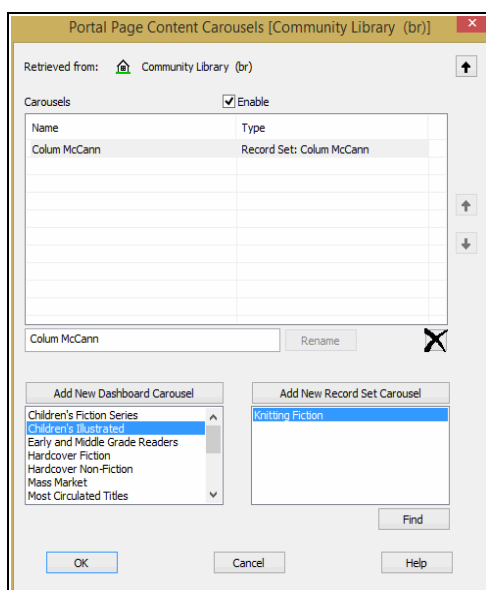
Children's Fiction Series  
**Children's Illustrated**  
 Early and Middle Grade Readers  
 Hardcover Fiction  
 Hardcover Non-Fiction  
 Mass Market  
 Most Circulated Titles

6. To add a record set carousel, follow these steps:
  - a. Click **Find**. The Find Tool for bibliographic record sets opens.
  - b. Search for the record set and select one or more record sets in the results lists.

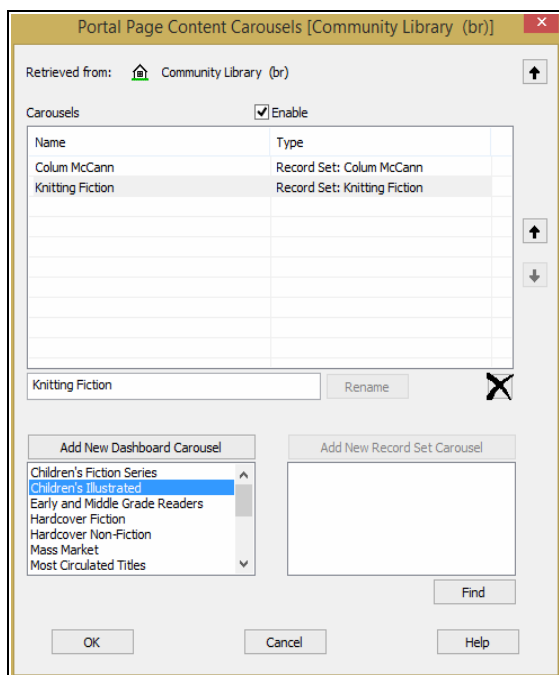
**Tip:**

You can search for any bibliographic record set. Existing rules and permissions are in effect when searching for and selecting record sets. For example, you cannot find record sets owned by individuals other than yourself.

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




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



7. By default, the carousel name is the name of the dashboard or record set. To assign a different display name for the PAC:
  - a. Select the carousel in the Carousels list. The name appears in the text box just below the list.
  - b. Type the new name and click **Rename**.
8. To set the display order of multiple carousels, select a carousel and click the up arrow to move it closer to the top of the list, or click the down arrow to move it closer to the bottom. The order of the list represents the display order in PAC.
9. Click **OK**.

#### Related Information

- Delete a carousel - Select the carousel in the Carousels list and click the Remove carousel icon .
- Inherit settings from a parent organization - The top of the dialog box indicates the organization where the current carousel options have been set. To inherit the settings of the parent organization, click the up arrow at the top of the dialog box.
- Content carousels and Community Profiles - For libraries that use Polaris Community Profiles, organization representatives can display content carousels on the organization's page in PAC search results or on the organization's own web site through widgets that are created with ContentXChange. These carousels can

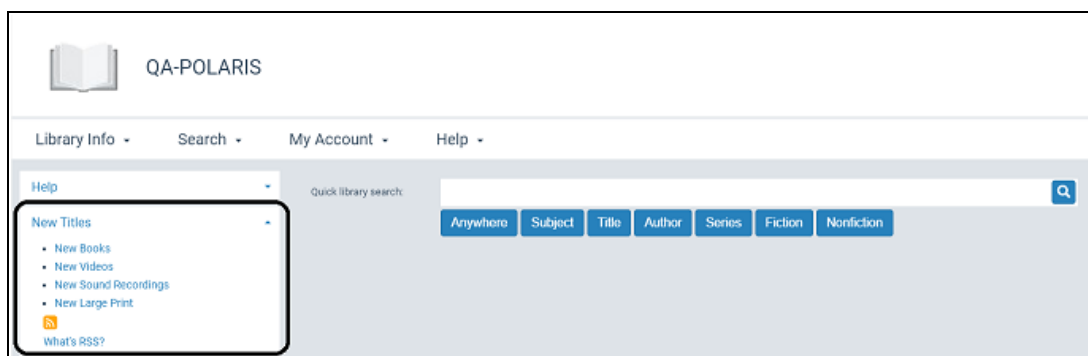
consist of title lists or searches saved in association with the organization representative's patron account. See the *Community Profiles Guide*.

## Defining Web Parts for Dashboards - Overview

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

### Note:

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



For general information on web parts, see:

- [Automatic Web Parts](#)
- [Custom Web Parts](#)
- [Best-Seller Lists from IndieBound \(Book Sense, Inc.\)](#)

For information on creating and using web parts, see:

- [Create a custom web part](#)
- [Assign web parts to public pages](#)
- [Limit items in Polaris and third-party lists](#)

For reference lists of Polaris PowerPAC and Polaris PowerPAC Children's Edition pages, see:

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

## Automatic Web Parts

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

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

### Note:

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

- **On-Order Items** - The On-Order Items web part elements are links that launch searches for titles in the Polaris database that have linked items with a status of On Order. By default, 20 titles are listed; the title that has the linked item with the most recent status change to On Order is listed first. If more than one On-Order

item is associated with a bibliographic record, the most recent On-Order item is used to order the list. Only titles that are marked for display in PAC are listed. This web part is updated as part of the nightly **Dashboard\_NewTitles** job.

**Tip:**

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

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

Polaris also provides a Make a Donation web part that allows users to make a donation to the library by credit card. The user does not have to log in to make the donation.

## Custom Web Parts

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

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

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

The following web parts are updated automatically with content from IndieBound (formerly Book Sense, Inc.), based on sales from over 350 independent bookstores in



the United States: Trade Paperback Fiction, Trade Paperback Nonfiction, Hardcover Fiction, Hardcover Nonfiction, Mass Market, Early and Middle Grade Readers, Young Adults, Children's Fiction Series, and Children's Illustrated. When a patron selects a title from one of these lists, a search for the title is launched in the Polaris database.

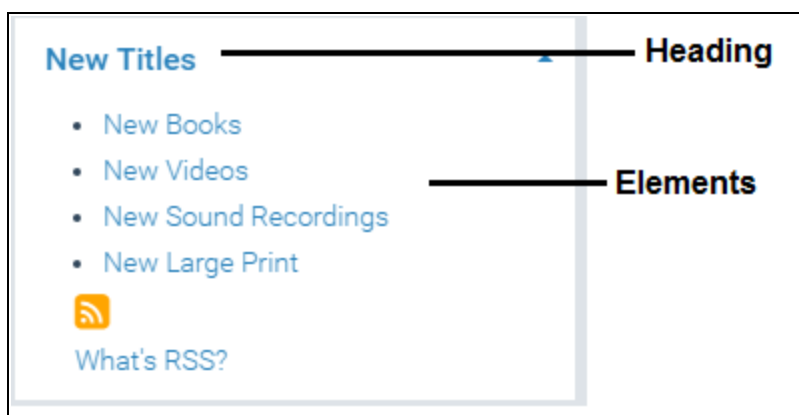
Every week, Innovative Interfaces receives a file of the updated best-seller lists from IndieBound. During overnight processing at your library, the **BookSenseImport** Microsoft SQL Server Agent at Innovative Interfaces updates the best-seller lists at your site.

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

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

### Create a custom web part

To create a custom web part, you define a heading for the web part and add data elements to the heading. You can add any combination of elements to the heading. (You create web parts for Polaris PowerPAC Children's Edition separately from Polaris PowerPAC, but the method is the same.)



To create a custom web part:

#### Important:

You can create web parts at the system level only. To actually display the

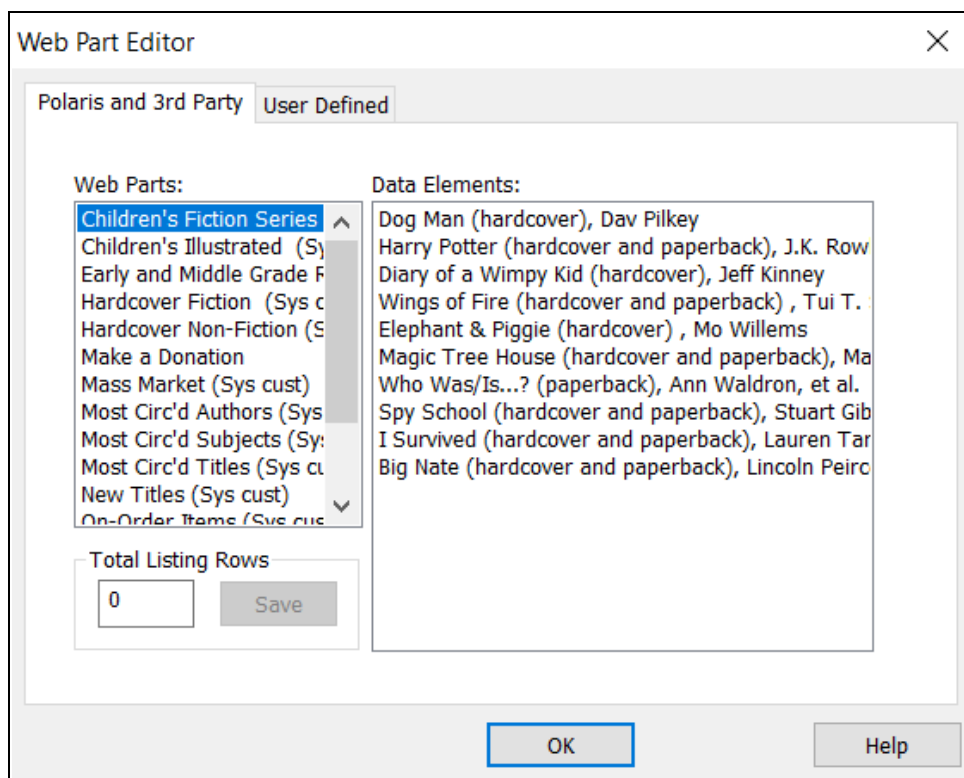
created web parts in the PAC, you assign them to specific pages for the appropriate organization. See [Assign web parts to public pages](#).

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

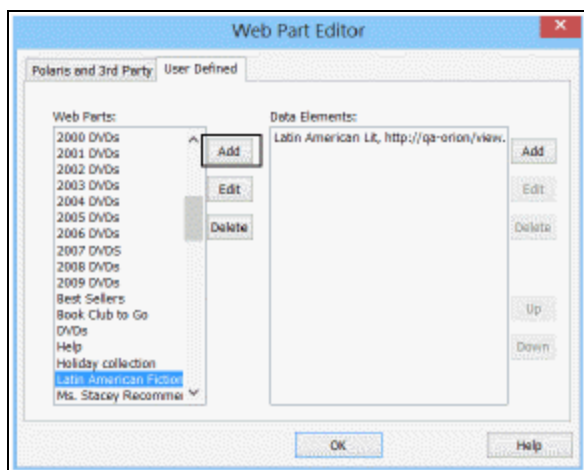
**Note:**

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

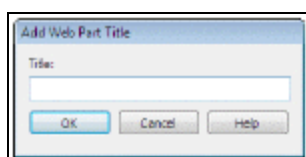
2. Double-click **Dashboards: Web part construction**. The **Web Part Editor** dialog box appears.



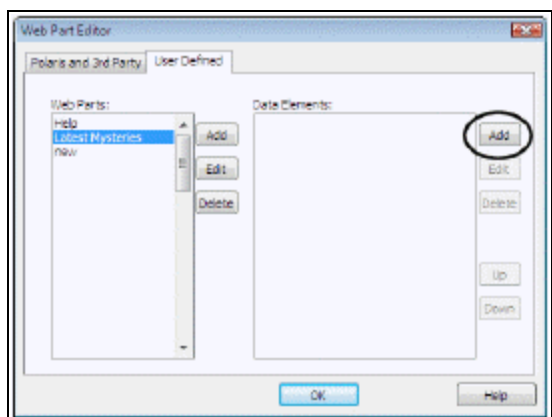
3. Select the **User Defined** tab.
4. Select **Add** by the Web Parts list to specify the heading for the new web part.



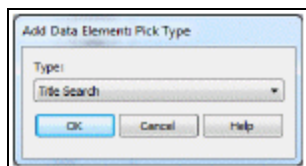
The **Add Web Part Title** dialog box appears.



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

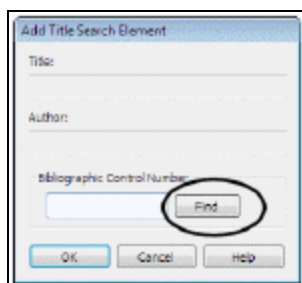


The **Add Data Element: Pick Type** dialog box appears.

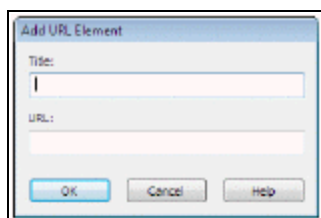


8. Select one of the following element types to add to the web part. When you select an element type, the appropriate Add ... Element dialog box for the selected element type appears:

- **Title Search** – Puts a title link in the list. When a patron selects the title in the list, the title information is displayed as search results. Type the bibliographic control number of the title, or select the title from the Polaris Find Tool results list (select **Find** to display the Find Tool).

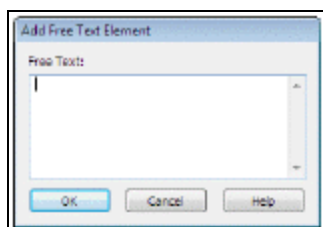


- **URL** – Puts a link to a website or page in the list. When a patron selects the link, the browser displays the destination page. Type the link text in the **Title** box, and type the uniform resource locator (address) in the **URL** box. See also [URL Data Elements and PowerPAC Context After Timeout](#).



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

text.



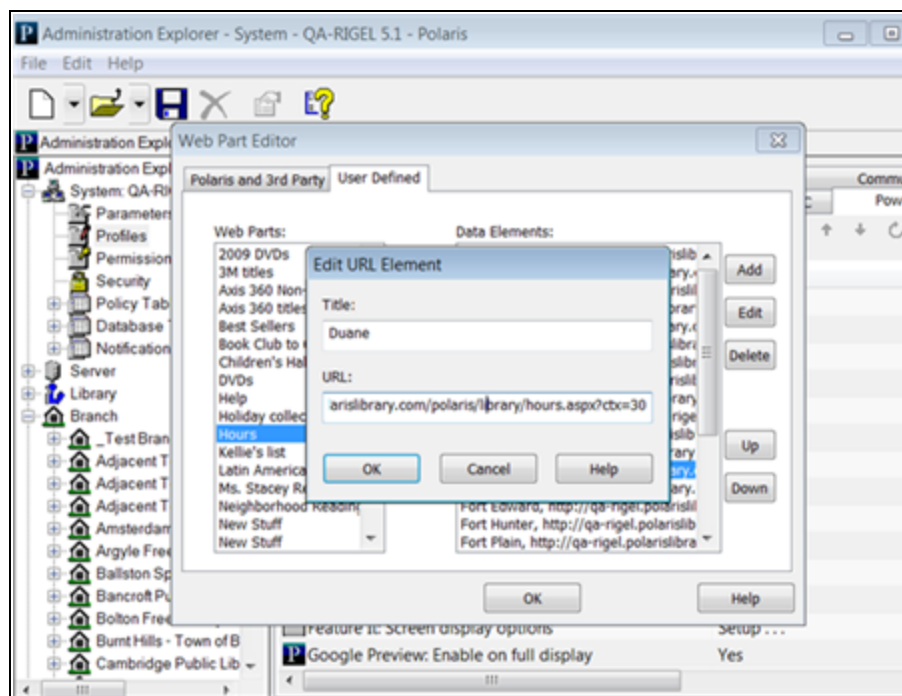
9. Select **OK** on the Add ... Element dialog box. The new element is displayed in the Data Elements list on the **Web Part Editor** dialog box.
10. Repeat steps 8 and 9 to add additional elements to the selected Web Part (heading). You can add any combination of element types to a single heading.
11. When you are finished working with the library-defined web parts, select **OK**.
12. Select **File > Save**.

#### URL Data Elements and PowerPAC Context After Timeout

To protect patron privacy, Polaris PowerPAC is designed to return to the system organization context after a timeout period even if the last connection had been to a specific branch organization. For example:

- The user connects to Polaris PowerPAC at the system level.
- The user then clicks a link to an external page with a specific organizational context (for example, a branch's hours page).
- The user has no activity and leaves the browser open for 20 minutes. PowerPAC times out.
- The user then clicks a link to a page with a specific organizational context, but Polaris PowerPAC returns to the system organization context.

If you want the URL on the external page to bring the user to the specific organization context in the above circumstances instead of reverting to the system context, place only the organization ID in the **ctx** portion of the URL data element. For example, use **ctx=30** instead of **ctx=30.1033.0.1**.



### Related Information

- Edit the title of a web part - Select the heading in the Web Parts list, and select **Edit** by the Web Parts list.
- Delete a web part - Select the heading in the Web Parts list, and select **Delete** by the Web Parts list.
- Edit an element in a web part - Select the heading in the Web Parts list, and select the element in the Data Elements list. Select **Edit** by the Data Elements list.
- Delete an element from a web part - Select the heading in the Web Parts list, and select the element in the Data Elements list. Select **Delete** by the Data Elements list.
- Reorder the elements in a web part - Select the heading in the Web Parts list, and select the element in the Data Elements list. Select **Up** or **Down** by the Data Elements list. The order in the Data Elements list determines the display order in the dashboard.
- Add a web part to a page - See [Assign web parts to public pages](#).

### Assign web parts to public pages

Each organization specifies which web parts are displayed on the dashboard for specific pages. You can add and remove web parts from individual pages without

affecting other pages, and change the order in which web parts appear on any specific page.

**Note:**

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

To specify which web parts are available on specific public pages for an organization:

**Important:**

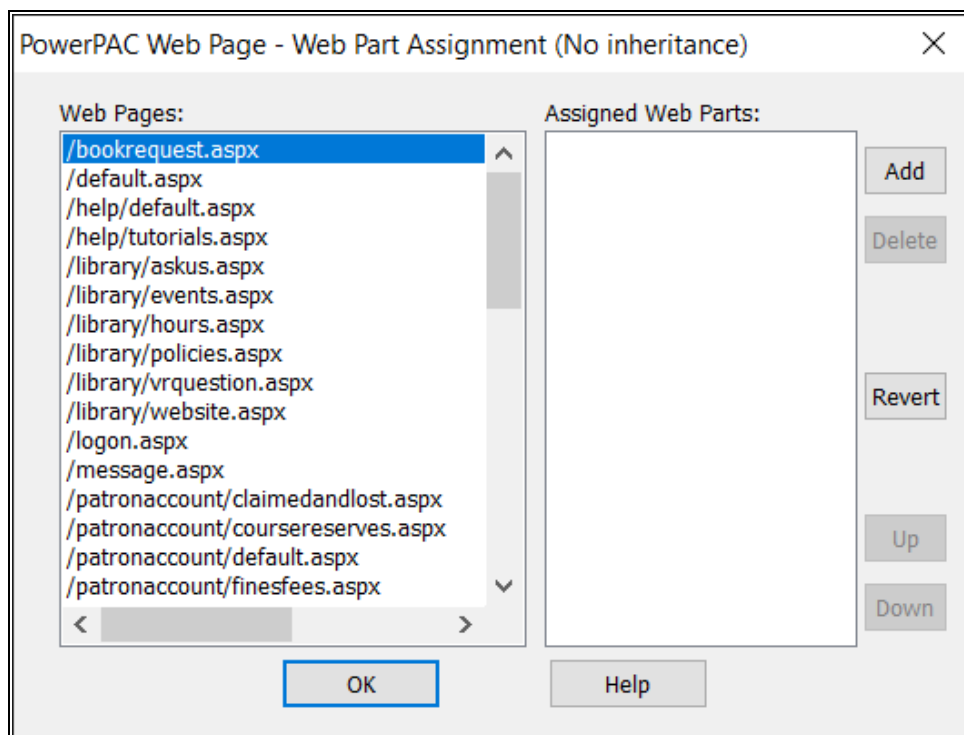
Web parts are inherited from the system level unless you make any change at the branch level. Then none are inherited for that branch and you must make the appropriate assignments at the branch level.

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

**Note:**

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

2. Double-click **Dashboards: Web Page/Web Part Assignment**. The Web Page - Web Part Assignment dialog box opens.



3. In the Web Pages list, select the public page to which you want to assign web parts:
  - If you are assigning web parts to Polaris PowerPAC pages, see [Setting Public Access Profiles and Parameters](#) for information about each page.
  - If you are assigning web parts to Polaris PowerPAC Children's Edition pages, see [Setting Public Access Profiles and Parameters](#) for information about each page.

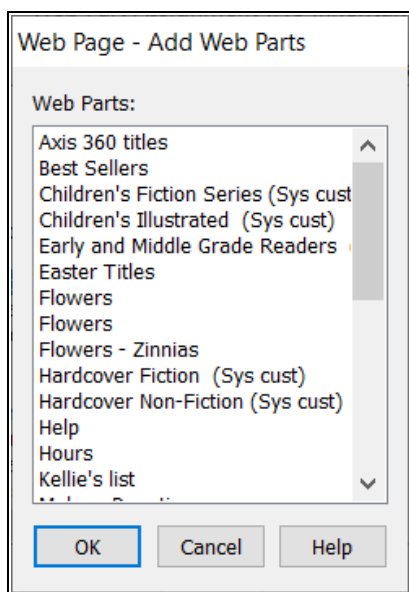
**Tip:**

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

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



4. To assign a web part to the selected page, do the following:
  - a. Select **Add**. The Web Page - Add Web Parts dialog box appears.



- b. Select the web parts you want to assign to the webpage.
  - c. Select **OK**.

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

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

#### Related Information

- Delete a web part from a page - On the Web Page - Web Part Assignment dialog box, select the web part in the Assigned Web Parts list, and select **Delete**.
- Revert to system-level settings - On the Web Page - Web Part Assignment dialog box, select **Revert**.

- Set the default display of web parts - You can determine whether web parts are expanded or closed by default when a page opens. (Patrons can always select a control in the header to expand or close a web part.) To set the default display to expanded web parts, set the PowerPAC profile **Dashboards: Expanded** to **Yes**. To set the default display to closed web parts, set the profile to **No**.

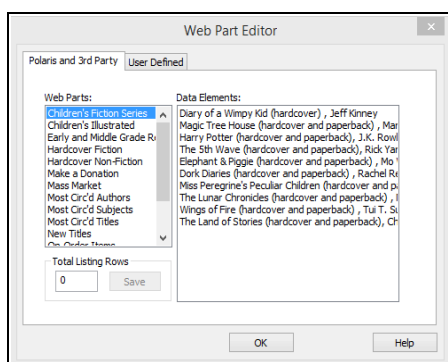
## Limit items in Polaris and third-party lists

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

### Note:

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

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



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

### Tip:

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

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

5. Repeat steps 3 and 4 for each Polaris and third-party web part you are using.
6. Select **OK**. The Web Part Editor dialog box closes.
7. Select **File > Save**. Your new settings are effective when the automatic lists are updated.

## Setting Up RSS Feeds

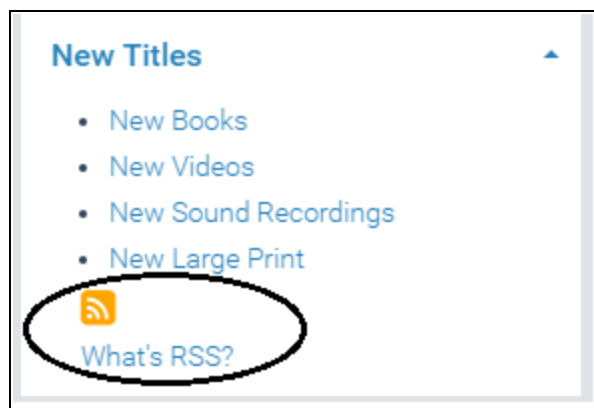
Real Simple Syndication (RSS) is a method of publishing links to content on your Web site. You can allow patrons to set up RSS feeds for new titles from Polaris PowerPAC directly to a Web site such as My Yahoo!. When the feed is received, the patron can click the link on the Web site to see a list of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

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

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

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

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



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

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

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## Setting Up Live Virtual Reference Services

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

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

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

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

To make a virtual reference service available:

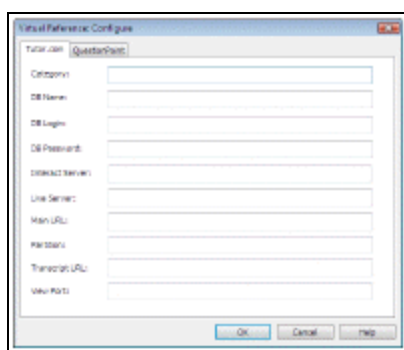
1. Establish an agreement with a virtual reference service.

**Note:**

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

2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
3. Double-click **Virtual reference: Enable**, and select **Yes**. This setting displays the virtual reference link on Polaris PowerPAC pages, and allows access to the virtual reference session history from the patron account.
4. Double-click **Virtual reference: Supplier**, and select your virtual reference provider from the list.

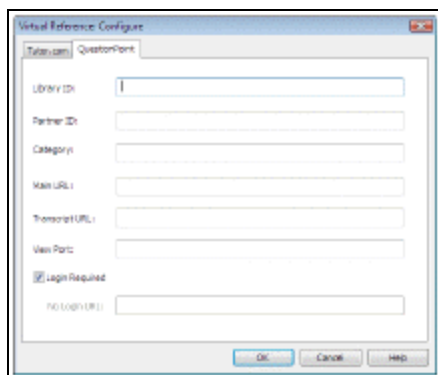
5. Double-click **Virtual reference: Configure**. The Virtual Reference Configure dialog box opens with the Tutor.com tabbed page displayed.



**Note:**

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

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



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

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

**<http://questionpoint.org/support>**

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

**Note:**

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

9. Restart the Internet Information Server (IIS). Polaris Hosted customers should contact Polaris Customer Support to perform an IIS reset.

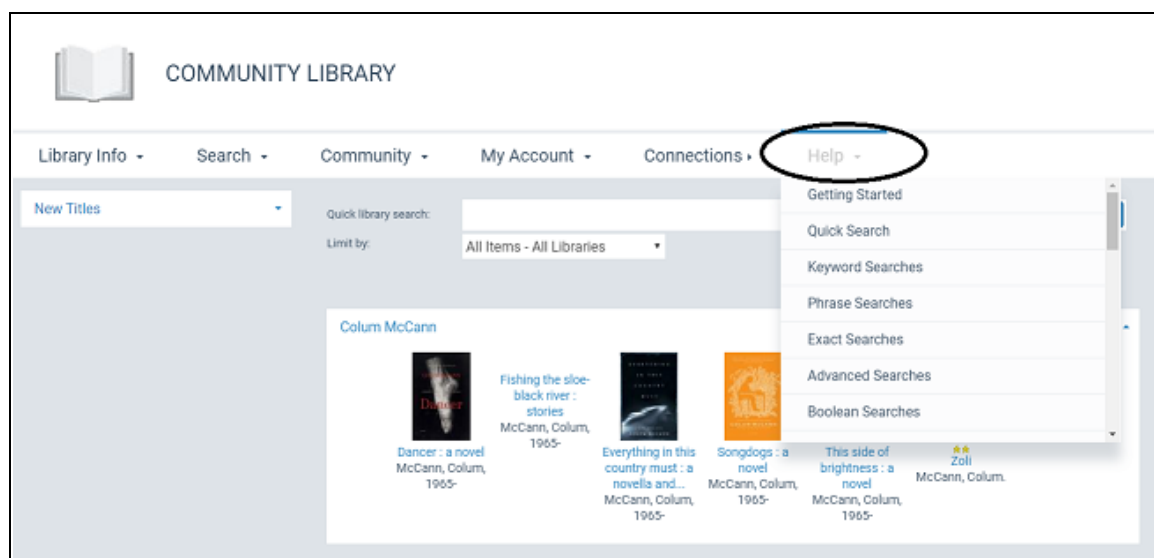
**Related Information**

Email reference service - You can allow patrons to send reference questions to your library via email. See [Set up and start Ask Us](#).

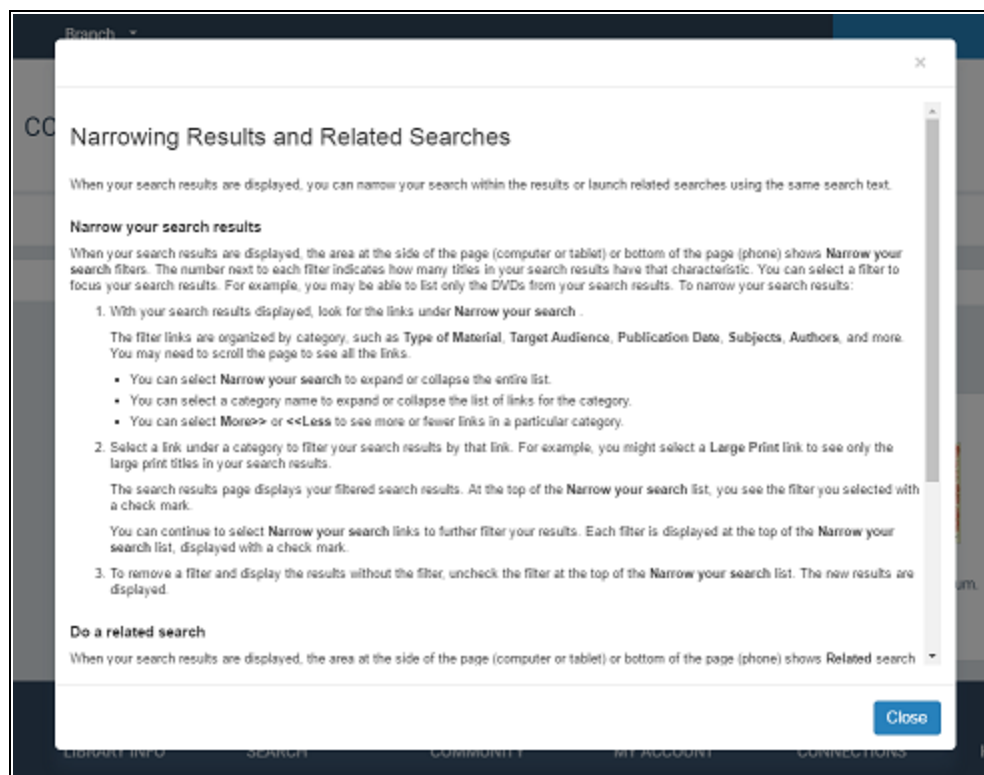
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## Polaris PowerPAC Help

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

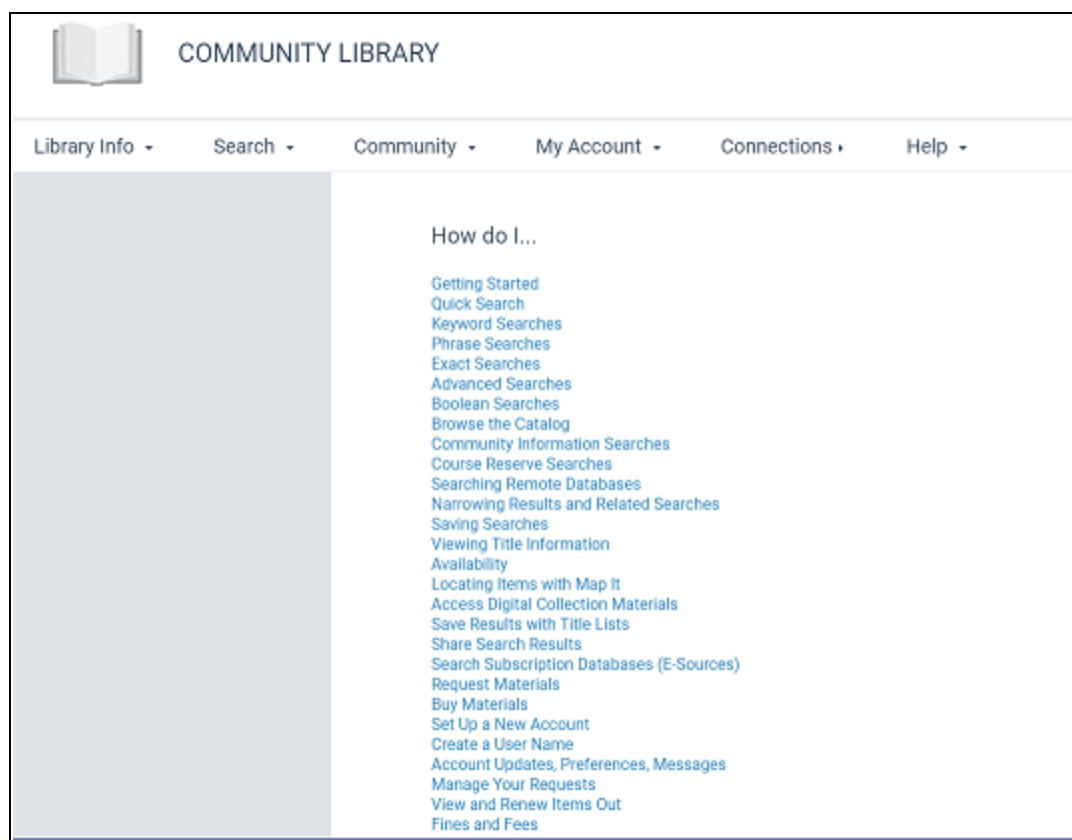


When the user clicks a topic link, the appropriate topic is displayed in a lightbox, without losing the current page context.





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



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

HELP TOPIC FILENAME	TOPIC LINK LABEL	LANGUAGE EDITOR STRING ID	POLARIS ADMINISTRATION FEATURE SETTING
Overview.htm	Getting	PACML_HELP_INTRO	[Always displayed]

HELP TOPIC FILENAME	TOPIC LINK LABEL	LANGUAGE EDITOR STRING ID	POLARIS ADMINISTRATION FEATURE SETTING
	Started		
QuickSearch.htm	Quick Search	PACML_HELP_SEARCHQUICK	PowerPAC profile Navigation: Portal
Keyword.htm	Keyword Searches	PACML_HELP_SEARCHKEYWORD	PowerPAC profile Navigation: Keyword
Phrase.htm	Phrase Searches	PACML_HELP_SEARCHPHRASE	PowerPAC profile Navigation: Phrase
Exact.htm	Exact Searches	PACML_HELP_SEARCHEXACT	PowerPAC profile Navigation: Phrase
Advanced.htm	Advanced Searches	PACML_HELP_SEARCHADVANCED	PowerPAC profile Navigation: Advanced
Boolean.htm	Boolean Searches	PACML_HELP_SEARCHBOOLEAN	PowerPAC profile Navigation: Boolean
Browse.htm	Browse the Catalog	PACML_HELP_SEARCHBROWSE	PowerPAC profile Navigation: Browse
CommInfo.htm	Community Information Searches	PACML_HELP_SEARCHCOMMUNITY	Community profile Navigation (PowerPAC): Community - Keyword Search
CourseReserve.htm	Course Reserve	PACML_HELP_SEARCHCOURSE	PowerPAC profile Navigation: Course

HELP TOPIC FILENAME	TOPIC LINK LABEL	LANGUAGE EDITOR STRING ID	POLARIS ADMINISTRATION FEATURE SETTING
	Searches		Reserves
Filters.htm	Narrowing Results and Related Searches	PACML_HELP_SEARCHNARROW	[Always displayed]
SavingSearches.htm	Saving Searches	PACML_HELP_SAVESEARCH	PAC profile Search agent: Enabled
TitleInfo.htm	Viewing Title Information	PACML_HELP_TITLEINFO	[Always displayed]
Availability.htm	Availability	PACML_HELP_AVAILABILITY	[Always displayed]
MapIt.htm	Locating Items with Map It	PACML_HELP_MAPIT	PowerPAC profile Google Maps
Fusion.htm	Access Digital Collection Materials	PACML_HELP_FUSION	[Polaris Fusion is enabled]
TitleLists.htm	Save Results with Title Lists	PACML_HELP_TITLELISTS	PowerPAC profile Title List: Enable
Share.htm	Share Search Results	PACML_HELP_SHARE	PowerPAC profile Bookmarking & Sharing: Enable
ESources.htm	Search Subscription Databases	PACML_HELP_ESOURCES	PowerPAC profile Navigation: E-Sources

HELP TOPIC FILENAME	TOPIC LINK LABEL	LANGUAGE EDITOR STRING ID	POLARIS ADMINISTRATION FEATURE SETTING
	(E-Sources)		
Request.htm	Request Materials	PACML_HELP_REQUEST	Request parameter Holds options
Purchase.htm	Buy Materials	PACML_HELP_PURCHASE	PAC profile Purchase options
NewAccount.htm	Set Up a New Account	PACML_HELP_NEWACCOUNT	PAC profile Patron access options (self-registration enabled)
Username.htm	Create a User Name	PACML_HELP_USERNAME	PAC profile Patron access options (patron user name enabled)
AcctUpdates.htm	Account Updates, Preferences, Messages	PACML_HELP_UPDATEACCOUNT	[Always displayed]
AcctRequests.htm	Manage Your Requests	PACML_HELP_ACCTREQUESTS	PowerPAC profile Navigation: Requests
AcctItemsOut.htm	View and Renew Items Out	PACML_HELP_ACCTITEMSOUT	PowerPAC profile Navigation: Items out
AcctReadingHistory.htm	Your Reading History	PACML_HELP_ACCTHISTORY	[Reading history is enabled for patron]

HELP TOPIC FILENAME	TOPIC LINK LABEL	LANGUAGE EDITOR STRING ID	POLARIS ADMINISTRATION FEATURE SETTING
AcctFines.htm	Fines and Fees	PACML_HELP_ACCTFINESFEES	PowerPAC profile Navigation: Fines and fees
AcctCourseStats.htm	Course Reserve Statistics	PACML_HELP_ACCTCOURSE	[Course reserves enabled, patron is instructor]
Donations.htm	Make a Donation	PACML_HELP_DONATE	Credit Card Payment parameter Online payments: Configure (Allow donations from PowerPAC)

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

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

**Important:**

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

If you have some programming knowledge, you can add your own links to the Help page. For more information, see the Polaris Developer Network.

### Help with Searching

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

## Creating Custom Help on the Dashboard

To provide custom help from the dashboard in Polaris PowerPAC:

### Tip:

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

1. Create and save the instruction pages you want to be accessible from the dashboard.
2. In the Administration Explorer tree view, open the **Profiles** folder for the system, and select the **PowerPAC** tab in the details view.
3. Double-click **Dashboards: Web part construction**. The Web Part Editor dialog box appears.
4. Click the **User Defined** tab.
5. Click **Add** by the Web Parts list to specify the heading for the instruction Web part. The Add Web Part Title dialog box appears.
6. Type the heading text in the **Title** box, and click **OK**. The heading for the new Web part is displayed in the Web Parts list.
7. Select the new heading in the Web Parts list.
8. Click **Add** by the Data Elements list. The Add Data Element: Pick Type dialog box appears.
9. Select **URL**. The Add ... Element dialog box for the URL element type appears.
10. Type the link text in the **Title** box, and type the complete path and filename or URL in the **URL** box.

11. Click **OK** on the Add ... Element dialog box. The new element is displayed in the Data Elements list on the Web Part Editor dialog box.
12. Repeat steps 8-11 to add additional elements to the selected Web Part (heading), and click **OK**. The Web Part Editor dialog box closes.
13. Select **File | Save**.
14. To assign the instruction Web part to the appropriate pages, do these steps:
  - a. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.
  - b. Double-click **Dashboards: Web Page / Web Part Assignment**. The Web Page - Web Part Configuration dialog box appears.
  - c. In the Web Pages list, select the page to which you want to assign the instruction Web part. See [Polaris PowerPAC Pages Reference](#). The Web parts currently assigned to the page are shown in the Assigned Web Parts list.
  - d. Click **Add**. The Web Page -Add Web Parts dialog box appears. It lists all the Web parts not currently assigned to the selected page.
  - e. Select your instruction Web part.
  - f. Click **OK** on the Web Pages - Add Web Parts dialog box. The selected Web parts are displayed in the Assigned Web Parts list.
  - g. Click **OK** on the Web Page - Web Part Configuration dialog box.
15. Select **File > Save**.

#### Related Information

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

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## Prompting PowerPAC Users to Accept Cookies

You can configure PowerPAC to display a message that informs patrons that the site uses cookies and prompts them to agree to the use of cookies.

When you enable this feature, the following message appears at the bottom of each PowerPAC screen. The message formatting matches your PowerPAC theme.

This site uses cookies and other technologies to provide you with an optimal experience. By continuing use of this website you are agreeing to use of our cookies. To learn more, see our [privacy policy](#) and [services privacy policy](#).

Accept

When a patron clicks **Accept**, the message disappears.

By default, the cookie policy message is not enabled.

### To enable and manage the cookie policy message

- [Enabling the Cookie Policy Message](#)
- [Customizing the Cookie Policy Message Text](#)
- [Configuring How Frequently the Cookie Policy Message Appears](#)

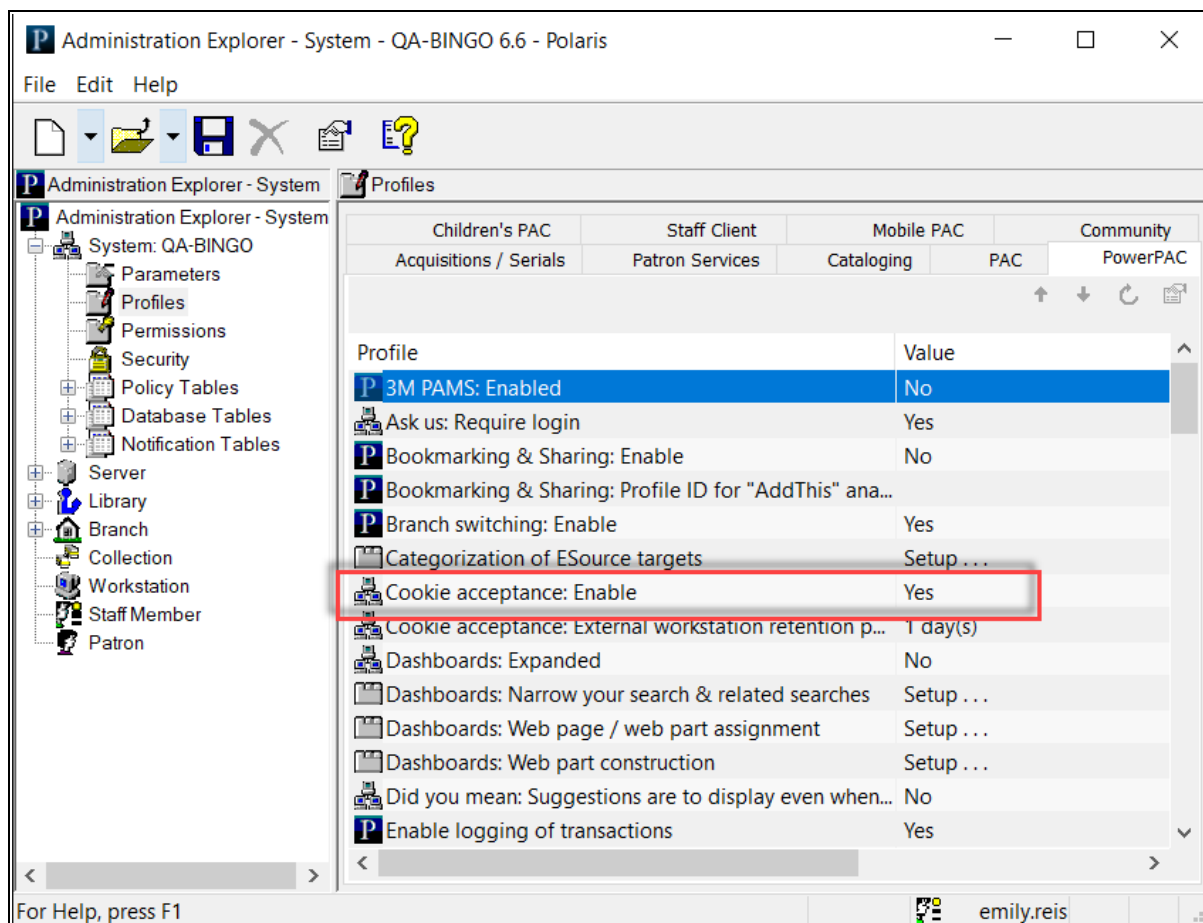
### Enabling the Cookie Policy Message

You can enable or disable the appearance of the cookie policy message at the system level.

#### To enable the cookie policy message

1. In the Administration Explorer, select **System > Profiles > PowerPAC**.
2. On the PowerPAC tab, set the **Cookie acceptance: Enable** profile to **Yes**.





### Customizing the Cookie Policy Message Text

Two strings in the Polaris Web Admin Tool allow you to customize the cookie policy message:

- PACML\_PRIVACY\_POLICY - Cookie policy message text
- PACPROF\_COOKIE\_ACCEPT\_BUTTON - Accept button label

By default, the cookie policy message includes links to Innovative's privacy policy and services privacy policy. You can edit the message to include links to your library's policies.

### Configuring How Frequently the Cookie Policy Message Appears

When a patron clicks **Accept**, the cookie policy message disappears and does not reappear for a configurable period of time. You can configure different "cookie

acceptance" periods for different types of users:

- In-house patrons (patrons accessing PowerPAC at public workstations in the library)
- External patrons (patrons accessing PowerPAC from home)

### For In-house Patrons

For in-house patrons, PowerPAC uses the **PowerPAC: Patron inactivity timeout** profile setting to determine when to display the cookie policy message.

When an in-house patron clicks **Accept**, the cookie policy message disappears and does not reappear until one of the following conditions causes it to reappear:

If the patron is	And	The following occurs
Signed in	Signs out of PowerPAC	The cookie policy message appears.
Signed in	Leaves the workstation without signing out	The cookie policy message appears when the <b>Patron inactivity timeout</b> period elapses.  If this profile is not enabled in Polaris Administration, the cookie policy message appears when the session timeout period elapses.
Not signed in	Leaves the workstation	The cookie policy message appears when the session timeout period elapses.

#### Notes:

- For more information about the **Patron inactivity timeout** profile setting, see [Set inactivity timeout for in-house workstations](#).
- PowerPAC's default session timeout period is 20 minutes. Contact Innovative Support to change the timeout period.

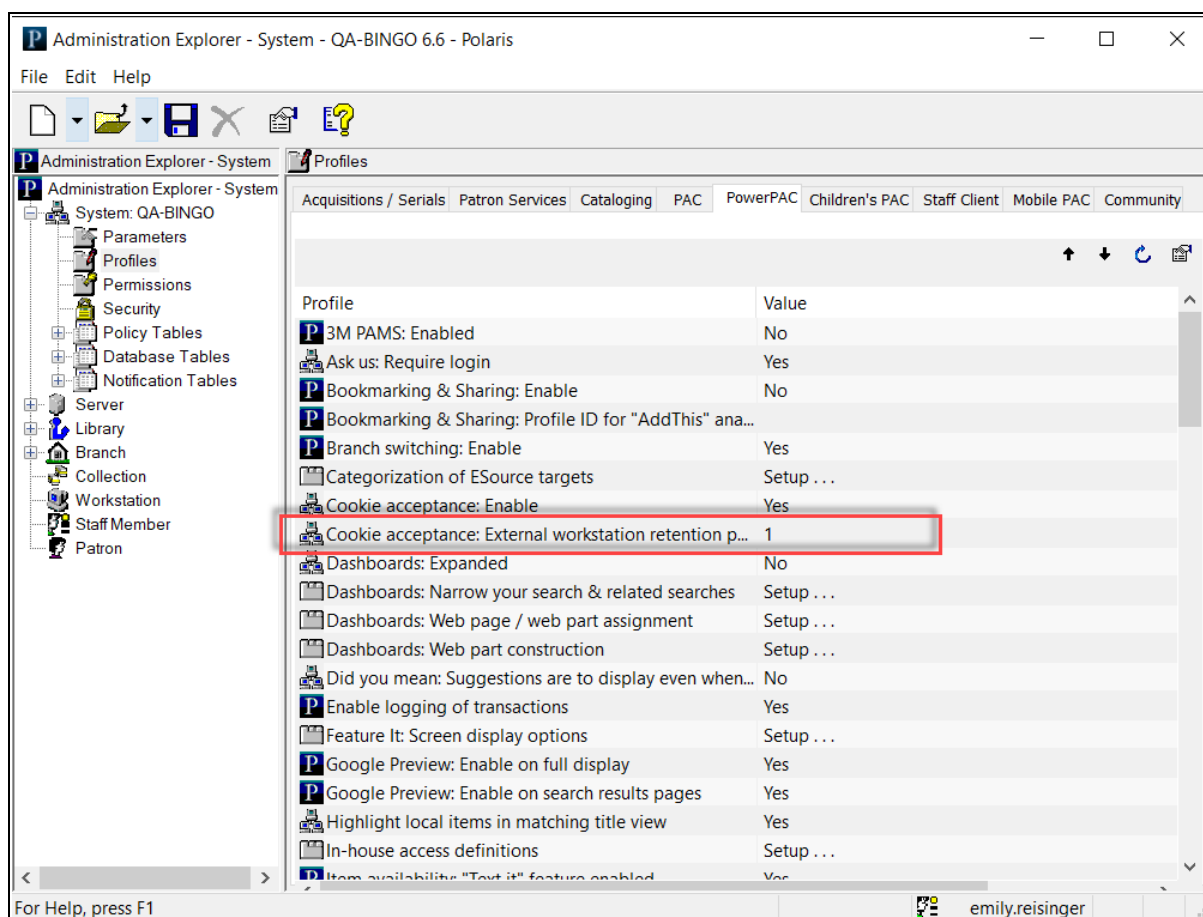
### For External Patrons

For external patrons, PowerPAC uses the system-level **PowerPAC: Cookie acceptance: External workstation retention period** profile setting to determine when to display the

cookie policy message.

### To configure how frequently the cookie policy message appears for external patrons

1. In the Administration Explorer, select **System > Profiles > PowerPAC**.
2. On the PowerPAC tab, double-click the value beside the **Cookie acceptance: External workstation retention period** profile.



3. Enter a value in days.

When an external patron accepts the cookie policy, the message disappears and does not reappear until the specified **External workstation retention period** elapses. By default, this profile is set to 365 days.

#### Note:

The cookie policy message reappears before the **External**

**workstation retention period** elapses if the patron clears their browser cache and cookies.

## Setting Search Options for Polaris PowerPAC

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

See also:

- [Specifying Default Search Settings](#)
- [Setting Up Search Filters \(Limit By\)](#)
- [Setting Available Search Types](#)
- [Related Words in PowerPAC Searches](#)
- [Setting Up Saved Searches in the PAC](#)
- [Setting Up Did You Mean Term Checking](#)
- [Auto-Search Suggestions - PowerPAC](#)
- [Searching Record Sets \(Polaris PowerPAC\)](#)
- [Deep Links to Polaris PowerPAC and Mobile PAC](#)
- [PAC CQL Commands and Access Points](#)
- [Customizing Search by Labels](#)

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### Specifying Default Search Settings

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

The screenshot displays the Polaris PowerPAC search interface. At the top, there is a 'Keyword search:' field containing the text 'cviil' and a search button with a magnifying glass icon. Below this, there are three main sections: 'Search by:' with a dropdown menu set to 'Any Field', 'Limit by:' with a dropdown menu set to 'All Items - All Libraries', and 'Using:' with a dropdown menu set to 'Local Polaris PAC DB'. To the right of the 'Using:' dropdown is a link labeled 'Select Databases'. Below the 'Limit by:' dropdown is a link labeled 'More Search Options'. At the bottom right, there is a checkbox labeled 'Course reserve items only' which is currently unchecked. At the bottom of the interface, there is a suggestion bar that says 'Did you mean civil or coil or evil?' followed by a 'Less' button.

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

See also:

- [Set PAC search setting defaults](#)
- [Specify level of relevance applied to popularity sort](#)
- [Customizing Search by Labels](#)

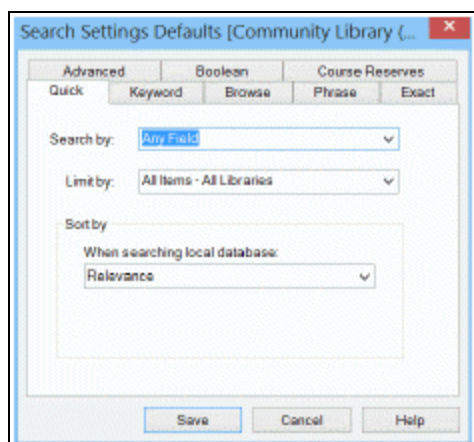
### Set PAC search settings defaults

To set the library's defaults for PAC searches:

#### Note:

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

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
2. Double-click **Search settings defaults**. The Search Settings Defaults dialog box opens. Settings on each tabbed page control the defaults for that search type.



3. Click the **Quick** tab and set the quick search defaults:

#### Note:

Quick search settings also apply to Mobile PAC.

- a. Select the library default search field in the **Search by** list.

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

**Note:**

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

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

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

- c. Select the library's default sort order for search results in the **Sort by** list. The Polaris default selection is **Relevance**. This selection sorts results based on weighted keyword frequency and proximity, so that those most likely to meet the user's needs appear first in the list.

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

**Note:**

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

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

**Note (Polaris PowerPAC):**

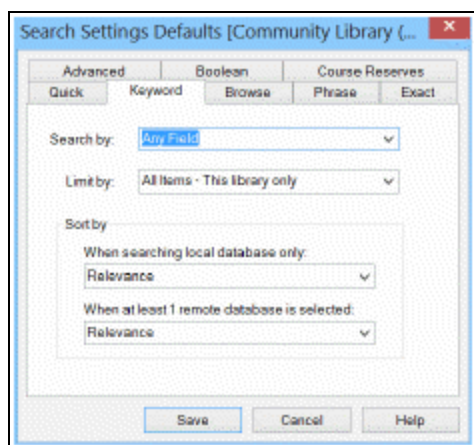
These settings apply only to the default quick search. If you choose to offer a quick search feature with search option buttons, these settings are

not used. For more information about the two types of quick searches, see [Customizing Portal Page Features](#).

4. Click the **Keyword**, **Phrase**, or **Exact** tab to set search defaults:

**Note:**

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



- a. Select the library default search field in the **Search by** list. The Polaris default selection is **Any Field**.

**Note:**

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

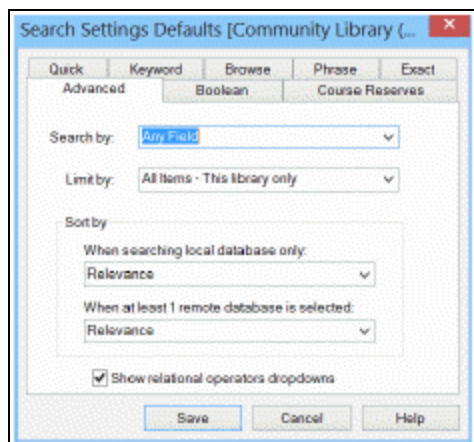
**Tip:**

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

- b. Select the library default search filter in the **Limit by** list. The available selections depend on the organization’s settings in the PAC Limit By Display policy table. See [Setting Up Search Filters \(Limit By\)](#).
- c. Select the library default sort order for local catalog search results in the **When searching local database only** list.



- d. Select the library default sort order for search results in the **When at least 1 remote database is selected** list.
  - e. Most Popular and call number sorting options are not available for searches that include at least one remote database.
5. Click the **Advanced** tab and set the advanced search defaults:



- a. Select the default search field in the **Search by** list. This setting also applies to Mobile PAC. The default selection is **Any Field**.

**Note:**

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

- b. Select the default search filter in the **Limit by** list. This setting also applies to Mobile PAC. The available selections depend on the organization's settings in the PAC Limit By Display policy table. See [Setting Up Search Filters \(Limit By\)](#).
- c. Select the sorting default for results from local databases in the **When searching local database only**. This setting also applies to Mobile PAC.
- d. Select the default sort order for results where a remote database is selected in the **When at least 1 remote database is selected** list.

**Note:**

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

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

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

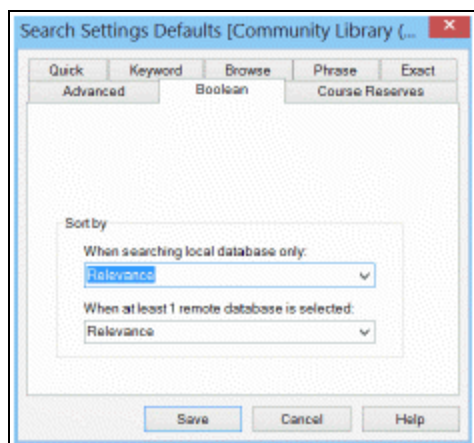
RELATIONAL OPERATOR OPTION	ACCESS POINTS	SEARCH EFFECT
Keyword (ALL)	AU, GENRE, KW (Any Field), NOTE, PUB, SE, SU, TI	All of the keywords in the search term must exist.
Keyword (ANY)	AU, GENRE, KW (Any Field), NOTE, PUB, SE, SU, TI	Any one of the keywords in the search term must exist.
Phrase (ADJ)	AU, GENRE, KW (Any Field), NOTE, PUB, SE, SU, TI	All of the keywords in the search term must exist, and must be adjacent to each other in the order specified in the search term.
Exact (==)	AU, CODEN, ISBN, ISSN, LCCN, PN, SE, STRN, SU, SUDOC, TI	The search term must be an exact match.

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

**Note:**

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

6. Click the **Boolean** tab and set the Boolean search defaults.

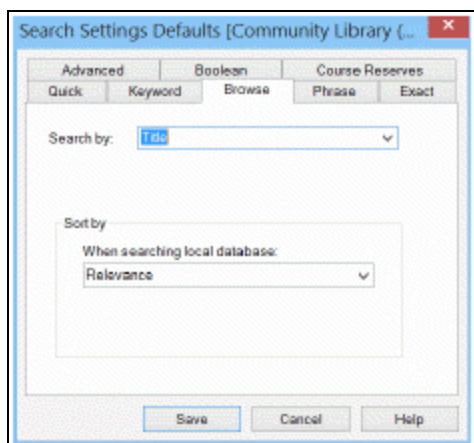


- a. Select the default sort order for local catalog search results in the **When searching local database only** list.
- b. Select the default order for search results from remote databases in the **When at least 1 remote database is selected** list.

**Note:**

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

7. Click the **Browse** tab and set the browse search default:



- a. Select the default search index in the **Search by** list. The default selection is **Title**.

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

**Note:**

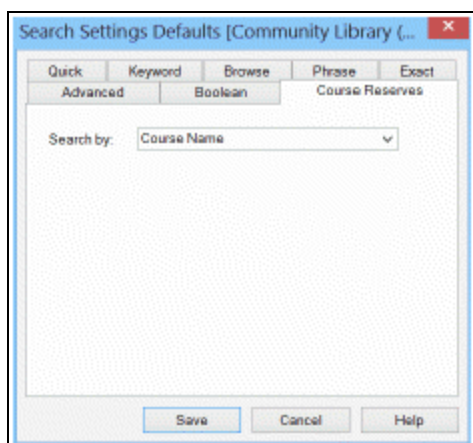
You can customize the labels displayed in Polaris PowerPAC for **Search by** options. See Customizing Search by Labels. However, the Search Setting defaults dialog box always displays the default labels.

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

**Note:**

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

8. Click the **Course Reserves** tab and set the course reserve search default in the **Search by** list. The default selection is **Course Name**.



9. Click **Save**.

*Related Information*

- Customizing labels for search options - You can customize the labels displayed in Polaris PowerPAC for **Search by** options. See [Customizing Search by labels](#). However, the Search Setting defaults dialog box always displays the default labels.
- Making search types available in Polaris PowerPAC - See [Setting Polaris PowerPAC search types](#).
- Limit call number browse searching to the local item-level call number index - Open PowerPAC profiles, double-click **Local Call Number Indexed Field: Limit Choice**, and select **Yes**. If the profile is set to **Yes** at the system level, and a Polaris

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

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

**Notes:**

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

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

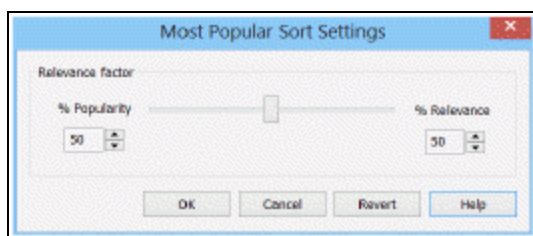
- Did You Mean search suggestions - See [Setting Up Did You Mean Term Checking](#).
- **Related words in search results** - When this feature is enabled, PowerPAC users can choose to add records containing related words as well as the literal typed search term to keyword and phrase search results. See [Related Words in PowerPAC Searches](#).

### Specify level of relevance applied to popularity sort

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

To adjust the relevancy factor applied to most popular sorting of search results in the PowerPAC or Mobile PAC:

1. In the Administration Explorer tree view, open the **Profiles** folder at the System level, and click the **PAC** tab in the details view.
2. Double-click **Most popular sort settings**.



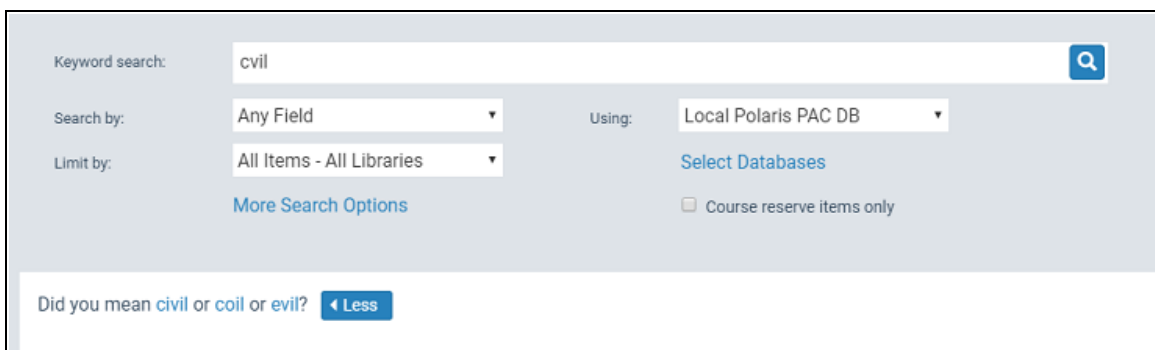
3. To adjust the Polaris default sort settings of 50/50, either click on an up or down arrow or move the slider. The **% Relevance** number increases as you move the slider right, and the **% Popularity** number increases as you move the slider left.

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

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

## Setting Up Search Filters (Limit By)

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

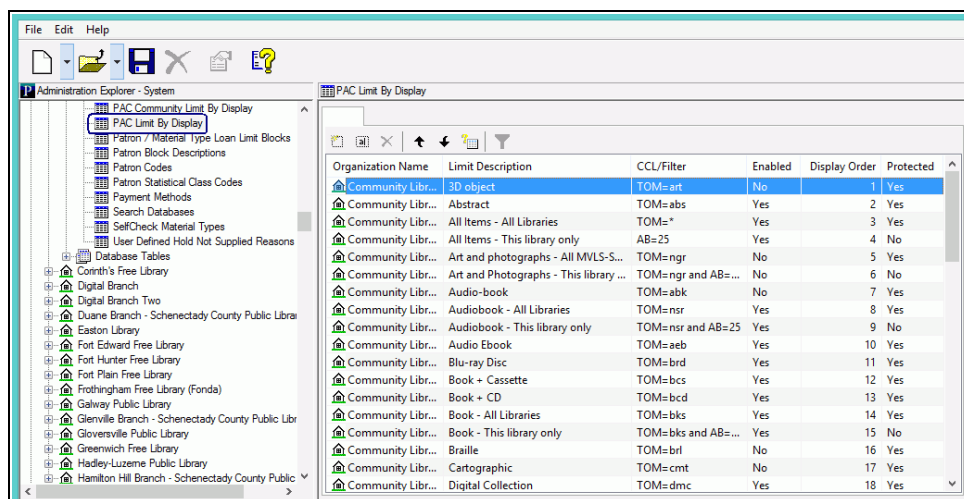


The screenshot shows the PowerPAC search interface. At the top, there is a 'Keyword search:' field with the text 'cviil' and a magnifying glass icon. Below this, there are three dropdown menus: 'Search by:' set to 'Any Field', 'Using:' set to 'Local Polaris PAC DB', and 'Limit by:' set to 'All Items - All Libraries'. To the right of the 'Limit by:' dropdown is a link 'Select Databases' and a checkbox labeled 'Course reserve items only'. Below the dropdowns is a link 'More Search Options'. At the bottom, there is a suggestion bar that says 'Did you mean civil or coil or evil?' with a 'Less' button.

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

### Note:

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



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

**Note:**

If a PAC user enters a search term, selects the local database and one or more remote databases, and selects a **Limit by** option, the Limit by filters will be applied to the remote databases that can support that filter. If the remote database is unable to use the filter, it will be applied only to the local results. Results may be returned from the remote databases using the search string without the filter. If an unsupported filter was removed from a search of a remote database, a message appears in the Search Status box.

- Type of material (TOM) filters - Polaris PowerPAC offers a set of standard formats/types of material and custom search filters in the **Limit by** list. In the PAC Limit by Display policy table, you can modify the description and the **Enabled** setting for standard formats/types of materials, but you cannot edit the CQL command for these standard filters. The TOM Limit by filters are used in Z39.50 searches of remote databases, but not in MuseGlobal databases. For MuseGlobal databases, the TOM limiter is discarded because MuseGlobal databases cannot interpret this limiter and would return zero results if this limiter were included in the search.
- Custom filters - Use CQL commands to set up custom filters for the **Limit by** list. You can combine standard type of material codes with other CQL commands to create custom search filters. See [Managing Federated Search Targets](#).
- Availability filters - You can also use the PAC Limit by Display policy table to set up search filters that limit search results to titles with at least one available linked



item. The patron selects the filter in the **Limit by** list before launching the search. If a PowerPAC or Mobile PAC connection is at the system level, the search results include all titles with at least one available item. If the connection is at the branch level, the results include all titles that have at least one linked available item assigned to that branch or the other branches defined as **Local** in the branch's Item Availability Display Order table. (At either level, items with a suppressed circulation status are not included, and items where **Display in PAC** is not checked in the linked bibliographic record are not included.)

See also:

- [Set up type of material/custom search filters for PAC](#)
- [Set up availability search filters for PAC](#)

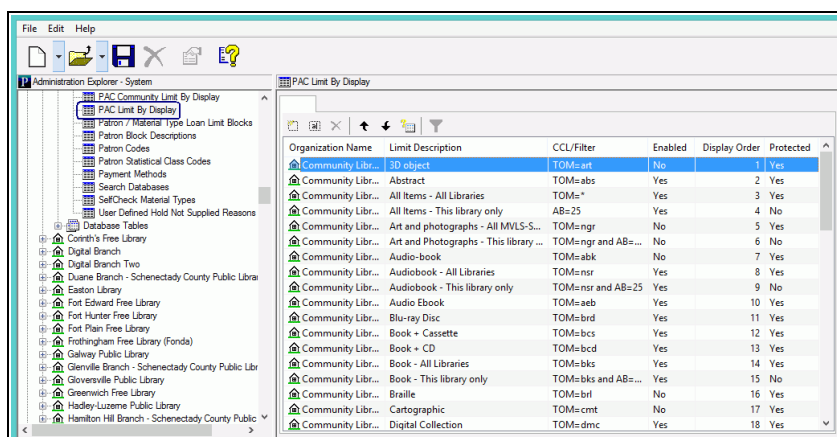
### Set up type of material/custom search filters for PAC

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


#### Note:

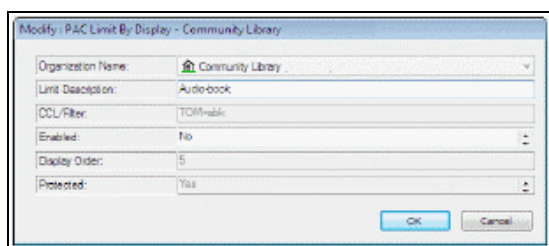
For a list of the Type of Material codes, see [Type of Material Filters](#). For a list of CQL codes that you can use to create custom filters, see [Setting PowerPAC Narrow/Related Search Options](#).

1. In the Administration Explorer tree view, open the Policy Tables folder for the organization, and select **PAC Limit By Display**. The PAC Limit by Display table appears in the details view.



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

- a. Select the format and click . The Modify PAC Limit by Display dialog box appears.



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

**Note:**

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

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


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

**Note:**

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

- d. Click **OK**. The Modify PAC Limit by Display dialog box closes, and the table displays your changes.

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

- a. Click  in the PAC Limit By Display table. The Insert PAC Limit By Display dialog box appears.

- b. Type the filter name in the **Description** box. This name appears in the **Limit by** list in PAC.
- c. Type the CQL search command for the filter in the **CCL Filter** box.

**Tip:**

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

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

**Examples:**

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

Description: **DVD Mysteries**

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

- d. Click **OK**. The Insert PAC Limit by Display dialog box closes, and the table displays your changes.

**Tip:**

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

4. To set the order of options in the **Limit by** list, select a filter in the table and click





or . Repeat this step until the list is ordered the way you want it.

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

5. Select **File > Save**.

*Related Information*

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

The screenshot shows a search interface with the following elements:

- Keyword search:** A text input field containing 'civil' and a search button (magnifying glass icon).
- Search by:** A dropdown menu currently set to 'Any Field'.
- Using:** A dropdown menu currently set to 'Local Polaris PAC DB'.
- Limit by:** A dropdown menu currently set to 'All Items - All Libraries'.
- More Search Options:** A blue link below the 'Limit by' dropdown.
- Select Databases:** A blue link to the right of the 'Using' dropdown.
- Course reserve items only:** A checkbox option to the right of the 'Select Databases' link.
- Suggestion bar:** At the bottom, it says 'Did you mean [civil](#) or [coil](#) or [evil](#)?' followed by a 'Less' button.

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

## Type of Material Filters

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

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

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








**Note:**












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












The table lists the standard types of material (TOM) by name and code, the TOM's corresponding icon, and the icon filename. These are the default TOM filters available for the **Limit by** list.

**Note:**












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










Format/Type of Material	Code	Icon	Icon Filename	Enabled by Default
Abstract	abs		formatid39.gif	Y
Archival/mixed materials	mix		formatid07.gif	N
Atlas	atl		formatid47.gif	Y
Audio books	abk		formatid37.gif	Y
Audio book on cassette	abt		formatid53.gif	Y
Audio book on CD	abc		formatid52.gif	Y
Blu-Ray Disc	brd		formatid40.gif	Y

Format/Type of Material	Code	Icon	Icon Filename	Enabled by Default
Blu-Ray + DVD	bdv		formatid45.gif	Y
Book	bks		formatid01.gif	Y
Book + Cassette	bcs		formatid43.gif	Y
Book + CD	bcd		formatid42.gif	Y
Book + DVD	bkv		formatid46.gif	Y
Braille	brl		formatid28.gif	N
Cartographic material	cmt		formatid03.gif	N
Digital collection	dmc		formatid38.gif	Y
DVD	dvd		formatid33.gif	Y
EAudioBook	aeb		formatid41.gif	Y
Ebooks	ebk		formatid36.gif	Y

Format/Type of Material	Code	Icon	Icon Filename	Enabled by Default
Electronic resources	elr		formatid06.gif	Y
Emagazine	emg		formatid50.gif	Y
Globe	glb		formatid14.gif	Y
Kit	kit		formatid23.gif	N
Large print	lpt		formatid27.gif	Y
Manuscript cartographic material	mcm		formatid12.gif	N
Manuscript material	mss		formatid15.gif	N
Manuscript music	mmu		formatid10.gif	N
Map	map		formatid13.gif	Y
Microform	mic		formatid26.gif	N
Motion picture	mot		formatid17.gif	Y



Format/Type of Material	Code	Icon	Icon Filename	Enabled by Default
Music CD	mcd		formatid35.gif	Y
Musical sound recording	msr		formatid21.gif	Y
Newspaper	new		formatid25.gif	Y
Nonmusical sound recording	nsr		formatid22.gif	Y
Periodical	per		formatid24.gif	Y
Printed cartographic material	pcm		formatid11.gif	N
Printed music	pmu		formatid09.gif	N
Printed or manuscript music	mus		formatid02.gif	N
Projected medium	pgr		formatid16.gif	Y
Serial	ser		formatid08.gif	Y
Sound recording	rec		formatid05.gif	Y

Format/Type of Material	Code	Icon	Icon Filename	Enabled by Default
Streaming music	stm		formatid48.gif	Y
Streaming video	stv		formatid49.gif	Y
Three-dimensional object (artifact)	art		formatid20.gif	Y
Two-dimensional nonprojected graphic	ngr		formatid19.gif	Y
Video game	vgm		formatid44.gif	Y
Videorecording	vid		formatid18.gif	Y
Videotape	vcr		formatid34.gif	Y
Vinyl	vyl		formatid51.gif	Y
Visual materials	vis		formatid04.gif	N


### Set up availability search filters for PAC

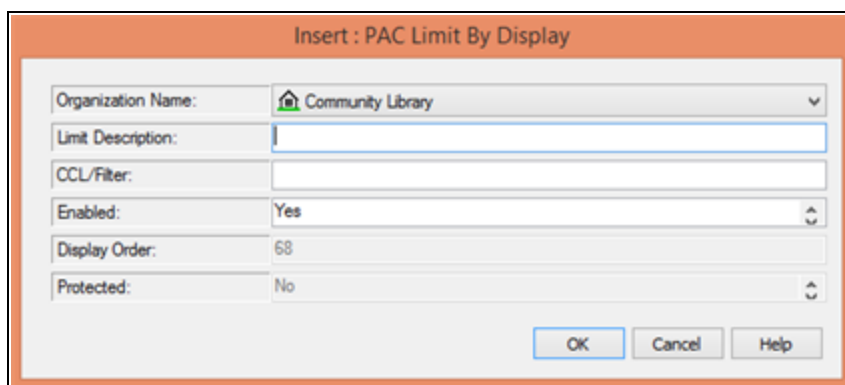
**Note:**

When a patron selects remote databases to search along with the local

Polaris database, and an availability search filter is selected, the availability search filter is applied to the Polaris database but not to the selected remote databases.

To place an availability search filter in the Polaris PAC **Limit by** list:

1. In the Administration Explorer tree view, open the Policy Tables folder for the organization, and select **PAC Limit By Display**. The **PAC Limit By Display** table appears in the details view.
2. Click  in the **PAC Limit By Display** table. The **Insert PAC Limit By Display** dialog box appears.



The dialog box titled "Insert : PAC Limit By Display" contains the following fields and controls:

- Organization Name:** A dropdown menu showing "Community Library".
- Limit Description:** An empty text input field.
- CCL/Filter:** An empty text input field.
- Enabled:** A dropdown menu showing "Yes".
- Display Order:** A text input field showing "68".
- Protected:** A dropdown menu showing "No".
- Buttons: "OK", "Cancel", and "Help" at the bottom right.

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

**AVAILABILITY > 0**

**Note:**

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

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

**Tip:**

When Polaris ILS is installed, the default selection is **All formats**, which specifies no filter on the search. You may want to change the description

of this selection—to **No limits**, for example—if your list includes custom filters.

6. To set the order of options in the **Limit by** list, select a filter in the table and click



or . Repeat this step until the list is ordered the way you want it. The higher an enabled item is positioned in the table (the lower the **Display Order** number), the closer to the top the item appears in the **Limit by** list. The first enabled item in the table is always the top item in the **Limit by** list.

7. Select **File > Save**.

#### Related Information

- More about search filters - See [Setting Up Search Filters \(Limit By\)](#).
- Defining local branches for availability - See [Set up the local/system item availability display](#).
- Suppressing items by circulation status - See [Suppress items by circulation status](#).
- Availability facet for filtering search results - See [Setting PowerPAC Narrow/Related Search Options](#)

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## Setting Available Search Types

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

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

**Note:**

Options for community information keyword and browse searches are also available if your Polaris installation includes Polaris Community Profiles, a separately licensed feature. For more information, see the *Community Profiles Guide*.

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

The screenshot shows a search interface with the following elements:

- Keyword search:** A text input field containing "cvil" and a blue search button with a magnifying glass icon.
- Search by:** A dropdown menu currently set to "Any Field".
- Using:** A dropdown menu currently set to "Local Polaris PAC DB".
- Limit by:** A dropdown menu currently set to "All Items - All Libraries".
- More Search Options:** A blue link below the "Limit by" dropdown.
- Select Databases:** A blue link to the right of the "Using" dropdown.
- Course reserve items only:** A checkbox option to the right of the "Select Databases" link.
- Did you mean:** A suggestion bar at the bottom showing "civil or coil or evil?" with a blue "Less" button.

To set the search types available in Polaris PowerPAC:

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

***Related Information***

- Quick search setup (Polaris PowerPAC) - You can offer a quick search feature on the portal page that includes search option buttons. See [Customizing Portal Page](#)

### [Features.](#)

- Search filters (Limit by) - PAC offers a set of standard formats/types of material and custom search filters in the **Limit by** list. Users can select a filter before launching a quick, keyword, phrase, exact, or advanced search. See [Setting Up Search Filters \(Limit By\)](#).
- Default search settings - Users can select various settings for each type of search. For example, for keyword searches, patrons can set a search field, search filter, search database, and sort order for the results. You can set the default selections for these options. See [Specifying Default Search Settings](#).
- Remote databases (Z39.50 search targets) for PAC searches - See [Managing Federated Search Targets](#).
- Subscription databases for PAC searches - See [Managing Federated Search Targets](#).
- Course reserve functions - See [Setting Up Course Reserves](#).
- Search results display - You can determine what data to display in PAC search results. See [Configuring the PowerPAC Title Display](#).
- Search Agent - Using the search agent, patrons can save searches and have them run automatically. The PAC parameter **Search Agent Parameters** controls search agent functions for both Polaris PowerPAC and Mobile PAC. When the search agent is enabled, the **Save Search** link is available in the Polaris PowerPAC and Mobile PAC. See [Setting Up Saved Searches in the PAC](#).


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## Related Words in PowerPAC Searches

When you enable the Related Words feature, PowerPAC users can choose to add records containing related words as well as the literal typed search term to keyword and phrase search results. "Related words" include words formed from stemming (for example, regular plurals and verb endings such as walk, walks, walker, walked, walking, but not irregular forms such as mouse/mice or run/ran) and synonyms. Synonyms include common nicknames, proper name variations, and spelling variations. The **Include related words** link is enabled by default; the connection library's setting determines whether to display the option (see [Enabling Related Words](#)).

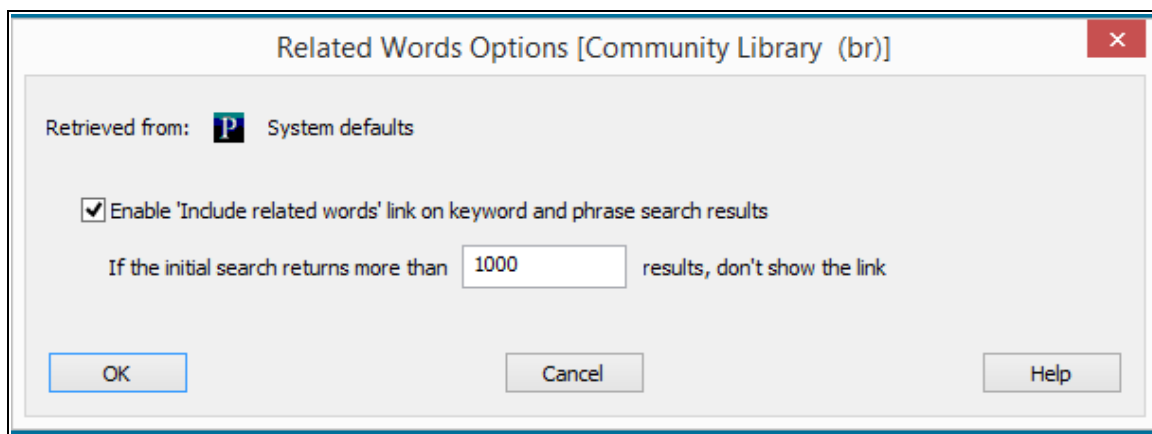
The **Include related words** link is available for keyword and phrase search results when:

- The user enters search terms for a keyword or phrase search and clicks or taps

the search icon .

- The user does a keyword or phrase search from the Advanced Search screen.
- The user selects an **Other Searches** entry in the Related Searches dashboard.

The link appears only if additional records are found when the stemming and synonyms rules are applied.



If the user clicks the link, additional records are retrieved. The search results list is then refreshed, and the **Include related words** link disappears until the user does a new search. Any facets that had been selected become unselected for the new search results, and a Related Words facet, if enabled, is added to the top of the **Narrow your search** dashboard element. See [Related Words Facet](#).

The link becomes available again when a search is relaunched; for example:

- The user changes the search terms, the **Search by** selection, or the **Limit by** selection, and clicks or taps the search icon.
- The user updates a selection in **More Search Options**.
- The user updates a selection in **Select Databases**.

The default **Include related words** strings are **Include related words (nnn more titles)** (plural) or **Include related words ({0} more title)** (singular). You can change the string in Polaris WebAdmin (Language Editor). The PowerPAC string ID for the plural statement is PACML\_INCLUDE\_RELATED\_WORDS\_LINK\_TEXT. The PowerPAC string ID for the singular statement is PACML\_INCLUDE\_RELATED\_WORDS\_SINGUAL.

See also:

- [Search Results Including Related Words](#)
- [Related Words Facet](#)
- [Overnight Processing for Related Words](#)
- [Enabling Related Words](#)

## Search Results Including Related Words

The search results with related words depend on the user's **Search By** selection and return only records containing the related word in the same field ( **Any Field, Title, Author, Subject, General notes, Publisher, Genre, and Series**). The related words option does not apply to number searches (**ISBN, ISSN, LCCN, Publisher no., SuDoc, CODEN, STRN**).

For phrase search results that include related words:

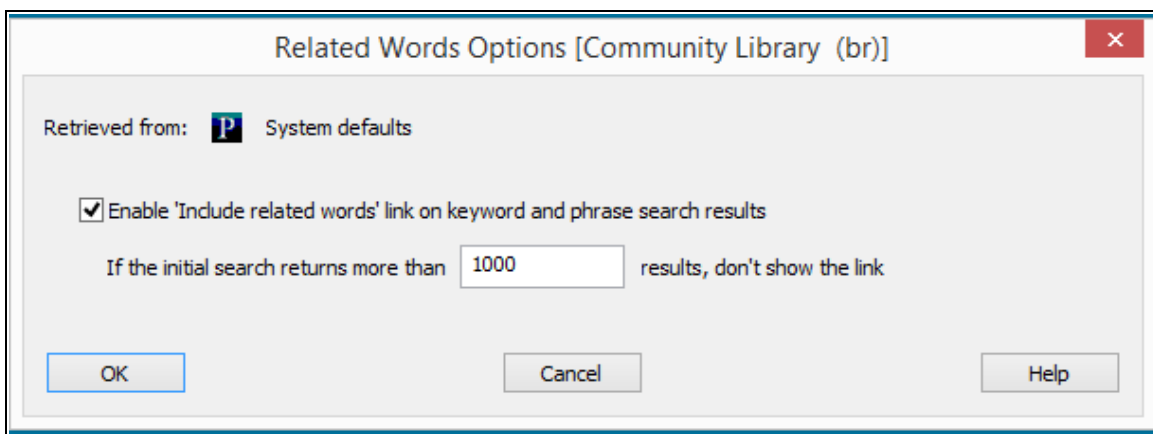
- Individual words in the phrase are processed for related words separately. For example, a phrase search for "fate and fury" retrieves titles with phrases such as "fate and furies," "fates and furies," and "fates and fury."
- The system checks the synonyms table for individual words in the phrase. For example, a phrase search for "colour purple" retrieves titles with "color purple."
- The phrase as a whole is NOT checked for synonyms. For example, a phrase search for "united kingdom" does NOT retrieve titles with "uk." Stemming and synonym pair matching is limited to individual keywords. That is, related terms map a keyword to another keyword. Mapping a single keyword to multiple keywords or multiple keywords to a single keyword is not supported.

Like the user's literal search term, related words appear in italics in the search results on the brief, summary and full displays in PowerPAC. Relevancy ranking also applies to search results that include related words. A match on the exact form of the word carries more weight than a match on other forms.

## Related Words Facet

A Related Words facet is available as the first filter on the Narrow Your Search dashboard when the user has selected **Include related words** for search results. The filter consists of two checkbox options: **See what was added (nnn titles)**, and **See original results (nnn titles)**.





- To see only the related words records, select only **See what was added**.
- To see only the original search results without the related words records, select only **See original results**.
- To see the original search results PLUS the related words records, check or uncheck both checkboxes.

You can control the display of the Related Words facet in system administration with the PowerPAC profile **Dashboards: Narrow your search & related searches**. The facet is set to display by default. For more information about this profile, see [Setting PowerPAC Narrow/Related Search Options](#).

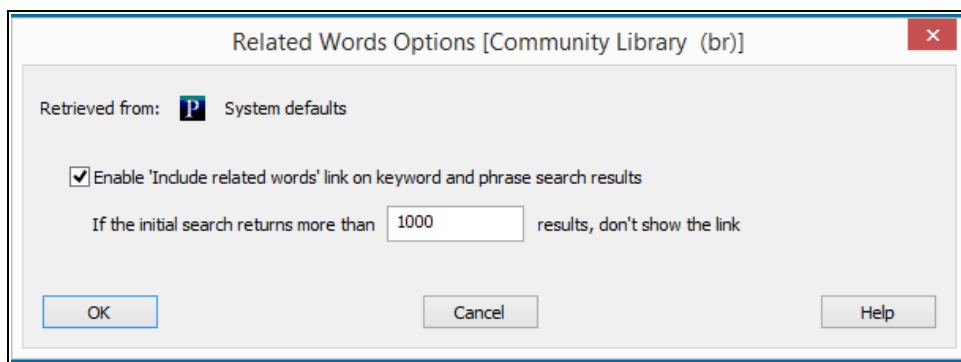
### Overnight Processing for Related Words

A step in the nightly CJ K Keyword Processing job applies processing rules and a Synonyms table to keywords in the BibliographicKeywords table. The job output goes to the BibliographicKeywordRelations table, which the search engine uses to find records containing words that are related to the user's search terms.

### Enabling Related Words

To enable related words in Polaris PowerPAC search results:

1. In the Administration Explorer tree view, open the **Profiles** folder for the PowerPAC connection organization, and click the **PowerPAC** tab in the details view.
2. Select the PowerPAC profile **Related words options**.



3. To enable the feature if it is not enabled, select **Enable 'Include related words' link on keyword and phrase search results**.

When this option is checked, overnight processing occurs (see [Overnight Processing for Related Words](#)) and the **Include related words** option appears on the search results screen. If the feature is not enabled, overnight processing occurs, but the **Include related words** option does not appear on the search results screen.

4. (Optional) Specify a maximum number of titles for the search results; if the maximum is exceeded, the **Include related words option** is not displayed. The default value is 1000 results. Note that including related words increases the number of titles in the search results list.

**Note:**

Be sure the value specified here does not exceed the number specified in the PowerPAC profile **Result set: Maximum number of records to return** for the same organization. If it does exceed **Result set** maximum, the link will never be suppressed.

5. Click **OK**.

---

## Setting Up Saved Searches in the PAC

Using the search agent, registered patrons can save any search except browse searches, and have the saved searches run automatically either weekly or monthly. (Patrons can also run a saved search manually, at any time.) Saved search criteria have full Unicode support; that is, saved searches can contain non-ASCII characters. Each search run looks for results in the local database that are new since the last run. The

results are automatically sent to an email address the patron specifies. By accessing their patron accounts, patrons can view, edit, and delete saved searches. The result count displayed in the PAC patron account shows the total number of new records found in all weekly and/or monthly runs (excluding the initial run).

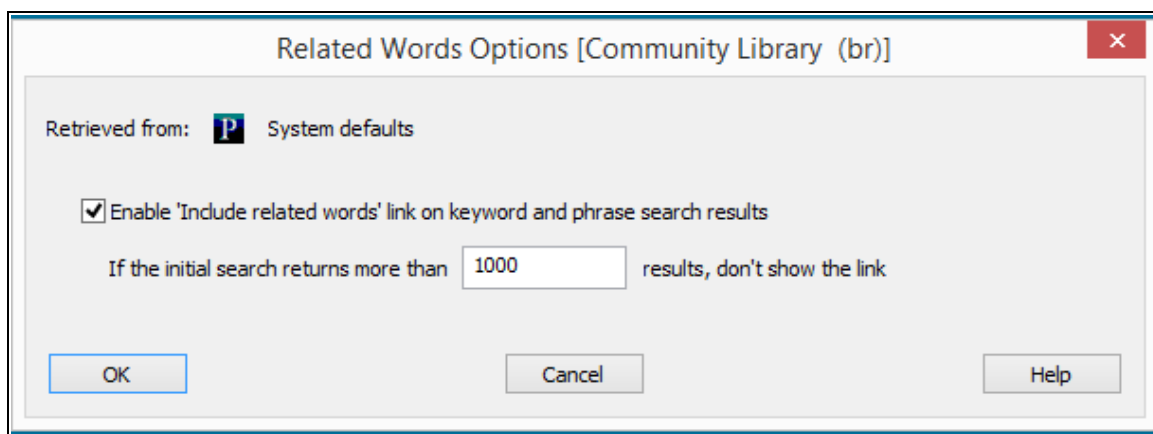
**Note:**

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

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

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

The search agent is available in Polaris PowerPAC and Mobile PAC. The example shows the **Save Search** option in the PowerPAC dashboard.



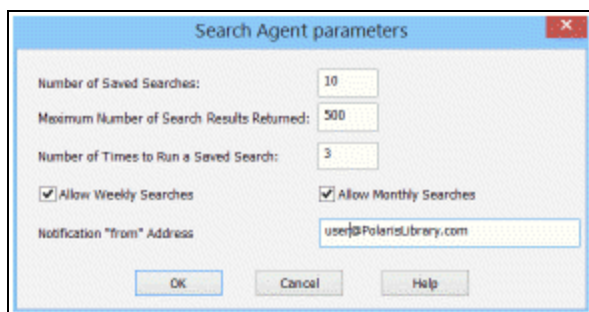
For each organization that makes the search agent available, you can specify how many searches a patron can have currently saved, the maximum total number of new titles that can be returned when a search is run, and the number of times a search can be run. You specify whether to offer weekly search runs, monthly search runs, or both, and

designate a “from” address to appear in the email message that delivers the search results to the patron.

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

To set up and enable the search agent:

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



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

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

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

**Note:**

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

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

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

7. To set up a “from” address for the notification e-mail, type the address in the **Notification “from” Address** box. The address can be a real address or a fictitious account. The address must contain the @ symbol; for example, **your-search@yourlibrary.org**
8. Click **OK** on the dialog box.
9. In the Administration Explorer, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
10. Double-click **Search Agent: Enable**, and select **Yes**.

**Note:**

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

11. Select **File | Save**.

**Related Information**

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

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## Setting Up Did You Mean Term Checking


When Did You Mean is enabled, suggestions are displayed on the search results page if there would be results in the Polaris database when the user clicks or taps a suggestion. Potential results in the Polaris database take into account any **Search by**, **Limit by**, and **More Search Options** selections, as well as resource groups, that were in effect when the search was launched. However, if the user changes a selection in the **Limit By** dropdown list or a selection in **More Search Options** and then clicks or taps the Did You Mean suggestion without launching the search again, the new selections are ignored.

**Note:**

If the user is also searching a remote database, Did You Mean suggestions may display even if there will be no results in the Polaris database, in case the remote database will return results. No attempt is made to determine if there will be hits in the remote database due to concerns about processing time.

If enabled, the Did You Mean function applies to quick, keyword, phrase, and exact phrase searches in Polaris PowerPAC, and to searches typed in the **Look for** bar in Polaris PowerPAC Children's Edition. Additional suggestions, if any, are displayed in line when the user clicks or taps **More**. The illustration is an example from Polaris PowerPAC.

The screenshot displays the search interface of Polaris PowerPAC. At the top, there is a 'Keyword search:' field containing the text 'civil' and a magnifying glass icon. Below this, there are three dropdown menus: 'Search by:' set to 'Any Field', 'Using:' set to 'Local Polaris PAC DB', and 'Limit by:' set to 'All Items - All Libraries'. To the right of these dropdowns is a link labeled 'Select Databases' and a checkbox labeled 'Course reserve items only'. Below the dropdowns is a link labeled 'More Search Options'. At the bottom of the interface, a message reads 'Did you mean civil or coil or evil?' followed by a 'Less' button.

Keyword search:  

Search by:  Using:

Limit by:  [Select Databases](#)

[More Search Options](#) ☐ Course reserve items only

Did you mean [civil](#) or [coil](#) or [evil](#)? [Less](#)

The user can click or tap **Less** to collapse the list of suggestions and display only the first suggestion.

The Did You Mean process identifies a possible search suggestion or suggestions in a Did You Mean Overrides table match, a sound value (metaphone) match in the underlying SearchSuggestions table, or one or more matches in the spell check dictionary.

At least one bibliographic record will be retrieved if the user follows the suggestion. If the process returns multiple suggestions, each suggestion is checked individually and is not displayed in the suggestion list if it produces zero hits. Any returned records must have **Display in PAC** checked. When multiple suggestions are returned, the first suggestion is displayed with a "more" link, which opens a small pop-up window that shows the other suggestions. Multiple matching suggestions show all the suggestions that will return at least one record.

When the user clicks or taps a Did You Mean suggestion, there may be a pause while the search is conducted; the pause is most noticeable when CQL filters from the **Limit by** list were applied to the search. Processing is limited to 10 seconds. The user is not prevented from doing other actions during processing time, but if another action is taken, the Did You Mean results are not returned. No additional search transaction is logged when the user clicks a Did You Mean suggestion.

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

To set up Did You Mean search suggestions and optionally specify override suggestions:

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

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

**Note:**

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

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

**Note:**

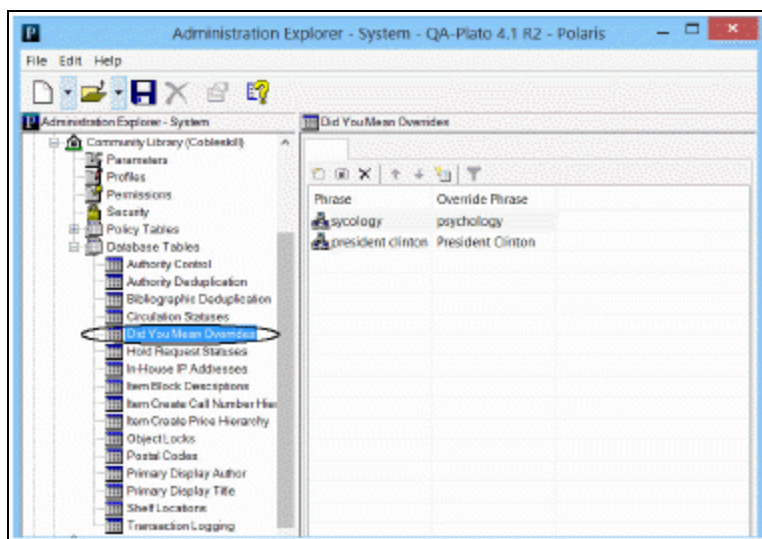
You may want to wait to set overrides until you have an idea of the common mistakes your patrons may make.

- a. In the Administration Explorer tree view, open the **Database Tables** folder for the organization, and select **Did You Mean Overrides**. The Did You Mean Overrides table appears in the details view.

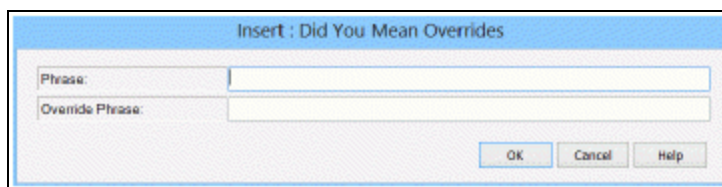
**Important:**

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





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



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

These fields are not case-sensitive.

#### Example:

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



#### Note:

You may find that the system suggests inappropriate terms for terms that the patron intended. For example, the patron types **amelia bedelia** (correct), but the system suggests **Amalia Delia**. You can enter a correctly spelled term in the **Phrase** box and the identical term in the **Override**

**Phrase** box. In this case, when the patron enters the term correctly, no Did You Mean suggestion will be displayed.

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

#### *Related Information*

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

---

## Auto-Suggest in PowerPAC

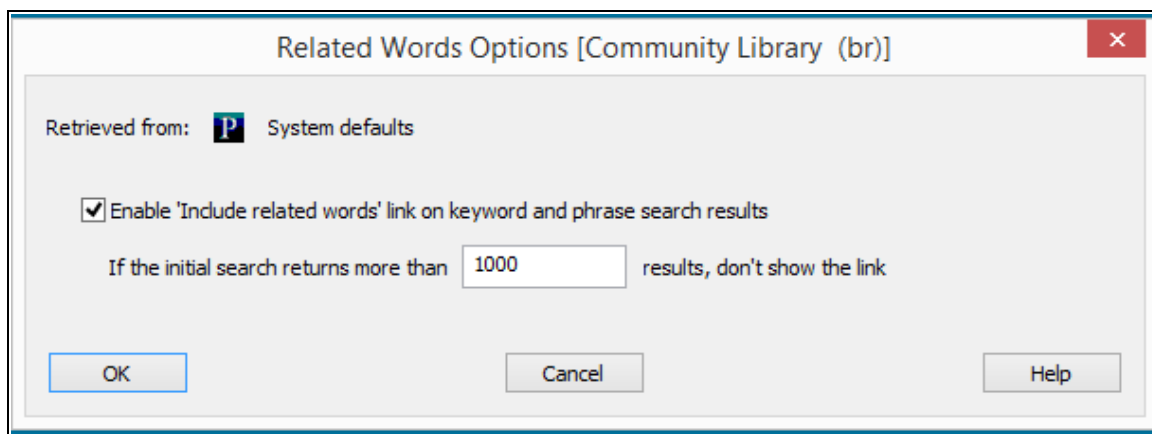
The system-level Cataloging parameter **Auto-suggest feature enabled** controls whether the auto-suggest feature is available in both Polaris PowerPAC and the staff client Find Tool. (For details on the applicable Find Tool searches, see the *Polaris Basics Guide*.) If you set this parameter to **No**, automatic search suggestions are suppressed in both PAC and the Find Tool.

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

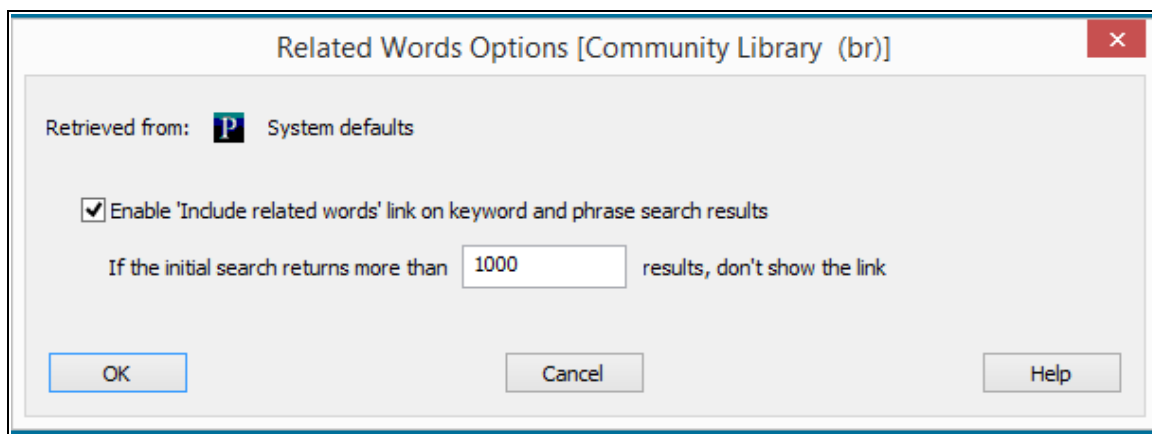
#### **Note:**

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

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



To show the suggestions after hiding them, the user clicks the arrow in the search text box.



### Secure Socket Layer (SSL) and Auto-Suggest

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

#### Note:

If you will use Secure Socket Layer to protect patron account information

only (not site-wide HTTPS), do not check the **HTTPS Port** option. For more information about Secure Socket Layer, see the *Polaris Basics Guide*.

---

## Searching Record Sets (Polaris PowerPAC)

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

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

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

See also:

- [Record Set Control Number Searches](#)
- [Record Set Name Searches](#)
- [Sort Order](#)
- [Record Set Results](#)

### Record Set Control Number Searches

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

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

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

**Example (single record set by number)**

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

Separate multiple record set control numbers with commas.

**Example (multiple record sets by number):**

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

## Record Set Name Searches

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

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

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

**Example (single record set by name):**

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

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

**Example (record set name with spaces):**

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

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

**Example (multiple record sets by name):**

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

## Sort Order

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

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

**Example (results sorted by call number):**

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

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

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

## Record Set Results

Record sets may contain any number of records, but the number of records displayed in the PAC is limited by the setting in Polaris Administration for the PowerPAC profile

**Result set: Maximum number of records to return.** Searches for multiple record sets return results in one results list.

### Note:

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

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

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

---

## Deep Links to Polaris PowerPAC and Mobile PAC

Deep links allow searches for specific bibliographic records in your PAC from external sites. Such searches are launched, for example, when you use the PAC look-up feature on the sites of book and material vendors. This section lists the PowerPAC and Mobile PAC URLs for setting up links to specific bibliographic records in your PAC from an external site.

### PowerPAC

All URLs should be prefixed with your site-specific base URL (example: **mylibrary.com/polaris/**). The URL is necessary for each link parameter.

#### ISBN

**view.aspx?isbn={isbn},{isbn}, ...**

Examples - Single and multiple ISBNs, any branch:

**<http://mylibrary.com/polaris/view.aspx?isbn=1234567890>**

**<http://mylibrary.com/polaris/view.aspx?isbn=1234567890,2222333344,987698765X>**

**Important:** To limit by branch, you must use **searchresults.aspx** instead of **view.aspx**. Be aware of the following points:

- **Searchresults.aspx** is subject to change as Polaris PowerPAC changes. You may need to change your link format accordingly. (**View.aspx** is stable from release to release.)
- You must have already set up a custom “limit by” for assigned branch in Polaris Administration. For instructions, see [Setting Up Search Filters \(Limit By\)](#).

Example - Branch-specific and limited to titles with linked items at that branch

**<http://mylibrary.com/polaris/search/searchresults.aspx?ctx=17.1033.0.0.1&type=keyword&by=ISBN&term=0375750126&limit=AB=17&page=0>**

Where **17** is the branch’s organization ID in Polaris. You can use the same format with other link parameters.

#### LCCN

**view.aspx?lccn={lccn},{lccn}, ...**

Examples:

**`http://mylibrary.com/polaris/view.aspx?lccn=2001627090`**

**`http://mylibrary.com/polaris/view.aspx?lccn=2001627090,2001336783,85153773`**

### Control Number

**`view.aspx?cn={control_number},{control_number}, ...`**

Examples:

**`http://mylibrary.com/polaris/view.aspx?cn=13243`**

**`http://mylibrary.com/polaris/view.aspx?cn=13243,9999,24354,348`**

See also [Limited Control Number](#).

### Keyword

**`view.aspx?keyword={url_encoded_keywords}`**

Examples:

**`http://mylibrary.com/polaris/view.aspx?keyword=cars`**

**`http://mylibrary.com/polaris/view.aspx?keyword=science+fiction+robots`**

### Title

**`view.aspx?title={url_encoded_title}`**

Examples:

**`http://mylibrary.com/polaris/view.aspx?title=Misery`**

**`http://mylibrary.com/polaris/view.aspx?title=Punishment+Crime`**

Title searches are keyword searches, and hits are returned regardless of the word order in the tag. If you want the title search to return only hits that match the order in the tag, you can have your vendor add a **type=phrase** query string parameter to the vendor's template.

Example (type=phrase):

**`http://mylibrary.com/polaris/view.aspx?title=Crime+and+Punishment&type=phrase`**

### Author

**`view.aspx?author={url_encoded_author}`**

Examples:



**<http://mylibrary.com/polaris/view.aspx?author=Shakespeare>**

**<http://mylibrary.com/polaris/view.aspx?author=John+Grisham>**

Author searches are keyword searches to ensure that hits are returned whether the name order is first, last or last, first. If you want the author search to return only hits that match the order in the tag, you can have your vendor add a **type=phrase** query string parameter to the vendor's template.

Example (type=phrase):

**<http://mylibrary.com/polaris/view.aspx?author=Grisham+John&type=phrase>**

## Subject

**[view.aspx?subject={url\\_encoded\\_subject}](#)**

Examples:

**<http://mylibrary.com/polaris/view.aspx?subject=dogs>**

**<http://mylibrary.com/polaris/view.aspx?subject=History+Civil+War>**

Subject searches are keyword searches, and hits are returned regardless of the word order in the tag. If you want the subject search to return only hits that match the order in the tag, you can have your vendor add a **type=phrase** query string parameter to the vendor's template.

Example (type=phrase):

**<http://mylibrary.com/polaris/view.aspx?subject=Civil+War+History&type=phrase>**

## Series

Example:

**<http://mylibrary.com/polaris/view.aspx?series=lonely+planet>**

## Combination: Author, Title, Subject

You can combine Author, Title, and/or Subject parameters in the same query.

Examples:

**<http://mylibrary.com/polaris/view.aspx?author=King&title=Misery>**

**<http://mylibrary.com/polaris/view.aspx?title=Harry+Potter&subject=wizard+schools>**

**<http://mylibrary.com/polaris/view.aspx?subject=cabin+building&author=Thoreau>**

## UPC

**view.aspx?upc={upc\_code},{upc\_code}, ...**

Examples:

**http://mylibrary.com/polaris/view.aspx?upc=287986736748**

**http://mylibrary.com/polaris/view.aspx?upc=289839472834,771826736475,112989783678**

## OCLC

**view.aspx?oclc={oclc\_number},{oclc\_number}, ...**

Examples:

**http://mylibrary.com/polaris/view.aspx?oclc=ocm12384675**

**http://mylibrary.com/polaris/view.aspx?oclc=ocm768375267,ocm38916725,ocm11286756**

## Record Sets (Bibliographic)

See [Create a URL Link to a Record Set in the PAC.](#)

## E-Source Targets

See [Provide links to e-sources on external sites.](#)

## Limited Control Number

Polaris PowerPAC's full bibliographic product page (**title.aspx**) also supports a deep link by control number for local titles. This limited-function deep link was added to improve link sharing on social web sites that the PowerPAC deep link format for **view.aspx** (see [Control Number](#)) did not support as well. The deep link for **title.aspx** supports a control number parameter (**cn={control-number}**) which, if present, searches for and goes directly to the PAC product page for the single, local bibliographic title with that control number.

**{pac-root-url}/search/title.aspx?&ctx={ctx-value}&pos=1&cn={control-number}**

Examples:

- Any branch or language (no **ctx** parameter):

**http://mylibrary.com/polaris/search/title.aspx?&pos=1&cn=12345**

- Branch organization ID is 83 (**ctx=83**):

**<http://mylibrary.com/polaris/search/title.aspx?ctx=83&pos=1&cn=12345>**

- Branch organization ID is 83, language is English (**ctx=83.1033**):

**<http://mylibrary.com/polaris/search/title.aspx?ctx=83.1033&pos=1&cn=12345>**

## Mobile PAC

All URLs should be prefixed with your site-specific mobile base URL (example: **mylibrary.com/mobile/**). The URL is necessary for each link parameter:

**{Base Mobile PAC URL}/view.aspx?{TYPE}={TERM}**

Because Mobile PAC does not currently support Boolean searching, only single terms are allowed. The following access points {TYPE} are available:

- **ISBN**
- **LCCN**
- **CN** - Control number
- **ISSN**
- **Title**
- **Author**
- **Subject**
- **Series**
- **Keyword**
- **brs** - Record set ID
- **brsn** - Record set name

In general, if a mobile device goes to a PowerPAC deep link and Mobile PAC supports the search criteria specified in the URL, the mobile device user is automatically directed to the Mobile PAC search results page. If Mobile PAC does not support the search criteria, the mobile device user is directed to the PowerPAC search results page.

However, if **type=phrase** is part of the PowerPAC deep link, the user is directed to the Mobile PAC search results page. Also, the user is directed to the Mobile PAC search results page when there are multiple terms for author, title, or subject in the PowerPAC deep link.

Examples:

**<http://mylibrary.com/polaris/view.aspx?title=time+to+kill&type=phrase>**

**<http://mylibrary.com/polaris/view.aspx?title=time+to+kill&author=grisham+john>**

**Note:**

Although the user is directed to the Mobile PAC search results page in these cases, if the user then clicks the **Search** bread crumb in the Mobile PAC page header, the search form does not support the deep link search terms due to their complexity.

---

## PAC CQL Commands and Access Points

This section lists the CQL (Common Query Language) commands and access points you can use to construct custom search filters for Polaris PowerPAC. For more information about this procedure, see [Setting Up Search Filters \(Limit By\)](#). You can also use CQL commands to construct ready-made searches for search categories in Polaris PowerPAC Children's Edition. For more information about this procedure, see the *Community Profiles Guide*.

The CQL search command can include the following parts:

- The text for which you are searching
- The access points (fields) you want to search; for example, author or title (see the *Community Profiles Guide*). Operators (connectors) that link one part of the search with another

**Example:**

To find the works of author Asimov published in or after 1970, you type the following command:

**AU=asimov AND PD >= 1970**

**AU** specifies the access point Author. The search text for this access point is **asimov**. **AND** is the Boolean operator connecting the two conditions of this search (the author and the date). **PD** specifies the access point Publication Date. The search text for this access point is **1970**. The symbol **>=** stands for the relative operator *greater than or equal to*.

Fields that can be searched with CQL search commands fall into one of three categories:

- Keyword-indexed fields (for example, author, title, subject, notes) - A record must contain all the keywords entered in the field selected for search, in any order. Other words may be present, or the words may be present in different fields of the same type.

To retrieve only records that contain the search words in a specific order with no words in between (that is, to do a phrase search), enter the words in double quotation marks. For example, a search for **TI=french cooking** finds the title *French Provincial Cooking* while **TI="french cooking"** does not.

- Fields that are searched with string searches - A record must contain an exact match on the search characters (for example, a call number or publisher number search). If the field typically includes spacing or punctuation, and you want to find an exact match on the entire string, enter the text within double quotation marks. For example, when searching for a call number: **CALL="641.5944 Dia"**
- Fields that require library-specific or Polaris-specific codes (for example, language, target audience, type of material).

**Note:**

To see whether fields use keywords or codes, refer to the *Community Profiles Guide*.

## Boolean Operators

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

- And - A record must match both the term before and the term after the operator to be included in the search results.

**Example:**

**AU="isaac asimov" AND TI=planets**

Finds only the items written by Isaac Asimov that have the word *planets* in the title.

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

**Example:**

**AU="isaac asimov" OR TI=planets**

Finds all items written by Isaac Asimov and all items with the word

*planets* in the title by any author, including Asimov.

If you have a number of terms to combine with OR, type the command this way:

**AU={list}asimov, dick, ballard, lem, capek{/list}**

You can insert as many terms as you need between **{list}** and **{/list}**

- Not - A record must match the term before the operator, but not the term after the operator, to be included in the search results.

**Example:**

**AU="isaac asimov" NOT TI=planets**

Finds only those items written by Isaac Asimov that do not have the word *planets* in the title.

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

### Search Text That Includes Operators or Special Characters

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

For example, to find the title *Bud, Not Buddy*, type this command:

**TI = "bud not buddy"**

Put this text in quotation marks because **not** is ordinarily a Boolean operator.

As another example, to find the title *Tim O'Toole and the Wee Folk*, type this command:

**TI= "tim o'toole"**

Put this text in quotation marks because the apostrophe in the word **o'toole** is a special character.

### Relative Operators

Relative operators are symbols that compare search terms:

Symbol	Relative Operation
=	Equal to search term
<>	Not equal to a single search term: <b>PD &lt;&gt; 1970</b>

Symbol	Relative Operation
	For a range of dates, use NOT: <b>NOT PD = 1970-1980.</b>
>=	Greater than or equal to search term
>	Greater than search term
<=	Less than or equal to search term
<	Less than search term

**Example:****PD >= 1987**

This example finds items published in or after 1987. **PD** specifies the publication date access point. See the *Community Profiles Guide* for access point codes.

**Example:****KW=solar system AND PD < 1932**

This example finds items published before 1932 that have the words "solar system" in any record field. **KW** specifies the keyword access point. See the *Community Profiles Guide* for access point codes.

**Proximity-Distance Operator**

With proximity searching, you specify the allowable distance between two terms, which can be keywords or phrases. The proximity-distance operator is **PROX/distance**. The proximity-distance is the difference between the positions of the left and right terms. The distance is never negative, and adjacent terms have a proximity-distance equal to 1. You can use the operator with the relative operators < (less than), <= (less than or equal to), = (equals), >= (greater than or equal to), > (greater than), or <> (not equal to).

You can use the following modifiers:

**/ordered** - The order of the two terms in the search results must be the same as the order of the terms in the query.

**/unordered** - The order of the two terms does not matter in the search results.

You can use keyword or phrase search access points (such as **KW**, **AU**, **TI**) but the access point must be the same for both terms. See the *Community Profiles Guide*.

**Example:**

**KW="cat" PROX/distance<=5 KW="the hat"**

Find the keyword **cat** where it appears less than or equal to 5 words before or after the phrase **the hat**. That is, between 0 and 4 words exist between the keyword **cat** and the phrase **the hat**.

**Example:**

**KW="Harry Potter" PROX/distance<10/ordered KW="J. K. Rowling"**

Find the phrase **Harry Potter** where it appears less than 10 words before the phrase **J. K. Rowling**. That is, between 0 and 8 words must exist between the phrase **Harry Potter** and the phrase **J. K. Rowling**, counting from the first word in each phrase.

**Example:**

**KW="United States" PROX/distance=2 KW="Union"**

Find the phrase **United States** where it appears exactly 2 words before or after the keyword **Union**. That is, exactly 1 word must exist between the phrase **United States** and the keyword **Union**.

## Restrictions

- The proximity operator does not support nested Boolean expressions in either the left or right terms. For example, **((KW=Dog OR Cat) PROX/distance=5 KW=Food) PROX/distance=6 KW=Kennel** is not supported.
- The maximum proximity-distance is 1024. If the proximity-distance in the query is greater than 1024, the search process changes it to 1024.
- The total maximum number of keywords in a proximity expression is 16. That is, the number of keywords on the left side of the proximity operator plus the number of keywords on the right side of the proximity operator is limited to 16. If a proximity expression contains more than 16 words, then the proximity operator will be ignored but up to the first 16 words on the left and the right will be checked for adjacency.
- The keyword or phrase access point (such as **KW**, **AU**, **TI**) used in the left and right terms must be the same. For example, the query



**SU="HARRY" PROX/distance<=5 AU="POTTER"** is not supported and will produce an **Unsupported search** error.

- The left and right terms for each proximity operator must be a keyword or phrase and not a Boolean expression, but there is no limit to the number of proximity operators in a query. For example, this query is valid:

**(AU="J. K." PROX/distance<10 AU="Rowling")**

**AND (TI="Conversations With" PROX/distance<10 TI="Rowling")**

**AND MAT=BKS**

### Search Access Point (Field) Codes

Access Point	Description
AB	Assigned branch (requires library-specific codes)
AU	Author (keyword)
AVAILABILITY	Filters search results to titles that have at least one available item. Type <b>AVAILABILITY &gt; 0</b> . Example: To find Harry Potter titles with at least one available item, type <b>TI = Harry Potter AND AVAILABILITY &gt; 0</b> . The <b>AVAILABILITY</b> access point works only for values greater than 0. ( <b>AVAILABILITY = 0</b> is not valid.)
BRS	Polaris bibliographic record set - control number
BRSN	Polaris bibliographic record set - record set name
CALL	Call number
CN	Polaris bibliographic record - control number
CODEN	Identifier for scientific and technical periodicals
COL	Collection (requires library-specific codes)
DD	Dewey classification
GENRE	Genre (keyword)
GOV	Superintendent of Documents classification number for government documents
ISBN	International Standard Book Number

Access Point	Description
ISSN	International Standard Serial Number
KW	Keyword (any field)
LA	Language (see <a href="#">LA (Language) Codes</a> )
LC	Library of Congress classification
LCCN	Library of Congress Control Number
MAT	Material type of physical items (requires library-specific codes)
NAL	National Agricultural Library classification
NLC	National Library of Canada classification
NLM	National Library of Medicine classification
NOTE	General notes (keyword)
OCLC	Online Computer Library Center (OCLC) control number
OCN	Other system control number (requires library-specific codes)
OWN	Record owner (requires library-specific codes)
PD	Publication date
PN	Publisher's number
PUB	Publisher (keyword)
SE	Series (keyword)
STATB	Record status (requires library-specific codes)
STRN	Standard Technical Report Number
SU	Subject (keyword)
TA	Target audience (see <a href="#">TA (Target Audience) Codes</a> )
TI	Title (keyword)
TOM	Format/Type of Material (see <a href="#">TOM (Format/Type of Material)</a> )

Access Point	Description
	<a href="#">Codes</a> )
UDC	Universal Decimal classification
UPC	Universal Price Code number

### LA (Language) Codes

These are some common codes to use with the language access point (LA) in a Boolean (CQL) search. Use the code, not the language name. For example, to specify English, type **LA=ENG**.

**Note:**

You can see a complete list of language codes at the Library of Congress Web site:

**[www.loc.gov/marc/languages](http://www.loc.gov/marc/languages)**

Language	Code
Arabic	ARA
Bosnian	BOS
Chinese	CHI
Czech	CZE
Danish	DAN
Dutch	DUT
English	ENG
French	FRE
German	GER
Modern Greek	GRE
Hebrew	HEB
Hindi	HIN

Language	Code
Italian	ITA
Japanese	JPN
Korean	KOR
Latin	LAT
Multiple Languages	MUL
Polish	POL
Portuguese	POR
Romanian	RUM
Russian	RUS
Serbian	SCC
Sign	SGN
Spanish	SPA
Ukrainian	UKR
Vietnamese	VIE
Yiddish	YID

### TA (Target Audience) Codes

Use these codes with the target audience (TA) access point in a Boolean (CQL) search. Use the code, not the target audience name. For example, to specify a preschool audience, type **TA=a**.

**Note:**

Not all bibliographic records include target audience information.

Target Audience	Code
Preschool	a

Target Audience	Code
Primary school	b
Elementary and junior high school	c
Secondary (senior high) school	d
Adult	e
Specialized	f
General	g
Juvenile	j

### TOM (Format/Type of Material) Codes

Use these codes with the Type of Material access point (TOM) in a Boolean (CQL) search. Use the format/type of material code, not the name. For example, to specify DVDs, type **TOM=DVD**.

Format/Type of Material	Code
Abstract	abs
Atlas	atl
Audio book	abk
Audio book on cassette	abt
Audio book on CD	abc
Blu-Ray Disc	brd
Blu-Ray + DVD	bdv
Book	bks
Book + Cassette	bcs
Book + CD	bcd

Format/Type of Material	Code
Book + DVD	bkv
Braille	brl
Cartographic material	cmt
Digital media collection	dmc
DVD	dvd
EAudiobook	aeb
Ebooks	ebk
Electronic resources	elr
Emagazine	emg
Globe	glb
Kit	kit
Large print	lpt
Manuscript cartographic material	mcm
Manuscript material	mss
Manuscript music	mmu
Map	map
Microform	mic
Mixed materials	mix
Motion picture	mot
Music CD	mcd
Musical sound recording	msr
Newspaper	new

Format/Type of Material	Code
Nonmusical sound recording	nsr
Periodical	per
Printed cartographic material	pcm
Printed music	pmu
Printed or manuscript music	mus
Projected medium	pgr
Serial	ser
Sound recording	rec
Streaming music	stm
Streaming video	stv
Three-dimensional object	art
Two-dimensional nonprojected graphic	ngr
Video game	vgm
Videorecording	vid
Videotape	vcr
Vinyl	vyl
Visual materials	vis

---

## Customizing **Search by** Labels

You can edit the search field (**Search by**) labels in Polaris WebAdmin (Language Editor). Your custom labels are displayed in Polaris PowerPAC but the default system labels are

used in the Polaris Administration profile for search setting defaults. See [Set PAC search setting defaults](#). The table shows the default labels and the corresponding language string in Polaris WebAdmin. For more information about using Polaris WebAdmin, see WebAdmin online help.

Search By Option Default Label	Code	Language String ID
Any Field	KW	PACML_SEARCHBARS_XSL_1607
Title	TI	PACML_SEARCHBARS_XSL_1608
Author	AU	PACML_SEARCHBARS_XSL_1609
Subject	SU	PACML_SEARCHBARS_XSL_1610
General notes	NOTE	PACML_SEARCHBARS_XSL_1611
Publisher	PUB	PACML_SEARCHBARS_XSL_1612
Genre	GENRE	PACML_SEARCHBARS_XSL_1613
Series	SE	PACML_SEARCHBARS_XSL_1614
ISBN [International Standard Book Number]	ISBN	PACML_SEARCHBARS_XSL_1615
ISSN [International Standard serial Number]	ISSN	PACML_SEARCHBARS_XSL_1616
LCCN [Library of Congress Control Number]	LCCN	PACML_SEARCHBARS_XSL_1617



Search By Option Default Label	Code	Language String ID
Publisher No. [Publisher's number]	PN	PACML_SEARCHBARS_XSL_1618
LC [Library of Congress call number option for browse searches]	LC	PACML_SEARCHBARS_XSL_1642
Dewey [Dewey call number option for browse searches]	DD	PACML_SEARCHBARS_XSL_1643
Call Number [Local call number option for browse searches]	LOCAL	PACML_SEARCHBARS_XSL_1624
SuDoc [Superintendent of Documents classification number (identifier)]	SUDOC	PACML_SEARCHBARS_XSL_1639
CODEN [Identifier for scientific and technical periodical titles]	CODEN	PACML_SEARCHBARS_XSL_1640
STRN [Standard technical report number (identifier)]	STRN	PACML_SEARCHBARS_XSL_1641
Control Number [Not exposed in default user interface, but available as a search access point by editing the configuration file SearchByOptions.xml.]	CN	PACML_SEARCHBARS_CNUMBER
Item Barcode [Not exposed in default user	BC	PACML_SEARCHBARS_BARCODE

Search By Option Default Label	Code	Language String ID
interface, but available as a search access point by editing the configuration file SearchByOptions.xml.]		
Course Name	CRSNA	PACML_SEARCHBARS_XSL_1647
Course Number/Section	CRSNO	PACML_SEARCHBARS_XSL_1648
Course Abbreviation	CRSABBR	PACML_SEARCHBARS_XSL_1649
School/Division Name	CRSSCHL	PACML_SEARCHBARS_XSL_1650
Department Name	CRSDPT	PACML_SEARCHBARS_XSL_1651
Instructor Name	CRSINST	PACML_SEARCHBARS_XSL_1652

## 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 \(AddThis™\)](#)

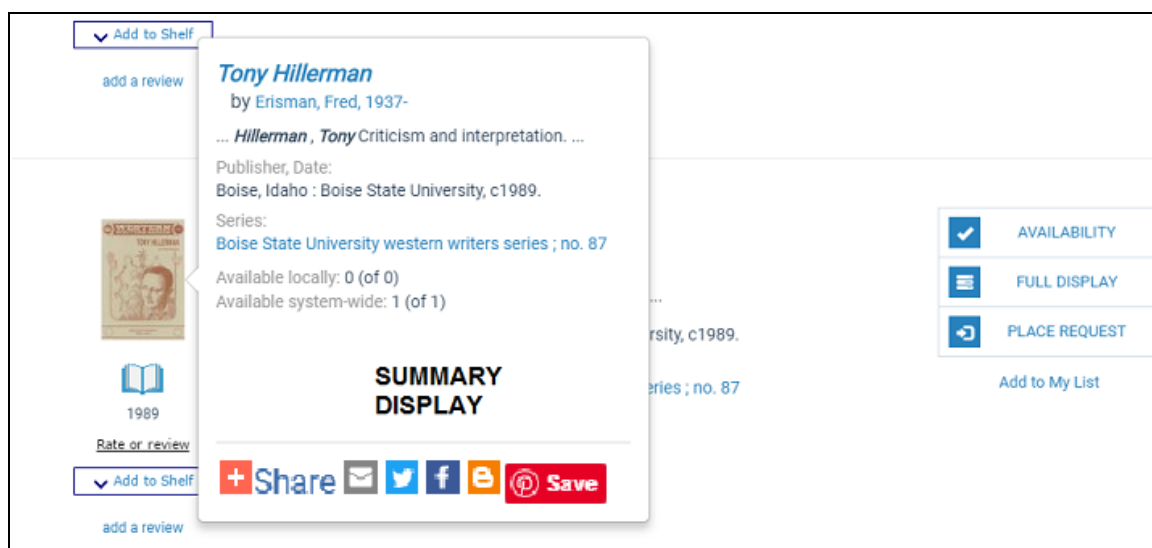
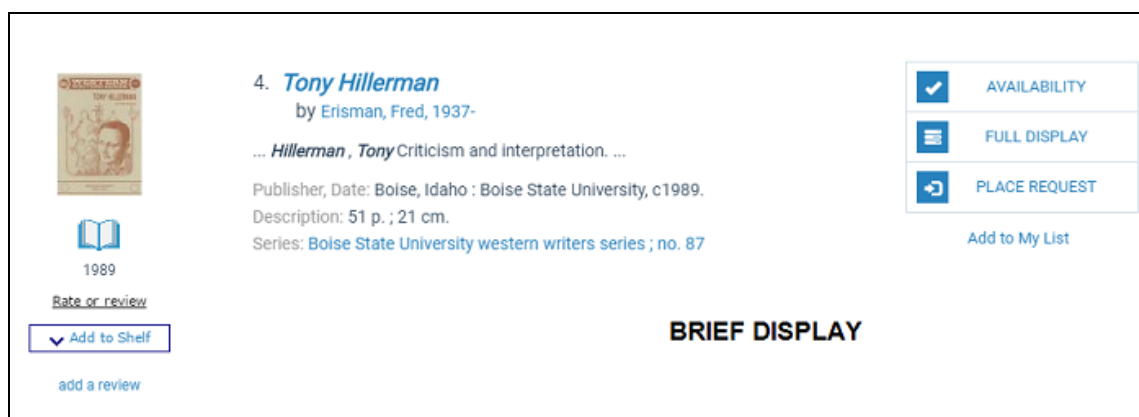
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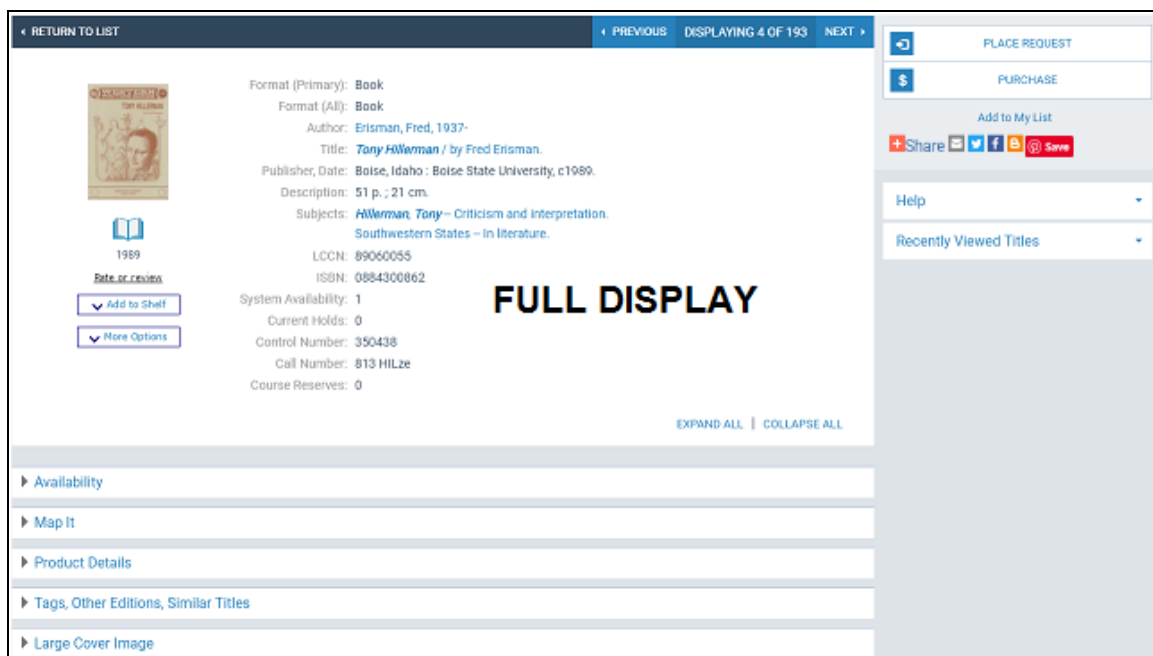
### Configuring the PowerPAC Title Display

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

following:

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





- Show multiple instances of a single tag in the brief display: for example, multiple 856\$a fields.
- Specify different elements for monographs and serials.
- Suppress selected elements from display at narrow screen (cell phone) width.
- Edit existing data elements.
- Set the display order of the data elements.
- Specify a custom label for each data element, and create translated versions of the data labels for languages you have licensed.
- Specify any additional data elements you need (custom entities), selecting the tags, indicator values, and subfields to include in each custom entity.
- Display a "requested" indicator for titles on which the patron has an active, pending, held, shipped, or located hold request. The indicator is a message: **You requested this on [date]**; the system supplies the date. The indicator can be displayed to logged-in patrons on the search results page, the title screen, the working title list, and saved title lists. The Brief and Full configuration view settings in the profile apply to both search results screens and title lists; that is, when you set the **Requested date** indicator to display in search results, it will also display in working and saved title lists.

**Note:**

When enabled, the indicator is displayed only for requests that have been placed in Polaris. The requested indicator does not apply to integrated eContent titles.

- Copy all these settings from any organization to any other organization.

You can also use the PowerPAC profile **Title Display: Number of characters in the Summary (Short)** to specify the maximum number of characters of the Summary (Short) field that are displayed in the brief and full search results views for a title in the Polaris PowerPAC. By default, this profile is set to "0", and the number of characters displayed is not limited. When **Summary** field text exceeds the specified limit, Polaris PowerPAC displays truncated summary text followed by a **More** link. Users can click **More** to expand the display to show the entire summary, and click **Less** to collapse the display again.

The Mobile PAC profile **Title Display: Configure** provides similar flexibility for the Mobile PAC bibliographic results display, and you follow the same procedures to set up the display. Search the Polaris online help for "Configuring the Mobile PAC Title Display." For libraries that use Polaris Community Profiles, separate profiles control the PowerPAC and Mobile PAC displays of community information results, and a separate set of data elements is available for your community information displays. See the *Community Profiles Guide*.

See also:

- [Select bibliographic entities for display and edit labels](#)
- [Suppress bibliographic entities from small screen display](#)
- [Select bound-with host and constituent links for display in PAC](#)
- [Edit bibliographic information display order](#)
- [Edit a bibliographic entity definition](#)
- [Define custom entities](#)
- [Share a bibliographic information display configuration](#)
- [Default Title Display Configuration for PowerPAC - Reference](#)

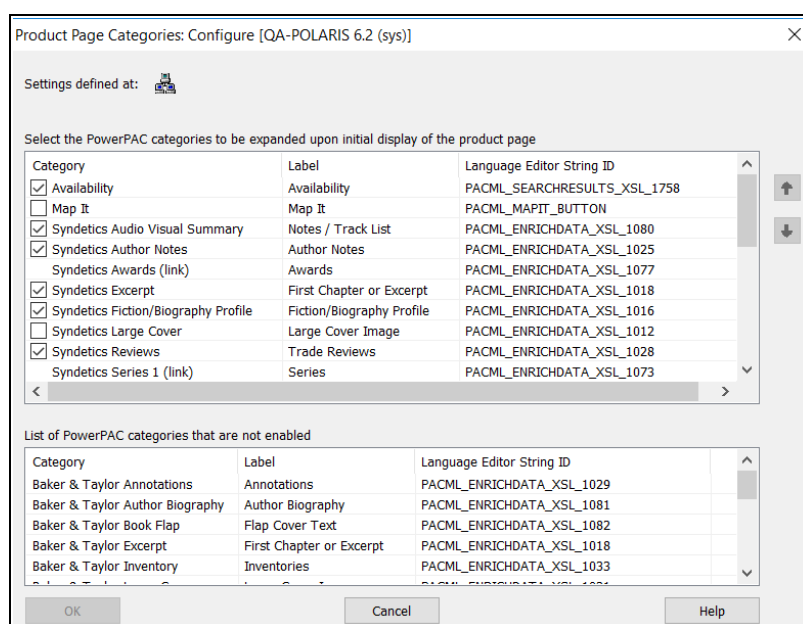
## Set up the PowerPAC Product Page

To set the default state of categories (expanded or collapsed) on the Polaris PowerPAC product page and determine their display order.

**Note:**

You need the permission **Modify product page categories: Allow** to do this procedure.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Product page categories: Configure**.
  - a. The Product Page Categories: Configure dialog box opens. The top portion lists the categories (features) that have been enabled for the organization.



- b. To set a category to be expanded in the initial product page display, check the category.
- c. To change the display order, select the category and click the appropriate arrow at the side of the dialog box to move the category up or down in the display order.
- d. Click **OK** to save the changes and close the dialog box.

### Related Information

- Editing category labels - The Product Page Categories: Configure dialog box lists the language string ID for each category for use in Polaris Language Editor (WebAdmin), where you can search for and edit the drawer labels. For more information, see the Polaris Language Editor (WebAdmin) Guide or Language Editor

online Help.

- Enabling categories - The bottom portion of the Product Page Categories: Configure dialog box lists the features that are possible to display on the product page, but have not been enabled for the organization.
- Map It - [Map It \(Google Maps\) in PAC](#)
- Librarian's View - Set the PowerPAC profile **Librarian's (MARC) View: Enable** to **Yes**.
- Mobile PAC product page - You can use a separate profile to configure the product page for Mobile PAC. See [Set up the Mobile PAC title \(product\) page](#).

### Select bibliographic entities for display and edit labels

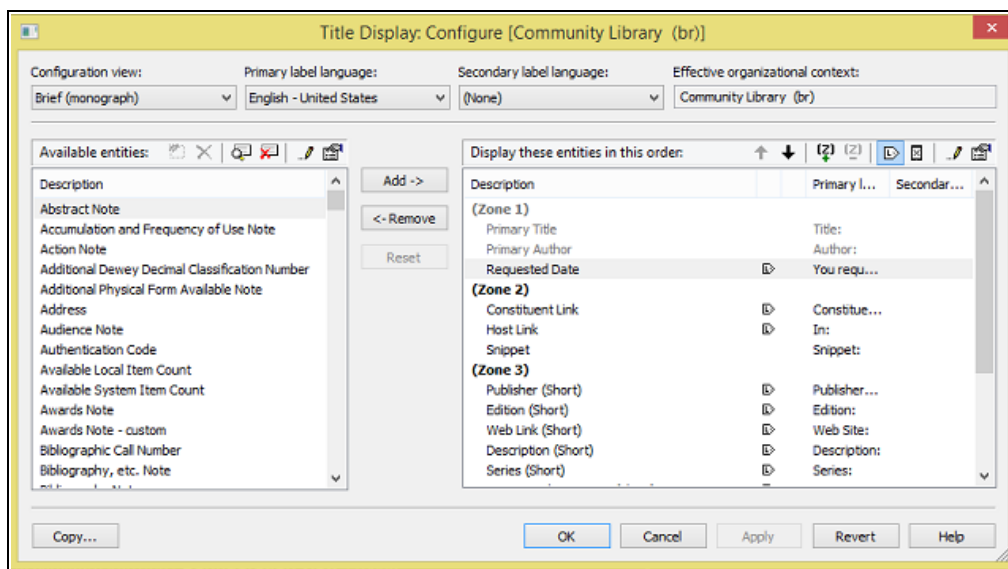
To select entities for display and edit their labels for PowerPAC bibliographic search results:

**Note:**

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

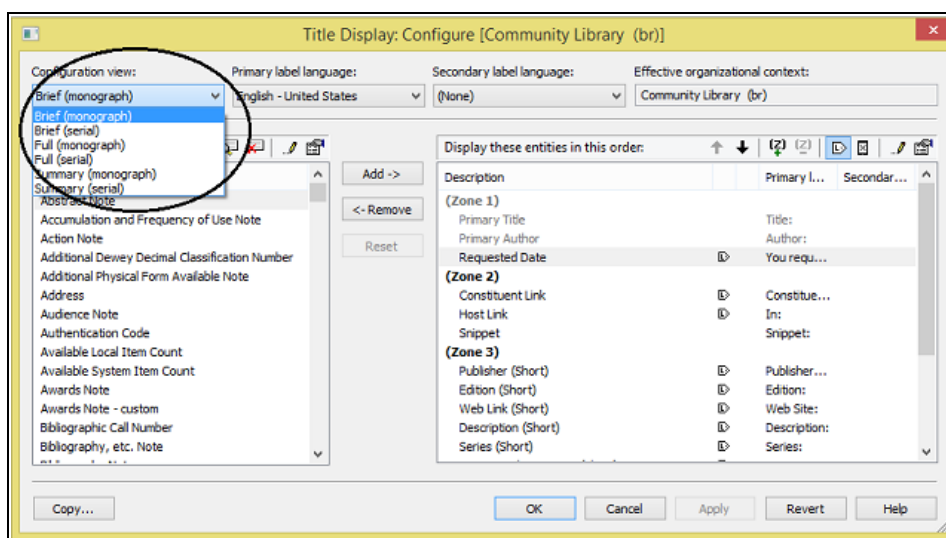
1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view. To see the PowerPAC profiles, select the appropriate level - System, Library, Branch.
2. Double-click **Title Display: Configure**. The **Title Display: Configure** dialog box opens.





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

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

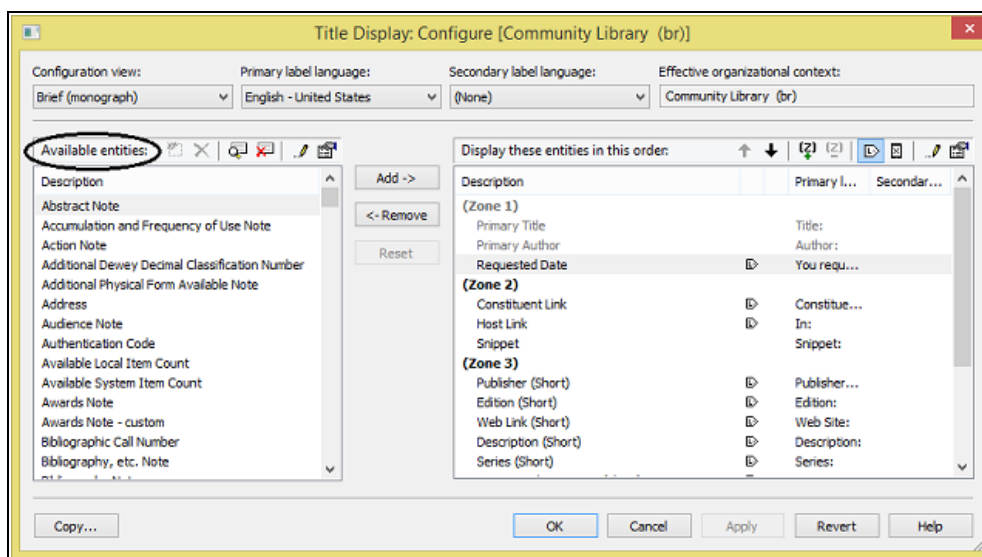


The **Available entities** list on the left side of the dialog box displays the entities that can be added to a view.

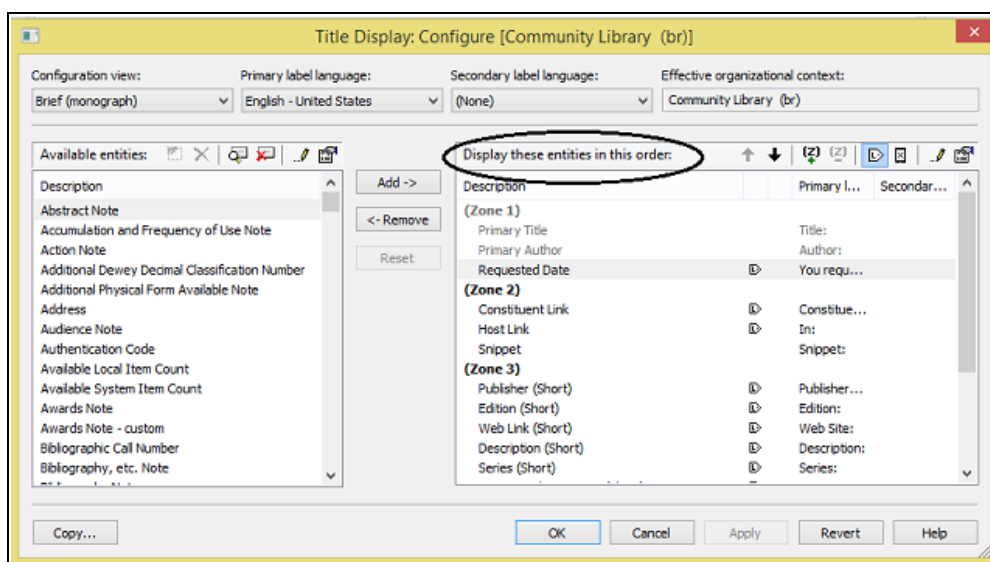
**Note:**

The **Available entities** list may include both system-supplied and custom

entities. Custom entities are defined at the system level only. See [Define custom entities](#). You can also edit many existing entities. See [Edit a bibliographic entity definition](#).

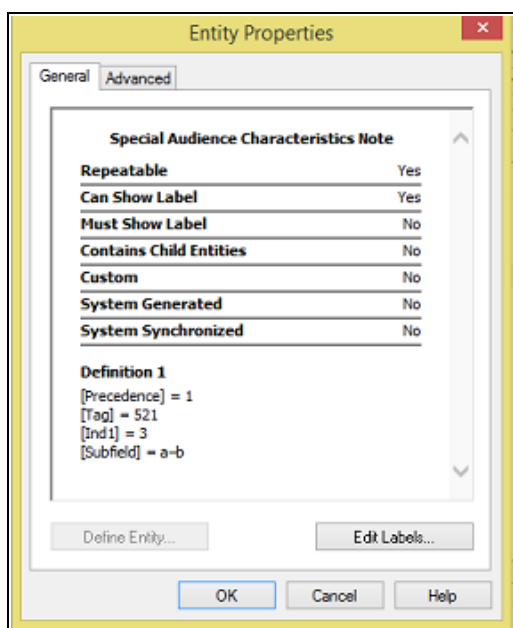



The **Display these entities** list on the right side of the dialog box lists those entities that are currently selected for the configuration view.

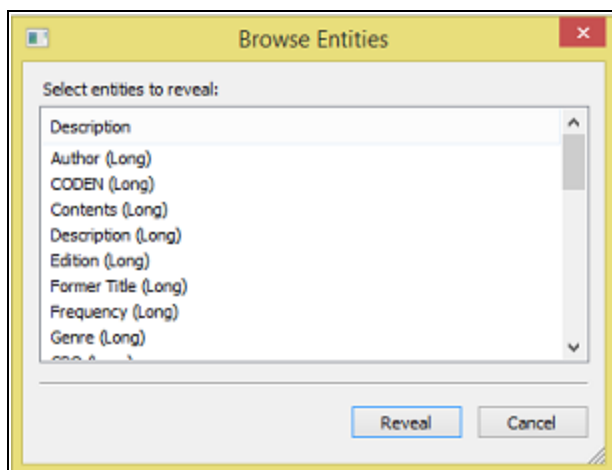


“Short” entities are not repeatable for a single view. “Long” entities are repeatable within a single view. You can double-click the edge of a column header to expand the column and display the full text if necessary.

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





5. To add an entity to the view, click the entity in the **Available entities** list and then click **Add**. The entity is added to the **Display these entities** list.
6. To remove an entity from the view, click the entity in the **Display these entities** list and then click **Remove**.
7. If the **Available Entities** or **Display these entities** list does not include the data element you want to display, follow these steps:
  - a. Click the Browse icon  at the top of the **Available entities** list. The **Browse Entities** dialog box opens.



- b. In the **Browse Entities** dialog box, select the entity you want to add to the **Available entities** list. You can hover the cursor over an entity to see its properties.
- c. Click **Reveal**. The entity now appears in the **Available entities** list and can be selected for display.

**Note:**

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

8. To edit the default English label for an entity, and to enter or change the labels for other languages, follow these steps:
  - a. Right-click the entity in the **Available entities** or the **Display these entities** list, and select **Labels** from the context menu, select **Edit Labels** from the Entity Properties dialog box, or click the Change Labels icon  at the top of the **Available entities** or **Display these entities** list. The **Change Labels** dialog opens for the entity you selected.

Language	Value
Arabic	جزء المؤسسة
Chinese	组成部分
English - United States	Constituent Part:
Farsi - Persian	بخش اصلی
French - Canada	Pièce de constituant :
Haitian Creole	Pati Eleman:
Hawaiian - United States	Ka hana a ke keiki me nā makua/pala...
Hindi	अंश भाग
Korean	구성 부분
English	Часть структуры

**Tip:**

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

- b. On the Change Labels dialog box, click the language you want to edit.
- c. To customize the label, click the **Customize** option and then enter your text.

**Note:**

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

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

9. Save or cancel your work in the **Title Display Configure** dialog box:

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

**Important:**

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

- To permanently save changes and close the Title Display Configure dialog box, click **OK**.

**Important:**

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

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

## Related Information

- [Suppress bibliographic entities from small screen display](#)
- [Edit bibliographic information display order](#)
- [Share a bibliographic information display configuration](#)
- [Edit a bibliographic entity definition](#) (system level only)
- [Define custom entities](#) (system level only)
- [Share a bibliographic information display configuration](#).

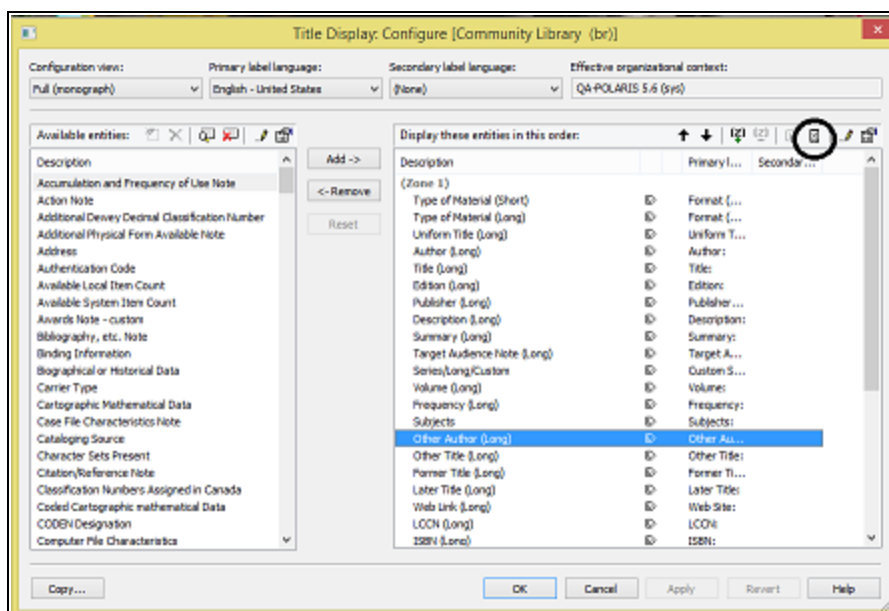
**Suppress bibliographic entities from small screen display**

All title entities that are set to display for a given configuration view will display at mobile width by default. You can suppress bibliographic entities from the PowerPAC

results display at mobile (650 px or narrower) width. This saves user data use and excessive scrolling through title information.

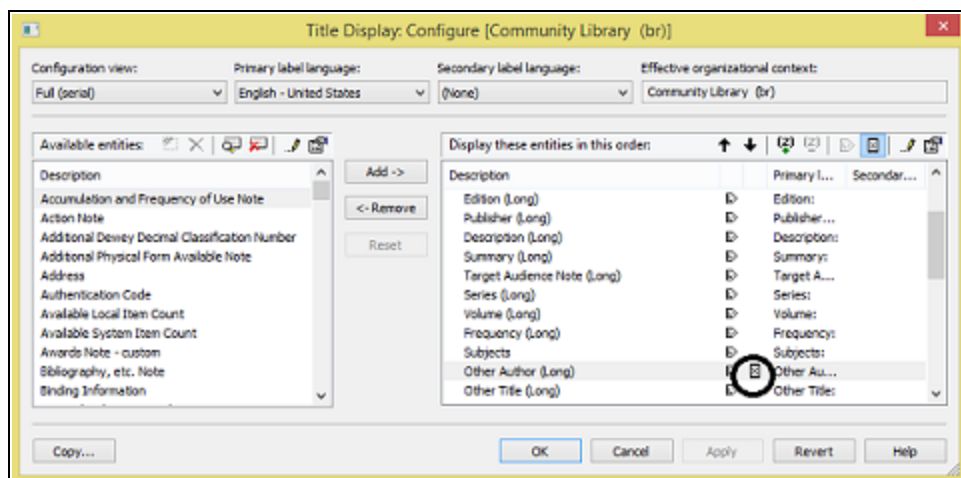
To suppress a bibliographic entity from the mobile display:

1. Using the PowerPAC profile **Title Display: Configure**, set up bibliographic entities for display. See [Select bibliographic entities for display and edit labels](#).
2. Select the configuration view that you want to modify; for example, **Full (monograph)**.
3. Select the entity to suppress in the **Display the entities** list and click the phone icon at the top of the list.



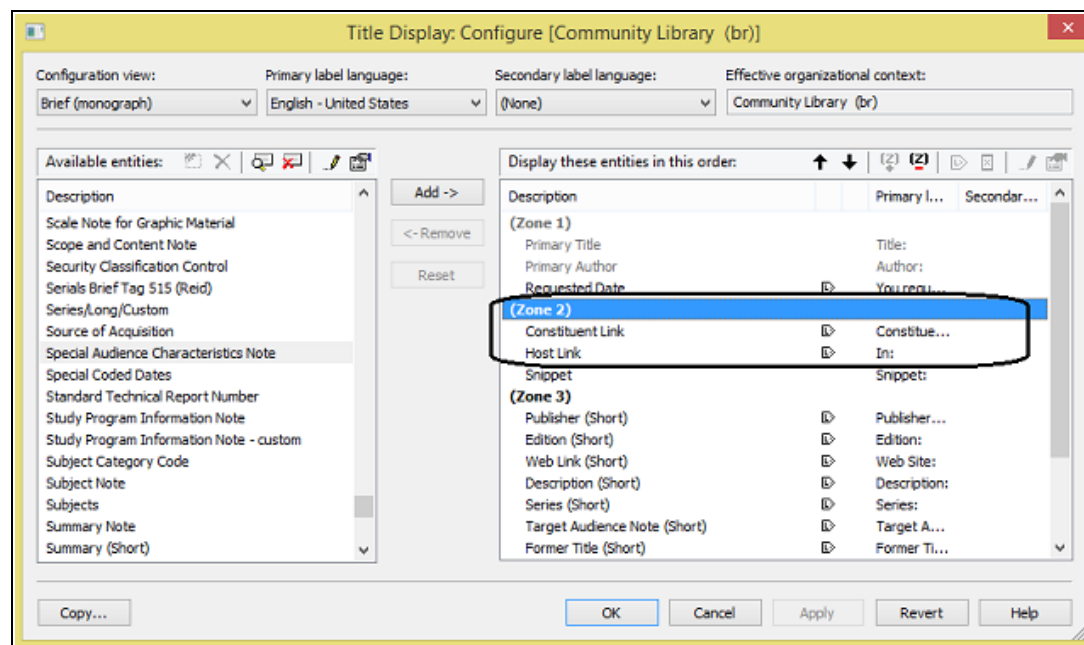
4. Click **Apply**.

When you have selected an entity to suppress from the mobile display, a phone icon by the entity in the **Display these entities** list indicates that it will be suppressed.



### Selecting Bound-With Host and Constituent Links for Display in PAC

Bound-with groups display in the PAC according to the settings in the PowerPAC and Mobile PAC **Title Display Configuration** profiles in Polaris Administration. The display entities, **Constituent link** and **Host link**, are system-generated and display as single strings that wrap, if necessary. The display entities are system-generated and cannot be edited, but the labels can be edited.





Libraries using bound-with features should be sure to add the display entities to the PAC views (especially brief and full) so PAC users will be able to see why individual titles were retrieved. In addition, they should add both host and constituent links to each view in which they want the linking entries to appear. Only one type of link will appear in any given record, depending on whether it is a host or constituent.

The constituent links display as active or “hot” links in on all displays (PowerPAC brief, summary, and full; and Mobile PAC details). The text of the hot links is equal to the value in the \$t, \$a, and \$d equivalent fields (not the \$w).

See the *Cataloging Guide*.

## Host Title Displays Constituent Links in the PAC

When the host title is displayed in the PAC, the titles bound within the volume display as active links next to the **Constituent Part** heading.

The screenshot displays a library catalog record. On the left, there is a book icon and the year '1865'. The main content area is divided into two sections. The top section, titled '1. Games : a locally-bound volume containing five titles', is highlighted with a red box. Below this, the 'Constituent Part' section lists several titles: 'A manual of cricket and base ball, : containing plans for laying out the grounds, plans for forming clubs, &c., &c.; to which are added rules and regulations for cricket / Boston : Mayhew & Baker, 1858. — The international cricket match : played Oct., 1859, in the Elysian Fields at Hoboken, on the grounds of the St. George's Cricket Club. / New York : Vinten, 1859. — Croquet. : as played by the Newport Croquet Club. / New York : Sheldon & Company, 498 & 500 Broadway, 1865. — The fashionable Chinese puzzle. / [s.l. : s.n., s.d.] — Croquet : terms, suggestions and rules, made uniform and condensed under direction of the American Croquet Company of Geneseo, N.Y. / Rochester, N.Y. : Scrantom & Wetmore, 1874, 1871.' This section is also highlighted with a red box. Below the constituent part, there is a summary line: '... Games : a locally-bound volume containing five titles / by various authors ...'. At the bottom, a description reads: 'Description: 1 volume (approximately 100 pages in various paginations) ; 15 cm.' On the right side of the record, there is a sidebar with three buttons: 'AVAILABILITY' (with a checkmark icon), 'FULL DISPLAY' (with a list icon), and 'PLACE REQUEST' (with a magnifying glass icon). Below these buttons is a link that says 'Add to My List'.

In the Librarian’s View, the constituent titles are displayed in 774 tags, subfield t.

```

▼ Librarian's View
LDR      ||||cam a22||||Ia 4500
001      972612
003      PolarisTest
005      20131204105134.0
008      040909s1865 nyu 000 0 eng d
040      $aNYPol$cNYPol
099      $a6005.15
245 00 $aGames :$ba locally-bound volume containing five titles /$cby various authors
246 18 $aGames
300      $a1 volume (approximately 100 pages in various paginations) ;$c15 cm.
590      $aBound volume includes: The fashionable Chinese puzzle -- A manual of cricket and base ball -- The international cricket
match -- Croquet as played by the Newport Croquet Club -- Croquet: terms, suggestions and rules.
590      $aBoston Public Library (Rare Books Department) copy bound in a volume with spine title Games.
774 0 $tA manual of cricket and base ball, : containing plans for laying out the grounds, plans for forming clubs, &c., &c.; to
which are added rules and regulations for cricket /$dBoston : Mayhew & Baker, 1858.$c1858$w(PolarisTest)972426$91$!3
774 0 $tThe international cricket match : played Oct., 1859, in the Elysian Fields at Hoboken, on the grounds of the St.
George's Cricket Club. /$dNew York : Vinten, 1859.$c1859$w(PolarisTest)972427$91$!3
774 0 $tCroquet. : as played by the Newport Croquet Club. /$dNew York : Sheldon & Company, 498 & 500 Broadway,
1865.$c1865$w(PolarisTest)972505$91$!3
774 0 $tThe fashionable Chinese puzzle. /$d[s.l. : s.n., s.d.]$w(PolarisTest)972513$91$!3
774 0 $tCroquet : terms, suggestions and rules, made uniform and condensed under direction of the American Croquet Company of
Geneseo, N.Y. /$dRochester, N.Y. : Scrantom & Wetmore, 1874, 1871.$c1874$w(PolarisTest)972514$91$!3
999      $c0$g0$h0$10$j1$k0$x6005.15$z0$!2

```

## Constituent Title Displays the Host Link in the PAC

When a user searches for a title that is a constituent in a bound-with group, the constituent title displays at the top level with the host title on the following line next to **In**.



1865

[Rate or review](#)

**1. *Croquet. : as played by the Newport Croquet Club.***

**In:** Games : a locally-bound volume containing five titles

... Bound volume includes: *The* fashionable Chinese puzzle--A manual of cricket and base ball-- *The* international cricket match-- *Croquet as played by the Newport Croquet Club* -- *Croquet*: terms, suggestions and rules. ...

Publisher, Date: New York : Sheldon & Company, 498 & 500 Broadway, 1865.

Web Site  [Web Link](#) Click here to view digitized item.

Description: vi, [7]-52, [8] ; 15 cm.

Call Number: 6005.15 no.4

☒ AVAILABILITY

☐ FULL DISPLAY

☐ PLACE REQUEST

[Add to My List](#)

In the Librarian's View, the host title is displayed in the 773 tag, subfield t.

```

▼ Librarian's View
LDR  ||||cam a22||||Ia 4500
001  972505
003  PolarisTest
005  20131113145817.0
008  040909s1865 nyu 000 0 eng d
035  $a3307495
035  $a(OCOLC)56475936
035  $a1534500
040  $aRA8$cRA8$dcrb$dOCLCQ$dUtOrBLW
099  $a6005.15 no.4
245 00 $aCroquet. :$bas played by the Newport Croquet Club. /$cby one of the members.
260  $aNew York :$bSheldon & Company, 498 & 500 Broadway,$c1865.
300  $avi, [7]-52, [8] ;$c15 cm.
500  $a[8] p. of publisher's advertisements at end.
590  $aBound volume includes: The fashionable Chinese puzzle--A manual of cricket and base ball--The international cricket
590  match--Croquet as played by the Newport Croquet Club--Croquet: terms, suggestions and rules.
590  $aBoston Public Library (Rare Books Department) copy bound in a volume with spine title Games.
650 0  $aCroquet.
655 0  $aDigital images.
710 2  $aNewport Croquet Club.
856 40 $uhttp://www.archive.org/details/croquetasplayedb00newp$zClick here to view digitized item.$xDigitized by Internet Archive
on Wed Aug 12 13:23:52 -0400 2009
914  $a3307495
949  $aBPL$bBOR$cBOR
949  $a1$bBRLRB$cBRef
773 0  $tGames : a locally-bound volume containing five titles /$c1865$w(PolarisTest)972612$91$!3
999  $b6005.15 no.4$c0$g0$h0$i0$j1$k0$x6005.15 no.4$z0$!2

```

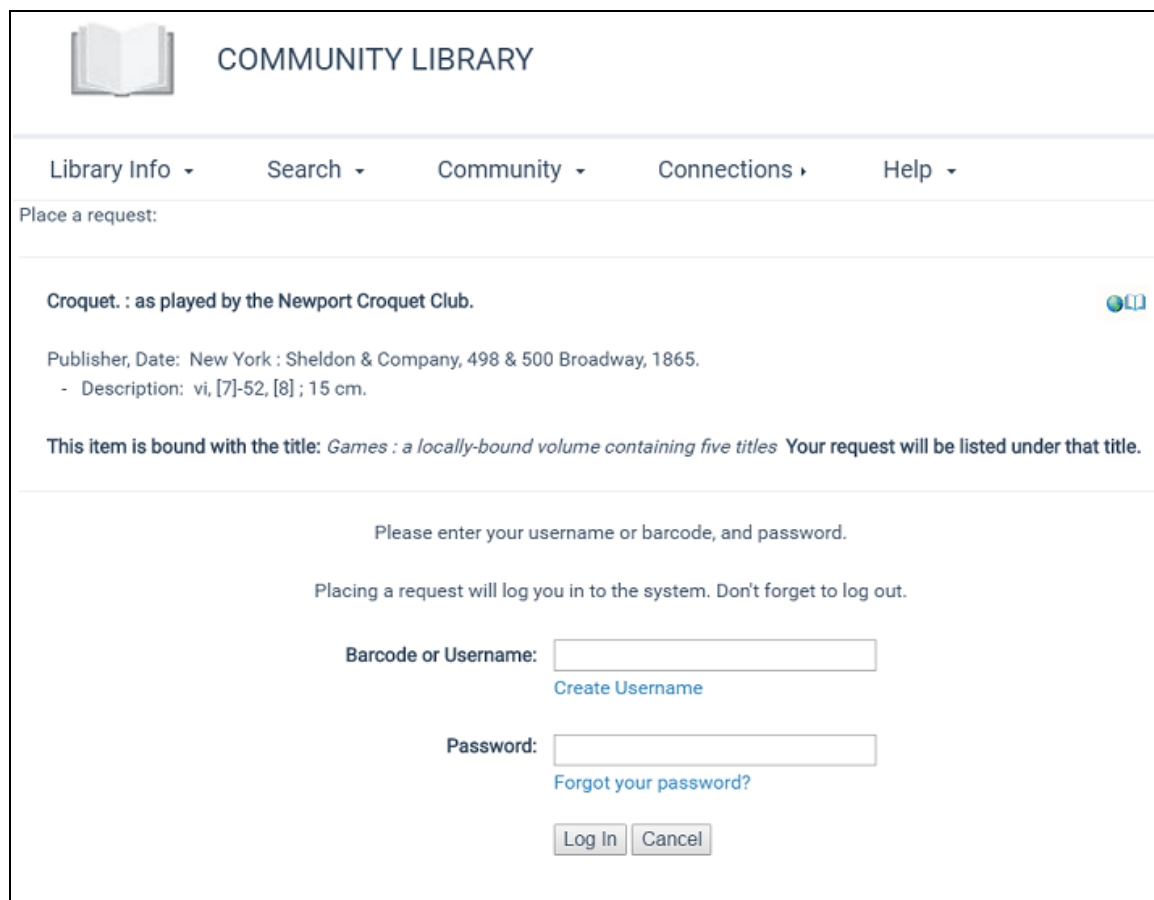
## Item Display for Bound-With Group in the PAC

In the **Availability** display, the call number for a constituent title in a bound-with group is taken from the constituent call number tag, unless none has been defined. If a constituent does not have a call number, the host item's call number is displayed.

 1. Croquet. : as played by the Newport Croquet Club. (1865)			
Call Number	Shelf Location	Status	Type
▼ Stillwater Public Library (0 of 1 available)			
 \$ 6005.15 no.4		In-Transit	Book

## Hold Requests Placed in the PAC


Hold requests are placed on the host volume that contains the constituent titles of the bound-with group.



**COMMUNITY LIBRARY**

Library Info ▾ Search ▾ Community ▾ Connections ▾ Help ▾

Place a request:

**Croquet. : as played by the Newport Croquet Club.** 

Publisher, Date: New York : Sheldon & Company, 498 & 500 Broadway, 1865.  
- Description: vi, [7]-52, [8] ; 15 cm.

This item is bound with the title: *Games : a locally-bound volume containing five titles* Your request will be listed under that title.

Please enter your username or barcode, and password.

Placing a request will log you in to the system. Don't forget to log out.

Barcode or Username:



[Create Username](#)

Password:

[Forgot your password?](#)


## Edit bibliographic information display order

To insert a zone separator or set the entity display order:

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

4. To change the order in which the entities and zone separators are displayed, select the entity or zone separator and click the up or down arrow buttons at the top of the **Display these entities** list.
5. To suppress the field label (but not the entity itself) from the PAC display, select the data element in the **Display these entities** list, right-click, and select **Show/Hide Label** from the context menu.

**Tip:**

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

6. Save or cancel your work in the **Title Display Configure** dialog box:
  - To remove any changes that have not been applied and close the dialog box, click **Cancel**.
  - To remove any changes that have not been applied and keep the dialog box open, click **Reset**.
  - To permanently save changes and keep the dialog box open, click **Apply**.
  - To permanently save changes and close the dialog box, click **OK**.

**Important:**

After saving your changes, use Polaris Language Editor (WebAdmin) to reload PowerPAC. See [Updating Page Caches](#).

**Edit a bibliographic entity definition**

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

Bibliographic call number	Fiction
Primary title	Hold Request Count
Primary author	Holdings Note
Snippet [the brief text string that shows the search terms in context]	Local Availability (Available Local Item Count and Total Local Item Count)

System Availability (Available System Item Count and Total System Item Count)	OCLC Control Number
Holdings Statement	Publication year
Available Local item Count	Retention Statement
Available System Item Count	Total Local Item Count
Control Number	Total System Item Count
Course Reserve Count	Type of Material

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

To edit existing entities for display in PAC search results:

**Note:**

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

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

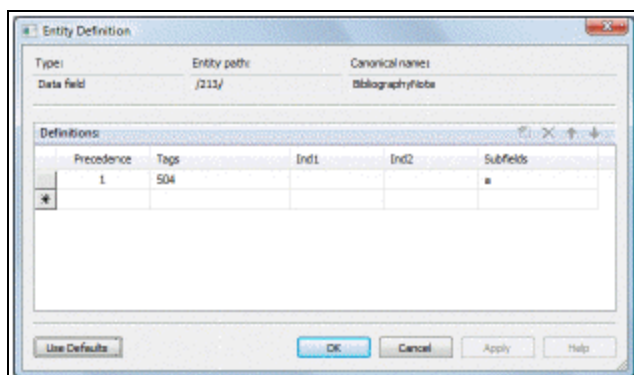
**Note:**

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

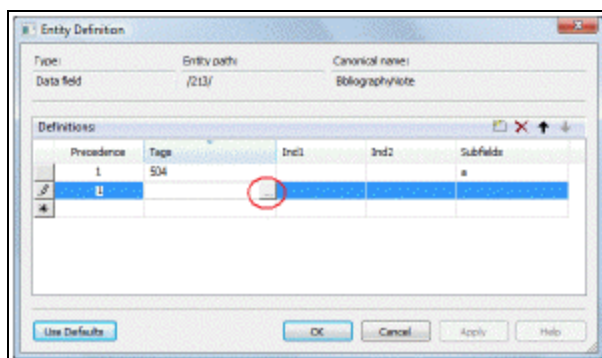


at the top of the **Available entities** list. Select the entity in the Browse Entities dialog box and click **Reveal** to add the entity to the **Available entities** list.

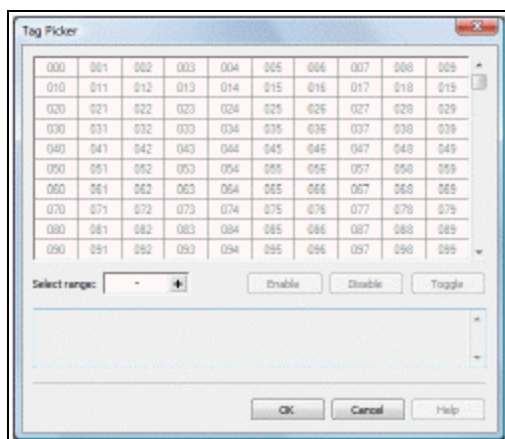
- On the Entity Properties dialog box, click **Define Entity**. The **Entity Definition** dialog box opens.



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

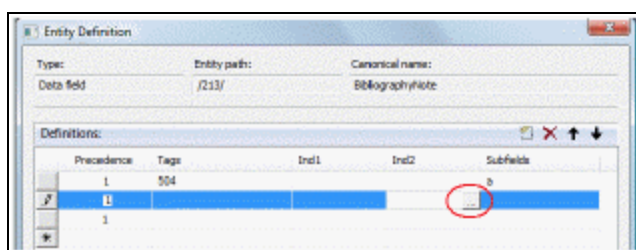


The **Tag Picker** dialog box opens.

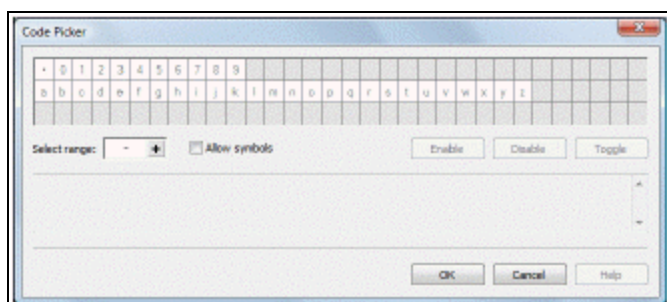


- Select a tag or multiple tags:

- To select one tag, click it in the grid, and then click **Enable**.
  - To select a contiguous range of tags, enter the beginning and ending tags in the **Select range** box, and click the **+** button to highlight the tags in the grid. Then click **Enable**.
  - To select a non-contiguous set of tags, press **CTRL+click** to select the tags in the grid, and then click **Enable**.
  - To save your changes and close the dialog box, click **OK**. The Entity Definition dialog box is displayed.
7. To select indicator values, click the ellipsis button in the **Ind1** or **Ind2** column.



The **Code Picker** dialog box opens.



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

**Note:**

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

- To select a contiguous range of indicator values, enter the beginning and ending values in the **Select range** box, and click the **+** button to highlight the values in the grid. Then click **Enable**.



- To select a non-contiguous set of values, press **CTRL+click** to select the values in the grid, and then click **Enable**.
  - To save your changes and close the Code Picker dialog box, click **OK**. The **Entity Definition** dialog box is displayed.
9. To select subfields, click the ellipsis button in the Subfields column to display the **Code Picker** dialog box, and follow the same steps you used to select the indicator values. See step 8.
  10. When all the tags, indicators and subfields are defined for the entity, click **Apply** to permanently save your work and keep the **Entity Definition** dialog open, or click **OK** to permanently save your work and close the dialog box.

Use the **Change Labels** dialog box to edit labels. See [Select bibliographic entities for display and edit labels](#).

## Define Custom Entities


Custom entities can be defined at the system level only. To define new entities for display in PAC bibliographic search results:

### Note:

The maximum number of custom entities that can be defined at one time is 16,383. Internally, custom entities are assigned identifiers in the range of 16,384 and 32,767. The identifier number is displayed in the Entity Properties dialog box, Advanced tabbed page (**Entity path**).

### Note:

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

1. Select **System, PowerPAC profiles, Title Display: Configure** to open the **Title Display: Configure** dialog box at the system level.
2. Click the new entity icon  at the top of the Available Entities list. The **New Custom Entity** dialog box opens.
3. Type a description for the entity. The description identifies the entity in the system, but does not display in PAC. Your description must contain at least one character and no more than 255 characters, and it must be unique within the set of bib-

liographic entities.


4. Type an initial label for the entity.

The label will be displayed in PAC if this entity and its label are both set to display. Labels associated with custom entities do not have default values. The initial label that you specify is created for each language at the system level. You can later edit the label for specific languages; see [Select bibliographic entities for display and edit labels](#).

5. If this entity is repeatable, select **Repeatable**.
6. Click **OK** to save the new entity and close the **New Custom Entity** dialog box. The **Entity Properties** dialog box appears.
7. Define the tags, indicators, and subfields for the new entity:
  - a. On the Entity Properties dialog box, click **Define Entity**.
  - b. See [Edit a bibliographic entity definition](#) for editing instructions.

#### Related Information

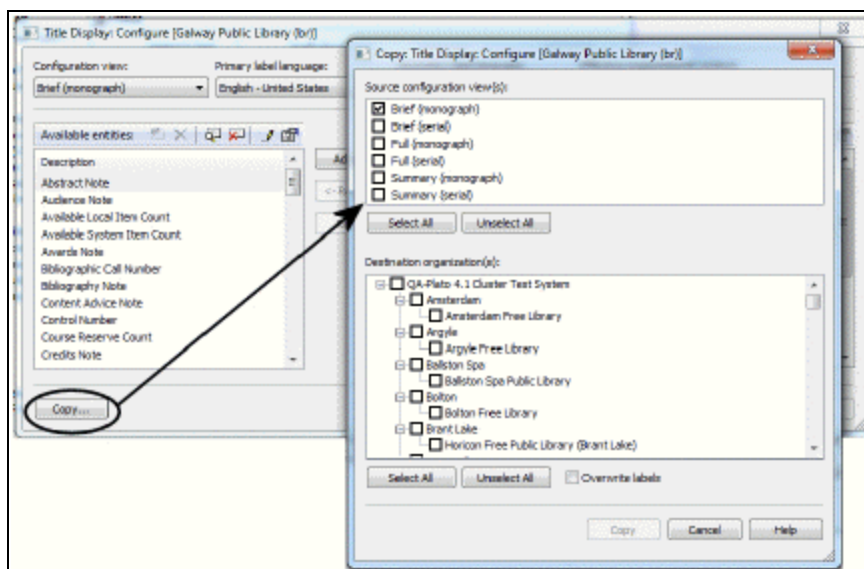
Deleting a custom entity - You cannot delete a custom entity if it is currently used in any display configuration. Select the entity in the **Available Entities** list and click the delete

icon  above the list. If the entity is currently in use, a message lists the configurations where it is used.

### Share a bibliographic information display configuration

To copy your bibliographic display configurations to other organizations:

1. Open the **Title Display Configure** dialog box if it not already open, and select the view you want to copy. See [Select bibliographic entities for display and edit labels](#). If the dialog box is already open and you have been making changes, click **Apply** to save your changes.
2. Click **Copy**. The Copy dialog box opens.



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

**Important:**

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

### Default Title Display Configuration for PowerPAC - Reference

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

PowerPAC Brief Display - Monograph			PowerPAC Brief Display - Serial		
Entity	Display Order	Label	Entity	Display Order	Label
Primary Title	1	Title:	Primary Title	1	Title:
Primary Author	2	Author:	Primary Author	2	Author:
Snippet	3	Snippet:	Snippet	3	Snippet:
Publisher	4	Publisher,	Publisher	4	Publisher,

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

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

Entity	Display Order	Label	Entity	Display Order	Label
Type of Material	1	Format:	Type of Material	1	Format:
Uniform Title (Long)	2	Uniform Title:	Uniform Title (Long)	2	Uniform Title:
Author (Long)	3	Author:	Author (Long)	3	Author:
Title (Long)	4	Title:	Title (Long)	4	Title:
Edition (Long)	5	Edition:	Edition (Long)	5	Edition:
Publisher (Long)	6	Publisher, Date:	Publisher (Long)	6	Publisher, Date:
Description (Long)	7	Description:	Description (Long)	7	Description:
Summary (Long)	8	Summary:	Summary (Long)	8	Summary:
Target Audience Note (Long)	9	Target Audience Note:	Target Audience Note (Long)	9	Target Audience Note:
Series (Long)	10	Series:	Series (Long)	10	Series:
Volume (Long)	11	Volume:	Volume (Long)	11	Volume:
Frequency (Long)	12	Frequency:	Frequency (Long)	12	Frequency:
Subjects	13	Subjects:	Subjects	13	Subjects:
Other Author (Long)	14	Other Author:	Other Author (Long)	14	Other Author:
Other Title (Long)	15	Other Title:	Other Title (Long)	15	Other Title:
Former Title	16	Former Title:	Former Title	16	Former Title:

(Long)			(Long)		
Later Title (Long)	17	Later Title:	Later Title (Long)	17	Later Title:
Web Link (Long)	18	Web Site:	Web Link (Long)	18	Web Site:
LCCN (Long)	19	LCCN:	LCCN (Long)	19	LCCN:
ISBN (Long)	20	ISBN:	ISBN (Long)	20	ISBN:
ISSN (Long)	21	ISSN:	ISSN (Long)	21	ISSN:
OCLC Control Number	22	Other Number:	OCLC Control Number	22	Other Number:
STRN (Long)	23	STRN:	STRN (Long)	23	STRN:
GPO (Long)	24	GPO Item No.:	GPO (Long)	24	GPO Item No.:
CODEN (Long)	25	Label: CODEN:	CODEN (Long)	25	Label: CODEN:
Total System Item Count	26	System Availability:	Total System Item Count	26	System Availability:
Hold Request Count	27	Current Holds:	Hold Request Count	27	Current Holds:
Control Number	28	Control Number:	Control Number	28	Control Number:
Bibliographic Call Number	29	Call Number:	Bibliographic Call Number	29	Call Number:
Course Reserve Count	30	Course Reserves:	Course Reserve Count	30	Course Reserves:
Medium (Long)	31	Medium:	Medium (Long)	31	Medium:

## System-Defined Entities for Title Display Configuration

This table lists the available system-defined entities for configuring the Brief and Full Title Display for PowerPAC.

<b>Available System-Defined Entities for Configuring Brief or Full Title Display</b>	
<b>Data Element</b>	<b>Description</b>
Keywords in Context string	Like many popular web search engines, this element shows an excerpt from the record that contains the search term in quick, keyword, phrase, exact, advanced, and Boolean brief search results. Helps patrons determine if a title is relevant by showing context, but some may find the additional information confusing.
Publisher, date (260 \$b, \$c)	Taken from the MARC record fields indicated.
Edition (250 all subfields)	Taken from the MARC record fields indicated.
856 (URL link)	<p>Taken from the MARC record field indicated. The following program logic determines the link text:</p> <ul style="list-style-type: none"> <li>•856 \$y - Link Text - If the bibliographic record has an 856 \$y, the text in the first occurrence of this tag is used for the web link display instead of the URL in the 856 \$u.</li> <li>•856 \$3 - Material Specified - If the bibliographic record does not have an 856 \$y, but it does have an 856 \$3, the text in the first occurrence of this tag is used for the web link display instead of the URL in the 856 \$u.</li> <li>•856 \$u - URL - If the bibliographic record does not have an 856 \$y or an 856 \$3, the web link text that you specify in the Label field. The default text is Web Site.</li> </ul> <p>Note: If there is text in the 856 \$z, it displays as a note but not part of the web link.</p> <p>When the link is selected, the related web site opens.</p>
Description (300 all	Taken from the MARC record fields indicated.



subfields)	
Series	<p>A single series field is selected for brief display. The following program logic determines which series field is used:</p> <ol style="list-style-type: none"> <li>1. Use the first 4xx in the record that is not a 490.</li> <li>2. If the only 4xx in the record is a 490, do not use it; instead, use the first 8xx in the record.</li> <li>3. If the only 4xx in the record is a 490 and there is no 8xx, use the 490.</li> </ol> <p>Clicking the series entry launches a browse search on the series.</p>
Target Audience (521 \$a)	Taken from the MARC record field indicated. This field displays the Motion Picture Association of America (MPAA) rating for movies.
Former Title (780 selected subfields)	<p>Taken from the MARC record fields indicated. Note:</p> <p>Subfields o, r, u, w, x, y, z, 4, 6, 7, and 8 are suppressed from the brief title display</p>
Later Title (785 selected subfields)	<p>Taken from the MARC record fields indicated. Note:</p> <p>Subfields o, r, u, w, x, y, z, 4, 6, 7, and 8 are suppressed from the brief title display.</p>
Local Availability Summary	Set this in conjunction with # <b>Local items in</b> and # <b>of Local items</b> (see below). This setting displays the specified label; the other two provide the appropriate numbers. If the local count is 0 and the user is connected to the system, the display is suppressed. Example with default label: <b>Local Availability: 3 (of 4)</b>
System Availability Summary	Set this in conjunction with # <b>System items in</b> and # <b>of System items</b> (see below). This setting displays the specified label; the other two provide the appropriate numbers. Example with default label: <b>System Availability: 3 (of 4)</b>
Call Number	If the user is connected to a branch, the item call number from the first item with a status of In at that location is displayed; if

	none are in, the call number of the last item that was in is displayed. If there are no local items, no call number is displayed. If the user is connected to the system and this data element is set to display, the bibliographic call number is used.
Edition (250 all subfields)	Taken from the MARC record fields indicated.
ISBN (020 \$a)	Taken from the MARC record field indicated.
# System items	Total items in the system attached to this bibliographic record. Works with the # <b>System items in</b> data element (see below) to construct an availability count - for example, 3 of 4. The data element <b>System Availability Summary</b> (see above) specifies the label for the count. To be included in item counts, <b>Display in PAC</b> must be checked in the item record, and the item record status must not be provisional or deleted. <i>Serials</i> : An item is considered a serial if there is an issue record (with or without linked item records), the copy order type is subscription, and issues are retained. These serials are included in the counts if <b>Display in PAC</b> is checked in the serial holdings record.
# Hold requests	Number of current hold requests for the title.
Summary (520 \$a)	Taken from the MARC record field indicated.
# Local items	Total number of local items attached to this bibliographic record. A local item is one whose assigned branch is listed as local to the connection organization in the Item Availability Display Order policy table for the organization. Works with the # <b>Local items in</b> data element (see below) to construct an availability count - for example, 3 of 4. The data element <b>Local Availability Summary</b> (see above) specifies the label for the count. If the local count is 0 and the user is connected to the system, the display is suppressed.
Control number (001)	The Polaris control number of bibliographic record, taken from the MARC record field indicated.
# Course reserves	Number of courses for which items linked to this bibliographic

	record are reserved.
# Local items in	Works with the # <b>Local Items</b> data element (see above) to construct an availability count. If the local count is 0 and the user is connected to the system, the display is suppressed.
# System items in	Works with the # <b>System Items</b> data element (see above) to construct an availability count.
Holdings Statement	For serials. Displays the retention period from the first to the last retained for <i>all</i> branches. Gaps are not included, certain issues may not be actually available locally.
Medium (245 \$h)	Taken from the MARC record field indicated.
Format	Polaris Type of Material entries, taken from multiple MARC record fields.
UPC (024 \$a)	Taken from the MARC record field indicated when IND1 = 1.
Gov Doc Number (086 \$a)	Taken from the MARC record field indicated.
Bibliography Note (504 \$a)	Taken from the MARC record field indicated.
Restrictions on Access Note (506 \$a - \$f, \$u)	Taken from the MARC record field indicated.
Credits Note (508 \$a)	Taken from the MARC record field indicated.
Participants and Performers Note (511 \$a)	Taken from the MARC record field indicated.
Summary Note (520 \$a - \$c, \$u)	Taken from the MARC record field indicated when IND1 = blank or 8.
Subject Note (520 \$a - \$c, \$u)	Taken from the MARC record field indicated when IND1 = 0.
Review Note (520 \$a	Taken from the MARC record field indicated when IND1 = 1.

- \$c, \$u)	
Scope and Content Note (520 \$a - \$c, \$u)	Taken from the MARC record field indicated when IND1 = 2.
Abstract Note (520 \$a - \$c, \$u)	Taken from the MARC record field indicated when IND1 = 3.
Content Advice Note (520 \$a - \$c, \$u)	Taken from the MARC record field indicated when IND1 = 4.
Audience Note (521 \$a - \$b)	Taken from the MARC record field indicated when IND1 = blank or 8.
Reading Grade Level Note (521 \$a - \$b)	Taken from the MARC record field indicated when IND1 = 0.
Interest Age Level Note (521 \$a - \$b)	Taken from the MARC record field indicated when IND1 = 1.
Interest Grade Level Note (521 \$a - \$b)	Taken from the MARC record field indicated when IND1 = 2.
Special Audience Characteristics (521 \$a - \$b)	Taken from the MARC record field indicated when IND1 = 3.
Motivation/Interest Level (521 \$a - \$b)	Taken from the MARC record field indicated when IND1 = 4.
Reading Program Note (526 \$a - \$d, \$i, \$z)	Taken from the MARC record field indicated.
System Details Note (538 \$a, \$i, \$u)	Taken from the MARC record field indicated.
Terms Governing Use and Reproduction Note (540 \$a - \$d, \$u)	Taken from the MARC record field indicated.

Language Note (546 \$a - \$b)	Taken from the MARC record field indicated.
Awards Note (586 \$a)	Taken from the MARC record field indicated.
# Hold requests	Number of current hold requests for the title.
Summary (520 \$a)	Taken from the MARC record field indicated.
# Local items	Total number of local items attached to this bibliographic record. A local item is one whose assigned branch is listed as local to the connection organization in the Item Availability Display Order policy table for the organization. See "Set up the local/system item availability display" on page 158. Works with the # <b>Local items in</b> data element (see below) to construct an availability count - for example, 3 of 4. The data element <b>Local Availability Summary</b> (see above) specifies the label for the count. If the local count is 0 and the user is connected to the system, the display is suppressed.
Control number (001)	The Polaris control number of bibliographic record, taken from the MARC record field indicated.
# Course reserves	Number of courses for which items linked to this bibliographic record are reserved.
# Local items in	Works with the # <b>Local Items</b> data element (see above) to construct an availability count. If the local count is 0 and the user is connected to the system, the display is suppressed.
# System items in	Works with the # <b>System Items</b> data element (see above) to construct an availability count.
Holdings Statement	For serials. Displays the retention period from the first to the last retained for <i>all</i> branches. Gaps are not included, certain issues may not be actually available locally.
Medium (245 \$h)	Taken from the MARC record field indicated.
Format	Polaris Type of Material entries, taken from multiple MARC record fields.

UPC (024 \$a)	Taken from the MARC record field indicated when IND1 = 1.
Gov Doc Number (086 \$a)	Taken from the MARC record field indicated.

This table lists the available system-defined entities for configuring the Full Title Display for PowerPAC.

<b>Available System-Defined Entities for Configuring the Full Title Display</b>	
<b>Data Element</b>	<b>Description</b>
Format	Polaris Type of Material entries, taken from multiple MARC record fields.
Uniform Title (130 all subfields)	Taken from the MARC record fields indicated. If a record in the search results does not have a Title Statement (245 tag), the system uses the Uniform title as the primary title. If you select this element for display, and the record has entries in both the 245 and 130 tags, both will display.
Author (1xx all subfields)	Taken from the MARC record fields indicated. Clicking an author entry launches a browse search on the author.
Title (245 all subfields)	Taken from the MARC record fields indicated.
Edition (250 all subfields)	Taken from the MARC record fields indicated.
Publisher, date (260 \$b, \$c)	Taken from the MARC record fields indicated.
Description (300 all subfields)	Taken from the MARC record fields indicated.
Summary (520 \$a)	Taken from the MARC record field indicated.
Target	Taken from the MARC record fields indicated.


Audience (521 \$a - \$z)	
Series (400, 410, 411, 440, 490, 800, 810, 811, 830 all subfields)	Taken from the MARC record fields indicated. Clicking a series entry launches a browse search on the series.
Volume (362 \$a)	Taken from the MARC record fields indicated.
Frequency (310 \$a)	Taken from the MARC record fields indicated.
Subject (6xx - except 655 - alphabetic subfields)	Taken from the MARC record fields indicated. Clicking a subject entry launches a browse search on the subject.
Genre (655 all subfields)	Taken from the MARC record fields indicated.
Added Author (700, 710, or 711 all subfields)	Taken from the MARC record fields indicated.
Added Title (222, 240, 242, 243, 246, 247, 730, or 740 all subfields)	Taken from the MARC record fields indicated.
Former Title (780 all non-numeric subfields)	Taken from the MARC record fields indicated. Note: Subfields o, r, u, w, x, y, and z are retained in the full title display.

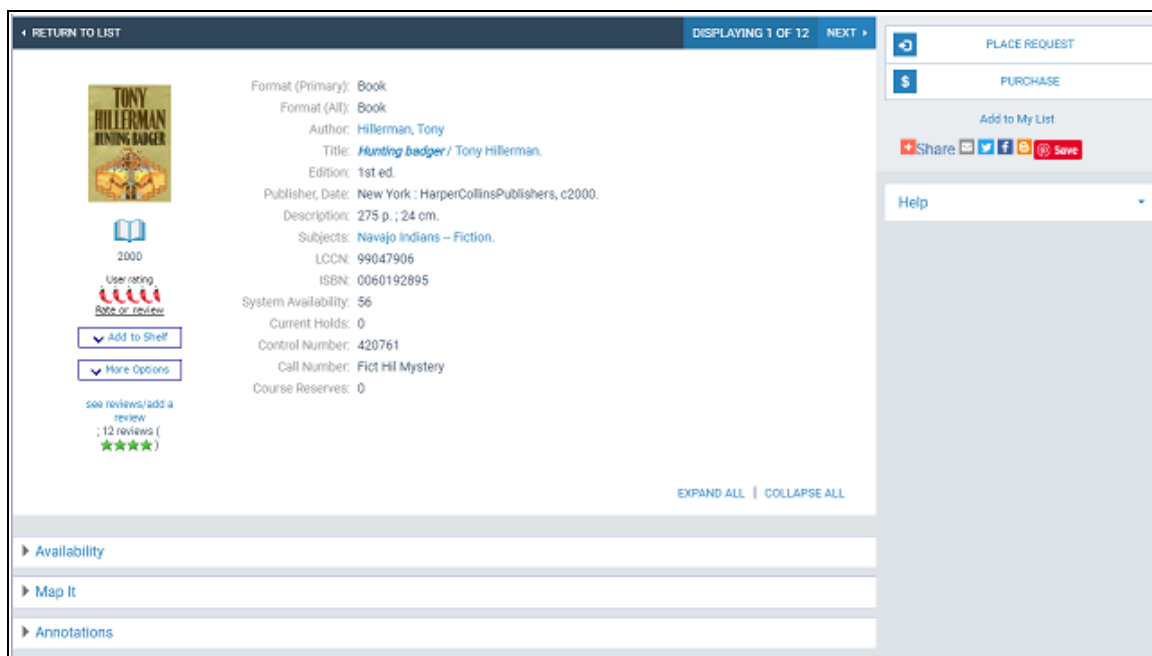
Later Title (785 all non-numeric subfields)	Taken from the MARC record fields indicated. Note: Subfields o, r, u, w, x, y, and z are retained in the full title display.
Notes (5xx all subfields, except 505, 520, and 521)	Taken from the MARC record fields indicated.
Contents (505 all subfields)	Taken from the MARC record fields indicated.
856 (URL link)	<p>Taken from the MARC record field indicated. The following program logic determines the link text:</p> <ul style="list-style-type: none"> <li>•856 \$y - Link Text - If the bibliographic record has an 856 \$y, the text in the first occurrence of this tag is used for the web link display instead of the URL in the 856 \$u.</li> <li>•856 \$3 - Material Specified - If the bibliographic record does not have an 856 \$y, but it does have an 856 \$3, the text in the first occurrence of this tag is used for the web link display instead of the URL in the 856 \$u.</li> <li>•856 \$u - URL - If the bibliographic record does not have an 856 \$y or an 856 \$3, the web link text that displays is the URL in the 856 \$u.</li> </ul> <p>Note: If there is text in the 856 \$z, it displays as a note but not part of the web link.</p> <p>When the link is selected, the related web site opens.</p>
LCCN (010 \$a)	Taken from the MARC record field indicated.
ISBN (020 \$a)	Taken from the MARC record field indicated.
ISSN (022 \$a)	Taken from the MARC record field indicated.



Publisher Number (028 \$a)	Taken from the MARC record field indicated.
Other Number (035 \$a)	Taken from the MARC record field indicated.
STRN (027 \$a)	Taken from the MARC record field indicated.
GPO Item No. (074 \$a)	Taken from the MARC record field indicated.
CODEN (030 \$a)	Taken from the MARC record field indicated.
# System items	Total items in the system attached to this bibliographic record. Works with the <b># System items in</b> data element (see below) to construct an availability count - for example, 3 of 4. To be included in item counts, <b>Display in PAC</b> must be checked in the item record, and the item record status must not be provisional or deleted. <i>Serials</i> : An item is considered a serial if there is an issue record (with or without linked item records), the copy order type is subscription, and issues are retained. These serials are included in the counts if <b>Display in PAC</b> is checked in the serial holdings record.
# Hold requests	Number of current hold requests for the title.
# Local items	Total number of local items attached to this bibliographic record. A local item is one whose assigned branch is listed as local to the connection organization in the Item Availability Display Order policy table for the organization. Works with the <b># Local items in</b> data element (see below) to construct an availability count - for example, 3 of 4.
Control number (001)	The Polaris control number of the bibliographic record, taken from the MARC record field indicated.

## Configuring the PowerPAC Product Page

The PowerPAC product page is displayed when a user clicks or taps a title, cover image, or **Full Display** for a title in the search results list. This page includes the bibliographic information set for the full display in the PAC profile **Title display: Configure** (see [Configuring the PowerPAC Title Display](#)). Since this information may be extensive, this section of the page can be scrolled. Below the bibliographic information is a series of expandable category “drawers” for availability information, enriched content, and other features. External links to other resources are indicated by an icon . (These links open in a new browser window.) The user can click **Expand All** or **Collapse All** to control the display of the drawer contents, or expand and collapse individual drawers. In Polaris Administration, you can set which drawers are expanded by default when the page is opened, and specify the display order of the drawers on the page. The illustration shows an example with drawers collapsed (not all drawers are shown).

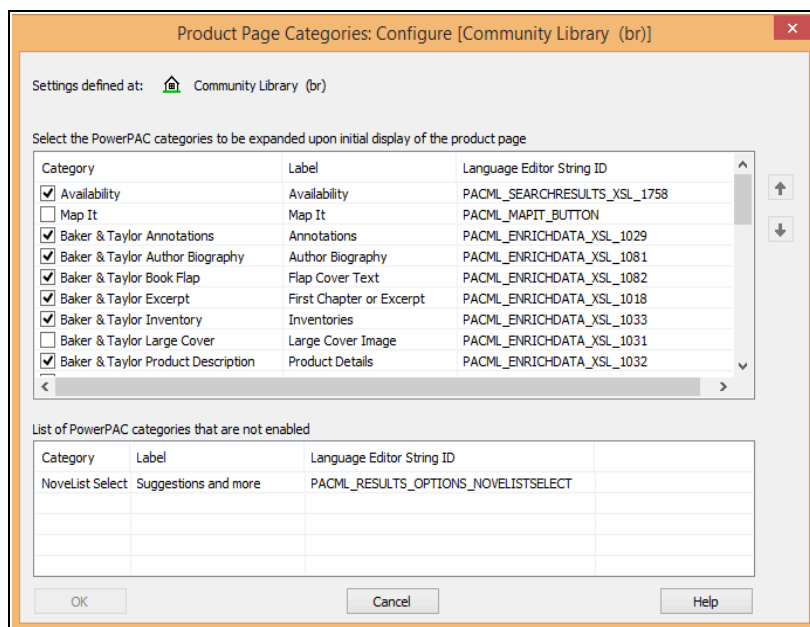


To configure the Polaris PowerPAC product page:

### Note:

You need the permission **Modify product page categories: Allow** to do this procedure.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Product page categories: Configure**. The **Product Page Categories: Configure** dialog box opens. The top portion lists the categories (features) that have been enabled for the organization.



3. To set a category to be expanded in the initial product page display, check the category.
4. To change the display order, select the category and click the appropriate arrow at the side of the dialog box to move the category up or down in the display order.
5. Click **OK**.

#### Related Information

- Editing category labels - The **Product Page Categories: Configure** dialog box lists the language string ID for each category for use in Polaris Language Editor (WebAdmin), where you can search for and edit the drawer labels. For more information, see the Language Editor online Help.
- Enabling categories - The bottom portion of the **Product Page Categories: Configure** dialog box lists the features that are possible to display on the product page, but have not been enabled for the organization. For information about setting up the features that can be displayed on the product page, see also:
- Enriched content from third parties - [Enabling Enriched Data](#)

**Note:**

NoveList Select content drawers are not displayed for digital content (Polaris Fusion) bibliographic records.

- Map It - [Map It \(Google Maps\) in PAC](#)
- Librarian's View - Set the PowerPAC profile **Librarian's (MARC) View: Enable** to **Yes**.
- Mobile PAC product page - You can use a separate profile to configure the product page for Mobile PAC. See [Set up the Mobile PAC title \(product\) page](#).

---

## Set up the local/system item availability display

To specify how an organization's holdings are displayed in the PAC:

**Note:**

These settings control how information about specific items is displayed in Polaris PowerPAC, and Mobile PAC where noted. Use the PowerPAC profile **Title display configure** to specify the information that should be included in brief and expanded title information, which bibliographic-level title information should be displayed, and the labels for the information. See [Configuring the PowerPAC Title Display](#).

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

Double-click the profile **Item Availability: Display local and system levels**, and select one of the following options:

- **Yes** - In Polaris PowerPAC, when a patron is connected to a branch, items for the branches defined as local for that branch are displayed and the patron can click a link to see those of other branches. When the patron is connected to the system organization, all branches' items are displayed in one list.
- **No** - Shows all holdings, both local and system, in one view.

Set the following additional PowerPAC profiles for the PowerPAC display:

- **Item Availability: Display last circ date** - Set to **Yes** to display the last circulation date of the item.

- **Item Availability: Display notes** - Set to **Text** to display any item or issue public notes as text, set to **Icon** to display an icon that the user hovers over to see the notes, or set to **Do not display** to suppress item or issue public notes from display.

**Note:**

For a serials public note to display in PAC, at least one issue or issue with a linked item must be added to a serials holdings record. If no issues exist, you can generate a “dummy” issue so the note will display. See the *Serials Guide*.

- **Item Availability: Display textual holdings notes** - Set to **Text** to display serials textual holdings notes as text, set to **Icon** to display an icon that the user hovers over to see the notes, or set to **Do not display** to suppress textual holdings notes from display.

Set the following PAC profiles to **Yes** or **No** to specify what information about each item should be displayed. These settings also affect Mobile PAC:

- **Item Availability: Display detailed item status** - Set to **Yes** to display the specific item circulation status of unavailable items, such as **Lost** or **Bindery**. Set to **No** to display **No items available** or your own text for items that are unavailable for circulation for any reason. (You must also set **Item Availability: Display status** to **Yes**.) This setting also affects Mobile PAC.

**Note:**

If you set this profile to **No**, you can customize the text that is displayed to indicate that an item is unavailable. See [Editing Messages and Labels](#).

- **Item Availability: Display due date in detailed item status** - If you set **Item Availability: Display detailed item status** to **Yes**, you can set this parameter to display or suppress the item’s due date. (If you set **Item Availability: Display detailed item status** to **No**, you cannot display the due date.) This setting also affects Mobile PAC.
- **Item Availability: Display shelf location** - Set to **Yes** to display an item’s shelf location. For more information, see [Naming Shelf Locations](#). This setting also affects Mobile PAC.
- **Item Availability: Display status** - Set to **Yes** to display an item’s availability status. If you set this to **Yes**, also review the setting for **Item Availability: Display detailed item status**. This setting also affects Mobile PAC.

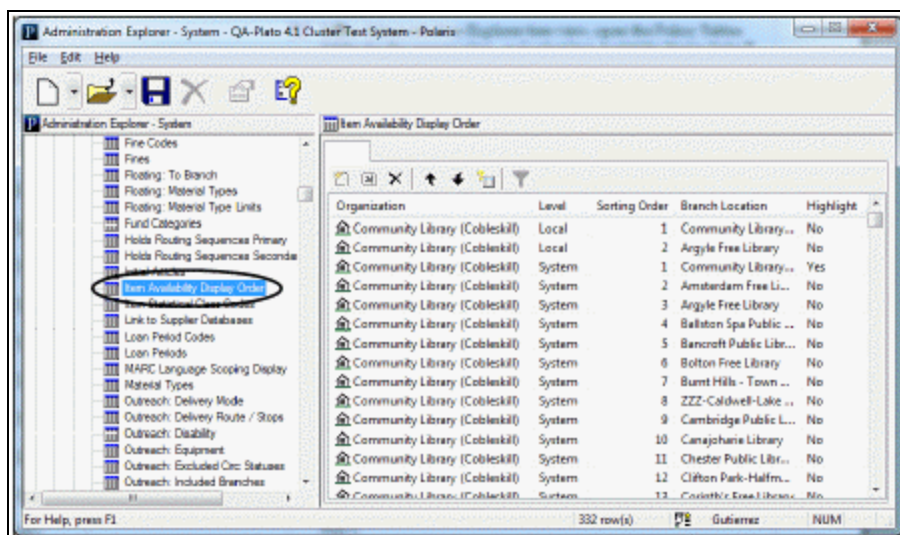
- **Item Availability: Display type** - Set to **Yes** to display the item's material type. This setting also affects Mobile PAC.

In the Administration Explorer tree view, open the Policy Tables folder for the organization, and select **Item Availability Display Order**.

**Note:**

These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify item availability display order table: Allow**. The organization level at which the table is opened determines the entries you see in the list.

The **Item Availability Display Order** table appears in the details view.



Click  to display the Insert Item Availability Display Order dialog box.

Insert: Item Availability Display Order -

Organization: Community Library (Cobleskill)

Level: Local

Sorting Order: 2

Branch Location: Amsterdam Free Library

Highlight: Yes

OK Cancel

In the **Organization** box, select the organization for which the item availability entry is being set up. The new entry will affect the PAC item availability display for this organization.

**Note:**

If the Item Availability Display Order table is opened at the branch level, only the branch name is displayed in the Organization list.

In the **Branch Location** box, select the organization whose holdings you want to display in the PAC for the **Organization** branch.

**Tip:**

If you want a branch to display in both the Local and System Availability views, add it to the table twice, designating it as **Local** for one entry and **System** for the other.

Specify whether the item holdings for the organization named in the **Branch Location** box are displayed in the Local or System Availability view of the PAC for the **Organization** branch:

- To display the Branch Location item holdings as local holdings, select **Local** in the **Level** box.
- To display the Branch Location item holdings as system holdings, select **System** in the **Level** box.

**Note:**

If you set the PAC profile **Item Availability: Display local and system levels** to **Yes**, entries designated as **Local** are displayed in the Local Availability view, and entries designated as **System** are displayed when the user clicks the link to see all items. If you set the profile to **No**, only the entries designated as **System** are displayed.


Click **OK** on the dialog box.

The Item Availability Display Order dialog box closes. The new item availability display entry is displayed at the end of the policy table.

Position the item holdings in the availability display for the organization by following these steps:

a) Select (highlight) the branch location entry for which you want to change the displayed order.



b) To move the branch entry's holdings higher on the list, click .

c) To move the branch entry's holdings lower on the list, click .

The **Sorting Order** value changes for the entry as you position the entry.

Select **File > Save**.

#### Related Information

- Modify an entry in the Item Availability Display Order policy table - Select the entry and click . You can change only the Highlight setting for an existing entry. If you need to change the entry in another way, delete the incorrect entry and create a new entry.
- Delete an entry in the Item Availability Display Order policy table - Select the entry and click . If you delete an entry in the middle of the sort order, the remaining entries are automatically reordered.
- Item availability display in Polaris PowerPAC - You can set the default item availability display for a branch or collection to expanded or closed, and make separate settings for non-serial and serial holdings. (Patrons can always select branch and collection controls to expand or close the list of items under each branch and collection.) To set the default display to expanded branch and collection lists for non-serial holdings, set the PowerPAC profile **Item Availability: Expand non-serial titles** to **Yes**. To set the default display to closed branch and collection lists, set the profile to **No**. To set the default display to expanded lists for serial holdings (those with a holdings statement for that particular branch), set the PowerPAC profile **Item Availability: Expand serial titles** to **Yes**. To set the default display to closed branch and collection lists, set the profile to **No**. (If you have extensive serial holdings, consider setting this profile to **No** to reduce scrolling in the PAC. Patrons can expand the lists they want to see at any time.)
- Item Availability display in Mobile PAC - See [Title Link: Find It](#).
- Text-message call numbers from item availability display - See [Sending Call Numbers by Text Message](#).
- Item availability summary in Polaris PowerPAC - You can display a summary count of available items associated with a title, and the current number of holds on the title, on the initial search results pages. See [Configuring the PowerPAC Title Display](#).



- Item display and circulation status - You can specify item circulation statuses that should prevent an item from being displayed in PAC search results. See [Suppress items by circulation status](#).
- Suppressing availability for specific types of material - You can suppress availability information for designated types of material from the PowerPAC and Mobile PAC search results displays. See [Suppressing Request and Availability Options](#).
- Serials display in PAC availability views - Settings in the serial holdings record control the location-specific compressed holdings statement and the issues that are displayed.

---

## Suppress items by circulation status

To suppress items with specific circulation statuses from appearing in Polaris PowerPAC and Mobile PAC search results:

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

**Tip:**

For any particular item, the system uses the setting for the item's assigned branch to determine whether the item should be included in the search results display.

2. Double-click **Suppress item display**.

The Suppress Item Display dialog box opens.

3. Select the circulation statuses that should prevent an item from being displayed in PAC search results.

The **OK** button becomes available.

4. Click **OK**.

Your changes will not be evident in the PAC until the SQL job **PAC Availability** adjusts the counts. This job ordinarily runs automatically during overnight processing.

## Setting Up Recently Viewed Titles

The Recently View Titles list is available when the user has viewed at least one product page for a title in the current session. It is displayed in the PowerPAC dashboard on the product page for a title, and on any bibliographic record search and results page. The list displays the titles already viewed, including the cover image, title, author, format icon, and publication date. The user can click or tap a title in the list to launch a search for the title.

The list is available as long as the current session is active, and is cleared when the browser is closed or the session times out. It is available regardless of whether the user has logged in. The user can disable the feature for the session by clicking or tapping **Turn off recently viewed titles**. This action clears the list; the user can start it again by clicking or tapping **Turn on recently viewed titles**.

You can enable the feature for in-house workstations, remote workstations, or both. Use the PowerPAC profile **Recently viewed titles**, available at the system, library, or branch level, to set up the Recently Viewed Titles web part.

The screenshot displays the PowerPAC interface. The main area shows a book record for 'TONY HILLERMAN' by John M. Reilly. The record includes a cover image, publication year (1996), and various metadata fields such as Format, Author, Title, Publisher, Date, Description, Subjects, LCCN, and ISBN. There are buttons for 'Add to Shelf', 'More Options', and 'Google Preview'. A sidebar on the right contains a 'Recently Viewed Titles' section, which lists two items: 'Tony Hillerman Erisman, Fred, 1937-' (1969) and 'The Book Thief [electronic resource] Zusak, Markus' (2007). At the bottom of the sidebar is a link to 'Turn off recently viewed titles'.

To set up the Recently Viewed Titles feature in Polaris PowerPAC:

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Recently viewed titles**. The **Recently Viewed Titles** dialog box opens.
3. Set either or both location options:
  - Check **Enable for in-house workstations** to make this feature available at workstations in the library. In-house workstations are those defined by the settings in the organization's PowerPAC profile **In-house access definitions**. If you have privacy concerns regarding in-house PAC workstations, leave this option unchecked.
  - Check **Enable for remote access** to make this feature available to users outside the library.
4. Set the maximum number of titles that should appear in the list. The maximum is 99; the default value is 5.
5. Click **OK**.

---

## Managing Feature It Promotions

Libraries can use Feature It to generate awareness of relevant resources that might otherwise go undiscovered in the public access catalog or in the community. With Feature It, you can promote library materials, web resources, and/or community organizations and events in the context of specific search results, similar to "You might also like" features on many popular web sites.

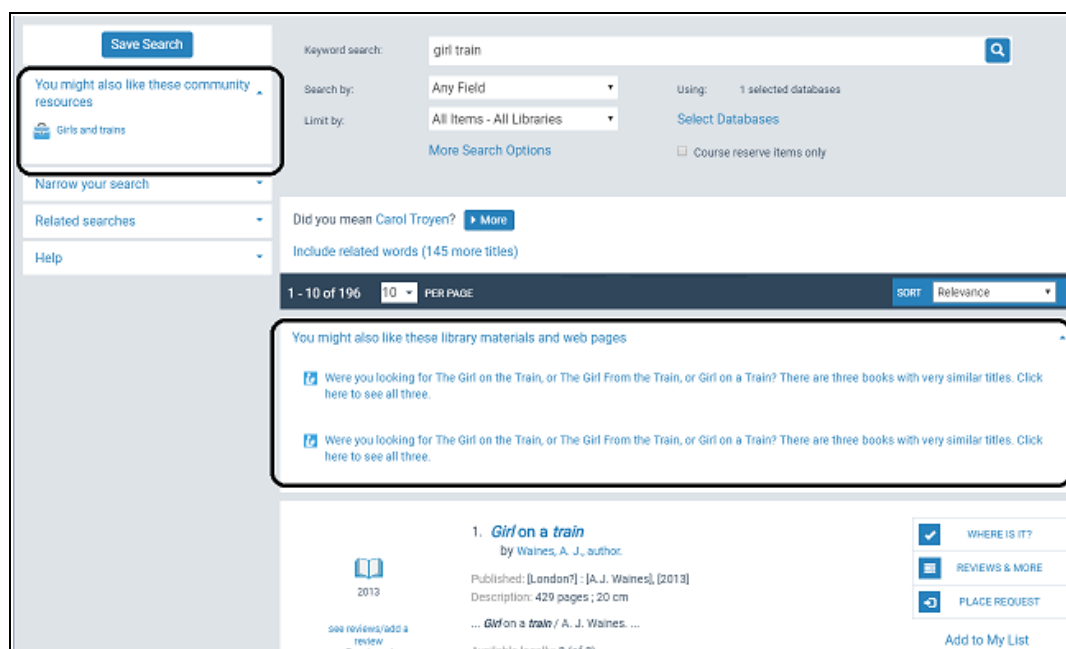
**Note:**

Feature It and Community Profiles are available by separate licenses.

Use the Cataloging Promotions function in the staff client to select resources to feature, and to specify the conditions under which they will be featured. See the *Cataloging Guide*.

Once promotions are set up, when one or more of the PowerPAC user's search terms (16 words maximum) match the triggers and filters associated with one or more promotion records, promotion links are displayed in a position you specify on the PowerPAC search results screen. A maximum of 8 promotion links can be displayed. If more than 8 promotion links match the user's search terms, a relevancy ranking formula is applied to select those most relevant to the user's search terms. (Relevancy is based on the words entered as triggers in the promotion record, not on the metadata in the featured resource records.)

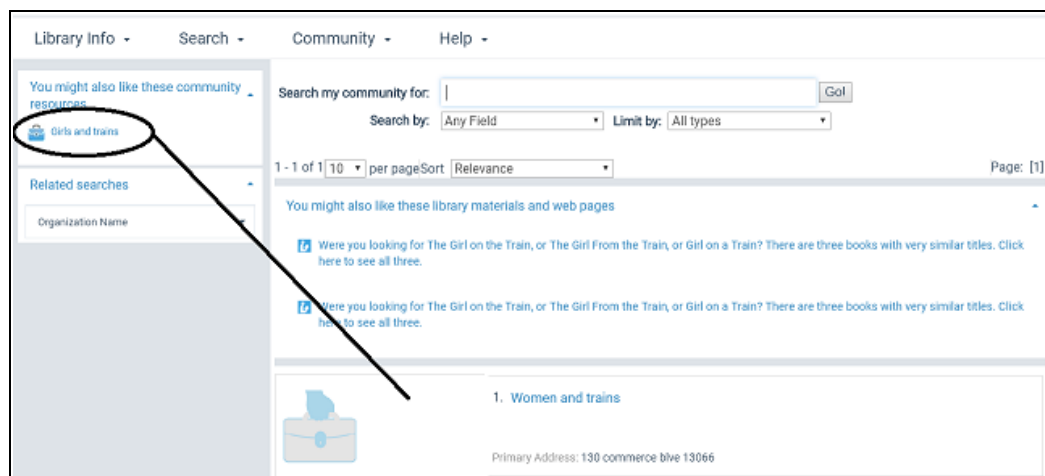
The example shows promotion links for community resources on the dashboard, and library material promotion links at the top of the search results list.



For bibliographic searches, promotions may be displayed for keyword, phrase, exact, advanced, and Boolean searches by one of the following access points (**Search by**): **Any field, Author, General notes, Publisher, Series, Subject, Title**. Promotions are not available for course reserve searches or browse searches. However, when the user selects a heading in a browse search headings list, promotions are displayed along with the titles associated with the heading. The selected heading is considered to be the user's search term when determining which promotions to display.

Promotions are also available for community keyword searches by one of the following access points: **Any Field, Organization Name, Event Name, Services available, Subject, Notes**. Promotions are not available for community browse searches, but when the user selects a heading in community browse results, promotions are displayed along with the records associated with the heading. As with bibliographic browse results, the selected heading is considered to be the user's search term when determining which promotions to display.

When the user clicks a promotion for a bibliographic record, a deep link to the catalog, or a community/event record, a search is launched for the appropriate bibliographic or community/event record, and the record is displayed in the PowerPAC results list.



When the user clicks a promotion link that is a URL for an external resource, a new browser window opens.

You can enable Feature It for library materials and web resources, community profile and event information (if licensed), or both, setting a separate display placement for each or presenting all promotions in one merged list. In the PAC display, the library icon



indicates bibliographic materials. The briefcase icon



indicates community information.

For library (bibliographic) material, the list header is **You might also like these library materials and web pages**. For community information, the list header is **You might also like these community resources**. For a merged list, the header is **You might also like**. You can edit the headers in Polaris Language Editor (WebAdmin). The language string IDs are:

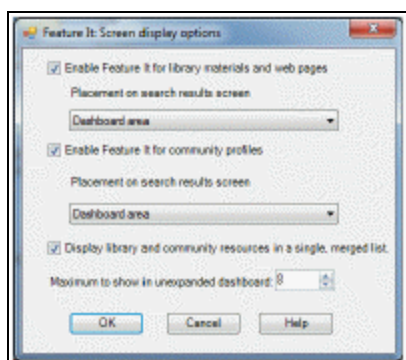
- Bibliographic materials - **PACML\_PACFEATURE\_DASHHEAD**
- Community information - **PACML\_CIPACFEATURE\_DASHHEAD**
- Merged list - **PACML\_FEATURE\_DASHHEAD**

In the staff client, use the Cataloging Promotions workflow to set up promotions for specific resources (see the *Cataloging Guide*). To specify how the promotions are displayed in Polaris PowerPAC:

**Note:**

You can set Feature It display options at the system, library, or branch level. The system uses the settings for the PowerPAC connection organization.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Feature It: Screen display options**. The **Feature It: Screen display options** dialog box opens.



3. To set up Feature It for library materials and web resources:
  - a. Select **Enable Feature It for library materials and web pages**. This setting enables promotion links for library materials and featured URLs when the user searches for either bibliographic records or community information.
  - b. Select the promotion placement on the search results screen. You can select **Dashboard area**, **Beginning of search results**, or **End of search results**.
4. To set up Feature It for community information:
  - a. Select **Enable Feature It for community profiles**. This setting enables promotion links for community information when the user searches for either bibliographic records or community information.
  - b. Select the promotion placement on the search results screen. You can select **Dashboard area**, **Beginning of search results**, or **End of search results**.

**Note:**

Community Profiles is a separately licensed feature.

5. To display library materials and community profile information in one list:
  - a. Enable both options and choose the same display position for both. See steps 3 and 4.
  - b. Select **Display library and community resources in a single merged list**.

6. If you have selected **Dashboard area** as the placement for an enabled Feature It option, set the maximum number of promotion links to show in an unexpanded dashboard list.

The maximum (and default) value is 8 promotion links. Since this list can occupy considerable dashboard space at the top of the dashboard, forcing the user to scroll to see search filters and related searches, you might want to set the value to a lower number. In this case, the dashboard list displays a **more** link when appropriate. The user can click **more** to expand the list (up to 8 links) and **less** to collapse it. If you set this value to 0, the list is completely collapsed and the user must click a plus sign to expand it.

7. Click **OK**.

---

## Setting PowerPAC Narrow/Related Search Options

When a user's search results are returned, the Polaris PowerPAC dashboard can display two web parts 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: checkboxes 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.

- Checkbox 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 checkbox 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:

Checkbox 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.



Save Search

Narrow your search

Availability

☒ Available Now

Assigned Branch

Local

☐ Amsterdam Free Library (20)

Other

☐ Clifton Park-Halfmoon Public Library (16)

☐ Schenectady Branch - Central (16)

☐ Burnt Hills - Town of Ballston Community Library (15)

☐ Canajoharie Library (14)

More>>

Type of Material

☒ Book

☐ Nonmusical Sound Recording (+12)

☐ Sound Recording (+12)

☐ Audio Book on CD (+3)

☐ Audio Books (+3)

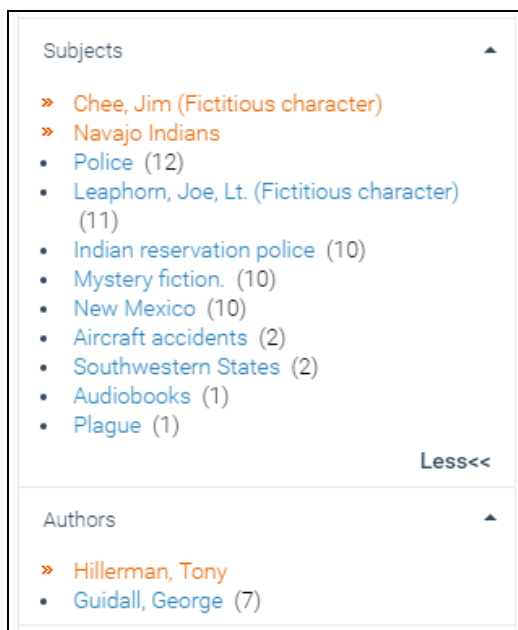
Target Audience

☐ Unknown or not specified (23)

Publication Date

☐ 2006 (1)

- 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**
- **Reading Level** - The Reading Level facet allows filtering based on reading level ranges from the MARC bibliographic record 521 tag. The reading level for a title is derived from the 521 \$a. The first indicator must be 8. The second indicator is undefined (#). The 521 \$b should indicate the reading level type. When multiple 521 tags exist in the bibliographic record, all tags that meet these criteria are considered. The system normalizes the data from the 521 tag and displays facets for reading level ranges. For example, a 521 \$a value of "1150" is included in the "1100-1195" range facet.

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.

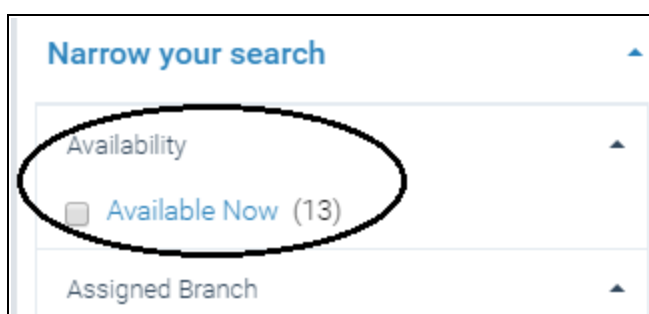
### **Availability and Assigned Branch Facets in the Narrow Your Search Web Part**

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](#), might 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.

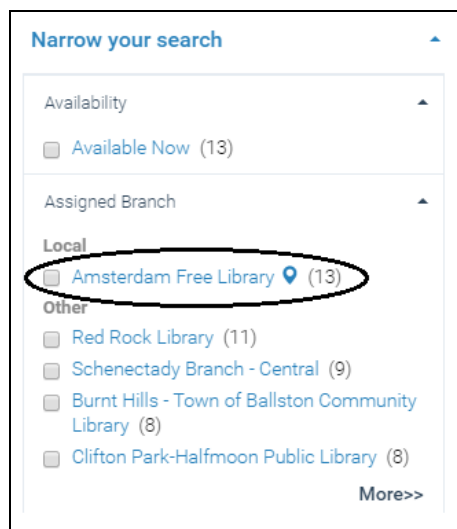
Libraries whose branches all connect at the system level can take advantage of the new Availability facet since both local and system organizations (as defined in the Item Availability Display Order table) are included in the Availability facet results. For more information about the Item Availability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

When you enable the facet, an **Available now** checkbox 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 selected.



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 selected 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 selected in the item record, and
  - The item's circulation status is *not* selected in the PAC profile **Suppress Item Display** for the connection branch (for example, shelving or non-circulating).
- Or **Display in PAC** is selected 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 selected.

**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 selects **Available now**, but does not select 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 selects 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 selected, it remains selected 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

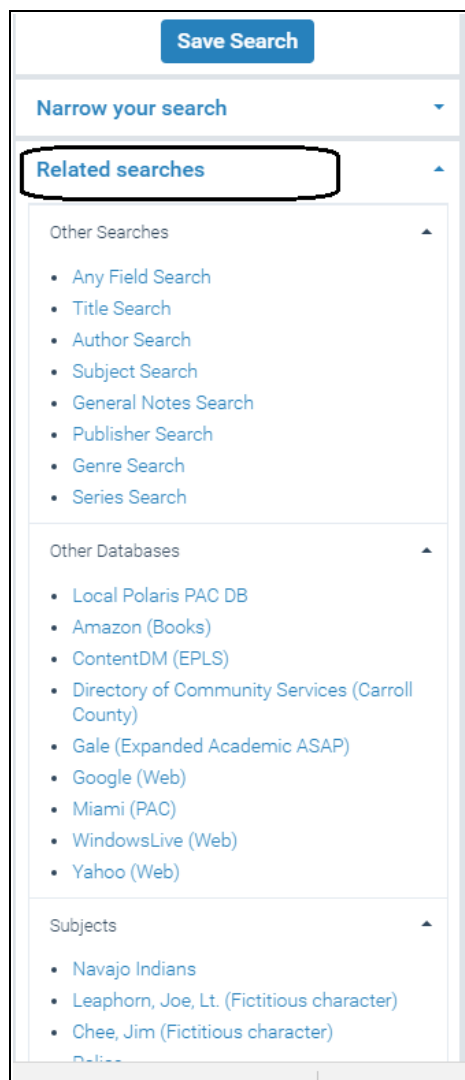
facet checkbox is cleared when a new search is launched, the PAC times out, the user clicks **Reset** after setting **More Search Options**, or the user logs in from the **My Account** menu.

### 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.



### Set up the Narrow your search web part

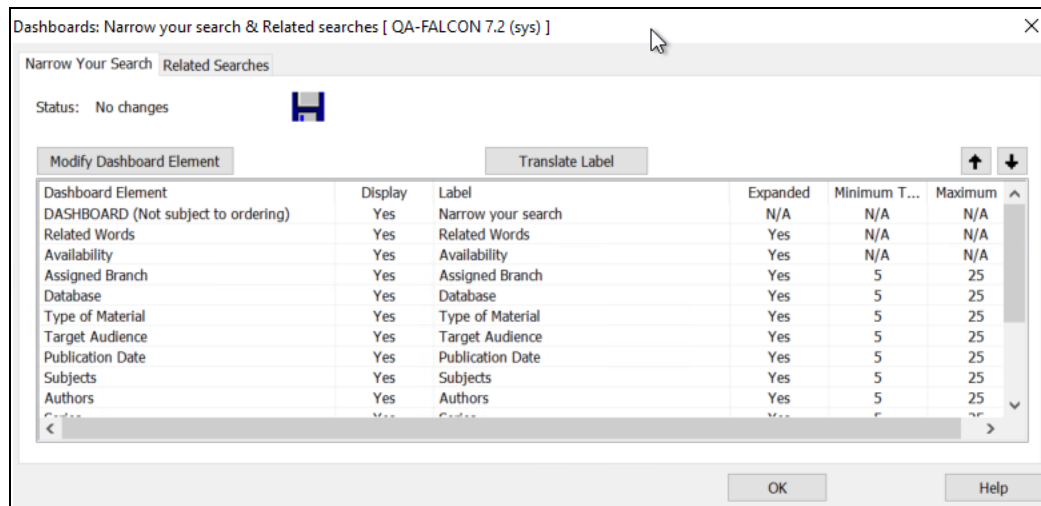
To set up the **Narrow your search** web part, which provides elements to filter a PAC search results set:

**Note:**

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

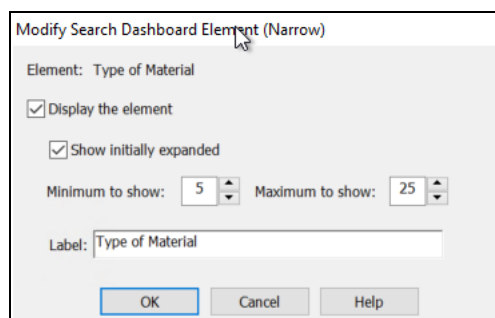


1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Dashboards: Narrow your search & related searches**. The dialog box opens to the Narrow Your Search tabbed page.



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

3. To modify the display of a Narrow element, select the element and click **Modify Dashboard Element**. The **Modify Search Dashboard Element (Narrow)** dialog box appears.



4. To display the element in the **Narrow your search** web part, select **Display the element**.

5. To display the element's links when the search results page appears, select **Show initially expanded**. By default, all elements are set to display as initially expanded.

**Note:**

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

6. To change the minimum and maximum number of links that can be displayed for the element, select or type the numbers in the **Minimum to show** and **Maximum to show** boxes. The default values are 5 minimum, 25 maximum.

**Important:**

The maximum number of links that can be displayed for one element is 99. However, higher numbers of links can slow processing time and may not be particularly useful to patrons, since the list of links for an element may be quite long for certain searches.

**Note:**

Reading Level: There are 15 possible reading levels. Typically you would leave the **Minimum to Display** setting at **15** to display all possible ranges if they exist in the search results, and leave the **Maximum to Display** setting at **25**.

7. If you want to change the default English label for the element, type the text in the **Label** box. The maximum number of characters is 50.
8. Click **OK**. The **Modify Search Dashboard Element (Narrow)** dialog box closes.
9. To change the order in which elements are displayed, select each element and click the up or down arrow until these elements are listed in the order you want them.

**Note:**

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

**Tip:**

If you have enabled the Availability facet, consider positioning the Assigned Branch facet immediately under the Availability facet. See [Availability and Assigned Branch Facets in the Narrow Your Search Web Part](#).

10. Select **Save** to save your settings on the Narrow Your Search tabbed page.

**Note:**

A message alerts you if you have set **DASHBOARD** to be displayed without setting elements to be displayed. At least one element within the web part must be set for display in order to display the web part itself.

Your changes are immediately applied to the Polaris database, but you need to clear the page cache. See [Updating Page Caches](#).

**Note:**

Because the **Narrow your search** Web part may be quite long, the **Related** Web part may not be visible in the interface without scrolling. If you want to be sure that patrons see the **Related** Web part without scrolling, you will need to limit the elements you enable for the **Narrow your search** Web part, or set at least some of the elements to be displayed as initially unexpanded.

## Related Information

- [Set up the Related searches Web part](#)
- [Translate labels for Narrow/Related Web parts \(Polaris PowerPAC\)](#)
- Setting up other dashboard features - See [Defining Web Parts for Dashboards](#).

**Set up the Related searches web part**

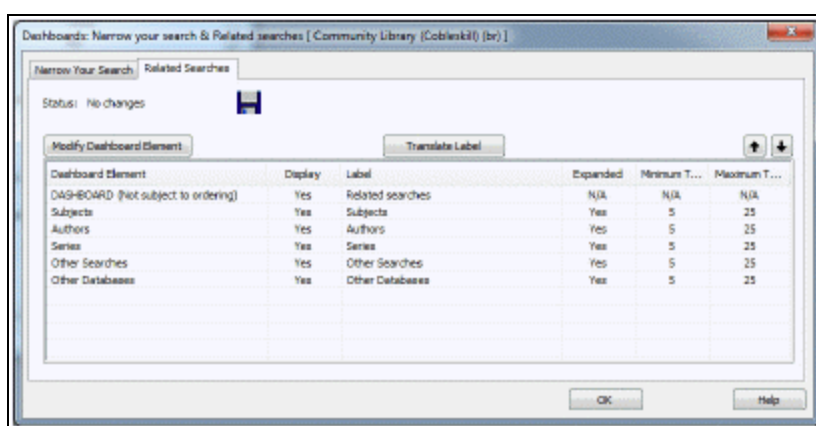
To set up the **Related searches** web part, which provides elements to launch new searches related to a PowerPAC search results set:

**Note:**

You save your settings separately for the **Narrow your search** and **Related searches** web parts, and they are inherited separately. For example, your branch may set its own elements for the **Narrow your search** web part,

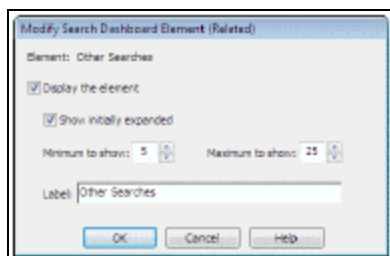
but inherit the system settings for the **Related searches** web part. Like other Polaris Administration settings, once you change the settings at the branch level, the branch no longer inherits the system settings.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Dashboards: Narrow your search & Related searches**. The dialog box opens to the Narrow Your Search tabbed page.
3. Click the **Related Searches** tab.



Settings on this tabbed page control whether the **Related searches** Web part is displayed, and what elements will be available for filtering search results.

4. To modify the display of a Related element, select the element and click **Modify Dashboard Element**. The Modify Search Dashboard Element (Related) dialog box appears.



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

#### Tip:

To minimize the need to scroll the PAC search results page, you may want

to consider displaying some or all elements as initially unexpanded. The patron can choose to expand any element that is unexpanded.

6. To display the element's links when the search results page appears, select **Show initially expanded**. By default, all elements are set to display as initially expanded.
7. To change the minimum and maximum number of links that can be displayed for the element, select or type the numbers in the **Minimum to show** and **Maximum to show** boxes. The default values are 5 minimum, 25 maximum.

**Important:**

The maximum number of links that can be displayed for one element is 99. However, higher numbers of links can slow processing time and may not be particularly useful to patrons, since the list of links for an element may be quite long for certain searches.

8. If you want to change the default English label for the element, type the text in the **Label** box. The maximum number of characters is 50.
9. Click **OK**. The **Modify Search Dashboard Element (Related)** dialog box closes.
10. To change the order in which elements are displayed, select each element and click the up or down arrow until these elements are listed in the order you want them.

**Note:**

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

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

**Note:**

A message alerts you if you have set **DASHBOARD** to be displayed but have not set any elements to be displayed. At least one element within the web part must be set for display in order to display the web part itself.

Your changes are immediately applied to the Polaris database, but you need to clear the page cache. See [Updating Page Caches](#).

**Note:**

Because the **Narrow your search** Web part may be quite long, the **Related searches** web part may not be visible in the interface without scrolling. If

you want to be sure that patrons see the **Related searches** web part without scrolling, you will need to limit the elements you enable for the **Narrow your search** web part, or set some or all of the elements to be displayed as initially unexpanded.

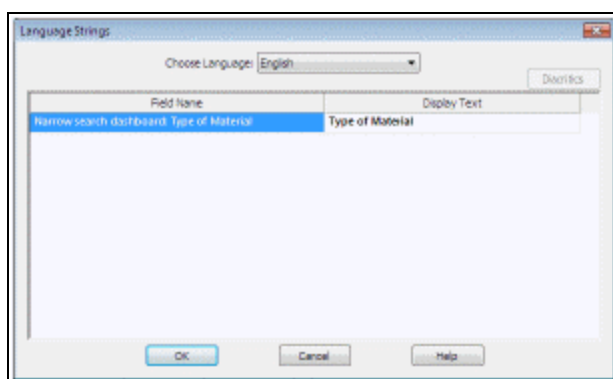
#### Related Information

- [Set up the Narrow your search Web part](#)
- [Translate labels for Narrow/Related Web parts \(Polaris PowerPAC\)](#)
- Setting up other dashboard features - See [Defining Web Parts for Dashboards](#).

### Translate labels for Narrow/Related web parts (Polaris PowerPAC)

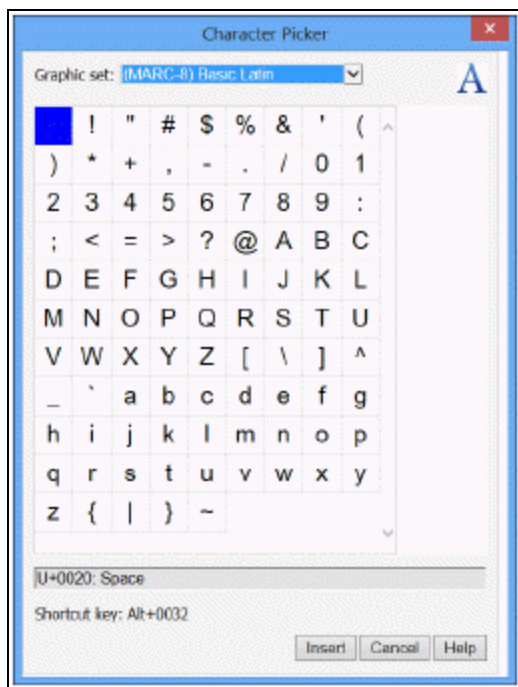
If your library system has purchased other language versions of Polaris PowerPAC, you can translate the labels for the **Narrow your search** and **Related searches** web parts and the labels for the elements displayed under them. To translate the labels:

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Dashboards: Narrow your search & Related searches**. The dialog box opens to the Narrow Your Search tabbed page.
3. Click the appropriate tab (**Narrow Your Search** or **Related Searches**) for the labels you want to translate. See [Set up the Narrow your search web part](#) or [Set up the Related searches web part](#).
4. Select the appropriate data element, and click **Translate Label**. The **Language Strings** dialog box opens.



5. Select a language from the **Choose Language** list. The options are determined by the language versions of Polaris PowerPAC purchased by your library system.

6. Double-click the box in the Display Text column next to the label name you want to translate, and type the translated text in the box. The maximum number of characters is 50.
7. To insert a diacritic character, follow these steps:
  - a. Click **Diacritics**. The **Character Picker** dialog box opens.



- b. Select a graphic character set.
  - c. Select the character, and click **Insert**. The **Character Picker** dialog box closes.
8. Click **OK** on the **Language Strings** dialog box.
9. Click the Save icon on the **Dashboards: Narrow your search & Related searches** dialog box to save your settings on the current tabbed page.

Your changes are immediately applied to the Polaris database, but you need to clear the page cache. See [Updating Page Caches](#).

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## Suppressing Request and Availability Options

Typical Polaris PowerPAC and Mobile PAC search results include title-level options for placing requests and viewing availability information. However, you may want to

suppress the ability to place requests and view availability for titles that do not have linked items in the Polaris database and have a specific primary system-defined type of material.

For both PowerPAC and Mobile PAC, you can suppress the ability to place requests and view availability information for bibliographic records with the primary system-defined types of material (TOMs) that you specify. For example, you can suppress these features for materials where the item is not physically in the library, either because it is eContent that is available only in downloadable form from another site, or because it is in an external storage device from companies such as Libramation's MediaBank or redbox®.

This PAC profile does not apply to EContent that is integrated with Polaris because in this case, item records are attached to the bibliographic record and the availability information is updated by the vendor. You can opt to suppress the display of integrated eContent titles using the PAC profile, **Item availability: Suppress for integrated econtent titles**.

The ability to place requests and view availability information in PAC is suppressed under these conditions:

- The title's primary TOM is checked in the PAC profile **Suppress Availability and Requests**
- At least one 856\$u or resource entity is present in the bib record (if you have selected **Records with an 856** for that TOM)
- The system availability count = 0, which means that there are no linked item records, the linked item records all have **Display in PAC** set to **No**, or the linked item records all have circulation statuses that are set for suppression from the display in the PAC profile **Suppress item display**.

**Tip:**

If a bibliographic record has linked issue records (via the serial holdings record) but no linked item records, the issue records are factored into the availability count, so availability information is not suppressed in this case.

- The title is for integrated eContent and the PAC profile **Item availability: Suppress for integrated econtent titles** is set to **Yes**. See [Suppress EContent availability display in PAC](#).



If these conditions are met, the following elements are suppressed from the results displays in PowerPAC (local and remote databases) and Mobile PAC:

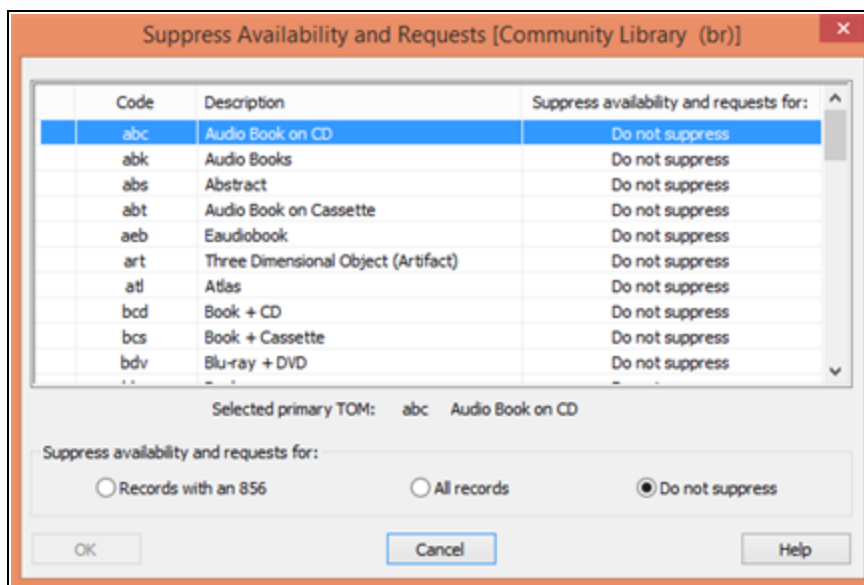
- Item availability fields in the brief and full title displays
- Local Availability Summary
- System Availability Summary
- # Local items
- # System items
- # Local items in
- # System items in
- PowerPAC **Availability** button at the title level
- Mobile PAC **Find It** button at the title level
- PowerPAC **Place Request** button and Mobile PAC **Request It** button at the title level

To suppress request and availability options for designated types of material from the PowerPAC and Mobile PAC search results display:

**Note:**

You can make these settings at the system, library, or branch level. The setting of the PAC connection organization determines the effect on Polaris PowerPAC and Mobile PAC. These settings do not affect the staff client. They can lessen patrons' confusion about how to access and obtain certain material types, but they do not prevent a staff client user from placing a hold on one of the suppressed types of material.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PAC** tab in the details view.
2. Double-click **Suppress availability and requests**. The **Suppress Availability and Requests** dialog box opens.

**Note:**

The list is ordered by the three-character alphabetic code that represents the TOM (Type of Material). The descriptions are the Polaris default descriptions, not the custom display descriptions you may have defined in the PAC Limit by Display policy table.

3. Select the TOM code and choose one of the following options:
  - **Records with an 856** - Suppress request and availability options for records with this TOM if there is an 856\$u tag or resource entity. Note that this setting affects only records with an 856\$u tag.
  - **All records** - Suppress request and availability options for all records with this TOM.

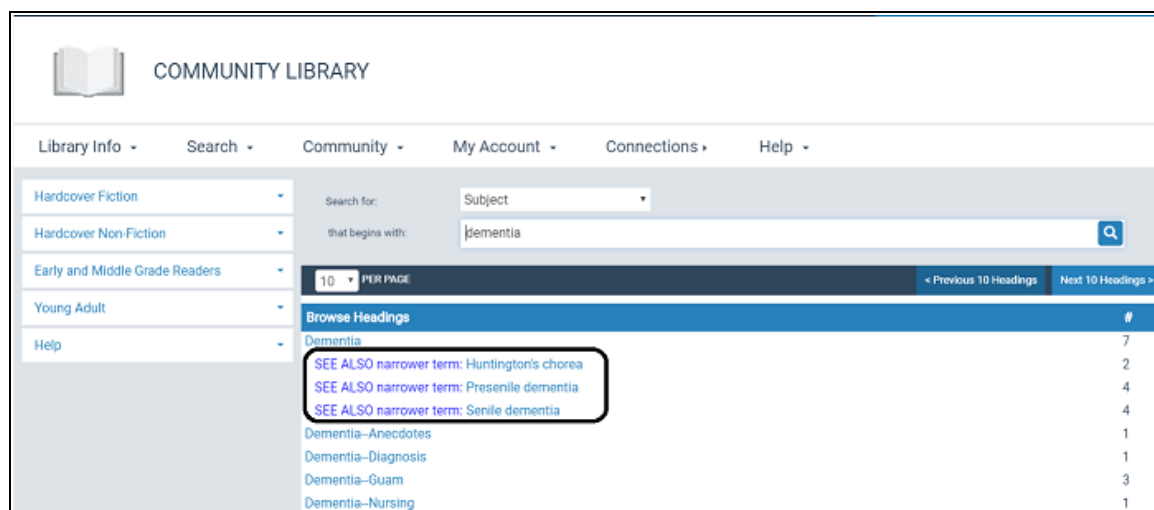
**Important:**

If **All records** is selected for any given type of material, records of that type that do not have 856\$u tags will appear in the catalog but there will be no way for the user to request the resource or view availability. This is likely acceptable for Polaris Fusion resources (TOM=dmc), which typically do not have 856\$u tags and are accessed by clicking a thumbnail image, but may be a problem for other types of material. The **All records** setting should be used with caution.

- **Do not suppress** - Request and availability options are displayed in search results for this type of material.
4. Repeat step 3 for each TOM for which you want to change the display setting.
  5. Click **OK**.

## Cross-Reference Display in Browse Search Results

You specify the labels that identify cross-references in Polaris PowerPAC browse search results. Typical cross-reference labels are See and See Also. However, you can specify any text for cross-reference labels.



You edit cross-reference labels in the Cross Reference Display Constants policy table, at the system, library, or branch level. Settings from the parent organization are used for the libraries or branches unless you change them at the lower level. The organization level at which the Cross Reference Display Constants table is opened determines the entries you see in the list, and you can view and change entries for the selected organization only. This table can be displayed on an organization workflow or with the Administration Explorer.

### Note:

These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify cross reference display constants table: Allow.**


To edit the labels that identify cross-references:


**Note:**

The cross-reference structure is set up when Polaris is implemented. You cannot add entries to this table or delete entries from it, only modify the text for the cross-reference labels.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Cross Reference Display Constants**. The Cross-reference Display Constants table is displayed in the details view.

**Note:**

The table may be blank at the library or branch level. Click  to copy the entries from a higher level into the table for editing.

2. To modify an entry, select the entry and click . The **Modify Cross Reference Display Constants** dialog box appears. You can change only the **Description** text for an existing entry. You cannot delete an entry.
3. Click **OK** on the dialog box.
4. Select **File | Save** to save any changes.

**Related Information**

- **Action when a cross-reference is selected** - The PowerPAC profile **Perform a new search if a cross-reference is selected** controls what happens when a cross-reference is selected. When this profile is set to **Yes** and a cross-reference is selected in the PAC browse headings index, the display is reset to the new location in the browse headings index. When this profile is set to **No** and a cross-reference is selected, the browse headings index remains at the same location, but the titles associated with the cross-reference are displayed.
- **Text in Titles column for "See" references** - The PowerPAC profile **Text: Headings count column for "See From" headings** sets the characters that are displayed instead of a title count for a "See" cross-reference entry when no titles are associated with a heading. The default characters are hyphens --, but you can specify any characters.

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## Setting Up Local and System Availability

When a user searches for and selects a title in the PAC, he or she can see detailed holdings information about the items associated with the title. Polaris Administration settings control the availability display in the PAC: whether all the system holdings are displayed in one list, or separated into local and system views; which branches are defined as “local,” the order of branch holdings; and the specific information that is displayed about each item.

Entries in the **Item Availability Display Order** policy table, combined with the **Display local and system levels** PowerPAC profile, create the following availability displays in Polaris PowerPAC:

- **Item Availability: Display local and system levels** profile set to **No** - Only the entries designated as System are displayed. Put the same list of libraries under both Local and System in the **Item Availability Display Order** policy table to generate local availability counts and facets.
- **Item Availability: Display local and system levels** profile set to **Yes** - The Local Availability view initially displays items for the branches designated as Local in the Item Availability Display Order policy table. The user clicks or taps a link to see branches designated as System in the table.

**Note:**

The **Assigned Branch** box in the item record determines the branch for which an item is displayed in the Availability view. If the item is not assigned to a branch, the item is not listed in any PAC availability display. Also, if the **Display in PAC** box is not checked in the item record, or the item has a circulation status that is suppressed from display, the item is not listed in any PAC availability display.

To set up the item availability display in the PAC:

**Note:**

These settings control how information about specific items is displayed in Polaris PowerPAC, and Mobile PAC where noted. Use the PowerPAC profile **Title display configure** to specify the information that should be included in brief and expanded title information, which bibliographic-level title information should be displayed, and the labels for the information. See [Configuring the PowerPAC Title Display](#).

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click the profile **Item Availability: Display local and system levels**, and select one of the following options:
  - **Yes** - In Polaris PowerPAC, when a patron is connected to a branch, items for the branches defined as local for that branch are displayed and the patron can click or tap a link to see branches defined as system. When the patron is connected to the system organization, all branches' items are displayed in one list.
  - **No** - Shows only entries designated as system. In this case, put the same list of libraries under both Local and System in the **Item Availability Display Order** policy table to generate local availability counts and facets.
3. Set the following additional PowerPAC profiles for the PowerPAC display:
  - **Item Availability: Display last circ date** - Set to **Yes** to display the last circulation date of the item.
  - **Item Availability: Display notes** - Set to **Text** to display any item or issue public notes as text, set to **Icon** to display an icon that the user clicks or taps to see the notes, or set to **Do not display** to suppress item or issue public notes from display.

**Note:**

For a serials public note to display in PAC, at least one issue or issue with a linked item must be added to a serials holdings record. If no issues exist, you can generate a "dummy" issue so the note will display. See the *Serials Guide*.

- **Item Availability: Display textual holdings notes** - Set to **Text** to display serials textual holdings notes as text, set to **Icon** to display an icon that the user clicks or taps to see the notes, or set to **Do not display** to suppress textual holdings notes from display.
4. Set the following PAC profiles to **Yes** or **No** to specify what information about each item should be displayed. These settings also affect Mobile PAC:
    - **Item Availability: Display detailed item status** - Set to **Yes** to display the specific item circulation status of unavailable items, such as **Lost** or **Bindery**. Set to **No** to display **No items available** or your own text for items that are unavailable for circulation for any reason. (You must also set **Item Availability: Display status** to **Yes**.) This setting also affects Mobile PAC.

**Note:**

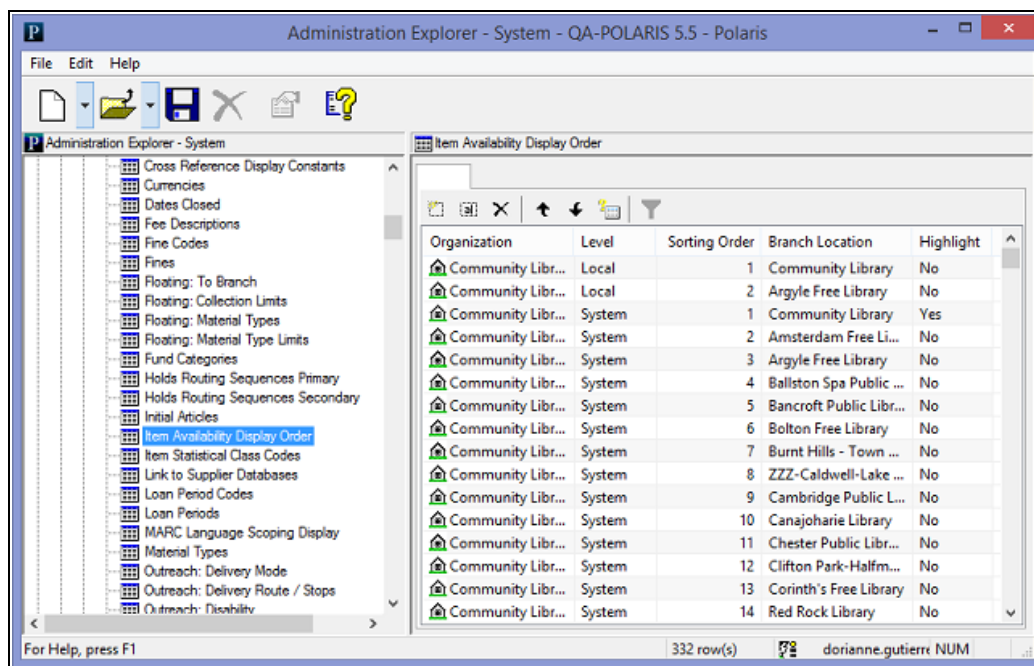
If you set this profile to **No**, you can customize the text that is displayed to indicate that an item is unavailable. See [Editing Messages and Labels](#).

- **Item Availability: Display due date in detailed item status** - If you set **Item Availability: Display detailed item status** to **Yes**, you can set this parameter to display or suppress the item's due date. (If you set **Item Availability: Display detailed item status** to **No**, you cannot display the due date.) This setting also affects Mobile PAC.
  - **Item Availability: Display shelf location** - Set to **Yes** to display an item's shelf location. For more information, see [Naming Shelf Locations](#). This setting also affects Mobile PAC.
  - **Item Availability: Display status** - Set to **Yes** to display an item's availability status. If you set this to **Yes**, also review the setting for **Item Availability: Display detailed item status**. This setting also affects Mobile PAC.
  - **Item Availability: Display type** - Set to **Yes** to display the item's material type. This setting also affects Mobile PAC.
5. In the Administration Explorer tree view, open the Policy Tables folder for the organization, and select **Item Availability Display Order**.

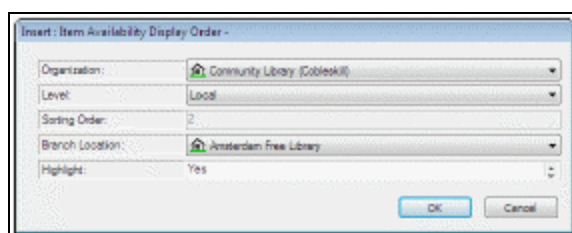
**Note:**

These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify item availability display order table: Allow**. The organization level at which the table is opened determines the entries you see in the list.

The **Item Availability Display Order** table appears in the details view.



6. Click  to display the Insert Item Availability Display Order dialog box.



7. In the **Organization** box, select the organization for which the item availability entry is being set up. The new entry will affect the PAC item availability display for this organization.

**Note:**

If the Item Availability Display Order table is opened at the branch level, only the branch name is displayed in the Organization list.

8. In the **Branch Location** box, select the organization whose holdings you want to display in the PAC for the **Organization** branch.

**Tip:**

If you want a branch to display in both the Local and System Availability





views, add it to the table twice, designating it as **Local** for one entry and **System** for the other.

9. Specify whether the item holdings for the organization named in the **Branch Location** box are displayed in the Local or System Availability view of the PAC for the **Organization** branch:
  - To display the Branch Location item holdings as local holdings, select **Local** in the **Level** box.
  - To display the Branch Location item holdings as system holdings, select **System** in the **Level** box.

**Note:**


If you set the PAC profile **Item Availability: Display local and system levels** to **Yes**, entries designated as **Local** are displayed in the Local Availability view, and entries designated as **System** are displayed when the user clicks the link to see all items. If you set the profile to **No**, only the entries designated as **System** are displayed; in this case, put the same list of libraries under both **Local** and **System** in the Item Availability Display Order table to generate local availability counts and facets.

10. Click **OK** on the dialog box. The Item Availability Display Order dialog box closes. The new item availability display entry is displayed at the end of the policy table.
11. Position the item holdings in the availability display for the organization by following these steps:
  - a. Select (highlight) the branch location entry for which you want to change the displayed order.
  - b. To move the branch entry's holdings higher on the list, click .
  - c. To move the branch entry's holdings lower on the list, click .


The **Sorting Order** value changes for the entry as you position the entry.

12. Select **File | Save**.


**Related Information**

- Modify an entry in the Item Availability Display Order policy table - Select the entry and click . You can change only the Highlight setting for an existing entry. If you

need to change the entry in another way, delete the incorrect entry and create a new entry.

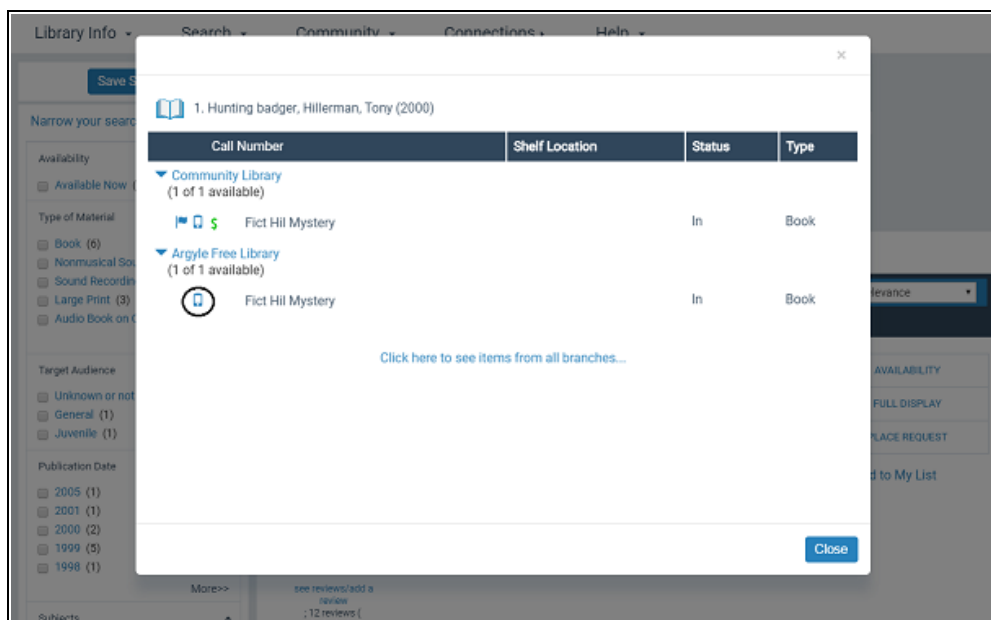
- Delete an entry in the Item Availability Display Order policy table - Select the entry and click . If you delete an entry in the middle of the sort order, the remaining entries are automatically reordered.
- Item availability display in Polaris PowerPAC - You can set the default item availability display for a branch or collection to expanded or closed, and make separate settings for non-serial and serial holdings. (Patrons can always select branch and collection controls to expand or close the list of items under each branch and collection.) To set the default display to expanded branch and collection lists for non-serial holdings, set the PowerPAC profile **Item Availability: Expand non-serial titles** to **Yes**. To set the default display to closed branch and collection lists, set the profile to **No**. To set the default display to expanded lists for serial holdings (those with a holdings statement for that particular branch), set the PowerPAC profile **Item Availability: Expand serial titles** to **Yes**. To set the default display to closed branch and collection lists, set the profile to **No**. (If you have extensive serial holdings, consider setting this profile to **No** to reduce scrolling in the PAC. Patrons can expand the lists they want to see at any time.)
- Item Availability display in Mobile PAC - See [Title Link: Find It](#).
- Text-message call numbers from item availability display - See [Sending Call Numbers by Text Message](#).
- Item availability summary in Polaris PowerPAC - You can display a summary count of available items associated with a title, and the current number of holds on the title, on the initial search results pages. See [Configuring the PowerPAC Title Display](#).
- Item display and circulation status - You can specify item circulation statuses that should prevent an item from being displayed in PAC search results. See [Suppress items by circulation status](#).
- Suppressing availability for specific types of material - You can suppress availability information for designated types of material from the PowerPAC and Mobile PAC search results displays. See [Suppressing Request and Availability Options](#).
- Serials display in PAC availability views - Settings in the serial holdings record control the location-specific compressed holdings statement and the issues that are displayed. See the *Serials Guide*.

## Sending Call Numbers by Text Message

From the Polaris PowerPAC or Mobile PAC item availability display, a user can send an email text message containing the item call number to his or her mobile phone via the mobile phone carrier's SMTP email service. If you enable this feature, a Text It icon 

appears next to each item in the Availability display for a title.

The illustration shows the Text It icon in the Availability view in Polaris PowerPAC brief search results.



In Polaris PowerPAC, the icon is displayed in the Availability view when the view is accessed from the brief search results and from the title product page. When the user clicks the Text It icon, a window opens. (For details about the Mobile PAC interface, see [Text It in Mobile PAC.](#))

Text this call number to your mobile phone  
(charges from your carrier may apply)

Title

Hunting badger

Mobile phone

Carrier

<Select a carrier>

Send Clear Close

If the user is logged in and the patron record includes a phone number designated for TXT notification, the **Mobile phone number** and **Carrier** fields are already filled in. If the user is not logged in, or is logged in but does not have a phone number designated for TXT notification in the patron record, the user enters the mobile phone number and selects a carrier from the list. (The carrier options are set in the system-level database table **Mobile Phone Carriers**.) When the patron clicks **Send**, the text message is sent to the patron's mobile phone.

To display the Text It icon in Polaris PowerPAC and Mobile PAC, set the PowerPAC profile **Item availability: "Text it" feature enabled** to **Yes** (the default setting). The profile is available at the system, library, and branch levels.

In addition, the current connection organization must have specified the email server in the PAC profile **Email notification: Server running SMTP service**. The "from" field of the message is taken from the PAC profile **Email notification: email address of sender** for the current connection organization. If no address has been specified in that profile, the "from" field is taken from the system-level parameter setting for the return email address in **Notification options**. (If no address is available from these settings, the Text It icon is not displayed.) The subject of the message is the first 30 characters of the title. The body of the message includes the branch display name and the call number and designation (if present).

Due to common carrier limitations, the entire message must not exceed 160 characters. If the message is longer, certain fields are automatically eliminated in the following order:

- Branch display name
- Designation
- If the branch display name and designation have been eliminated and the total still exceeds 160 characters, characters are removed from the end of the call number field until a total of 156 characters is reached. Then the system adds a space and an ellipsis to the end of the call number.

The patron does not receive notification if the delivery fails, and Polaris does not record the failure.

### Text It Report

A report, **PAC Text It Use**, is available in Polaris SimplyReports on the **Patron** tab, **Patron Statistical Reports** sub-tab. The report includes an activity summary, the number of in-house transactions, and the number of outside transactions. In-house transactions are those from workstations that are identified as in-house for the selected transacting organizations in the In-House IP Addresses database table. Standard SimplyReports parameters, filters, and formats for patron statistical reports are available for the report. For more information, see online Help in SimplyReports.

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### Suppressing Items from Search Results

To be included in item counts and displayed in search results, **Display in PAC** must be checked in the item record, and the item record status must not be provisional or deleted. Serial issues are included in the counts if **Display in PAC** is checked in the linked serial holdings record and the issues are retained (see the *Serials Guide*). In addition, you can use the PAC profile **Suppress item display** to specify item circulation statuses that should prevent an item from being displayed in both Polaris PowerPAC and Mobile PAC search results. When a circulation status is selected, items with this status are not displayed in PAC even when **Display in PAC** is checked in the item record. You can set this profile at the system, library, or branch level.

To suppress items with specific circulation statuses from appearing in Polaris PowerPAC and Mobile PAC search results:

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

**Tip:**

For any particular item, the system uses the setting for the item's assigned branch to determine whether the item should be included in the search results display.

2. Double-click **Suppress item display**. The **Suppress Item Display** dialog box opens.
3. Select the circulation statuses that should prevent an item from being displayed in PAC search results.
4. Click **OK**.

Your changes will not be evident in the PAC until the SQL job **PAC Availability** adjusts the counts. This job ordinarily runs automatically during overnight processing.

---

## Naming Shelf Locations

If the PAC profile **Item Availability: Display shelf location** is set to **Yes**, the Availability view in the PAC displays the shelf location of an item, as specified by the setting in the **Shelf Location** box on the Item Record workform. Each branch can have its own shelf location descriptions. Typically, shelf locations are names of the various areas where items are currently shelved, such as the New Books Shelf, the Display Case, or the Atlas Stand.

**Note:**

You can also define collections in Polaris. For example, a branch may have collections named Genealogy, Non-Fiction, Children, and Reference. Any collection you define can be shown, along with call number and shelf location, in the Availability view in the PAC. Shelf locations are not related to collections, and you do not need to define collections to use shelf locations.

Entries in the Shelf Locations database table determine the branch's shelf location options in an item record. You can open the table from the system, library, and branch levels, but entries are branch-specific. Shelf locations are not inherited or shared from the parent organizations. If you open the table at the system level, you can view, add, and change shelf locations for any branch. If the table is opened at the library level, you

can view, add, or change shelf locations for the branches in the selected library. If the table is opened at the branch level, you can view, add, or change entries for the specific branch.

**Note:**

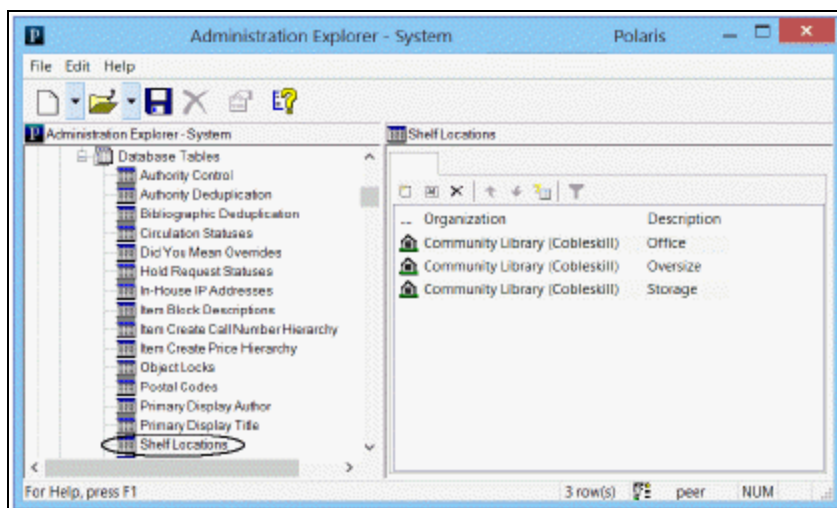
These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify shelf locations table: Allow.**

To define shelf location options for an organization's item records:

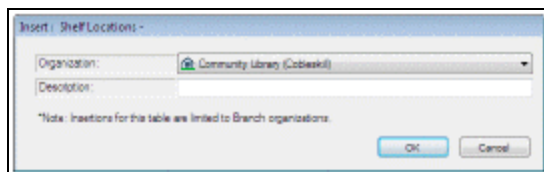
1. In the Administration Explorer tree view, open the **Database Tables** folder for the organization, and select **Shelf Locations**. The Shelf Locations table appears in the details view.

**Note:**

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.



2. Click  to display the **Shelf Locations** dialog box.




3. Select the branch that needs the shelf location in the Organization list.

**Note:**

If the Shelf Locations policy table is opened at the branch level, only that branch name is displayed in the Organization list.


4. Type the shelf location in the **Description** box, and click **OK**. The new entry is displayed in the Shelf Locations database table for the selected branch. **Modification pending** appears in the status bar.
5. Repeat steps 2-4 until you have listed all shelf locations for the branch.
6. Select **File | Save**.

**Related Information**

- **Modify a table entry** - Select the entry and click . You can change only the description for an existing shelf location entry. Your changes should be limited to correcting spelling unless the location name has changed; for example, the Children's Reading Room officially becomes the Young Readers' Center.

**Important:**

Changes to a shelf location description are applied to all item records that used the original description of the entry.

- **Delete an entry** - Select the entry and click .

**Important:**

You cannot delete a shelf location description if it is used by any item record in Polaris. Use the Bulk Change tool on the Record Set workform to change the shelf location on item records that use the entry, so you can delete the entry.



## Highlighting Titles with Local Items (PowerPAC)

In Polaris PowerPAC search results, you can choose to highlight titles that have at least one local item. The items considered to be local are based on the connection organization's settings in the Item Availability Display Order policy table (see [Set up the local/system item availability display](#)). This setting can help patrons quickly see the titles with locally owned items.

The screenshot displays two search results for the title 'The wailing wind' by Tony Hillerman. The first result, numbered 22, is titled '22. The wailing wind' and is circled with a callout indicating it is a 'Highlighted title (at least one local item)'. This entry includes a book icon, the year 2002, a 'Rate or review' button, and an 'Add to Shelf' button. The second result, numbered 23, is titled '23. The wailing wind [sound recording]' and includes a sound recording icon, the year 2002, a 'Rate or review' button, and an 'Add to Shelf' button. Both results have a 'Full Display' button and a 'Place Request' button on the right side.

### Note:

If the connection organization is the system, or if only one local library or branch is defined as a connection organization, no titles are highlighted

Use the PowerPAC profile **Highlight local items in matching title view** to control whether these titles are highlighted. The profile is available at the system, library, and branch levels. To highlight local items, set the profile to **Yes**. The default setting is **No** (do not highlight).

## Map It (Google Maps) in PAC

Using the JavaScript interface provided by Google Maps™, Polaris PowerPAC and Mobile PAC offer a Map It feature that provides a visual guide to the location of items linked to titles in the patron's search results list. The Map It feature offers all the zoom, pan, satellite and map imagery available on Google's hosted mapping site.

### Note:

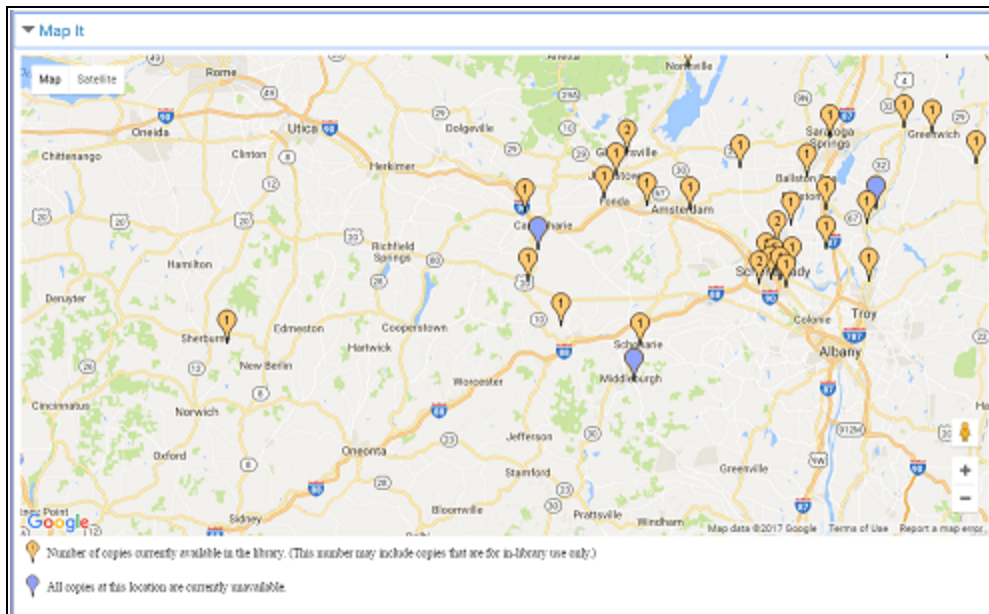
If the PAC browser session is run directly on the PAC server, the following domain must be open for Google Maps to work properly:  
Port 80: maps.google.com

When the patron clicks or taps **Map It** in the title product page (full display), a map displays bubble markers for branch locations that have linked items.

### Note:

For a description of the Map It display in Mobile PAC, see [Title Link: Map It](#).

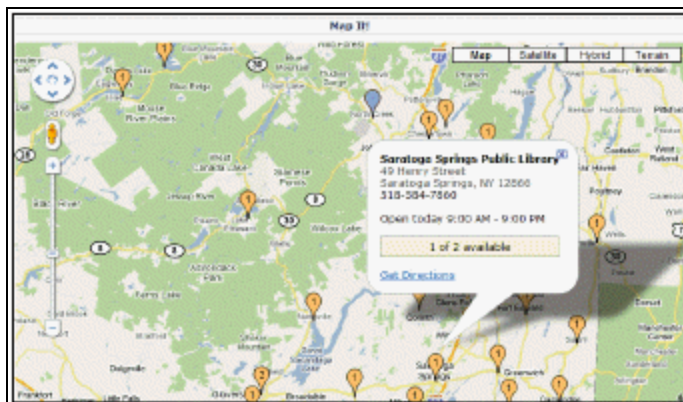




On a desktop computer, the patron can place the cursor over a marker bubble to see the branch name.

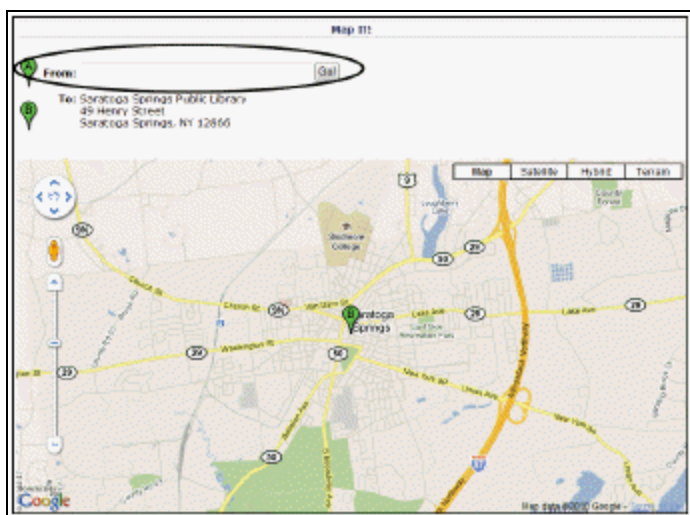


Click or tap the branch marker to see the branch's address and hours.



When you click or tap **Get Directions** in the hours window, you can get directions to the branch from any address. You enter the address and click or tap **Go!** (If the patron is

logged in, the primary address from the patron record is already filled in for convenience, but it can be changed.)



**Note:**

No separate fees are required to enable Map It in Polaris PowerPAC, either by Google or Innovative Interfaces. However, to comply with Google's terms of free use, the mapping feature must be accessible on the public Internet to any user; no private Intranet use is allowed without paying Google for the service. Also, public users of the service must not be charged any fee to use it. For details, see <http://code.google.com/apis/maps/terms.html>

For general information about Map It, see:

- [PowerPAC Map It Option Display](#)
- [Marker Display](#)
- [Hours Display](#)

For instructions on setting up Map It, see:

- [Set up Map It for PowerPAC and/or Mobile PAC](#)

### PowerPAC Map It Option Display

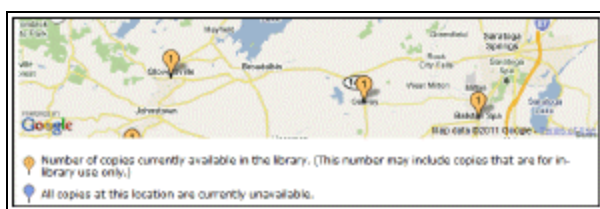
The Map It drawer is displayed for any title in a results set whose # **system items** count in the PAC brief display is greater than 0. For more information about # **system items**, see [Configuring the PowerPAC Title Display](#). The Map It button does not appear for any

title whose **# system items** is 0, even when Google Maps is enabled for the connection organization.

The PAC profile **Suppress availability and requests** also controls whether the Map It drawer appears. If the bibliographic record meets the criteria for suppression as specified in this profile, the Map It option does not appear. For more information about these settings, see [Suppressing Request and Availability Options](#).

## Marker Display

The map displays markers for every branch that has at least one item for that title (that is, **# local items** is greater than 0). Default markers for branches that have items that are currently in are orange and display the number of copies in, while blue markers indicate branches that have no copies currently in. “In” is defined using the same rules that govern the **# local items in** count in the PAC brief display (see [Configuring the PowerPAC Title Display](#)). Non-circulating items are included in the availability counts, so an orange marker does not necessarily mean that an item can circulate outside the library. A text key explains the meaning of the markers.



You can edit the explanatory text and the label on the Map It “drawer” itself with Polaris Language Editor (WebAdmin). Polaris provides a set of stock marker images in **/Themes/Shared/Map/Pins/**, so you can specify different marker shapes and colors.

## Hours Display

When the patron clicks a map marker, details about the availability counts at that branch as well as address, phone, and hours open that day are listed. The details window uses the settings for the Polaris PowerPAC Hours page. For details, see [Set Polaris PowerPAC features on the menu bar](#).

## Set up Map It for PowerPAC and/or Mobile PAC

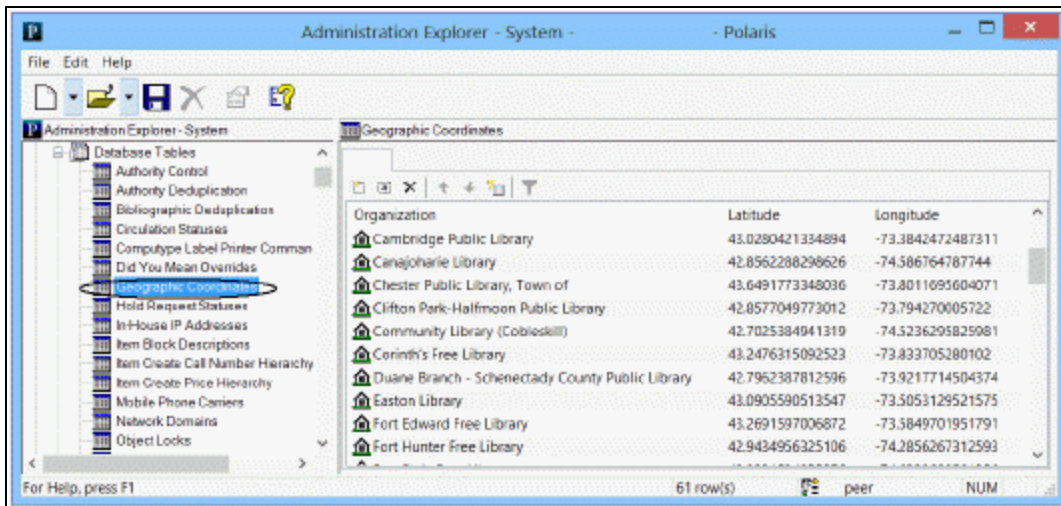
Map It is a feature that uses Google Maps provides a visual guide to the location of items linked to titles in the patron’s search results list. To set up Map It for Polaris


## PowerPAC and/or Mobile PAC:

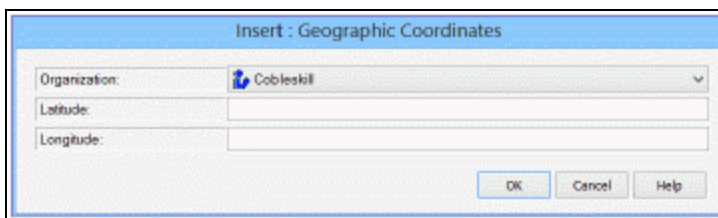
1. Find and copy or record the geographic coordinates for each branch that should appear on the map.
2. Enter the geographic coordinates in Polaris Administration by following these steps:
  - a. In the Administration Explorer, select the system-level database table **Geographic Coordinates**. The table is displayed in the details view of the Explorer.

**Note:**

You need the System Administration permission **Modify geographic coordinates table: Allow** to edit this table.



- b. To add an organization to the table, click . The Insert dialog box opens.



- c. Select the organization from the **Organization** list, which displays all the system organizations that have not yet been added to the table.

- d. Enter or copy the organization's latitude and longitude (obtained in step 1) in the appropriate text boxes. You can enter up to 20 characters in each box. Valid characters include one minus sign (to indicate a negative number, must be the first character), one period (to indicate a decimal point) and numerals 0-9. The allowed range is -90 to 90 latitude, and -180 to 180 longitude.
  - e. Click **OK**.
3. Set up Google Maps for an organization by following these steps:
    - a. Double-click the PAC profile **Google Maps** for the organization. The profile is available at the system, library, and branch level. The Google Maps dialog box opens.

The screenshot shows a dialog box titled "Google Maps [Community Library (br)]". It contains the following fields and controls:

- Two checked checkboxes: "Enable in PowerPAC" and "Enable in Mobile PAC".
- An "API key:" text box.
- A section titled "Location of Community Library (br)" containing:
  - "Latitude:" with the value "42.7025384941319".
  - "Longitude:" with the value "-74.5236295825981".
- A section titled "Geographic center of map position" containing:
  - "Latitude:" with the value "43.2217".
  - "Longitude:" with the value "-74.1748".
- A "Zoom level of initial display:" spinner box set to "10".
- Three buttons at the bottom: "OK", "Cancel", and "Help".

- b. Select **Enable** in **PowerPAC** to display the Map It button in Polaris PowerPAC when this organization is the connection organization.
- c. Select **Enable** in **Mobile PAC** to display the Map It link in Mobile PAC when this organization is the connection organization.
- d. If you are implementing Map It for the first time after June 2016, enter your Google Maps API key in the box. For more information about obtaining the API key, go to <https://developers.google.com/maps/faq#keysystem>. If you implemented Map It before June 2016 and are simply changing your settings, the API key is not necessary.

- e. For **Geographic center of map position**, enter the latitude and longitude that should be used to position the initial display of the map. For valid format, see step 2. If you have entered geographic coordinates for the system organization (see step 2), these are already entered as the default values. If no system coordinates have been entered, the default coordinates are those of the current organization. If these have not been entered in the Geographic Coordinates table, the **Latitude** and **Longitude** fields are blank.

**Note:**

Users can shift the map away from the initial center as they navigate it.

**Tip:**

Change the zoom level on the Polaris Latitude and Longitude tool to determine the zoom level you want for the initial map display. See step 1.

- f. Set a value for **Zoom level of initial display**. This setting determines the zoom level of the initial map display. The default level is 10; valid values are 1-21. Higher numbers produce a view that is zoomed in closer.

**Note:**

Users can change the initial zoom level as they navigate the map.

- g. Click **OK**.

---

## Google Preview for PowerPAC Search Results


Google Preview is a book viewer for every book that has a preview in Google Book Search. You can offer Google Preview for titles in the brief search results list, on the product page (full display) for a title, or in both locations. The Google Preview button is displayed only for titles with an ISBN match that have Google previews.

**Note:**

On rare occasions, a match is found but Google Preview fails to load when the user clicks the Google Preview button. Polaris PowerPAC displays the following message in this situation: **Google Preview is not available for this title at this time.**

The illustration shows the Google Preview button on the title product page.





2005

User rating  
1 review

[Add to Shelf](#)

[More Options](#)

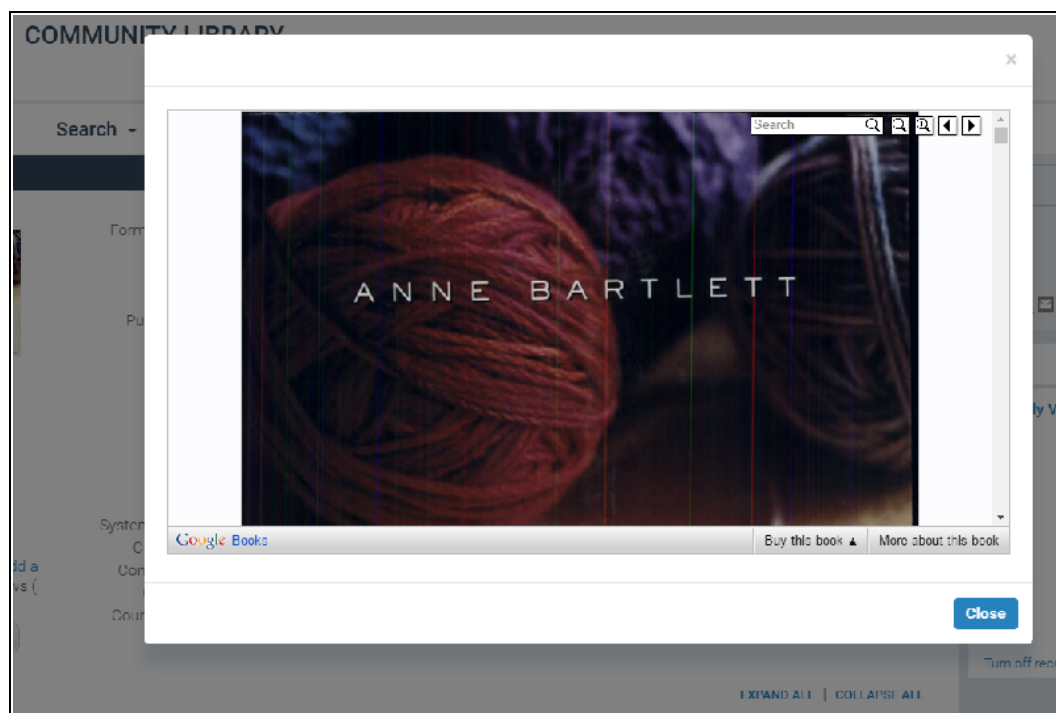
[see reviews/add a review](#) 9 reviews (★★★)



Format (Primary): Book  
Format (All): Book  
Author: [Bartlett, Anne.](#)  
Title: [Knitting / Anne Bartlett.](#)  
Publisher, Date: Boston : Houghton Mifflin, 2005.  
Description: 272 p. ; 19 cm.  
Subjects: [Widows -- Fiction.](#)  
[Knitting -- Fiction.](#)  
[Women teachers -- Fiction.](#)  
[Loss \(Psychology\) -- Fiction.](#)  
[Female friendship -- Fiction.](#)  
[Knitters \(Persons\) -- Fiction.](#)  
LCCN: 2004060922  
ISBN: 0618499261  
System Availability: 8  
Current Holds: 0  
Control Number: 554902  
Call Number: Fict Bar  
Course Reserves: 0

[EXPAND ALL](#) | [COLLAPSE ALL](#)

When you click the Google Preview button, the preview is displayed in a lightbox window (desktop computer or tablet) or full screen on a new browser tab (phone). The Preview controls are available to page through the preview.



Use the PowerPAC profiles **Google Preview: Enable on search results pages** and **Google Preview: Enable on full display** to enable this feature in the brief search results and the product page for a title respectively. The profiles are available on the system, library, or branch level and are set to **Yes** by default.

**Important:**

You do not need any kind of Google account ID to enable this feature, but Google's terms of service document states that you cannot alter the Google Preview button image. For details, go to <https://developers.google.com/books/branding>

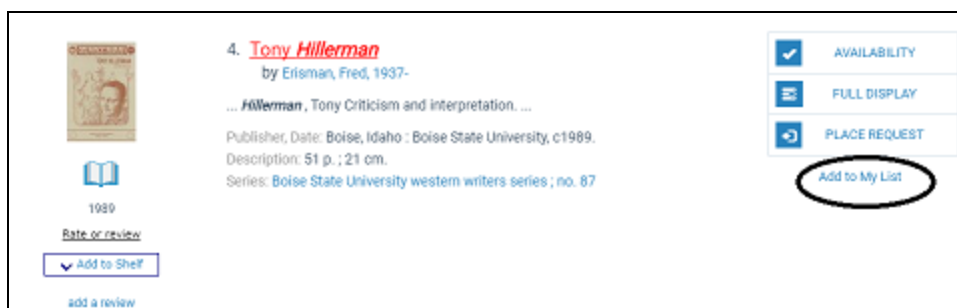
**Note:**

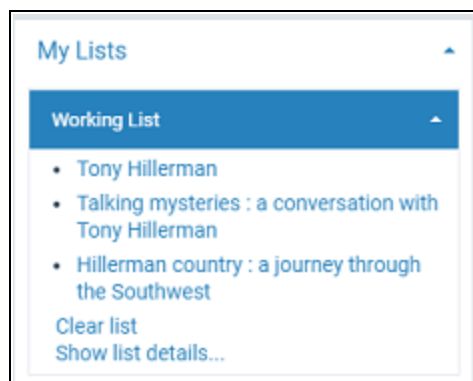
If the PAC browser session is run directly on the PAC server, the following domain must be open for Google Preview to work properly:  
Port 80: [www.google.com](http://www.google.com)

## Setting Up PAC Title Lists

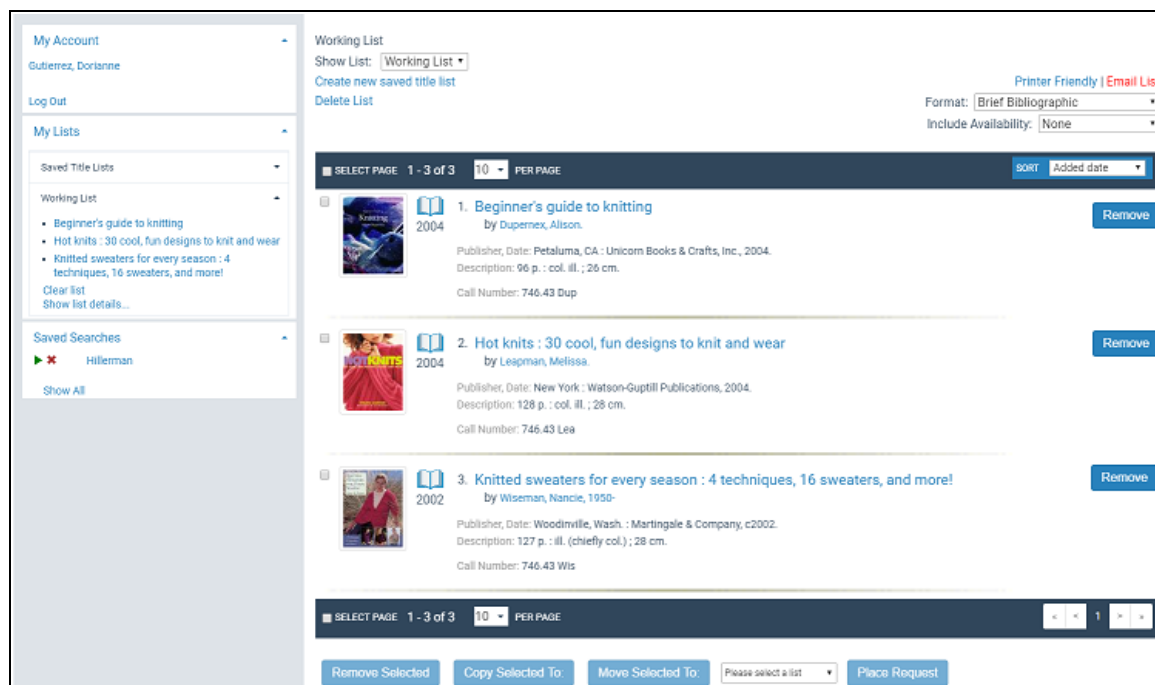
PAC users can place titles selected from their search results in a formatted title list that can be printed, saved, or sent by email. List formats include Brief Bibliographic, Full Bibliographic, Chicago Manual of Style, and APA.

As the user selects titles from search results, they are placed in a working list that is displayed in the dashboard.

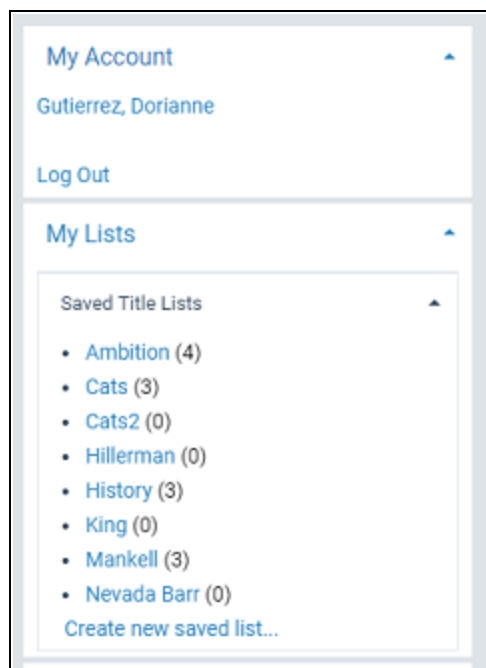




In Polaris PowerPAC, the working list remains in the dashboard for the duration of the session. (For details about title list features in Mobile PAC, see [Title Lists in Mobile PAC](#)). Working title lists are limited to 100 titles. When the user tries to add more, the system displays a message advising the user to save the list. The example shows a portion of a working list when the user has clicked or tapped **Show list details**.



Registered library patrons can create and save multiple title lists in association with their patron accounts. Whenever patrons log in, they can see and work with their saved lists. The example shows a portion of the dashboard for a logged-in patron with saved title lists.





For more information:


- [Selecting Multiple Titles in a List](#)
- [Paging Title Lists](#)
- [Sorting Title Lists](#)
- [Printing and Emailing Title Lists](#)
- [Availability Information in Title Lists](#)
- [Setting Up Title List Functions](#)





### Selecting Multiple Titles in a List

In working and saved lists, the user can check multiple titles and move or copy them from a working list to a saved list or among saved lists, and print, email, or save to disk any list pages, as well as email the entire list. The user can also check single or multiple titles to place hold requests on the selected title or titles. If you choose to enable this feature (see [Bulk Hold Requests from Polaris PowerPAC Title Lists](#)).


A **Select Page** checkbox is available at the top and bottom of the title list page in Polaris PowerPAC. When you select this checkbox, all titles on the current page are checked. A **Remove from list** button is also available for individual titles on working and saved title lists when displayed in Brief Bibliographic or Full Bibliographic format. You can click or tap **Remove from list** to remove a single title without first selecting the checkbox.


Ambition  
 Show List: **Ambition**   
[Create new saved title list](#)  
[Delete List](#) [Printer Friendly](#) | [Email List](#)  
 Format: **Brief Bibliographic** 

**SELECT PAGE** - 4 of 4 **10** PER PAGE **SORT** Added date 

- 
**1. Presidential ambition : how the American presidents gained power, kept power, and got things done**  
 by Shenkman, Richard.  
 You requested this on: 5/12/2017  
 Publisher, Date: New York : HarperCollinsPublishers, 1999.  
 Edition: 1st edition.  
 Description: 361 p. ; 24 cm.  
**Remove**
- 
**2. The arc of ambition : defining the leadership journey**  
 by Champy, James, 1942-  
 You requested this on: 5/12/2017  
 Publisher, Date: Reading, Mass. : Perseus Books, c2000.  
 Description: x, 272 p. ; 24 cm.  
**Remove**
- 
**3. Civilizations : culture, ambition, and the transformation of nature**  
 by Fernández-Armesto, Felipe.  
 You requested this on: 5/12/2017  
 Publisher, Date: New York : Free Press, c2001.  
 Description: xii, 545 p. ; 25 cm.  
**Remove**
- 
**4. Evil, Inc.**  
 by Kaplan, Glenn, 1950-  
 You requested this on: 5/12/2017  
 Publisher, Date: New York : Forge Books, 2007.  
 Edition: 1st hardcover ed.  
 Description: 348 p. ; 25 cm.  
**Remove**

The user clicks or taps the appropriate button at the bottom of the page to take action on the selected titles.

☒  **3. Civilizations : culture, ambition, and the transformation of nature**  
 by Fernández-Armesto, Felipe.  
 You requested this on: 5/12/2017  
 Publisher, Date: New York : Free Press, c2001.  
 Description: xii, 545 p. ; 25 cm.  
**Remove**

☒  **4. Evil, Inc.**  
 by Kaplan, Glenn, 1950-  
 You requested this on: 5/12/2017  
 Publisher, Date: New York : Forge Books, 2007.  
 Edition: 1st hardcover ed.  
 Description: 348 p. ; 25 cm.  
**Remove**

**SELECT PAGE** 1 - 4 of 4 **10** PER PAGE « < 1 > »

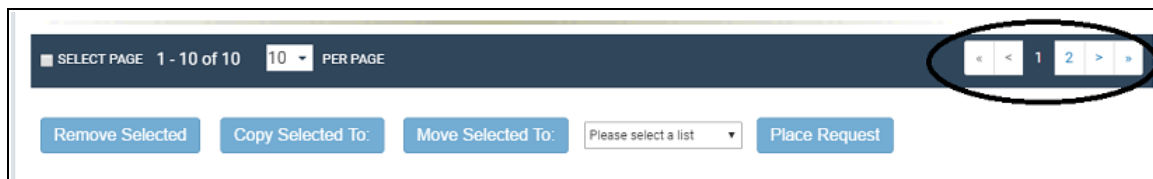
**Remove Selected** **Copy Selected To:** **Move Selected To:** Please select a list **Place Request**

## Paging Title Lists

PowerPAC title lists offer paging. The user can choose to display 10 (the default), 20, 30, 50, or 100 titles per page from a drop-down control at the top or bottom of the list.



Paging controls are available at the bottom of multi-page lists.



## Sorting Title Lists

The user can sort the brief and full views of working and saved title lists by date added to list (the default), author, publication date, or title. When you select a new sort order, the entire list is sorted even if it extends to multiple pages; the page refreshes and you return to the first page of the list. The selected sort order is retained in the output file when you select print, email list, or save to disk. When a logged-in patron selects a sort order in a saved title list, the sort order is retained the next time the patron logs in, and any titles added to the saved list are correctly sorted for that list.

**Note:**

If you select the Chicago Manual of Style or APA format, the list is sorted according to the rules of those style guides, and that order is retained in the output file for print, email, or save to disk. If you switch back to the brief or full view, the sorting order is the one most recently selected for those views.

**Printing and Emailing Title Lists**

When you click or tap **Printer Friendly** or **Email List** on a working or saved title list, titles from the current list page are displayed in the printer-friendly view. You can click or tap **Print Page**, **Save Page to Disk**, or **Email Page to** to take action on the current page, or select **Email all to**, which emails the entire list to the designated address. Very long emails may exceed system or email service limits that prevent successful delivery. In this case, the system displays an alert message. The user can click or tap **OK** to close the alert and send the email, or **Cancel** to return to the title list. The user can then select a different display format, or select fewer titles.

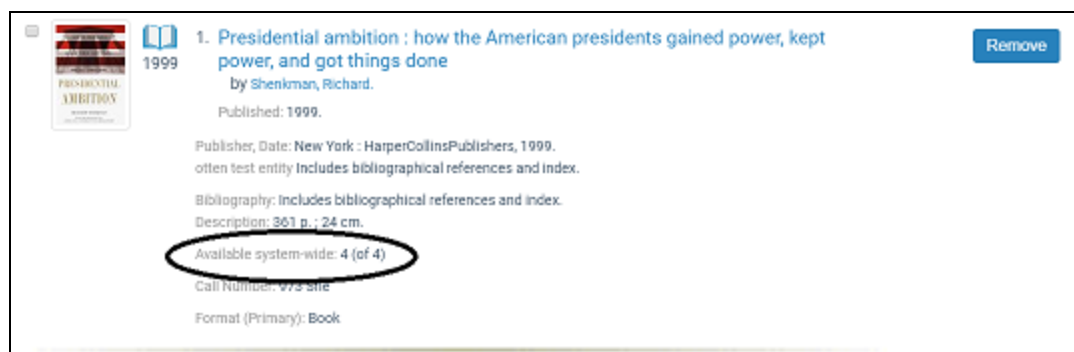
**Availability Information in Title Lists**

Availability counts and availability details on working and saved title lists are automatically updated to reflect real-time data whenever the user displays the list.

**Note:**

As in previous versions of Polaris, availability details are available only on the working list.

When availability counts on the brief and full displays for the connected branch are set to display (PowerPAC profile - **Title Display: Configure**), the counts on working and saved title lists reflect real-time data when the patron displays the title list page. The counts are refreshed when the patron takes any action that refreshes the page; for example, leaving the page and returning; paging through a multi-page list; changing the sort order; changing the list format.




When availability details on the brief and full displays for the connected branch are set to display (PowerPAC profile - **Title Display: Configure**), the working list displays the details when the patron selects **Local Availability** or **System Availability** from the **Include Availability** drop-down list. Availability details are also updated in real time when the patron takes any action that refreshes the page.



Working List  
 Show List: Working List ▾  
[Create new saved title list](#)  
[Delete List](#)

[Printer Friendly](#) | [Email List](#)  
 Format: Brief Bibliographic ▾  
 Include Availability: System Availability ▾

SELECT PAGE 1 - 4 of 4 10 PER PAGE SORT Added date ▾



1. **Landscapes**  
 by Delafosse, Claude.  
 Published: 1996, c1993.  
 Publisher, Date: New York : Scholastic, 1996, c1993.  
 often test entity "Cartwheel books."  
 Description: unpag. : col. ill. ; 19 cm.  
 Series: [First discovery art book](#).  
 Available system-wide: 3 (of 4)  
 Call Number: J 750 Del  
 Format (Primary): Book

Remove

Call Number	Shelf Location	Status	Type
Amsterdam Free Library (1 of 1 available)			
Children's Nonfiction			
J 750.11 Del		In	Book
Red Rock Library (0 of 1 available)			
Children's Nonfiction			

## Setting Up Title List Functions

To set up title list functions in Polaris PowerPAC and Mobile PAC:

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Title List: Enable**, and select **Yes**.
3. To allow patrons to send title lists by email, double-click **Title List: Email**, and select **Yes**.
4. To allow patrons to print title lists, double-click **Title List: Print**, and select **Yes**.

### Note:

This setting does not apply to Mobile PAC. See [Title Lists in Mobile PAC](#) for details about Mobile PAC title list features.

5. To allow patrons to save title lists to a computer drive or disk, double-click **Title List: Save**, and select **Yes**.

**Note:**

This setting does not apply to Mobile PAC. See [Title Lists in Mobile PAC](#) for details about Mobile PAC title list features.

6. Select **File | Save**.

**Related Information**

- **Bulk holds** - You can allow patrons to place hold requests on one or more titles directly from a working or saved title list in PowerPAC. See [Bulk Hold Requests from Polaris PowerPAC Title Lists](#)
- **Requested indicator** - You can display a "requested" indicator in Polaris PowerPAC and Mobile PAC title lists for titles on which the patron has an active, pending, held, shipped, or located hold request. The indicator is a message: **You requested this on [date]**; the system supplies the date. See [Configuring the PowerPAC Title Display](#) and [Configuring the Mobile PAC Title Display](#).

---

## Bulk Hold Requests from Polaris PowerPAC Title Lists

When you enable the bulk holds feature, patrons can select multiple titles from their working or saved title lists in Polaris PowerPAC and place hold requests on all the selected titles at once.

**Note:**

For more information about PAC title lists, see [Setting Up PAC Title Lists](#). A **Requested date** indicator is also available to let patrons know which titles they have already requested in a title list or set of search results. See [Configuring the PowerPAC Title Display](#).

The bulk holds feature is not available in these cases:

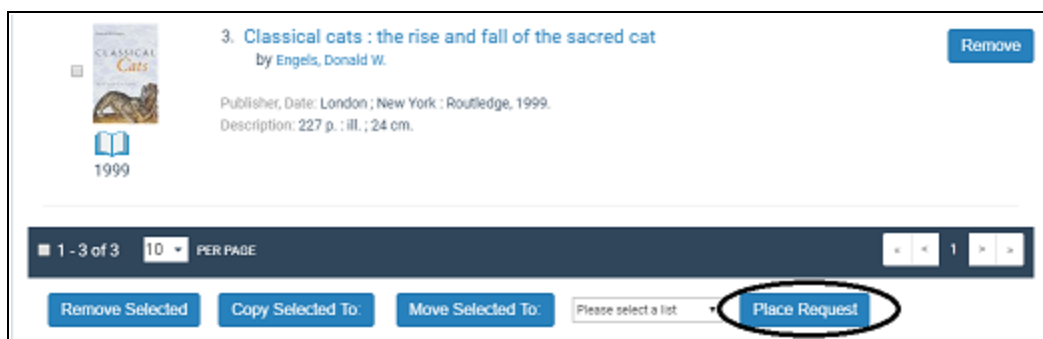
- Titles from remote databases listed in the title list cannot be requested through bulk holds.
- Integrated eContent titles cannot be requested through bulk holds.
- The bulk hold feature does not apply to Borrow by Mail requests.
- The bulk hold feature is not available in Mobile PAC.

For details, see:

- [Placing Bulk Hold Requests in PowerPAC](#)
- [Bulk Holds Processing](#)
- [Enabling Bulk Holds](#)

## Placing Bulk Hold Requests in PowerPAC

In Polaris PowerPAC, the logged-in patron checks at least one title in a working or saved title list and clicks or taps **Place Request**.



- The **Place Request** button is disabled if the patron has not selected at least one title in the list. The button is also disabled for secured patrons. (The button is not displayed at all if PAC title-level holds and bulk holds have not been enabled in Polaris administration. See [Enabling Bulk Holds](#).)
- You can edit the **Place Request** button label in Polaris WebAdmin. The string mnemonic is **PACML\_REQUESTS\_1380**. See Polaris WebAdmin online help.
- If the patron has selected more titles than allowed by the PowerPAC profile **Title list: maximum number of titles to request in bulk**, the system displays a message: "You can only place [n] holds at once. Uncheck one or more titles and try again." You can edit the message in Polaris WebAdmin; the string mnemonic is **PACML\_REQUESTS\_MAXREQ**

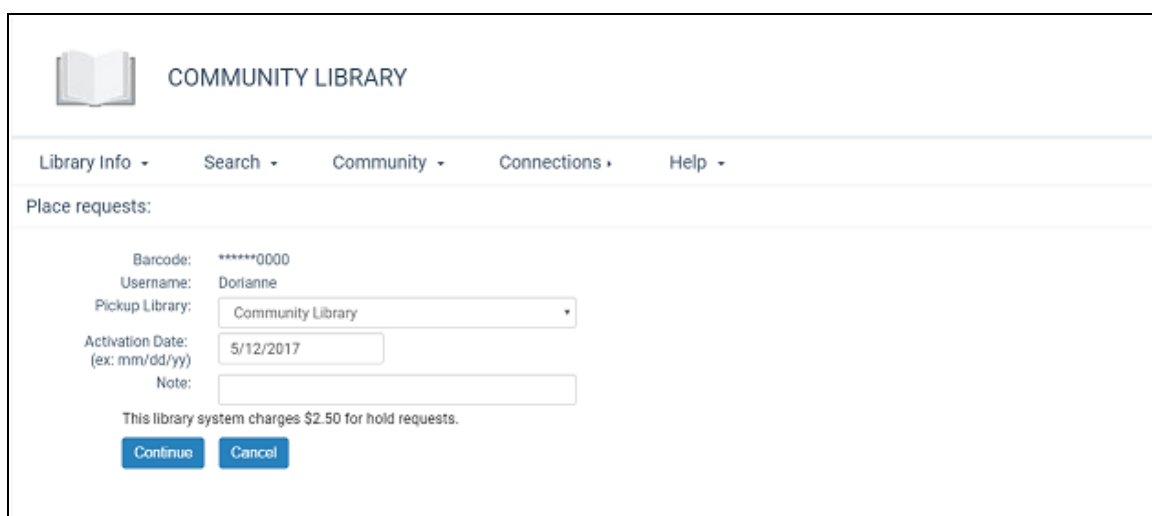
## Place Requests Page

When the patron's selections meet the bulk hold limit and the patron clicks or taps **Place Requests**, the Place Requests page is displayed. The patron can set an activation date; the patron can also select a pickup library and enter a note if these features are enabled for patron-initiated requests. See the *Patron Services Administration Guide* for more information about these settings. This page also displays a policy statement link if the

PAC profile **Patron access: Policy statement hypertext link permitted** is set to **Yes** for the connection branch.

**Note:**

The activation date must be entered in the format displayed on the Place Requests page. It cannot be in the past, and cannot be more than two years from the current date. If there is a problem with the date entry, the system displays a message. The patron clicks or taps **OK** and re-enters the date.



**COMMUNITY LIBRARY**

Library Info ▾ Search ▾ Community ▾ Connections ▾ Help ▾

Place requests:

Barcode: \*\*\*\*\*0000  
 Username: Dorianne  
 Pickup Library: Community Library ▾  
 Activation Date: 5/12/2017 (ex: mm/dd/yy)  
 Note:   
 This library system charges \$2.50 for hold requests.  
 Continue Cancel

You can edit the **Place requests:** title on this page in Polaris WebAdmin. The string mnemonic is **PACML\_REQUESTS\_1380**.

The Place Requests page displays a warning message if the system-level **Request** parameter **Holds Options** (Charges tab) is set to charge for holds. See the *Patron Services Administration Guide*. The patron can click or tap **OK** to proceed or **Cancel** to exit. If your library system has set this option, you can edit the message in the **Request** parameter **Holds Options**, Charges tab.

The patron can click or tap **Cancel** on the Place Requests page to return to the title list, where any titles previously checked remain checked, or (if not blocked) the patron can select **Continue** to proceed with the bulk hold requests. A progress indicator and the message "Checking status and limits..." are displayed. The WebAdmin string mnemonic for the message is **PACML\_REQUESTS\_1395**.

If placing the hold requests would meet or exceed the maximum total number allowed for the patron as set in the Patron/Material Type policy table, and **If the patron is**

**blocked: Block in PAC** is checked in the **Holds Options** parameter (Staff client & PAC tab), the system displays a page with a message: "Your requests cannot be placed because you have reached your limit of [n] requests. You may want to cancel some requests from your patron account, then try again." The WebAdmin string mnemonic for the message is **ILL\_BULK\_BLOCKEDMAXNUMREQS**. The patron can click or tap **Back** to return to the title list.

### Confirm Bulk Requests Page

When the patron clicks or taps **Continue** on the Place Requests page, the Confirm Bulk Requests page appears.

Confirm bulk requests:

Click Update to make changes. Click Confirm to submit your requests:

<input checked="" type="checkbox"/>	Type	Title
<input checked="" type="checkbox"/>	Book	Presidential ambition : how the American presidents gained power, kept power, and got things done by Shenkman, Richard.
<input checked="" type="checkbox"/>	Book	The arc of ambition : defining the leadership journey by Champy, James, 1942-
<input checked="" type="checkbox"/>	Book	Civilizations : culture, ambition, and the transformation of nature by Fernández-Armesto, Felipe.
<input checked="" type="checkbox"/>	Book	Evil, Inc. by Kaplan, Glenn, 1950-

Update Confirm Cancel

The list displays the selected titles, and for each title, the material types of the items that can potentially satisfy the request. If the PAC profile **Patron access: Display hold queue information** is set to **Yes** for the patron's registered branch, the list includes an Active Requests column that displays how many other requests exist for the title. (This profile also affects the PAC patron account Requests page. See [Controlling Patron Account Login and Access](#).) Titles with checkboxes can be unchecked if the patron does not want them.

Titles without checkboxes in the display cannot be requested at all, either because they are from remote databases, they are duplicates, they represent integrated eContent, the bibliographic record has been deleted but not yet removed by overnight processing, or due to item-related or patron-related conditions. A message specific to the error displays under the title of each request.

The Confirm Bulk Requests page displays appropriate messages if a request on a selected title or titles cannot be placed due to the following item-related conditions:

**Note:**

When no items can fill a request on a title and the checkbox is suppressed, the material type and active request information is also suppressed.

- The title has no linked items and **If no items are attached: Block in PAC** checked in the **Holds Options** parameter (Staff client & PAC tab). The system displays this message under the title: "No items are available to fill your request. Contact the library for assistance." The WebAdmin string mnemonic for this message is **ILL\_TEXT\_NOITEMSAVAILABLE**.
- The title is linked to at least one item that is IN and **Prevent on status: In** is checked in the **Holds Options** parameter (Requests tab). The system displays this message under the title: "The request cannot be placed because a copy of this title is currently available at the library. You can obtain the item at the library." The WebAdmin string mnemonic for this message is **ILL\_TEXT\_ERR\_COPYAVAILABLE**.
- All items associated with the title are restricted from being held. The system displays this message under the title: "Requests are not permitted for this title. Contact the library for assistance." The WebAdmin string mnemonic for this message is **ILL\_TEXT\_REQNOTPERMITTED**.
- There are no item records linked to the title, or all the linked item records fit one or more of these conditions:
  - **Display in PAC** is set to No (not checked) in the item record, or
  - The item circulation status is set to be suppressed from the PAC display in the PAC profile **Suppress item display** for the connection branch, or
  - The connection organization is the System, and the linked item is assigned to a branch that is set for suppression from PAC in the system-level PAC profile **Suppress branches**,

AND

- Suppress **All records** is selected for the Type of Material (TOM) in the PAC profile **Suppress availability and requests** for the connection branch, or
- Suppress **Records with an 856** is selected for the Type of Material (TOM) in the PAC profile **Suppress availability and requests** for the connection branch. Note that this selection applies only to records with the 856\$u tag.

The system displays this message under the title: "Requests are not permitted for this title. Contact the library for assistance." The WebAdmin string mnemonic for this message is **ILL\_TEXT\_REQNOTPERMITTED**.

- All items associated with the title have an excluded status. The system displays this message under the title: "This item is not available to fill your request. Contact the library for assistance." The WebAdmin string mnemonic for this message is **ILL\_TEXT\_ITEMNOTAVAILABLE**.
- The title is from a remote database, or the bibliographic record has been deleted but the cached copy has not yet removed by overnight processing. The system displays this message under the title: "The library does not own this title. You cannot request this title from your title list. You can search for the title in a remote database and request it individually, or contact the library for assistance." The WebAdmin string mnemonic for this message is **PACML\_REQUESTS\_REMOTEDB**.
- All items linked to the title are restricted, and at least one item's eContent checkbox is checked. The system displays this message under the title: "You cannot request this eContent title through bulk requests. Please contact your library for more information." The WebAdmin string mnemonic for this message is **ILL\_BULK\_NO\_ECONTENT**.
- The title is a journal and **Allow requests on serials in PAC and Staff client** is set in the **Holds options** parameter, Requests tab (Manage item requests). The system displays this message under the title: "Serial issues must be searched for and requested individually." The WebAdmin string mnemonic for this message is **ILL\_BULK\_SERIALSNOREQ**.
- The title is a multi-part set and **Allow requests on multi-part sets is set in PAC and Staff client** is set in the **Holds options** parameter, Requests tab (Manage item requests). The system displays this message under the title: "Multi-volume sets must be searched for and requested individually." The WebAdmin string mnemonic for this message is **ILL\_BULK\_MULTIPARTNOREQ**.
- The title appears in the list more than once, so the system does not allow the duplicate request. The system displays this message under the title: "This title is a duplicate of another title in this list." The WebAdmin string mnemonic for this message is **PACML\_REQUESTS\_1396**.

The Confirm Bulk Requests page also displays appropriate messages if a request on a selected title or titles cannot be placed due to patron-related conditions as specified in Polaris Administration. the *Patron Services Administration Guide* for more information about these settings. The following situations are examples:

- Placing a hold request on a title would result in a duplicate request. The system displays this message: "The request cannot be placed because a duplicate request has been found. Please check your account." The WebAdmin string mnemonic for the message is **ILL\_TEXT\_DUPLICATEREQ**.
- If placing these hold requests would exceed the maximum total number allowed for the patron as set in the Patron/Material Type policy table, and **If the patron is blocked: Block in PAC** is checked in the Holds Options parameter (Staff client & PAC tab) for the pickup branch, the system displays a message: "You currently have [n] total requests. You are allowed a maximum of [n]. Uncheck [n] and click Update." The WebAdmin string mnemonic for the message is **ILL\_BULK\_ILL\_BULK\_EXCEEDMAXREQUESTS**.
- Placing the hold requests would exceed the maximum number of holds for a particular material type for the patron as set in the Patron/Material Type policy table and **If the patron is blocked: Block in PAC** is checked in the Holds Options parameter (Staff client & PAC tab). The system displays this message: "You will exceed the maximum number of requests allowed for one or more material types:". The WebAdmin string mnemonic for the message is **ILL\_BULK\_EXCEEDMATERIALLIMITS**. Separate messages then detail the material types affected; for example:
  - "Book: maximum = 20; uncheck 4 of this type" (**ILL\_BULK\_EXCEEDMATERIALLIMITS\_UNCHECK**)
  - "Audiobook: maximum = 5; limit reached, uncheck all of this type" (**ILL\_BULK\_EXCEEDMATERIALLIMITS\_UNCHECKALL**)

**Note:**

For both maximum holds and maximum holds for material type, if the system-level Patron Services parameter **Consortium circulation - Patron blocks** is set to **Transacting branch**, the pickup branch's setting for **Block in PAC** determines whether the patron can place the hold requests. If **Consortium circulation - Patron blocks** is set to **Patron branch**, the patron's registration branch setting for **Block in PAC** determines whether the patron can place the hold requests.

The Confirm Bulk Requests page may also display warning messages for certain titles with checkboxes:

- An item attached to a selected title might fill the request, and the Patron Services parameter **Check-out: Charge options** for the item's assigned branch is checked



for the logged-in patron's code. The default message text is "If your request is filled you may be charged to Borrow this item according to the policy of the owning library." You can edit the message in WebAdmin. The string mnemonic is **ILL\_BULK\_CHARGECKOREQ**.

- The title has no linked items, but **If no items are attached: Block in PAC** is *not* checked in the Holds Options parameter (Staff client & PAC tab). The default message text is "This title has no items. Your request may not be filled." You can edit the message in WebAdmin. The string mnemonic is **ILL\_TEXT\_NOITEMSAVAILABLE\_BULK**.

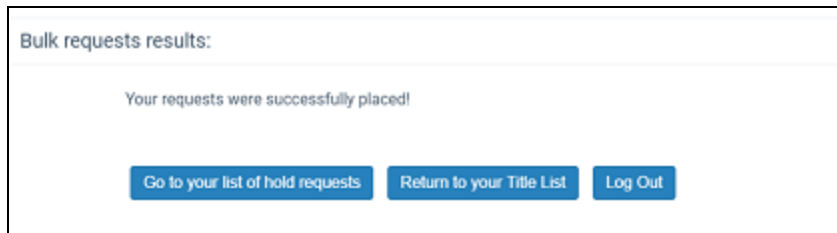
The patron can uncheck selected titles if necessary, and click or tap **Update**. If no titles are selected and the patron clicks or taps **Update**, a message is displayed: "You must select one or more titles, or click Cancel to return to your title list" (WebAdmin string mnemonic **PACML\_REQUESTS\_1394**). When the list is satisfactory, and after the patron has clicked or tapped **Update** to save any changes, the patron clicks or taps **Confirm**. If the patron clicks or taps **Cancel**, the display returns to the page of the title list that was displayed when the patron navigated away from the page; any titles previously checked remain checked.

You can edit the text of page elements on the Confirm Bulk Requests page in Polaris WebAdmin. The string mnemonics are as follows:

LABEL	MNEMONIC
Confirm bulk requests	PACML_REQUESTS_1381
Click Update to make changes. Click Confirm to submit your hold requests.	PACML_REQUESTS_1382
Type	PACML_REQUESTS_1383
Active Requests	PACML_REQUESTS_1384
Title	PACML_REQUESTS_1385
Update	PACML_REQUESTS_1386
Confirm	PACML_REQUESTS_1387
Cancel	PACML_REQUEST_XSL_1652

## Bulk Requests Results Page

When the patron clicks or taps **Confirm**, a "processing" spinner icon is briefly displayed with the message **Creating requests . . .**. You can edit the message in Polaris WebAdmin (string mnemonic **PACML\_REQUESTS\_1393**). When processing is complete, the system displays the Bulk Requests Results page with the message: **Your requests were successfully placed!**



The patron can select **Return to your Title List**, **Go to your list of hold requests**, or **Log Out**. The labels can be edited in Polaris WebAdmin. The string mnemonics for the page are as follows:

LABEL	MNEMONIC
Bulk requests results: [page title]	PACML_REQUESTS_1389
Return to your Title List	PACML_REQUESTS_1392
Go to your list of hold requests	PACML_REQUEST_GOTO_ACCOUNT
Log Out	PACML_BASICINFO_1195

## Bulk Holds Processing

Bulk Holds processing uses two database tables: BulkHolds and BulkHoldsBibs. These tables are populated with data that is needed during bulk holds processing but are not required once the bulk holds process has completed. The Hold Request Cleanup Nightly SQL job includes a Bulk Holds Cleanup step. This step deletes all entries in the BulkHolds and BulkHoldsBibs tables that are over 120 minutes old. See the *Polaris Administration Guide*.

## Enabling Bulk Holds

To enable bulk hold requests:

1. Confirm that the setting **Enable title-level hold requests from PowerPAC and Mobile PAC** is checked for the connection branch (**Request** parameter **Holds options**, Requests tab). See the *Patron Services Administration Guide*.
2. Set the PowerPAC profile **Title list: Enable bulk holds** to **Yes**.

The profile is available at the system, library, and branch levels; the system uses the PAC connection branch setting. When this profile is set to **Yes** and title-level hold requests from PAC are enabled, the **Place Request** button is displayed in working and saved title lists.

3. (Optional) Set the number of titles that can be processed in one bulk hold request.

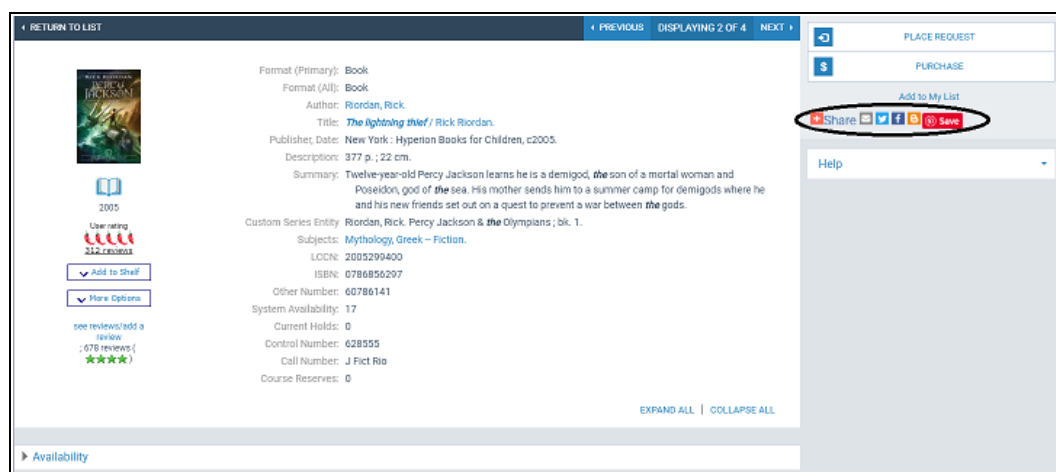
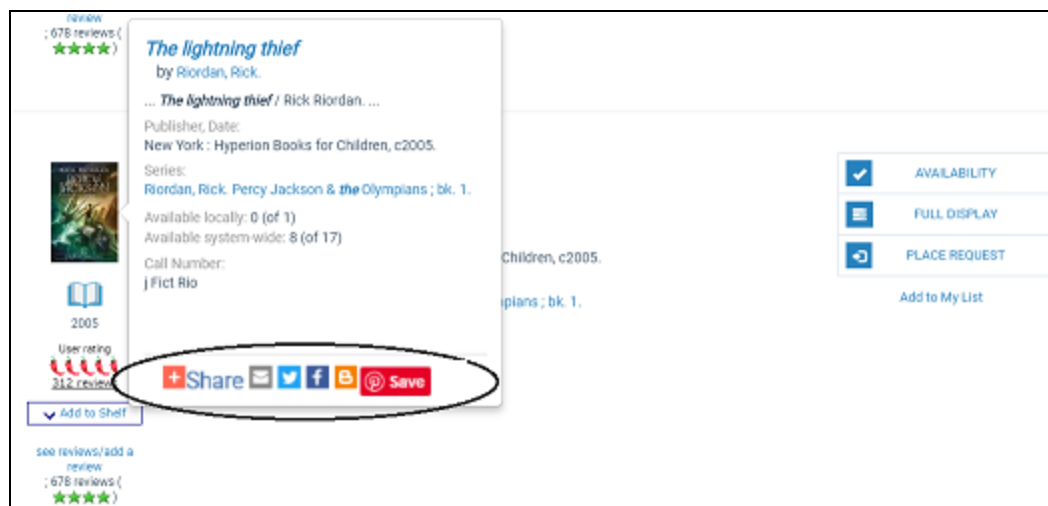
The default number is 10. Change the setting with the PowerPAC profile **Title list: maximum number of titles to request in bulk**. The range is 1-100. The profile is available at the system, library, and branch levels; the system uses the PAC connection branch setting.

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## Social Bookmarking for Search Results (AddThis™)

Social bookmarking is a method for Internet users to share, organize, search, and manage bookmarks of web resources. Polaris PowerPAC users can share bookmarks to titles in their search results on over 200 sites that support social bookmarking, such as Facebook™, Twitter™, and Digg™. Polaris uses AddThis™ to provide this feature, a widely available no-fee service that maintains the social bookmarking URLs and provides usage analytical statistics to libraries that register for an AddThis account.

If you enable bookmark sharing, icons representing popular bookmarking sites are displayed on the summary view when the user hovers the cursor over or taps a book jacket image in brief Polaris PowerPAC search results, and on the product page for a title.



The initial icons represent the most popular bookmarking and sharing sites according to AddThis. The user can select an icon, or click or tap **Share** to open a dialog box with a list of additional sites and a search feature that covers more than 200 social bookmarking providers.

**Tip:**

Users can “pin” PowerPAC search results pages in Pinterest only with the Pin It icon. The Pin It browser bookmark offered by Pinterest currently supports only static URLs and does not accommodate the dynamic URLs generated through a PowerPAC search.

The user selects a site link to open a new window for the selected site, log on to the site account, and add a bookmark for the selected title. When someone selects the link on the social network site, a search for the title is launched in the library catalog.

To set up bookmarking and sharing for PowerPAC search results:

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Bookmarking & Sharing: Enable**, and select **Yes**. This setting displays the **Share** link for titles in Polaris PowerPAC search results.
3. If you want usage statistics from AddThis, follow these steps:
  - a. Set up an AddThis account at the AddThis Web site: go to **<http://www.addthis.com/>** and click the **Join Now** link at the top of the page.
  - b. Create a user name and password for the AddThis account, and supply an appropriate e-mail address.

**Note:**

The AddThis terms of service and privacy policies are available on the AddThis Web site.

- c. In Polaris Administration, type your AddThis profile ID in the PowerPAC profile **Bookmarking & Sharing: Profile ID for AddThis analytics**.

**Note:**

The current implementation of Pinterest by AddThis does not function properly across all web sites. The Pinterest feature is therefore a custom integration in PowerPAC and is not included in AddThis analytics.

Select **File > Save**.

**Related Information**

Polaris Social, in partnership with ChiliFresh Connections, offers integrated social features in Polaris PowerPAC. See [Polaris Social with ChiliFresh Connections](#).

## 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 the *Public Access Administration Guide*, "Updating Page Caches."

## EContent in PAC Search Results

When patrons search for titles in the PAC, the integrated eContent titles display along with titles for physical material. For example, if a patron searches for a specific title, the results may include a physical DVD and a downloadable ebook or audio ebook from one or more integrated eContent vendors, such as OverDrive and cloudLibrary (formerly 3M Cloud Library).

The screenshot displays two search results. The first result, titled '4. The book thief', is a DVD. It features a cover image of a woman, a 'DVD' icon, and a '2014' year label. The description includes publisher information (Fox 2000 Pictures), a description of the content (1 videodisc, 131 minutes), and an MPAA rating of PG-13. To the right of the title are buttons for 'AVAILABILITY', 'FULL DISPLAY', and 'PLACE REQUEST', along with an 'Add to My List' link. The second result, titled '5. The Book Thief[electronic resource]', is an electronic resource. It features a cover image of the book, a '2007' year label, and a '2007' year label. The description includes publisher information (Random House Children's Books) and availability information (5 of 5 available, 0 current holds). To the right of the title are buttons for 'FULL DISPLAY' and 'CHECK OUT', along with an 'Add to My List' link. Both results have an 'Add to Shelf' button at the bottom left.

The Availability display depends on how your eContent vendor accounts are set up and whether these accounts are shared by the entire library system, shared by specific organizations, or limited to a single branch. You may also suppress detailed item availability display for integrated eContent. See [EContent Availability and Holds Counts](#).

## EContent Availability and Holds Counts in PAC

The availability and holds counts for integrated eContent titles are populated in real time on the PAC search results lists. These counts are not affected by settings in the **Title**

**Display: Configure** profile.

Your library may opt to suppress detailed item availability display for integrated eContent titles in PowerPAC and Mobile PAC by setting the PAC profile **Suppress availability display for integrated econtent titles** to **Yes**. When the PAC connection branch has set this profile to **Yes**, the **Availability** button and drawer do not display in PowerPAC, and the **Find It** link does not display in Mobile PAC. The availability counts still display. See [Suppress eContent Availability Display in PAC](#).

For OverDrive Advantage accounts, Advantage copies for the branch display when a patron is connected to the PAC at that branch, regardless of whether the patron is logged in or not. The library uses an option in the Vendor Record to specify whether patrons see Advantage titles when connected to the PAC at the system level. See "Create an Overdrive integrated vendor account" in the *Integrated EContent Administration Guide*.

The patron may see a **Please log in for availability** message that indicates Polaris cannot determine the library organization. This might happen if the patron has not yet logged in and is connected to the PAC at an organization that does not honor resource groups. If the patron does not have access to the eContent title, a **Restricted** button is displayed with the hover text **Sorry this title is currently not available at your registered branch**. You can modify this text string in WebAdmin using the mnemonic: **PACML\_EBRESTRICTED\_TIP**. See "Manage patron access to eContent using resource groups" in the *Integrated EContent Administration Guide*.

**Suppress eContent Availability Display in PAC**

Your library can prevent detailed availability information from displaying for integrated eContent titles in PAC (PowerPAC and Mobile PAC). When the PAC profile **Item availability: Suppress for integrated econtent titles** is set to **Yes** for the branch the patron is connected to, eContent titles display as follows:

- PowerPAC - Neither the **Availability** button nor the **Availability** drawer are displayed for integrated eContent. The availability counts are not affected by this setting and will continue to display.
- Mobile PAC - The **Find It** links do not display for integrated eContent.

**Note:**

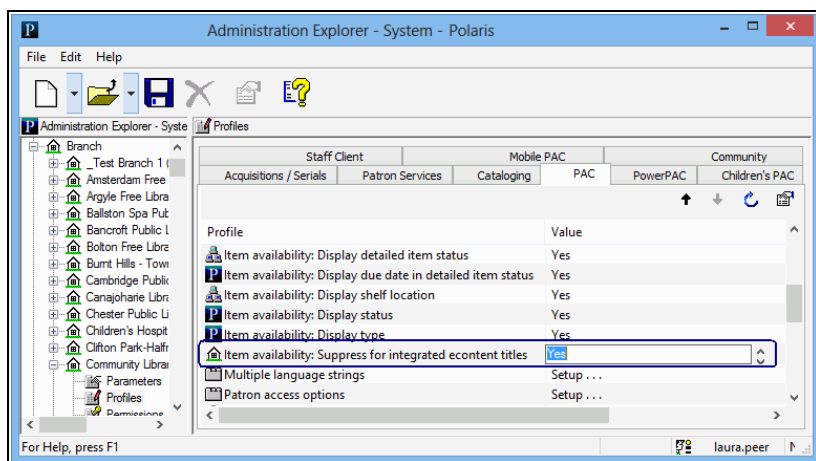
The **Suppress availability and requests** profile applies to bibliographic records without any linked items, and generally does not apply to integrated eContent titles, which have linked items. The **Item availability:**



**Suppress for integrated econtent titles** option suppresses availability display for integrated eContent titles that have eContent items.

To suppress the availability display for integrated eContent titles:

1. Select **Administration > Explorer**, and select the organization (System, Library, or Branch).
2. Select **Profiles**, and select the **PAC** tab.
3. Double-click **Item availability: Suppress for integrated econtent titles**, and select **Yes**.



4. Select **File > Save** to save your changes.

For examples of integrated eContent title display when availability is suppressed for the selected branch connection in the PAC, see:

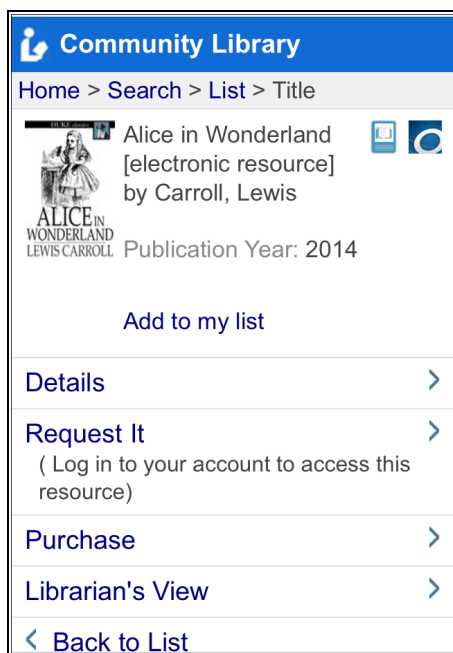
- [EContent Availability Suppressed in PowerPAC](#)
- [EContent Availability Suppressed in Mobile PAC](#)

## EContent Availability Suppressed in PowerPAC

When the PAC profile, **Item availability: Suppress for integrated econtent titles**, is set to **Yes** for the branch the patron is connected to, the results list does not display the **Availability** button, and the full display for a title does not include the **Availability** drawer for integrated eContent titles in PowerPAC. The availability counts display regardless of the profile setting.

## EContent Availability Suppressed in Mobile PAC

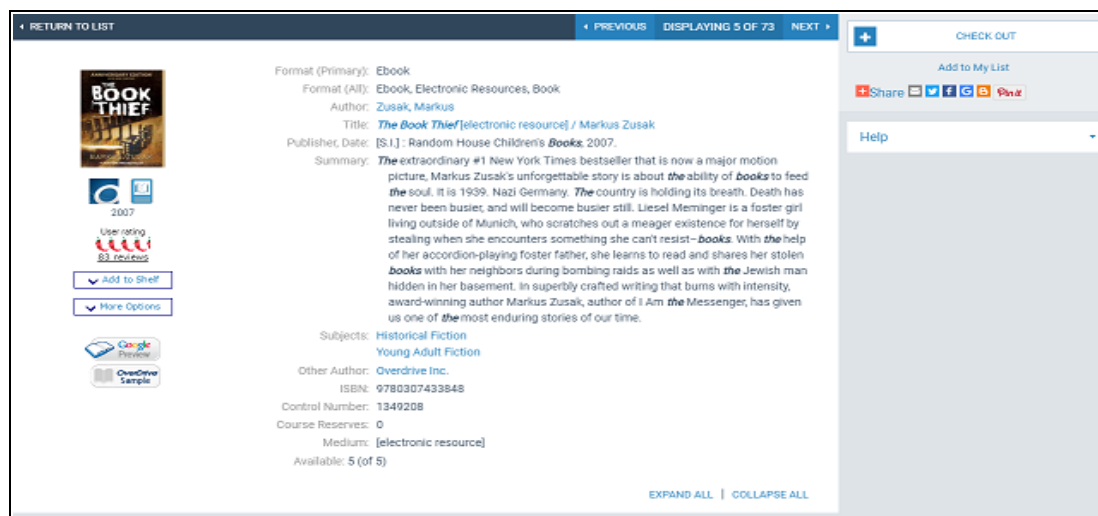
When the PAC profile **Item availability: Suppress for integrated econtent titles** is set to **Yes** for the branch the patron is connected to, the **Find It** link does not display on the Mobile PAC Title view.



---

## EContent Product Page Display in the PAC

The product page (full display) for eContent is similar to the full display for other bibliographic materials.



The bibliographic information display for eContent is configured with the PowerPAC and Mobile PAC **Title Display Configure** profiles. See [Configuring the PowerPAC Title Display](#).

The **Purchase** button and the **Map It** feature are suppressed for eContent. If your library does not want to display detailed availability information for integrated eContent titles, you can set the PAC profile **Item availability: Suppress for integrated econtent titles** to **Yes**. See [Suppress eContent Availability Display in PAC](#).

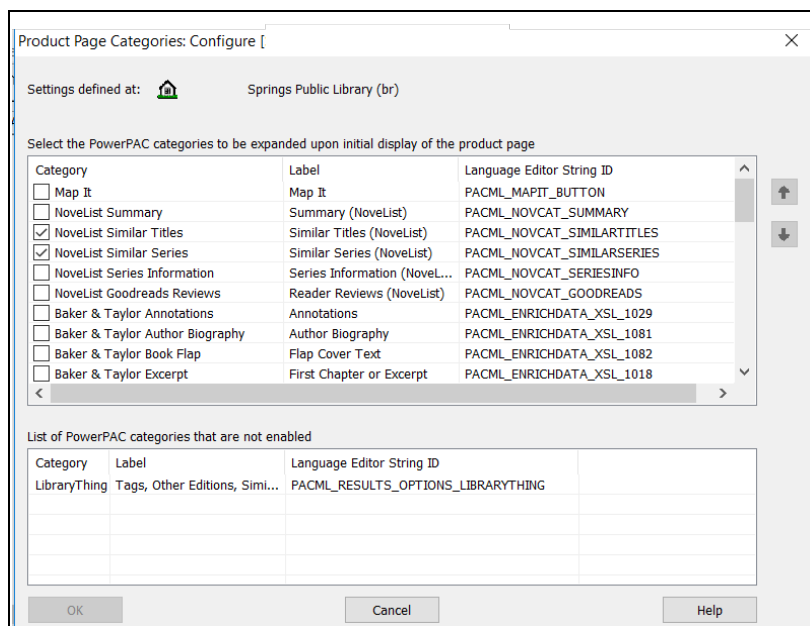
See also:

- [Configure the Enriched Content Drawers for PowerPAC](#)
- [Enable enriched content for Axis 360 or OverDrive](#)

### Configure the Enriched Content Drawers for PowerPAC

To configure the enriched content display for the eContent vendor in Polaris PowerPAC:

1. In the Administration Explorer tree view, open the Profiles folder for the organization, and click the PowerPAC tab in the details view.
2. Double-click **Product page categories: Configure** to open the dialog box.



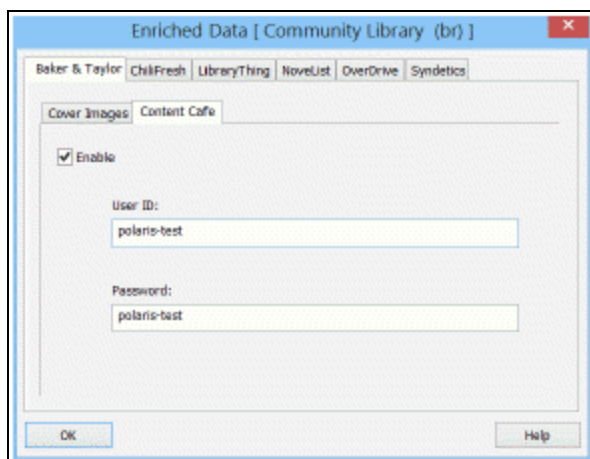
3. Select the checkboxes next to the categories you want to be expanded upon initial display of the product page in PowerPAC.
4. Click **OK**.

### Enable enriched content for Axis 360 or OverDrive

You can enable enriched content provided by Baker & Taylor for Axis 360, or for OverDrive. When your library has implemented the eContent vendor, and enabled the enriched content, patrons will see a “drawer” in the PAC, labeled **Descriptions and more, from [vendor name]**.

To enable enriched content for an eContent vendor:

1. In the Administration Explorer tree view, open the Profiles folder for the organization, and click the PAC tab in the details view.
2. Double-click **Enriched data**.
3. Select **Baker & Taylor** and select the Content Cafe subtab for Axis 360, or select the **OverDrive** tab, and select the **Enable** checkbox. This selection enables the enriched content.



## Patron-Initiated EContent Circulation from PAC

In Polaris, the loaning branch for circulation transactions is typically the patron's registered branch. However, your library may want to set the loaning branch as the eContent item's assigned branch for patron-initiated circulations, where the patron places holds or checks out eContent from the PAC. This option can be set at the System level only.

EContent titles in PAC search results display the **Check Out** button if the item is available to the patron or a **Place Request** button if no local item is available. (If the vendor account is not active, a **Temporarily Unavailable** button is displayed.)

If the patron does not have access to the eContent title, a **Restricted** button is displayed with the hover text **Sorry this title is currently not available at your registered branch.** You can modify this text string in WebAdmin using the mnemonic: **PACML\_EBRESTRICTED\_TIP**. Patrons can also be blocked from checking out eContent based on settings in the Patron Services Administration profile **Patron initiated circulation: Blocking conditions**. See the *Patron Services Administration Guide*.

### Note:

Your library can change the labels on the **Place Hold** and **Check Out** buttons by modifying vendor-specific strings in WebAdmin.

See also:

- [Set the Loaning Branch for eContent Circulations](#)
- [Require Format for Integrated eContent Check Outs in PAC](#)

- [Prevent or allow downloads of OverDrive eContent on in-house workstations](#)
- [EContent in the PAC Patron Account](#)

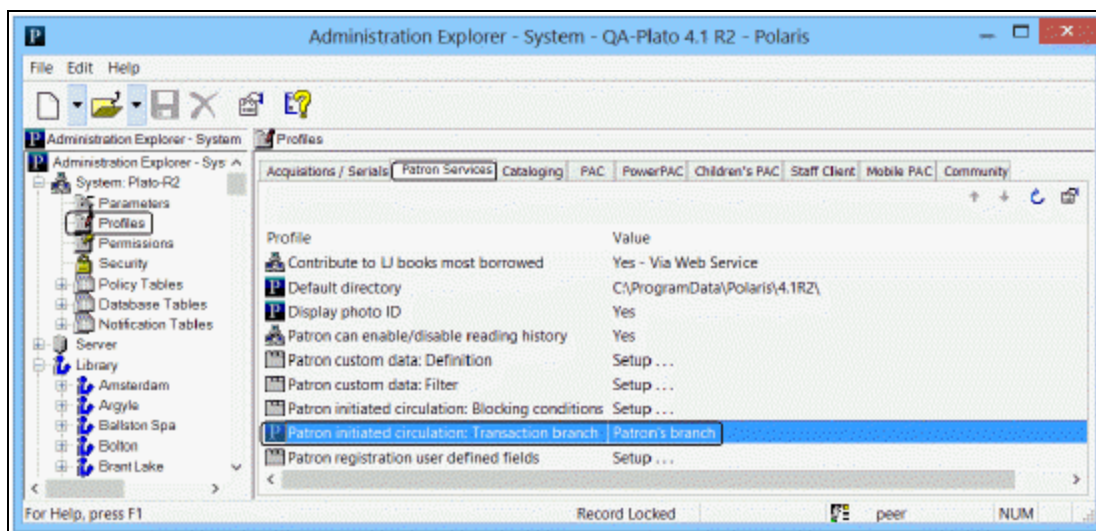
For information regarding patron access to a specific vendor's integrated eContent, see the *Integrated EContent Administration Guide*.

### Set the Loaning Branch for eContent Circulations

In Polaris, the loaning branch for circulation transactions is the patron's registered branch. However, your library might want to set the loaning branch as the item's assigned branch for patron-initiated circulations, where the patron places holds or checks out eContent from the PAC. This profile can be set at the System level only.

To set the loaning branch for eContent circulation:

1. In the Administration Explorer tree view, open the **Profiles** folder at the System level, and select the **Patron Services** tab in the details view.
2. Double-click **Patron initiated circulation: Transaction branch** to open the drop-down list.



3. Select **Patron's branch** or **Item's branch**. This setting applies to eContent circulations from the PAC only; the loaning branch for physical items is still the patron's registered branch.

## Require Format for Integrated eContent Check Outs in PAC

Your library can require patrons to select a format when they check out integrated eContent titles from the PowerPAC or Mobile PAC. When the Patron Services parameter **Check out: Require format selection when checking out integrated econtent** is set to **Yes** for the library organization the patron is connected to, the format list defaults to **Please select**, and the patron must select a format from the list to check out the eContent.

To require patrons to select a format when checking out integrated eContent titles in PAC:

1. Select **Administration | Explorer** and select the organization (system, library, or branch).
2. Select **Parameters** under the organization, and select the **Patron Services** tab.
3. Double-click **Check out: Require format selection when checking out integrated econtent** and select **Yes**.
4. Select **File | Save**.

## Prevent or allow downloads of OverDrive eContent on in-house workstations

Your library can prevent patrons from downloading OverDrive eContent titles to library workstations or opening checked-out eContent in the browser on a library workstation. If the **OverDrive download: Enable on in-house workstations** profile is set to **No** (the default), patrons will not be able to download or open checked-out OverDrive eContent on workstations specified as In-house for the PAC connection library (see the *Polaris Administration Guide*).

To allow or prevent patrons from accessing and downloading OverDrive integrated eContent on in-house library workstations:

1. Select **Administration > Explorer** and select the organization (system, library, or branch).
2. Select **Profiles** under the organization, and select the **PowerPAC** tab.
3. Select the **OverDrive download: Enable on in-house workstations** profile and set it to **Yes** to allow patrons to download or open checked-out OverDrive eContent on library workstations, or set it to **No** (the default) to prevent patrons from downloading or opening checked-out OverDrive eContent on workstations specified as In-house (using the In-House Access Definitions table for the PAC connection lib-

rary).

4. Select **File > Save**.

---

## EContent in the PAC Patron Account

After eContent titles are checked out, they are listed on the Items Out page of the patron account. The list reflects the eContent currently checked out, regardless of whether the patron has actually downloaded content.

### **Note:**

EContent titles cannot be renewed from PAC, the staff client, or Polaris Phone Attendant. Check-in from the staff client is not supported. For more information, see the *Integrated EContent Administration Guide*.

EContent items automatically expire when the item's expiration date and time are reached. When the expiration date of the item is reached, the item becomes available to someone else. Polaris automatically checks in the item and removes it from the patron account. Patrons can also check in cloudLibrary eContent and some OverDrive eContent formats before they expire. Check in does not apply to Axis 360 eContent.

A logged-in patron can view the status of requests for eContent on the Requests page of the patron account. Items available for checkout and download are also included in the count of items ready for pickup in the patron account summary dashboard. (This count may change if the user takes action after accessing the account.)

Requests for eContent titles cannot be suspended or reactivated, but requests with a status of Active can be canceled. The patron can click **Refresh eContent** on the patron account Requests page to see the changes in PAC. All actions taken on the PAC patron account Requests page result in a real-time update to the vendor account and to the information on the Requests page.

See the following topics in the *Integrated EContent Administration Guide*:

- "Patron Access to Axis 360 EContent"
- "Patron Access to OverDrive EContent"
- "Patron Access to cloudLibrary EContent"



## Managing Federated Search Targets

Polaris PowerPAC features integrated federated searching, which enables users to simultaneously search local and remote databases, and retrieve merged search results. Libraries can offer federated searching of Z39.50 databases only, a feature included in Polaris at no additional cost. These search targets are remote databases or Web search engines that can be searched simultaneously with the Polaris database using the Z39.50 search protocol. If your library allows patrons to place interlibrary loan requests from PAC, you will likely provide Z39.50 search targets that patrons can choose using the **Select Databases** feature in Polaris PowerPAC. You can filter Z39.50 search target results to show only those materials that patrons can actually request. See "Filter Remote Z39.50 Target Search Results in PowerPAC" in the *Polaris Administration Guide*.

**Note:**

Vital is Innovative's digital asset management solution for describing, indexing, and making available electronic content, such as photographs, slides, digital video, sound clips, and electronic documents. Polaris PowerPAC users can search for Vital digital resources along with other types of material in the library catalog. You set up Vital for searching as you would other remote databases. See *Searching Vital Digital Resources in PowerPAC - Overview*.

**Tip:**

Your library can also offer remote databases that are searched separately in PowerPAC. See [Configure remote database usage settings](#).

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

**Note:**

For specific information about setting up federated searching with MuseGlobal, see the *Polaris Administration Guide*.

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

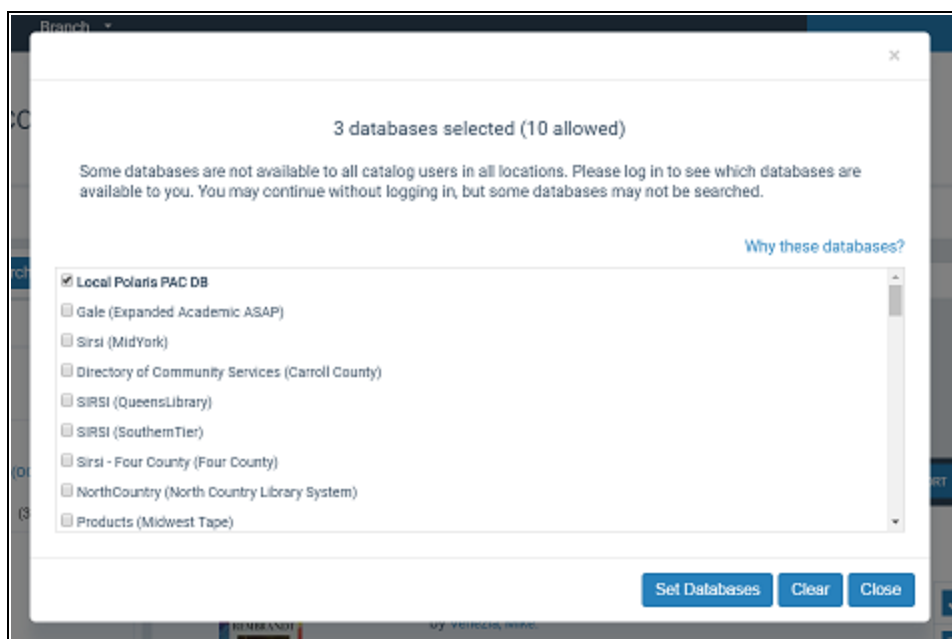
See also:

- [Merged Results in Polaris PowerPAC](#)
- [Organizing Target Databases for PowerPAC Display](#)
- [Maximum Number of Databases Searchable at One Time](#)
- [Remote Database Usage Settings for PowerPAC](#)

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## Merged Results in Polaris PowerPAC

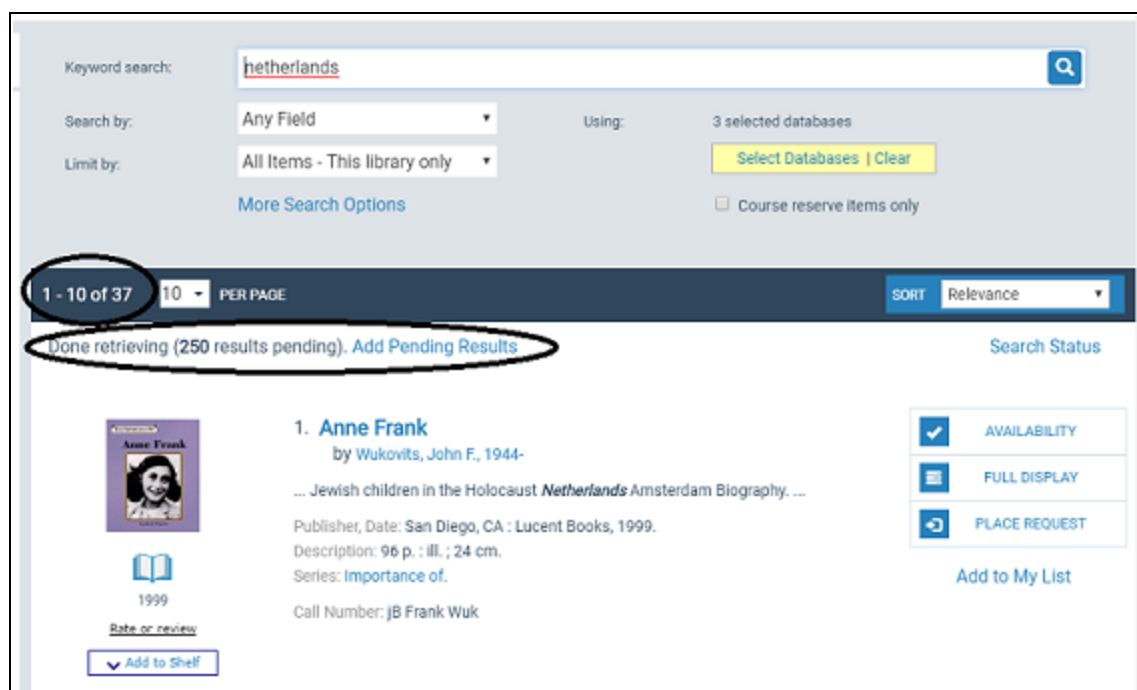
When users search both remote databases and the local catalog, the results are displayed in a merged list. To select the remote databases for searching, the user clicks or taps the **Select Databases** link to open the list of available databases, and selects the checkbox next to the databases.



**Note:**

You can specify a remote database or databases to be included by default in PowerPAC search results. When you have set this option, patrons do not have to deliberately select the databases for searching using the **Select Databases** feature. See [Remote Database Usage Settings for PowerPAC](#).

The user then clicks or taps Set Databases, enters the search term, and clicks or taps the search icon. The search results list first displays results from the local catalog, if selected, and the user can select **Add Pending Results** to add more results to the list. The number displayed at the top of the list changes as the results are added.



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

Database	Status	Pending	Retrieved
Local Polaris PAC DB	Done	0	37
WorldCat Cataloging (OCLC - Cataloging)	Done	250	0
OCLC Authority (OCLC - Cataloging)	Done	0	0

Done retrieving (250 results pending). [Add Pending Results](#)

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

Keyword search:

Search by:  Using: 3 selected databases [Select Databases](#) [Clear](#)

Limit by:  [More Search Options](#) ☐ Course reserve items only

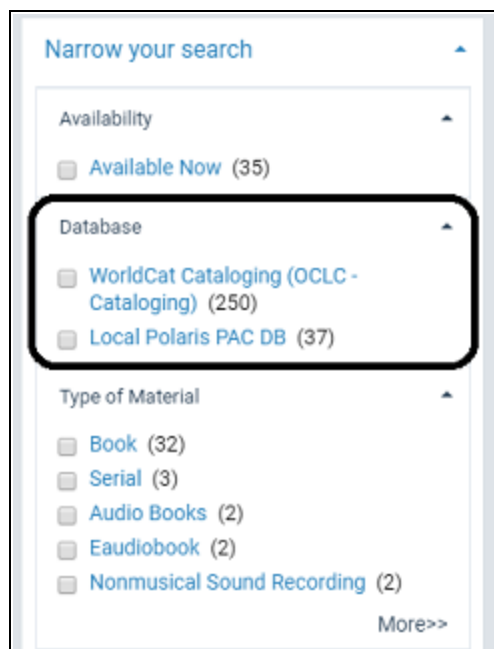
1 - 10 of 287  PER PAGE [SORT](#)


**All retrieved results have been added** [Search Status](#)

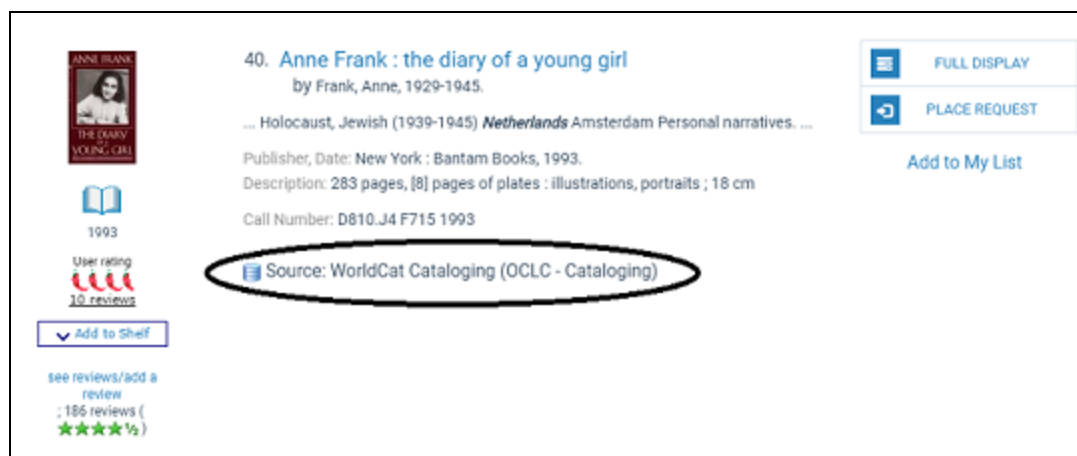
1. **Anne Frank**  
by Wukovits, John F., 1944-  
... Jewish children in the Holocaust **Netherlands** Amsterdam Biography. ...  
Publisher, Date: San Diego, CA : Lucent Books, 1999.  
Description: 96 p. : ill. ; 24 cm.  
Series: *Importance of.*  
Call Number: J8 Frank Wuk

[Add to Shelf](#) [Add to My List](#)

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



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



## Organizing Target Databases for PowerPAC Display

By default, all remote search targets available for the connection organization's PowerPAC searches are displayed as a single list, which may be very long. Using the

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

See also:

- [Select Databases Lightbox in PowerPAC](#)
- [Develop the remote targets display for PAC](#)

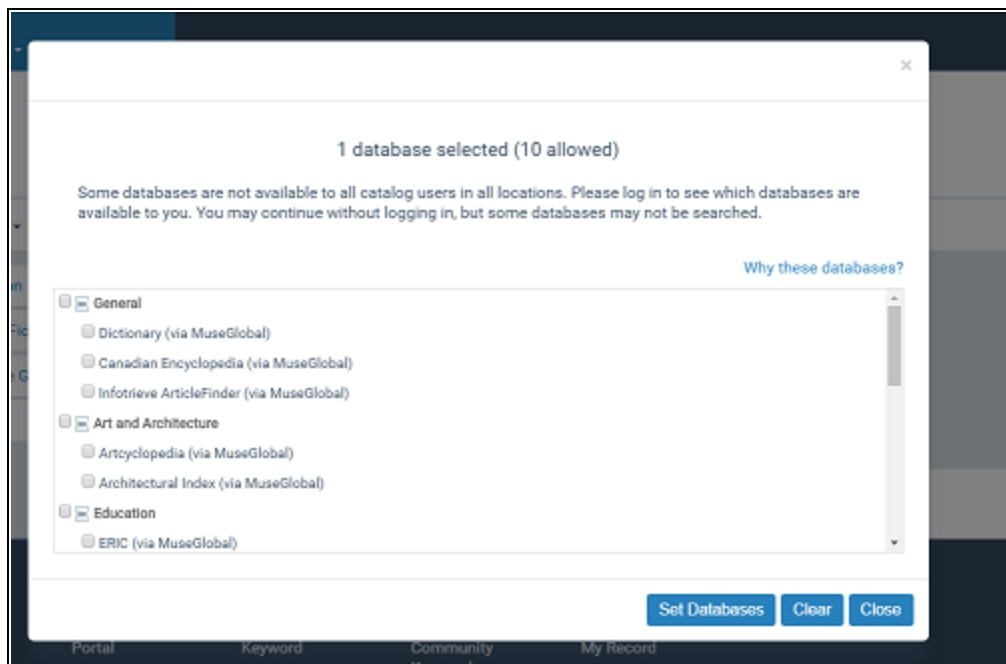
### Select Databases Lightbox in PowerPAC

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

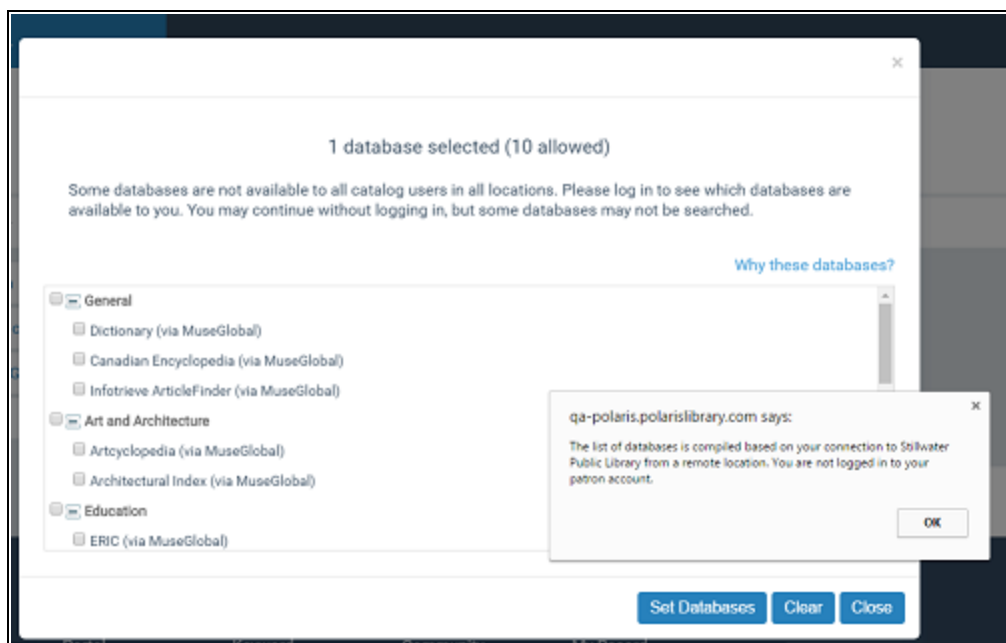
An explanatory message is displayed at the top of the Select Databases lightbox. If the patron is not logged in, the default text is:

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

You can edit the message in Polaris WebAdmin (Language Editor). Choose the PowerPAC product; the language string IDs for this message are **PACML\_SELECTDB\_NOTE\_LOGIN** and **PACML\_SELECTDB\_NOTE\_LOGIN2**. See WebAdmin online help for detailed instructions.



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



You can edit the label and message in Polaris Language Editor (WebAdmin). Choose the PowerPAC product; the language string IDs for the label and message are **PACML\_SELECTDB\_WHYDB** and **PACML\_SELECTDB\_NOTE\_CONNECT**.

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

- The immediately preceding search was a keyword control number search (launched when the user selected a dashboard or content carousel link).
- There was no immediately preceding search in the current session.

**Note:**

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

Selecting **Clear** deselects (unchecks) all databases except the local database, and selects the local database.

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

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

### Develop the remote targets display for PAC

To make remote search targets available for searching in Polaris PowerPAC, and organize them into categories:

**Note:**

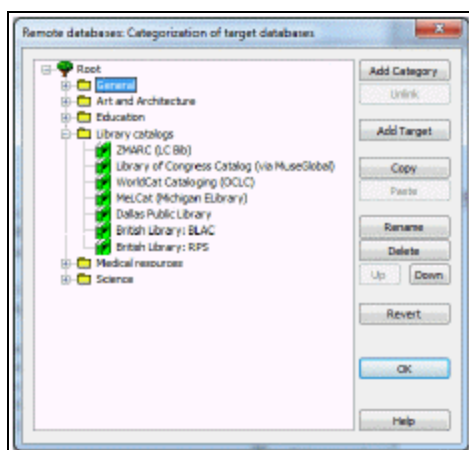
You establish connections to remote resources through Polaris



Administration server records. See the *Polaris Administration Guide*. In Polaris PowerPAC, if no remote search targets have been set up, the **Select Databases** link and the **Using** label and drop-down list are not displayed.

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

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

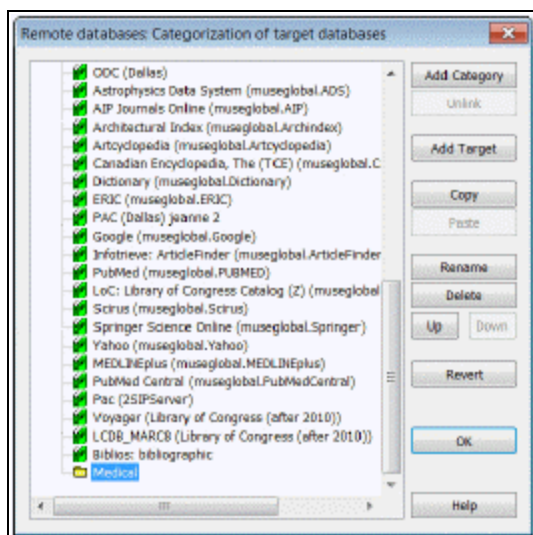


3. Select **Root** to add a new category at the top level, or select an existing category folder to add a subcategory, and click **Add Category**. A new category folder icon appears in the tree view, with the cursor positioned to name the folder.

**Note:**

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

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

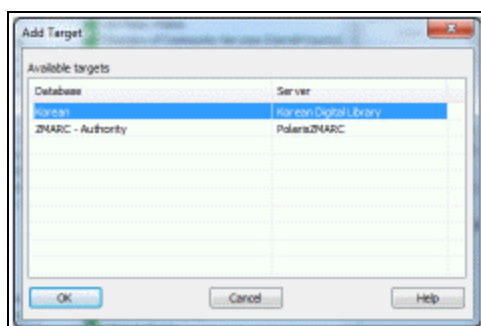


- To make an individual search target available, select the category, and click **Add Target**. (To add a target directly to the Root level, select **Root**.)

**Note:**

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

The Add Target dialog box appears with a list of databases available to the organization, based on its membership in the resource groups with access to the databases. See the *Polaris Administration Guide*.



- Select the target database to add to the category.

**Note:**

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

**Note:**

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

7. Click **OK**. The target database is added to the category.
8. Continue adding categories and targets as needed for the organization.

*Related Information*

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

**Note:**

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

- Delete a target - Select the target in the Remote databases: Categorization of target databases dialog box and click **Delete**. (Deleting a target from a particular category, including Root, does not delete it from other categories.) The local Polaris database cannot be completely removed from the categorization dialog box. If you select the last instance of the local database and click **Delete**, a message

informs you that the local database must appear at least once, either at the root level or within one category. When you click **OK**, the message box closes and the local database remains selected. It is not deleted.

**Important:**

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

- PAC display - See [Select Databases Lightbox in PowerPAC](#).
- Enable ILL requests from PAC - See the *Patron Services Administration Guide*.

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## Maximum Number of Databases Searchable at One Time

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

**Note:**

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

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## Remote Database Usage Settings for PowerPAC

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

See also:

- [Follow-On Search Display in PowerPAC](#)
- [Default Remote Databases for PowerPAC Searches](#)
- [Configure remote database usage settings](#)

### Follow-On Search Display in PowerPAC

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

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

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

#### Note:

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

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

code), those databases are not searched and an error message is displayed in the search status window for the databases that could not be searched.

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

### Default Remote Databases for PowerPAC Searches

You can specify a remote database or databases to be included by default in PowerPAC search results. When you have set this option, patrons do not have to deliberately select the databases for searching using the **Select Databases** feature, but they can deselect them to omit the database results from a search if they choose.

Be sure the database servers are registered in Polaris, and that resource groups have been specified if necessary. See the *Polaris Administration Guide*.

#### Note:

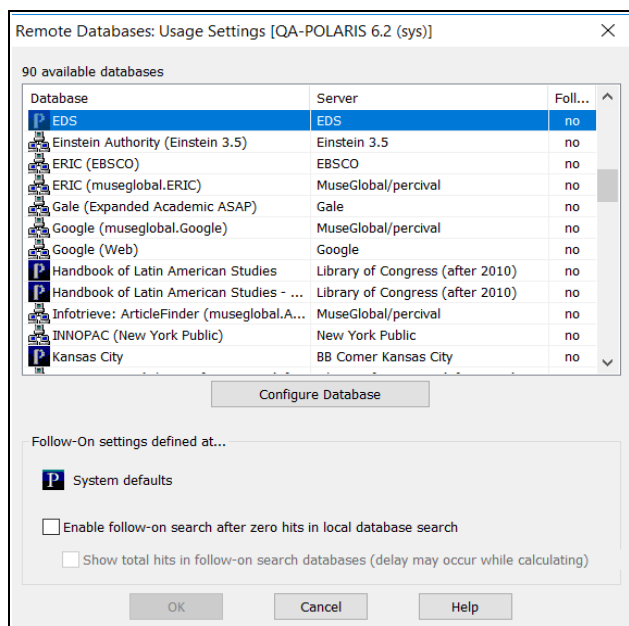
The PowerPAC profile **Remote databases: Maximum number that can be searched at once** sets the maximum number of databases that can be searched at one time. The system honors this limit when including remote databases to be searched by default. For example, if you set the maximum number that can be searched at once to 10, but select 12 to be searched by default, only the first 10 will be selected in PowerPAC.

See [Configure remote database usage settings](#) for set-up instructions.

### Configure remote database usage settings

Usage settings for remote databases can be defined at the system, library, or branch level. To configure usage for each remote database:

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



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

**Note:**

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

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

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

- Select the database you want to configure, and click **Configure Database**. The **Configure <Database Name>** dialog box opens to the Parameters tabbed page.

Configure: Vital (Vital)

Parameters Authentication UI Options

Server: Vital

Display name: Vital

☐ Enable for follow-on searching ☒ Enable ILLs in PAC

☐ Include in quick-select drop down ☐ Include by default

Maximum number of records to return: 250

Maximum search time (seconds): 30

Save Cancel Revert Help

**Note:**

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

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

**Note:**

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

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



**Note:**

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

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

**Important:**

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

8. To include this database in PowerPAC searches by default, select **Include by default**. For more information about this feature, see [Default Remote Databases in PowerPAC Searches](#).

**Note:**

The PowerPAC profile **Remote databases: Maximum number that can be searched at once** sets the maximum number of databases that can be searched at one time. The system honors this limit when including remote databases to be searched by default. For example, if you set the maximum number that can be searched at once to 10, but select 12 to be searched by default, only the first 10 will be selected in PowerPAC.

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

The illustration shows an example from PowerPAC.

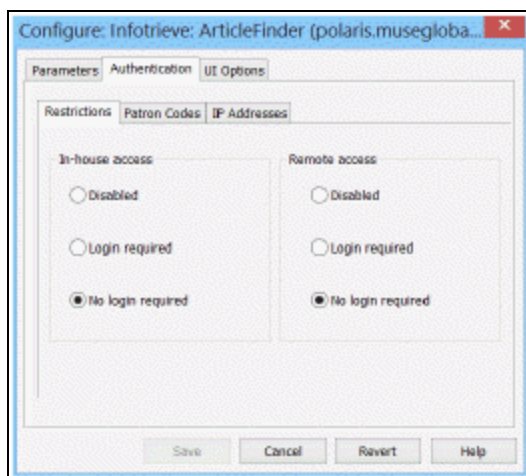
The screenshot shows the PowerPAC search interface. On the left, there is a 'Keyword search:' field with a magnifying glass icon. Below it are two dropdown menus: 'Search by:' set to 'Any Field' and 'Limit by:' set to 'All Items - This library only'. A link for 'More Search Options' is visible. On the right, the 'Using:' dropdown menu is open, displaying a list of databases. The first two options, 'Local Polaris PAC DB' and 'Local Polaris PAC DB', are highlighted in blue. The rest of the list includes: AIP Journals Online (museglobal.AIP), Amazon (Books), ContentDM (EPLS), Directory of Community Services (Carroll County), Gale (Expanded Academic ASAP), Google (Web), Infotrieve: ArticleFinder (museglobal.ArticleFinder), Miami (PAC), Scirus (museglobal.Scirus), Springer Science Online (museglobal.Springer), WindowsLive (Web), and Yahoo (Web). Below the search fields, a message reads: 'Need help searching? Click here for tips and it'.

The PowerPAC **Using** field always includes the local database. When at least one remote database is specified for the **Using** quick-select drop down, the drop-down list includes the local database and any remote databases specified for inclusion. However, the drop-down list suppresses a database from display according to access restrictions (see steps 13-16), even if it is selected for inclusion.

**Note:**

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

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



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

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

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

**Note:**

For information about setting the criteria that determine whether a workstation is in-house or remote, see the *Polaris Administration Guide*.

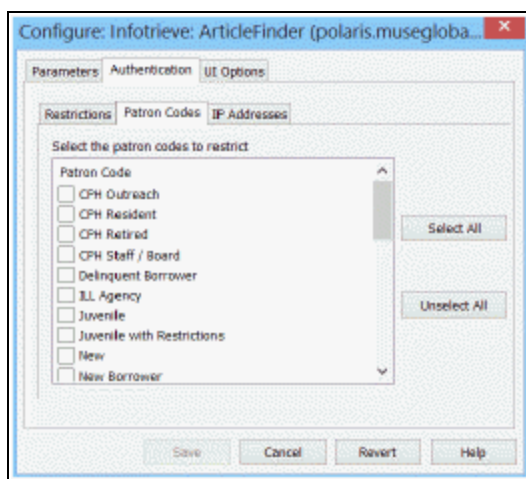
b. Select one of the following options under **Remote access**:

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

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

**Important:**

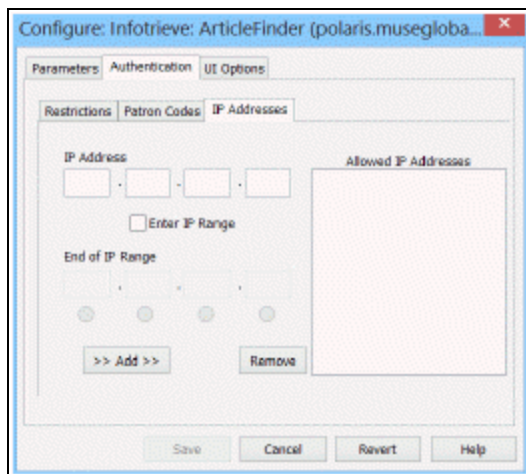
If you choose to restrict access by patron code, you must also require the patron to log in (see Step 13). If you do not require log-in, your settings for restricted patron codes are ignored.



16. To allow access to the remote database by the IP address of the PAC search computer, select the **IP Addresses** subtab, and do the following:
  - Type the IP address in the top boxes and click **Add**.
  - To include an IP address range, select **Enter IP range**, type the beginning IP address in the top boxes and the last two digits of the ending IP address in the bottom boxes.

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

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

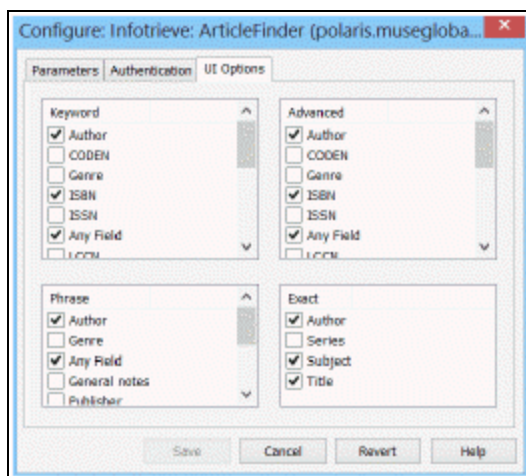


17. Select the **UI Options** tab to define the search access points that are available for the selected database and search type as follows:

**Note:**

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

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



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

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

### ***Related Information***

**Filtering PAC remote database search results** - You can set up a Contextual Query Language (CQL) filter for a particular Z39.50 connection that filters the results to show only those materials that patrons can actually request. See the *Polaris Administration Guide*.

## Managing E-Sources

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

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

**Tip:**

You can also offer remote databases that can be searched simultaneously in PowerPAC. See [Managing Federated Search Targets](#).

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

See also:

- [Setting Up E-Source Targets](#)
- [Organizing E-Source Targets](#)
- "E-Source Reports" in the Polaris *Basics Guide*

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### Setting Up E-Source Targets

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

access by preventing patrons with certain patron codes from accessing an e-source target, and by setting specific IP addresses for access.

See also:

- [Set up an e-source target](#)
- [Example - E-Source Target Post Transfer Type](#)
- [Example - E-Source Target Get Transfer Type](#)
- [Provide links to e-sources on external sites](#)
- [Organizing E-Source Targets](#)

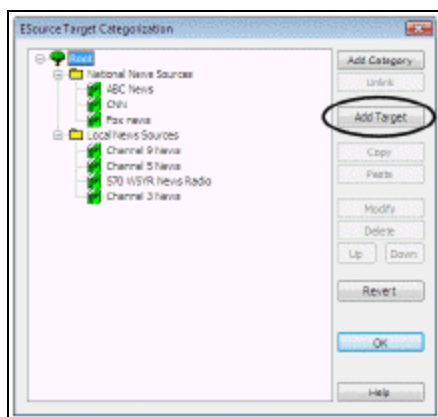
### Set up an e-source target

To set up access restrictions and authentication data elements for an e-source target:

1. Obtain the following information from the e-source target provider:
    - URL for the target's login page - The complete URL for the target's login page (not the site's home page, or account setup page). Polaris automatically passes your library's authentication information to this URL.
    - Connection data parameters - Connection data parameters are set up in sets consisting of **Name** and **Value**. **Name** is the descriptive field name that the database provider uses to prompt for input. **Value** is the actual text string that the database provider assigns to your library when the subscription is established.
- Example:**  
 A vendor requires a user ID and a password to access a database, so you define two parameters (two sets of Name and Value data elements). For the first set, Name is **UserID**. Value is **WESTSIDELIBRARY**. For the second set, Name is **Password** and Value is **read**.
- Transfer type (Get or Post) - The protocol for passing authentication data from your library to the e-source target. **Get** displays authentication information in the URL string, unless Secure Socket Layer (SSL) is enabled at the server level. **Post** does not display the authentication information. Most vendors can use the post method. To determine this information yourself, see [Example - E-Source Target Post Transfer Type](#) and [Example - E-Source Target Get Transfer Type](#).
  2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.



3. Double-click **Categorization of ESource targets**. The **ESource Categorization** dialog box appears.



**Tip:**

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

4. Select a category for the new target (optional), and click **Add Target**. The **Add ESource Target** dialog box appears.

**Note:**

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

5. Set up general information for the target as follows:

- Type a name for the target in the **Name** box. This name is displayed on the PAC E-Sources page.
- Type a brief (890-character maximum) description in the **Description** box, if you want to display a description on the PAC E-Sources page.

**Tip:**

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

- Type a brief message in the **Message** box, if you want to display a message to patrons regarding the target.
  - Input the complete URL for the target's log-in page in the **URL** box.
  - Select **Get** or **Post** in the **Transfer Type** box (see step 1). If you are unsure of the transfer type, see [Example - E-Source Target Post Transfer Type](#) and [Example - E-Source Target Get Transfer Type](#).
6. To set in-library access to the target, select an option under **Inhouse access** (General Restrictions tabbed page):
- To make the e-source unavailable to in-house users, select **Disabled**.

**Note:**

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

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

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

**Note:**

By default, the system checks both the In-House IP Addresses table and

registered workstations to determine if a computer is in-house. However, if you experience performance issues related to e-source restrictions, you can set the system to check only the In-House IP Addresses table.

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

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

**Note:**

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

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

The screenshot shows the 'Add ESource Target' dialog box with the 'Patron Codes' tab selected. The 'Patron Codes' tab is circled in red. The list of patron codes includes: CPH Outreach, CPH Resident, CPH Retired, CPH Staff / Board, Delinquent Borrower, ILL Agency, Juvenile, Juvenile with Restrictions, and None. The 'Select All' and 'Unselect All' buttons are visible to the right of the list.

- b. Select the codes you want to prevent from accessing the target. Patrons who are assigned these codes cannot access the e-source target.

**Important:**

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

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

**Important:**

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

- a. Click the **IP Addresses** tab on the **Add ESource Target** dialog box.

- b. Define IP addresses using one of the following methods:
- To define IP addresses one at a time, type each IP address in the boxes and click **Add**. The addresses are displayed in the **Allowed IP Addresses** list.

- To define a range of IP addresses, select the **Enter IP Range** checkbox. Then enter the first address of the range in the IP address boxes, and enter the last address of the range in the **End of IP Range** boxes. Click the radio button below the appropriate **End of IP Range** box to specify if the last number in the range is in that address segment. Click **Add** to add the range to the **Allowed IP Addresses** list.

**Note:**

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

10. Set connection parameters for the target by following these steps:
  - a. Click the **Connection Data** tab on the **Add ESource Target** dialog box.

The screenshot shows the 'Add ESource Target' dialog box with the 'Connection Data' tab selected. The dialog has a title bar with a close button. Inside, there are fields for 'Name:', 'Description:', 'Message:', and 'URL:'. Below these is a 'Transfer Type:' dropdown menu set to 'Get'. A tabbed interface at the bottom shows four tabs: 'General Restrictions', 'Patron Codes', 'IP Addresses', and 'Connection Data' (which is active and circled). The 'Connection Data' tab contains a table with two columns: 'Name' and 'Parameter'. Below the table are buttons for '>> Add >>', 'Remove', 'OK', 'Cancel', and 'Help'.

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

**Note:**

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

- c. Repeat step b to add as many parameters as the e-source provider requires for connection authentication.
11. Click **OK** on the **Add ESource Target** dialog box. The new target is represented by a book icon in the **ESource Categorization** dialog box.
12. Click **OK** on the **ESource Categorization** dialog box.

*Related Information*

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

### Example - E-Source Target Post Transfer Type

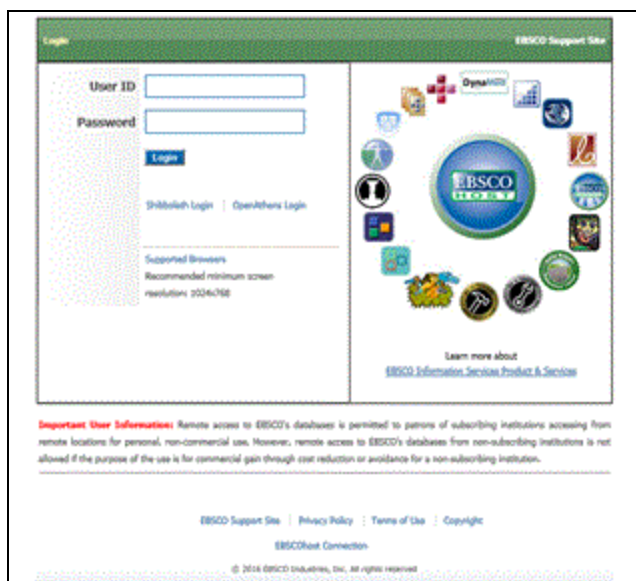
This procedure lists how to enter a URL and view source code to set up connection authentication to EBSCOhost as an example of post transfer type. See [Set up an e-source target](#) for a detailed procedure on setting up e-sources.

1. On the PowerPAC profiles tab for the organization, double-click **Categorization of ESource targets**.
2. Click **Add Target** on the **ESource Categorization** dialog box to display the **Add ESource Target** dialog box.

**Tip:**

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

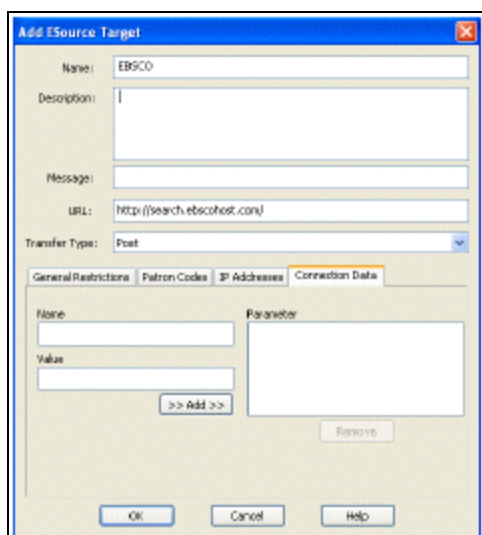
3. Open a Web browser, and access the online log-in form for the vendor. The example shows EBSCO at <http://search.ebscohost.com>.



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

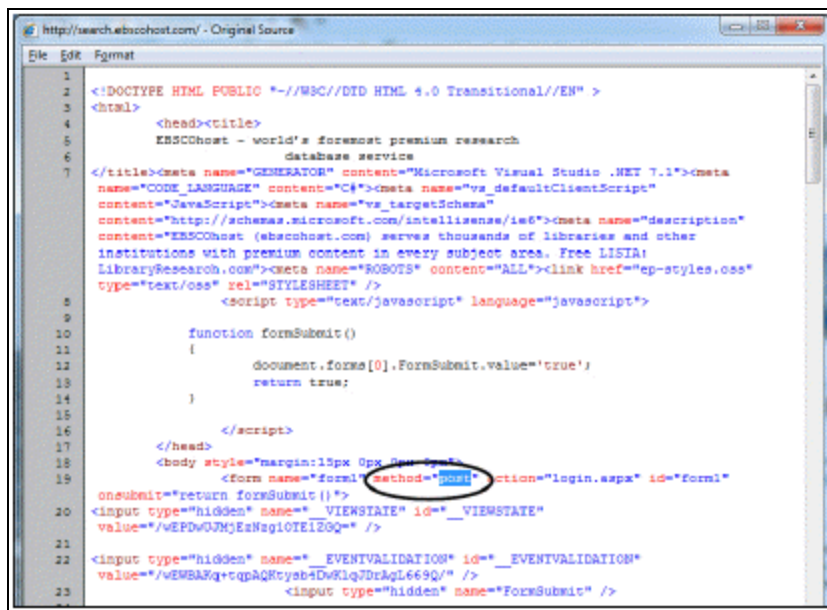
**Note:**

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



5. Return to the browser menu bar, and select **Page, View Source**. The HTML source code for the logon page is displayed in your default text editor.

6. Determine the transfer method by following these steps:
  - a. Select **Edit, Find** (or press **CTRL+F**) to display a Find dialog box.
  - b. Search for the text string **form** or **method**.



```

1  <!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN" >
2  <html>
3    <head><title>
4      EBSCHost - world's foremost premium research
5      database service
6    </title><meta name="GENERATOR" content="Microsoft Visual Studio .NET 7.1"><meta
7      name="CODE_LANGUAGE" content="C#"><meta name="vs_defaultClientScript"
8      content="JavaScript"><meta name="vs_targetSchema"
9      content="http://schemas.microsoft.com/intellisense/ie8"><meta name="description"
10     content="EBSCHost (ebshost.com) serves thousands of libraries and other
11     institutions with premium content in every subject area. Free LISTA:
12     libraryresearch.com"><meta name="ROBOTS" content="ALL"><link href="ep-styles.css"
13     type="text/css" rel="stylesheet" />
14     <script type="text/javascript" language="javascript">
15
16       function formSubmit()
17       {
18         document.forms[0].FormSubmit.value='true';
19         return true;
20       }
21     </script>
22   </head>
23   <body style="margin:10px 0px 0px 0px">
24     <form name="form1" method="post" action="login.aspx" id="form1"
25     onsubmit="return formSubmit();"
26     <input type="hidden" name="__VIEWSTATE" id="__VIEWSTATE"
27     value="/wEPDwQJHjEzNg10TE1ZQ=" />
28     <input type="hidden" name="__EVENTVALIDATION" id="__EVENTVALIDATION"
29     value="/wEPBAQ+tpAQRtyeb+DvKlq7DrAgL669Q/" />
30     <input type="hidden" name="FormSubmit" />
  
```

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

7. On the **Add ESource Target** dialog box, set the Transfer Type to **Post**.
8. On the source code window, determine the logon parameters by following these steps:
  - a. Select **Edit, Find** (or press **CTRL+F**) to display a Find dialog box.
  - b. Search for the text string **input**. Ignore **input type= "hidden"** entries. Look for associated **name=** statements.



```

51 align="center" border="0" style="width:100%;border-collapse:collapse;">
52   <tr id="loginUI_rw_tbl_left_1"
53   style="height:40px">
54     <td id="loginUI_lb_UserMessage_Left"
55     class="bodybold-shaded" style="width:33%;></td><td class="bodyLarger"
56     align="left"><span id="loginUI_lb_UserMessage"></span></td>
57   </tr><tr id="loginUI_rw_tbl_left_3">
58     <td id="loginUI_lb_UserID_Left"
59     class="bodybold-shaded" style="height:20px;><span id="loginUI_tbl_lblUserID">User
60     ID</span></td><td style="height:20px;><table id="loginUI_tbl_txtUserID"
61     cellpadding="0" cellspacing="0" align="left" border="0" style="border-
62     style:none;width:70%;border-collapse:collapse;">
63       <tr>
64         <td valign="bottom"
65         style="border-style:none;"><input name="user" maxlength="20" id="user"
66         class="blue_border_txt" /></td>
67       </tr>
68     </table></td>
69   </tr><tr id="loginUI_rw_tbl_left_5">
70     <td id="loginUI_lb_Pwd_Left"
71     class="bodybold-shaded" style="height:20px;><span
72     id="loginUI_tbl_lblPwd">Password</span></td><td style="height:20px;><table
73     id="loginUI_tbl_txtPwd" cellpadding="0" cellspacing="0" align="left" border="0"
74     style="border-style:none;width:70%;border-collapse:collapse;">
75       <tr>
76         <td valign="top"
77         style="border-style:none;"><input name="password" type="password" maxlength="20"
78         id="password" class="blue_border_txt" /></td>
79       </tr>
80     </table></td>
81   </tr><tr id="loginUI_rw_tbl_left_6">
82     <td id="loginUI_btnLogin_Left"

```

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

#### Important:

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

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

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

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

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

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

The screenshot shows the 'Add ESource Target' dialog box. The 'Name' field is filled with 'EBSCO'. Below it is a 'Description' field. The 'Message' and 'URL' fields are empty. The 'Transfer Type' is set to 'Post'. There are four tabs: 'General Restrictions', 'Patron Codes', 'IP Addresses', and 'Connection Data'. The 'Connection Data' tab is active, showing a table with two columns: 'Name' and 'Value'. One row is present with 'password' in the Name column and 'password=lib504 user=westside' in the Value column. Below the table are buttons for '>> Add >>', 'Remove', 'OK', 'Cancel', and 'Help'.

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

### Example - E-Source Target Get Transfer Type

This procedure lists how to enter a URL and view source code to set up connection authentication to Gale as an example of get transfer type. See [Set up an e-source target](#) for a detailed procedure on setting up e-sources.

#### Note:

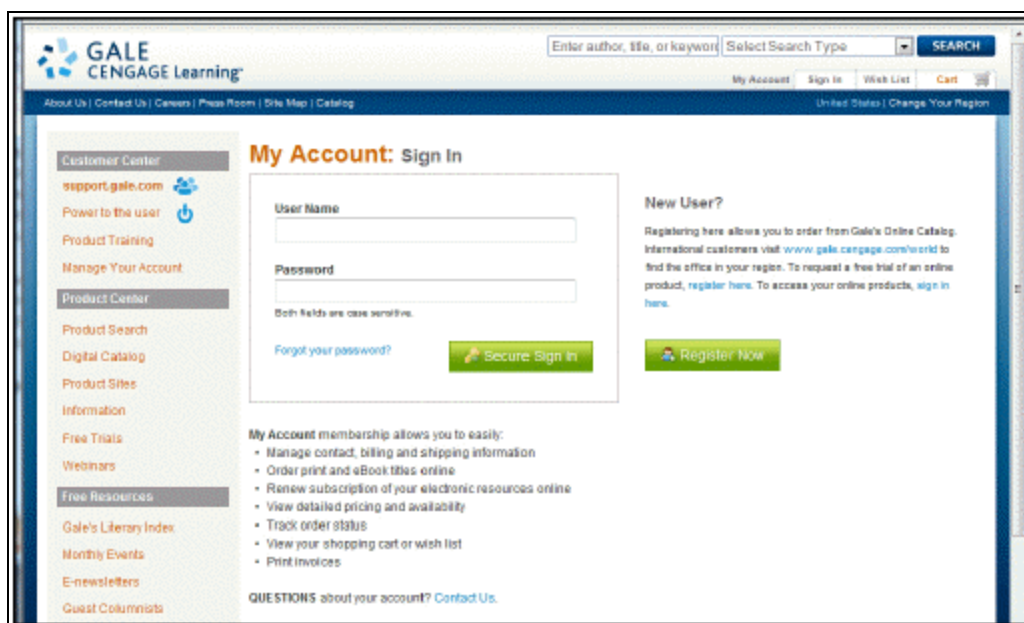
Database suppliers may require different authentication routines for different databases. Therefore, the authentication setup for one Gale database may differ from the setup for another Gale database. The following procedure is an example only. You must contact your vendor to get your library-specific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

1. On the PowerPAC profiles tab for the organization, double-click **Categorization of ESource targets**.
2. Click **Add Target** on the **ESource Categorization** dialog box to display the **Add ESource Target** dialog box.

**Tip:**

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

3. Open a Web browser, and access the online logon form for Gale at **http://-gale.cengage.com**.



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

**Note:**

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

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

```

292 <script LANGUAGE="JavaScript">
293     function clearItem()
294     {
295         document.loginForm.userName.value= "";
296         document.loginForm.password.value= "";
297     }
298     // End -->
299 </script>
300 </head>
301 <body onload="clearItem()">
302
303
304 <div id="holder"><!-- holder -->
305 <div id="header"><!-- header -->
306 <div class="top floatleft"><a
307     href="http://www.gale.cengage.com/"></a></div>
309 <div class="search login floatright">
310 <form id="form_search"
311     action="https://www.gale.cengage.com/servlet/SearchResultServlet"
312     method="get">
313 <div><span><input type="text" value="Enter author, title, or keyword"
314     size="24" /> <input name="imprint" type="hidden" value="000" /> <input
315     name="region" type="hidden" value="9" /> <select
316     name="search_dropdown" id="search_dropdown"
317     style="height: 20px; line-height: 20px; border: 1px solid #7f0db9; margin: 0; padding: 0; color:
318     #666; font-weight: normal;">
319 <option value="0">Select Search Type</option>
320 <option value="1">Products (e.g. InfoTrac)</option>
321 <option value="2">Site (e.g. Customer Service)</option>
322 </select> <input id="go" class="track" type="button" name="button" value=" "
323     title="Global Search" /></div>
  
```

The transfer method is **get**.

7. On the Add E-Source Target dialog box, set the Transfer Type to **Get**.
8. On the source code window, determine the logon parameters by following these steps:
  - a. Select **Edit, Find** (or press **CTRL+F**) to display a Find dialog box.
  - b. Search for the text string **input**. Ignore **input type= "hidden"** entries. Look for associated **name=** statements.

```

575     href="http://www.gale.cengage.com/LegalNotice">R&grave;glement du recours collectif canadien sur le
576     droit d'auteur</a></p>
577     </div>
578     <!-- END COL_LEFT -->
579
580
581     <div id="col_center"><!--col_center is MAIN CONTENT AREA -->
582     <h1>My Account: <span>Sign In</span></h1>
583     <form method="post" id="loginForm" action="login.do.jsp"
584     name="loginForm">
585     <fieldset class="medium floatleft">
586     <p><label for="username" class="above">User Name</label> <input
587     id="username" class="medium" name="userName" type="text" maxlength="30"
588     tabindex="1" /></p>
589     <p><label for="password" class="above">Password</label> <input
590     id="password" class="medium" name="password" type="password"
591     maxlength="100" tabindex="2" /></p>
592     <span class="smallfont">Both fields are case sensitive.</span></p>
593     </p>

```

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

#### Important:

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

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

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

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

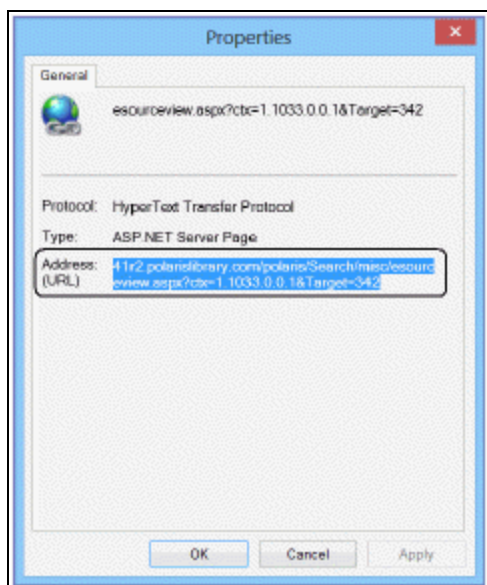
The second parameter is listed in the **Parameter** box.

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

### Provide links to e-sources on external sites

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

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



3. Right-click the selected URL, and select **Copy**.
4. Paste the URL as a hypertext link. The external link uses the authentication criteria and access restrictions placed on the target.

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




---

## Organizing E-Source Targets

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

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

To organize the library's e-source targets into categories and subcategories:

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Categorization of ESource targets**. The **ESource Target Categorization** dialog box appears.
3. To add a category, do these steps:
  - a. Select (highlight) the folder to which you want to add a category. **Root**, the default category, cannot be copied, deleted, or renamed. If you are adding a new category to the root level, select **Root**. If you are adding a subcategory to an existing category, select the existing category folder.
  - b. Click **Add Category**. A folder icon appears in the Category tree view, with the

cursor positioned to name the folder.

- c. Type a category heading, and press **ENTER**.
4. Use the following methods to place e-source targets in categories:
  - Add individual e-source targets to a category. See [Set up an e-source target](#).
  - Copy an existing e-source target (book icon) to another category. Select the target in the **ESource Categorization** dialog box, and click **Copy**. Then select the category where you want to place the copy of the target, and click **Paste**. This procedure creates targets that are linked. Any change to one target is applied to all the linked targets.
5. To set the display order in the PAC, select a category or target and click **Up** or **Down**. Repeat until the categories or targets are in the display order you want.

**Note:**

On the PAC e-sources page, targets defined at the Root level are always displayed below any categories.

6. Click **OK**.

**Related Information**

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

**Note:**

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



---

## E-Source Reports

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

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

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

For information about logging transactions, see the *Administration Guide*.

## 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](http://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 login 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. Search the Polaris online help for "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](#)

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## Exporting Records to the ChiliFresh Database

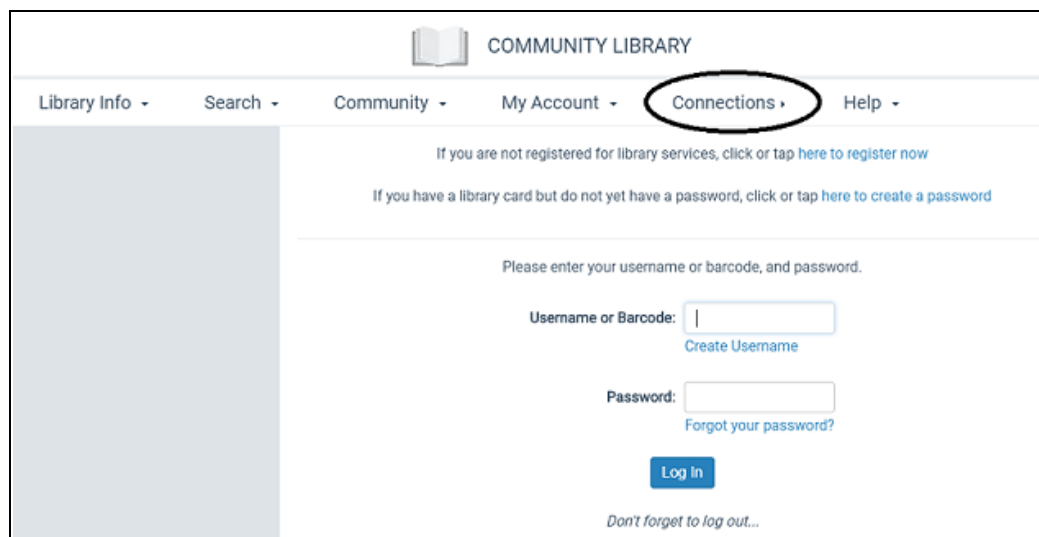
To display Chilifresh Connections content in PAC, you must initially export a file containing all your library's MARC bibliographic information to ChiliFresh. Use the Polaris staff client **Utilities, Export** function to upload the records, using the default option **Extract All Final MARC 21 Records**. 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 login. 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.



COMMUNITY LIBRARY

Library Info ▾ Search ▾ Community ▾ My Account ▾ **Connections ▾** Help ▾

If you are not registered for library services, click or tap [here to register now](#)

If you have a library card but do not yet have a password, click or tap [here to create a password](#)

Please enter your username or barcode, and password.

Username or Barcode:

[Create Username](#)

Password:

[Forgot your password?](#)

[Log In](#)

*Don't forget to log out...*

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.

here to sign up.' The link 'here' is circled." data-bbox="113 466 442 521"/>

You have not yet signed up for the social features of the catalog.

Click [here](#) to sign up.



☒ Create a nickname to use social features

Nickname:

Birthdate:

☐ Use an existing ChiliFresh Connections account

Email:

Password:

[Get password](#)

[Sign up](#) [Cancel](#)

[What is ChiliFresh Connections?](#)

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:**

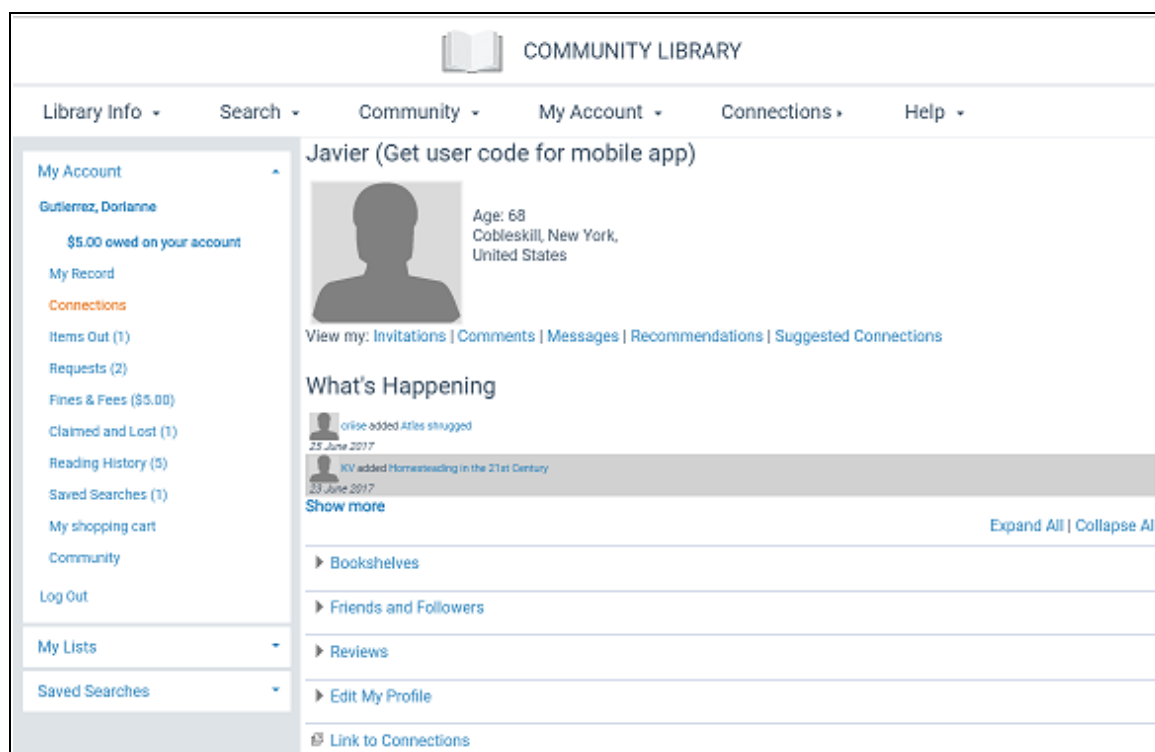
Logging on to ChiliFresh Connections from outside PowerPAC does not log the user on to the PowerPAC (library) account.

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.

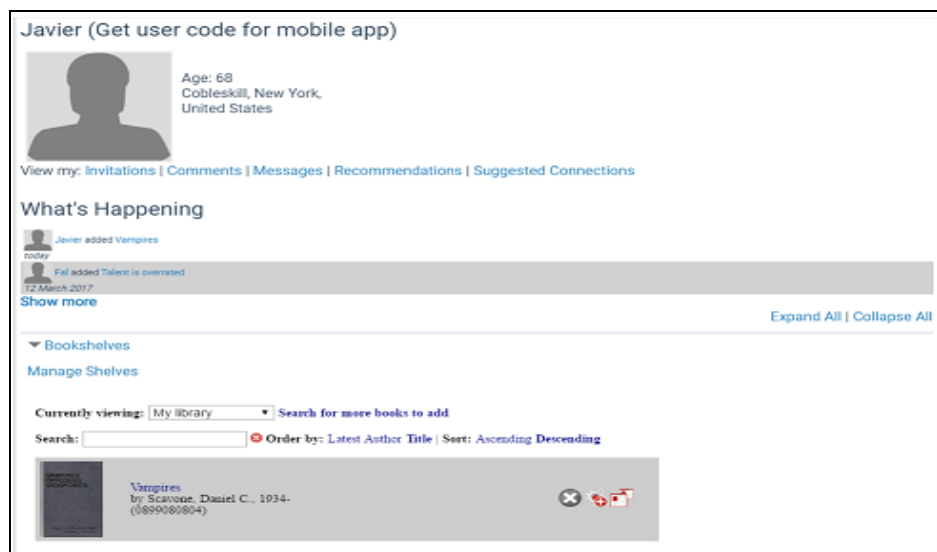


The Connections account page offers links for invitations, comments, messages, recommendations, and suggested connections. Each of these features opens in a lightbox. Below, five content “drawers” contain ChiliFresh Connections user account data. They are initially displayed as collapsed, but the user 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 login 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

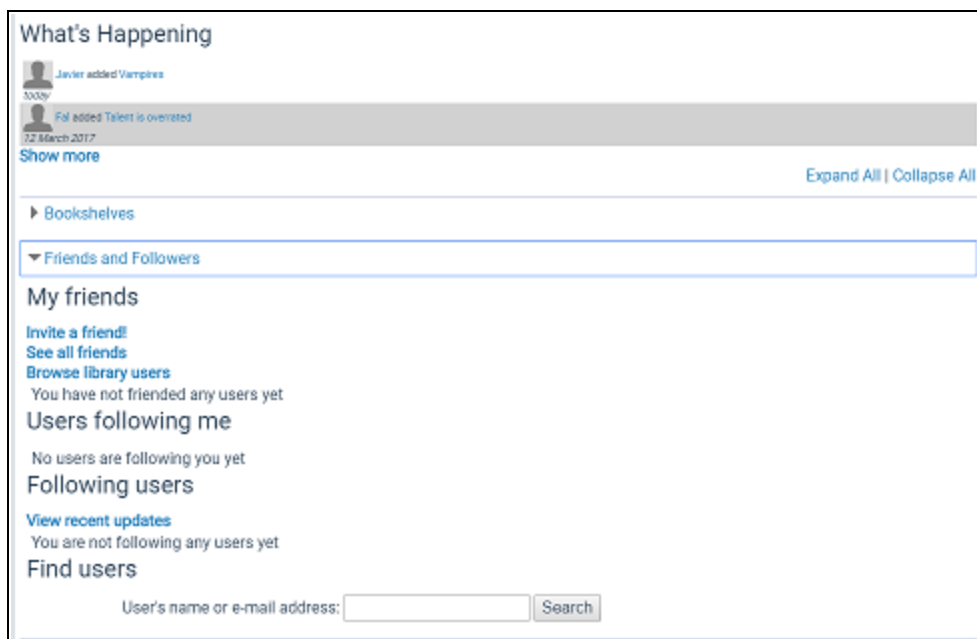
Bookshelves may include **My library**, **My current reads**, **My wishlist**, and any custom bookshelves (lists) the patron has created.




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  - Sends a friend request to the ChiliFresh user; if the user accepts, he or she is added to the patron's friends list.
- Send message  - Sends a message to this user.
- Add comment to corkboard  - This option adds a comment to the user's Comments list, and sends the user an e-mail alert.
- Follow/unfollow this user  - Adds the patron to the Followers list on the ChiliFresh user's profile and adds the ChiliFresh user to the Following list on the patron's profile (or reverses the operation).

### Reviews Drawer

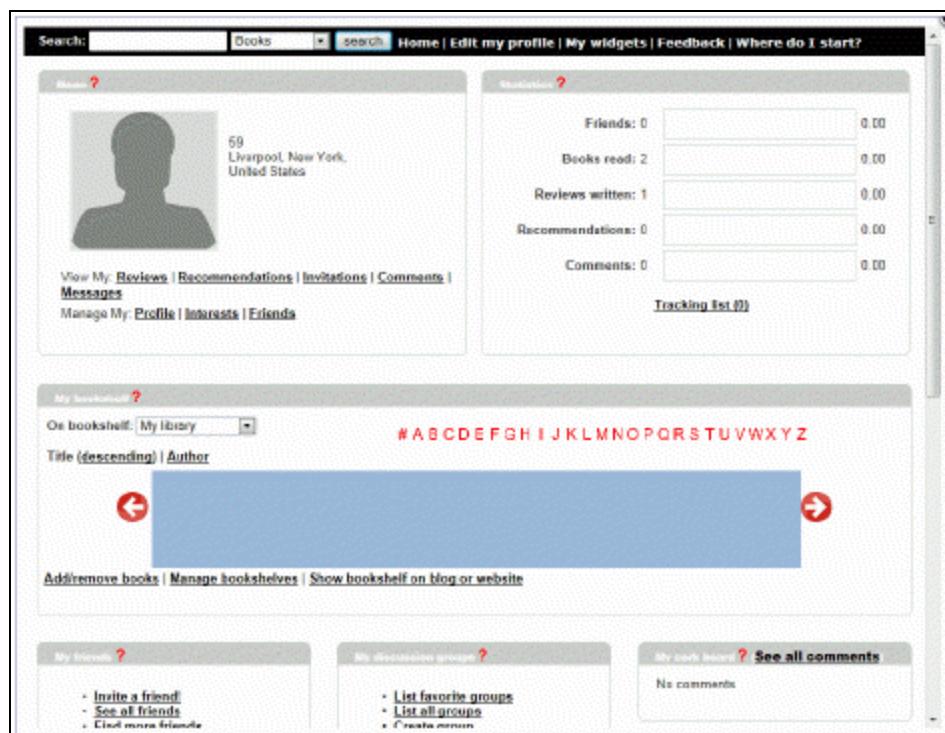
This drawer displays the reviews the patron has already submitted. The patron can select a title to display search results for that title in PowerPAC. Reviews can be added from search results. See [Social Features in Search Results](#).

### 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.

**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

### *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.

**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

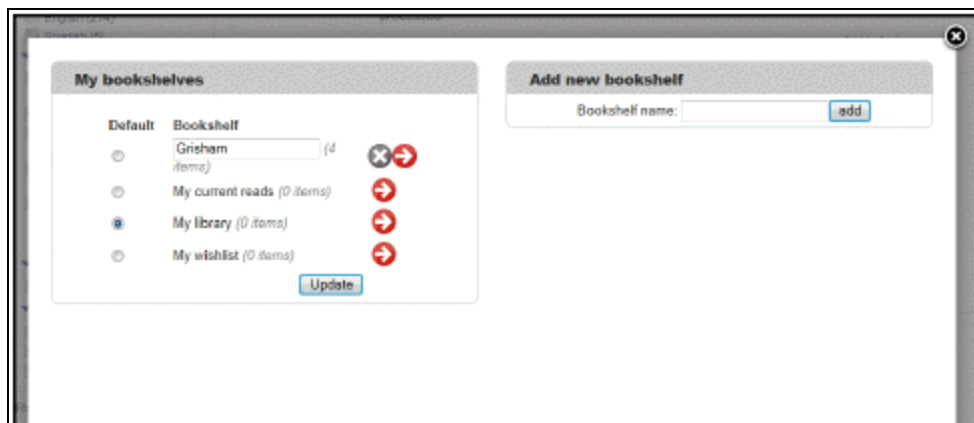
☒ Print receipts only with prompt

OK Cancel Help

**Note:**

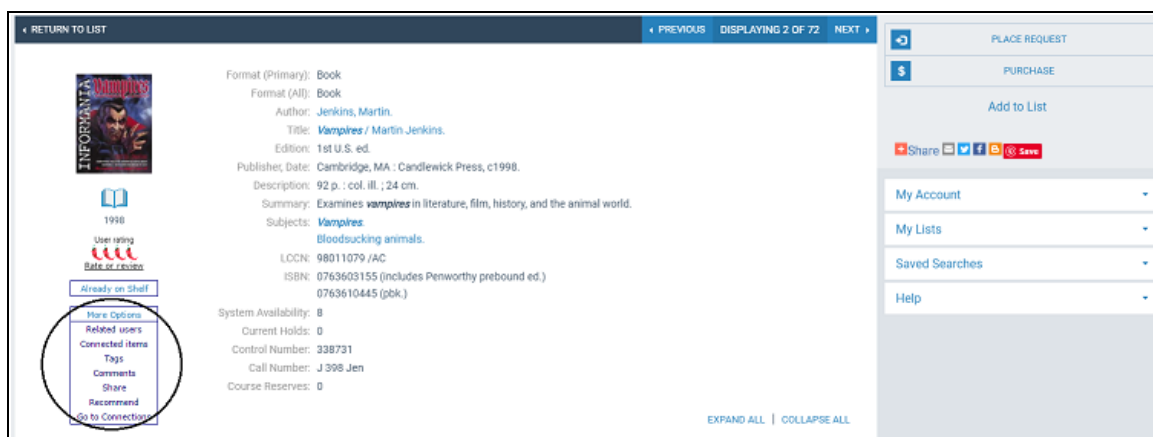
If the title has already been added to one of patron's bookshelves, the displayed link is **Already on Shelf**.

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:

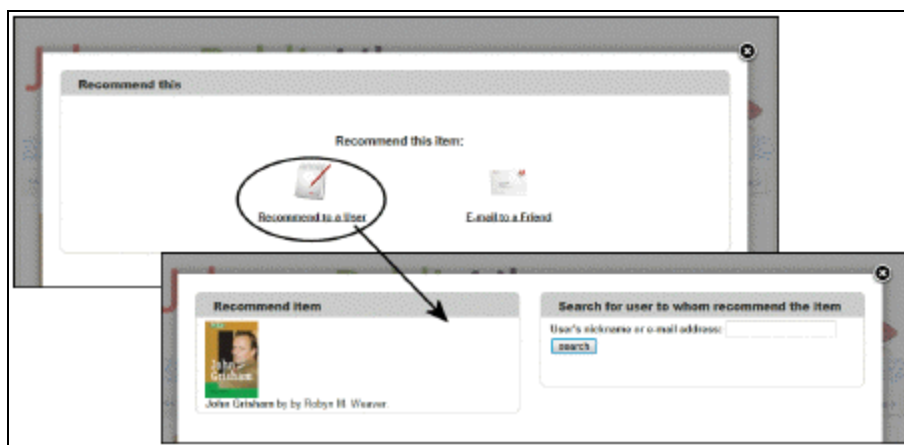


- **Related Users** - Selecting this link displays a lightbox that lists users who have taken an action on the item, such as adding it to their shelf or reviewing it. Selecting a Connections user in the lightbox opens the public profile display of that user (see [Friends and Followers Drawer](#)).
- **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. Search Polaris online help for "Set up enriched data - ChiliFresh." See Set up enriched data - ChiliFresh.

For information about port 80/443 access requirements, search Polaris online help for "Enriched Data Domains Requiring Port 80/443 Access."



## Enabling Enriched Data

The term “enriched data” describes a variety of third-party services that enhance a title’s display in the PAC. Depending on your contract with the vendor, the enriched data can consist of a simple book jacket image, or contents, excerpts, reviews, ratings, and other information related to the title. When enabled, enriched data is displayed automatically in both Polaris PowerPAC and Mobile PAC search results.

In Polaris PowerPAC, when the patron clicks the title or the **Full Display** button for a title in the search results list, the additional information is available in a series of content “drawers” on the title’s product page. You can set the display order of the drawers and whether each is initially expanded or collapsed. See [Configuring the PowerPAC Product Page](#). Reader ratings and reviews may also be displayed. When the patron clicks a link, the selected information is displayed in a lightbox window. For a description of the enriched content display in Mobile PAC, see [Title Links: Enriched Content](#).

You can also display rotating book jackets on the Polaris PowerPAC home page, based on the images supplied by your enriched data vendor, that launch a search for the title. For more information, see [Set up rotating book jackets](#). Book jackets are also featured in content carousels. See [Content Carousels on the PowerPAC Portal Page](#).

Polaris supports enriched data from Baker & Taylor; EBSCO’s NoveList®; Syndetics Solutions (Bowker); Syndetics Unbound; ChiliFresh; OverDrive; and LibraryThing. Polaris Social, a separately licensed product, offers ChiliFresh Connections features integrated in Polaris PowerPAC. See [Polaris Social with ChiliFresh Connections](#).

**Note:**

If you use Secure Socket Layer (SSL) to secure the entire PowerPAC site, and you use content from third-party vendors, be aware that your patrons may receive messages about allowing unsecured content. If you think the messages will be a problem, contact your vendors to see if they can use https. If so, you will need to change their URL settings from **http** to **https** when you follow the procedures in this unit.

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### Enriched Data Domains Requiring Port 80/443 Access

If you lock down ports 80 and 443 on your PAC server, be aware that the following domains must be open on the PAC server for these features to work properly on any

browser client, including remote access clients:

Feature	Domain	Port	More Setup Information
Baker & Taylor Content Cafe	contentcafe2.btol.com	80	<a href="#">Baker &amp; Taylor Enriched Data</a>
ChiliFresh Reviews & Ratings	secure.chilifresh.com	443	<a href="#">ChiliFresh Enriched Data</a>
Syndetics Reviews & Ratings	www.syndetics.com	80	<a href="#">Syndetics Enriched Data</a>
ChiliFresh Connections	chilifresh.com secure.chilifresh.com	80 443	<a href="#">Polaris Social with ChiliFresh Connections</a>

If the PAC browser session is run directly on the PAC server, the following domains must be open for the features to work properly:

Feature	Domain	Port	More Setup Information
Baker & Taylor Cover Images	images.bol.com	80	<a href="#">Baker &amp; Taylor Enriched Data</a>
ChiliFresh Cover Images	content.chilifresh.com	80	<a href="#">ChiliFresh Enriched Data</a>
LibraryThing Reviews & Ratings	ltfl.librarything.com	80	<a href="#">LibraryThing Enriched Data</a>
NoveList Select (Suggestions and More)	imageserver.ebscohost.com	80	<a href="#">EBSCO's NoveList Enriched Data</a>
Syndetics Cover Images	www.syndetics.com	80/443	<a href="#">Syndetics Enriched Data</a>
Google Preview	www.google.com	80	<a href="#">Google Preview for PowerPAC Search Results</a>

Feature	Domain	Port	More Setup Information
Google Analytics	google-analytics.com	80/443	<a href="#">Set up basic operating features for Polaris PowerPAC</a>
Google Maps	maps.google.com	80	<a href="#">Map It (Google Maps) in PAC</a>
ChiliFresh Connections	chilifresh.com secure.chilifresh.com	80 443	<a href="#">Polaris Social with ChiliFresh Connections</a>

See also:

- [Baker & Taylor Enriched Data](#)
- [EBSCO's NoveList Select Enriched Data](#)
- [Syndetics Enriched Data](#)
- [ChiliFresh Enriched Data](#)
- [LibraryThing Enriched Data](#)
- [OverDrive Enriched Data](#)

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## Baker & Taylor Enriched Data

You can use book jackets (cover images) from Baker & Taylor, and provide a variety of Content Cafe links on the PowerPAC and Mobile PAC product pages.

**Note:**

For Baker & Taylor port access requirements, see [Enriched Data Domains Requiring Port 80/443 Access](#).

**Note:**

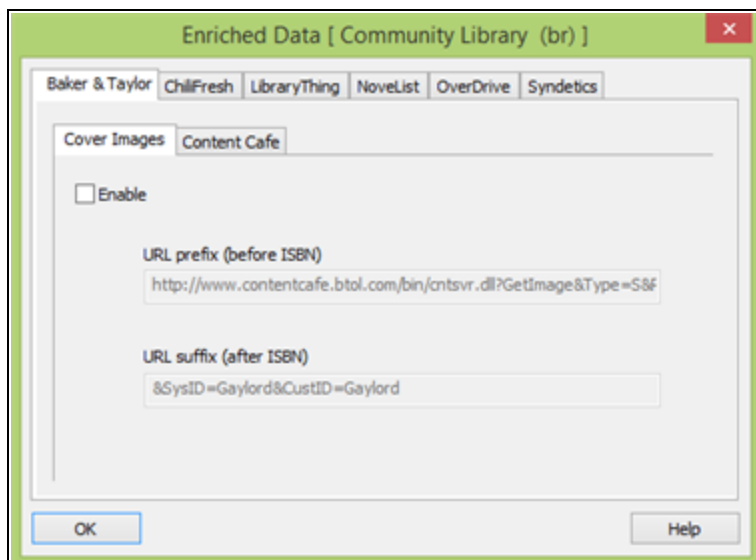
If you allow patrons to save searches to run automatically, cover images are displayed in the results based on the **Enriched Data** settings for the patron's registered branch. For more information about setting up saved searches, see [Set up basic operating features for Polaris PowerPAC](#).

To set up Polaris to use enriched data from Baker & Taylor, including Content Cafe:

**Tip:**

Cover images can be enabled for only a single vendor. Other enriched data services may be received from multiple vendors.

1. Contact your vendor's customer support department for help in obtaining your library's connection and authentication information for this enriched data provider.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
3. Double-click **Enriched Data**. The **Enriched Data** dialog box opens.



4. Click the **Baker & Taylor** tab, if it is not already selected.
5. If you receive cover images (book jackets) from Baker & Taylor, click the **Cover Images** tab. Then select **Enable**.

**Note:**

If you use Baker & Taylor cover images for rotating book jackets on the Polaris PowerPAC portal page, you must also supply Content Cafe settings. See steps 8 through 10. For more information about setting up rotating book jackets, see [Set up rotating book jackets](#).

6. In the **URL Prefix (before ISBN)** box, type the Web address and path to the Baker & Taylor content domain or server that provides book jacket images.

This prefix is the part of the URL that comes before the title's ISBN when a search is launched at the Baker & Taylor site for the book jacket image. The default setting is

**http://images.btol.com/ContentCafe/Jacket.aspx?UserID={site\_userid}&Password={site\_password}&Return=1&Value=**

Contact your vendor to obtain the site user id and password to use in this setting.

The **URL Suffix (after ISBN)** setting is always **&Type=S**.

7. If you receive other content from Baker & Taylor's Content Cafe, click the **Content Cafe** tab.

The screenshot shows a dialog box titled "Enriched Data [ Community Library (br) ]". It has several tabs: "Baker & Taylor", "ChilFresh", "LibraryThing", "NoveList", "OverDrive", and "Syndetics". The "Content Cafe" tab is selected. Inside this tab, there is a section with a checked "Enable" checkbox. Below it are two text input fields: "User ID:" and "Password:", both containing the text "polaris-test". At the bottom of the dialog are "OK" and "Help" buttons.

8. Select **Enable**.
9. Type your Content Cafe user ID and password in the appropriate boxes. These are the same settings you use for Baker & Taylor cover images. Contact your vendor to obtain these settings.
10. Click **OK**.

#### *Related Information*

**Polaris Bookstore with Baker & Taylor** - See [Enabling Online Book Purchases](#).

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## EBSCO's NoveList Select Enriched Data

If your library has a contract with NoveList Select, patrons see NoveList content in the Polaris PowerPAC and Mobile PAC product pages. NoveList Select automatically provides the appropriate connections for your library's NoveList contract. If you have any questions or concerns about your NoveList subscription, contact EBSCO at [novelistselectsupport@ebSCO.com](mailto:novelistselectsupport@ebSCO.com).

**Note:**

NoveList works with customers to configure NextReads newsletters and subscription links.

The NoveList content contains no active links except in the NextReads newsletter, which offers links to related newsletters (NoveList-generated content) and a link to a subscription page (also NoveList-generated content). These links open separate browser windows. The **Link to NoveList** option opens the NoveList site in a separate browser window due to frameset security issues.

**Note:**

For NoveList Select port access requirements, see [Enriched Data Domains Requiring Port 80/443 Access](#).

## Updating the Library's Holdings for NoveList Select

The accuracy of NoveList Select features such as Similar Titles depends on NoveList Select having up-to-date information about the titles in your library catalog. NoveList Select requires a CSV file consisting of one ISBN per line to collect this information. Polaris provides a SQL job, **ISBN List**, which is disabled by default. To generate the CSV file, enable the job, which is scheduled to run weekly (Monday at 1:10 am) by default. You can change the schedule if necessary. The job places the **ISBNList.csv** file in **{Server - Active Node}/ProgramData/Polaris/[version]/Logs/SQLJobs**. The file includes the ISBNs for bibliographic records where the ISBN is valid, the record status is final, and the record is set to display in PAC. For instructions about uploading the CSV file to NoveList, contact your NoveList support representative or go to: <http://support.ebsco.com/help/index.php?lang=en&int=novselect>

You will need to upload the file regularly (typically once a month) to reflect changes in your catalog.

## Set up Enriched Data - EBSCO's NoveList

To set up Polaris to use enriched data from EBSCO's NoveList:

**Note:**

You can enable and receive enriched data from more than one vendor, except cover images. These must be enabled for one vendor only.

1. Contact your vendor's customer support department for help in obtaining your library's connection and authentication information for this enriched data provider.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
3. Double-click **Enriched data**. The **Enriched Data** dialog box opens.
4. Click the **NoveList** tab.

The NoveList Select subtab appears.

5. Select **Enable**.

The screenshot shows a dialog box titled "Enriched Data [ QA-POLARIS ]". It has a tabbed interface with tabs for "Baker & Taylor", "ChiliFresh", "LibraryThing", "NoveList", "OverDrive", and "Syndetics". The "NoveList" tab is selected, and within it, the "NoveList Select" subtab is active. In the "NoveList Select" subtab, there is a checkbox labeled "Enable" which is checked. Below this checkbox are three text input fields: "Profile ID:", "Password:", and "Service URL:". At the bottom of the dialog box are two buttons: "OK" and "Help".

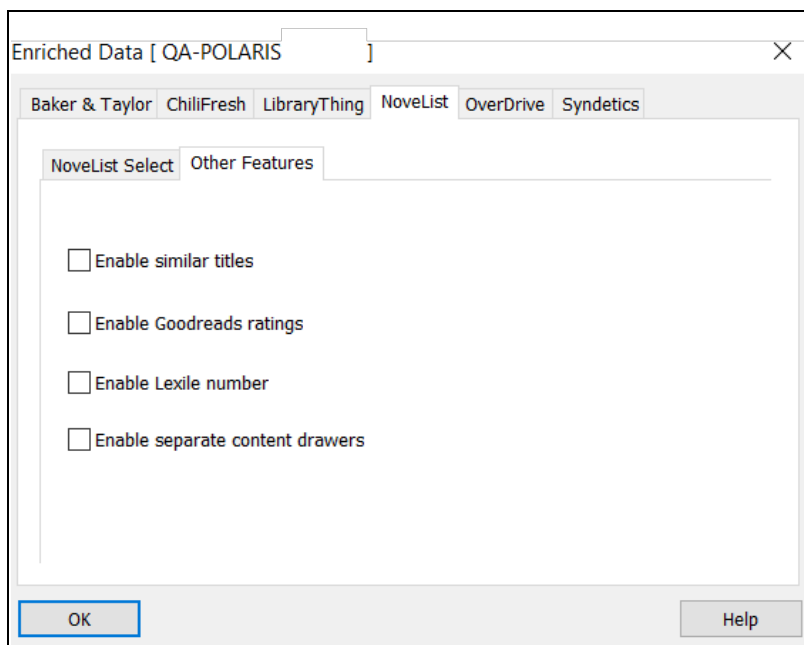
6. Type your Profile ID, password, and service URL in the appropriate boxes. Contact your vendor to obtain the unique first part of the Profile ID and your password.

**Important:**

The Service URL is the same for all Polaris customers. You do not need to change it unless the NoveList Select Service URL changes. However, if

you run Mobile PAC in SSL mode, the Service URL must begin with https://

7. Click the **Other Features** tab.



8. Click the checkboxes for the other features you want to enable.

If you enable similar titles, Goodread ratings, or Lexile number, the features appear on the search results and full display. If you enable separate content drawers, the selected features appear in separate content drawers on the full display. You can use the PowerPAC profile **Product Page Categories: Configure** to specify the order in which the NoveList content drawers appear and whether they are expanded by default. See "Configure the Enriched Content Drawers for PowerPAC" in the *Patron Services Administration Guide*.

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## Syndetics Enriched Data

If your library has access to enriched content from Bowker's Syndetic Solutions or Syndetics Unbound, you can use the **Enriched data** PAC profile to enable the display of the following content in the PAC:



- Cover images (book jackets) - Polaris automatically sends the ISBN, UPC, and OCLC number from the title's MARC record to Syndetics. Be sure to include the UPC in the MARC records for these types of material to ensure that the appropriate cover images are displayed. Syndetics cover images may fail to display in search results for certain types of material, such as music CDs or DVDs, when there is no ISBN in the MARC record.

**Note:**

If you allow patrons to save searches to run automatically, book jackets are displayed in the results based on the **Enriched Data** settings for the patron's registered branch. For more information about setting up saved searches, see [Set up basic operating features for Polaris PowerPAC](#).

- Other Features - When Other Features are enabled, your library can display content such as video/music profiles and video game profiles in PowerPAC product page drawers and Mobile PAC product page links. If available, the enriched content displays in the PAC for video, music, and video game titles based on real-time matching on the product's UPC, OCLC number, and ISBN. The Syndetics formatting is retained where possible. Once the content has been enabled for your organization, use the following Administration profiles to specify how the content displays: Mobile PAC profile, **Product page categories: Configure** and PowerPAC profile, **Product page categories: Configure**.

**Syndetics Unbound Service** - When the Syndetics Unbound service is enabled, your library can display enriched content including: cover images, annotations, author biographies, "look inside book" feature, awards, recommendations, reader and professional reviews, other formats, tag clouds, and other content.

Syndetics also offers a **Find Similar Titles** link on the Polaris PowerPAC product page. The **Find similar titles** link opens a Web site in a secondary browser window where the patron can specify the characteristics of a title and get a list of similar titles available at the library.

**Note:**

For Syndetics port access requirements, see [Enriched Data Domains Requiring Port 80/443 Access](#).

To set up Polaris to use enriched data from Bowker's Syndetic Solutions:

**Note:**

You can enable and receive enriched data from more than one vendor, except cover images. These must be enabled for one vendor only.

1. Contact your vendor's customer support department for help in obtaining your library's connection and authentication information for this enriched data provider.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
3. Double-click **Enriched data**. The **Enriched Data** dialog box opens.
4. Click the **Syndetics** tab.
5. If you receive cover images (book jackets) from Syndetics, click the **Cover Images** tab, and do the following:
  - Select **Enable**.

**Note:**

If you use Syndetics cover images for rotating book jackets on the portal page, you must also supply **Other Features** settings. See [Set up rotating book jackets](#).

- In the **URL prefix** box, type the Web address and path to the Syndetics content server or domain used for your account. The address must begin with **http://www.syndetics.com/**

**Note:**

PAC title lists and request pages use https, which is not supported by this prefix. If you want book jackets to be displayed on these pages, use the prefix **https://secure.syndetics.com/**

**Note:**

If possible, use the Fully Qualified Domain Name instead of the IP address. If your infrastructure does not allow this, your Polaris Site Manager can help you work with Bowker Technical Support to resolve connectivity issues.

- In the **URL suffix** box, type your client code after **&client=**. The suffix defines your specific account access information. Contact your vendor

to obtain this setting.

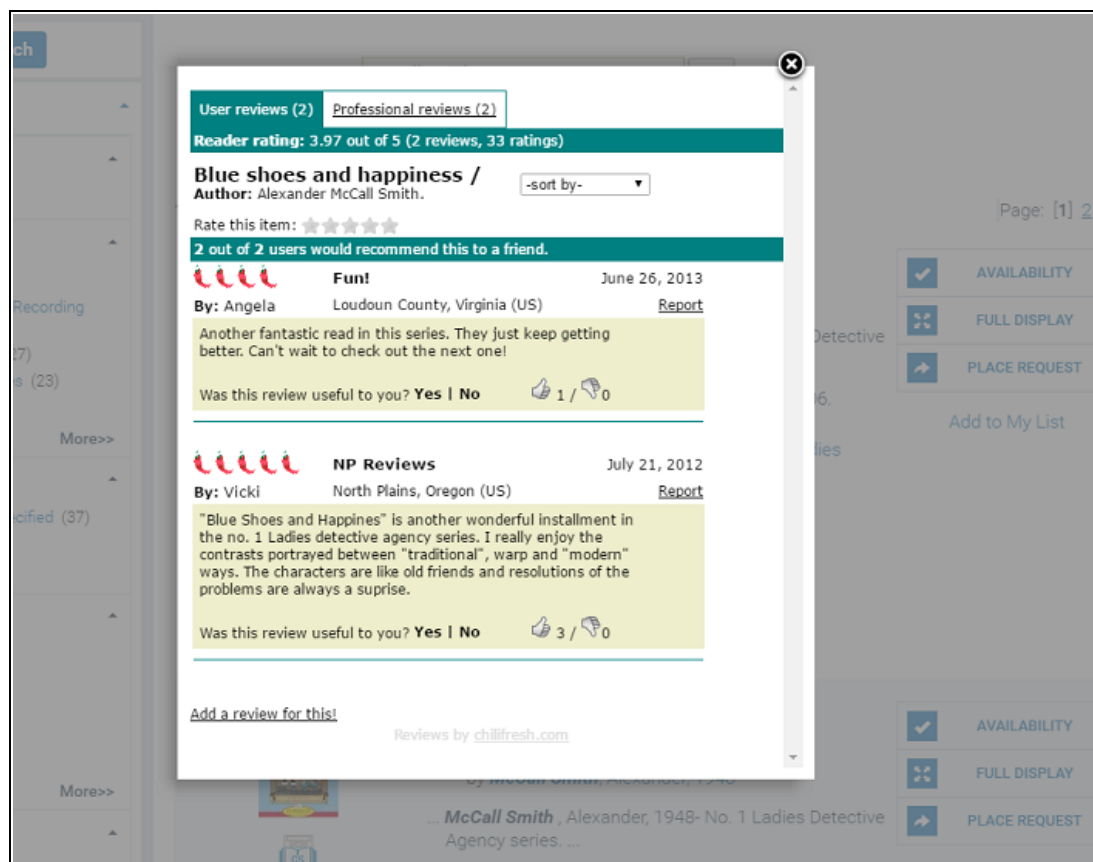
6. If you receive other Syndetics enriched data, such as video/music content and game profiles, click the **Other Features** tab, and do the following:
  - a. Select **Enable**.
  - b. In the **URL prefix** box, type the Web address and path to the Syndetics content server or domain used for your account. The address must begin with **http://www.syndetics.com/**. Contact your vendor to obtain the account-specific portion of this setting.
  - c. In the **URL suffix** box, type your client code after **&client=**. Contact your vendor to obtain this setting.
  - d. Click **OK**.
7. If you use the Syndetics Unbound service, click the **Unbound** tab and do the following:
  - a. In the **Service URL** box, type the URL for the Syndetics Unbound JavaScript library.
  - b. In the **Account ID** box, type your library's account ID for Syndetics Unbound.
  - c. Click **OK**.

Once the enriched content is enabled, configure the display of this content using the **Product page categories: Configure** profiles for PowerPAC and Mobile PAC. See [Set up the PowerPAC product page](#) and [Set up the Mobile PAC title \(product\) page](#).

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## ChiliFresh Enriched Data

ChiliFresh.com provides patron reviews and ratings in Polaris PowerPAC and Mobile PAC. You can choose to display reviews written only by your own patrons, by patrons in a specific region, or by patrons at multiple locations. You can also choose to screen reviews before they are made available for viewing. The patron logs in with a user name (e-mail address) and password to write a review. The ChiliFresh Review Engine consists of a database of reviews that reside on a ChiliFresh remote server, so your servers are not burdened with storing and processing the reviews. The illustration is an example of ChiliFresh reviews in Polaris PowerPAC.



ChiliFresh.com also offers cover images. If you subscribe to ChiliFresh Connections, a readers' social networking tool available in Polaris PowerPAC and Mobile PAC, you can receive ChiliFresh cover images at no cost. These images are displayed in the PAC and work with the ChiliFresh drag-and-drop feature to add covers to reader recommendations and virtual Connections bookshelves.

### Tip:

The PAC product page for a title displays a "drawer" for a large cover image when the large image is available from ChiliFresh. If the large image is not available, the drawer is not displayed.

### Notes:

For ChiliFresh port access requirements, see [Enriched Data Domains Requiring Port 80/443 Access](#).

Polaris Social, a separately licensed product, offers ChiliFresh Connections features integrated in Polaris PowerPAC. See [Polaris Social with ChiliFresh Connections](#).

For more information about ChiliFresh.com products, go to **www.chilifresh.com**.

To set up Polaris PowerPAC to use patron ratings and reviews from ChiliFresh.com:

**Note:**

You can enable and receive enriched data from more than one vendor, except cover images. These must be enabled for one vendor only.

1. Contact your vendor's customer support department for help in obtaining your library's connection and authentication information for this enriched data provider.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
3. Double-click **Enriched Data**. The **Enriched Data** dialog box opens.
4. Click the **ChiliFresh** tab.
5. To set up patron reviews and ratings, follow these steps:
  - a. Click the **Other Features** sub-tab.
  - b. Select **Enable**.
  - c. In the **Service URL** box, type your ChiliFresh service URL as in the following example:

**http://chilifresh.com/on-site/js/polaris4.1-R2a.js**

Obtain your specific URL from ChiliFresh.

**Note:**

ChiliFresh supports SSL (Secure Socket Layer). If you use SSL to secure the entire PowerPAC site, change the beginning of the ChiliFresh URL setting from **http://chilifresh.com** to **https://secure.chilifresh.com**.

- d. In the **Account ID** box, type your account identification code. Obtain your specific account code from ChiliFresh.
- e. In the **API Key** box, type your API key. Obtain your specific API key from ChiliFresh. The key is unique for your account ID.
6. To set up cover images, follow these steps:

- a. Click the **Cover Images** sub-tab.
- b. Select **Enable**.
- c. Type the URL prefix and suffix for your ChiliFresh cover images account in the appropriate fields.

**Note:**

Mobile PAC also uses ChiliFresh cover images when these are enabled.

7. Click **OK**.

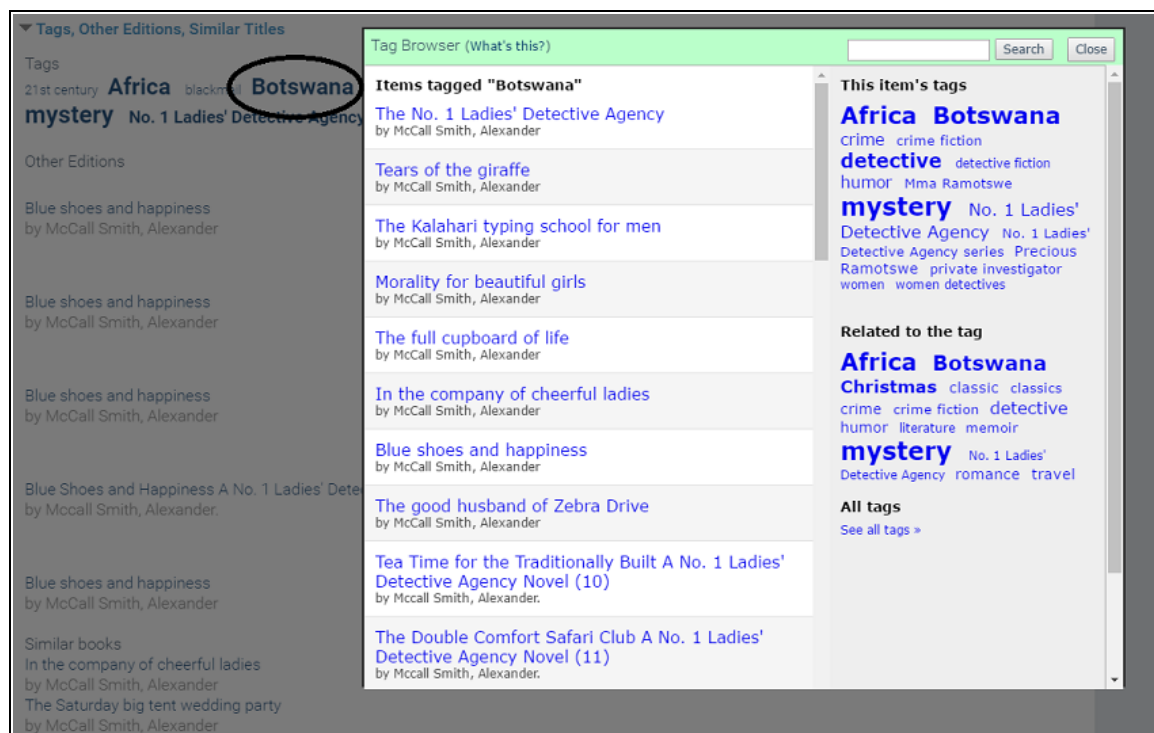
***Related Information***

ChiliFresh Connections integration - Polaris Social, a separately licensed product, offers ChiliFresh Connections features integrated in Polaris PowerPAC. See [Polaris Social with ChiliFresh Connections](#).

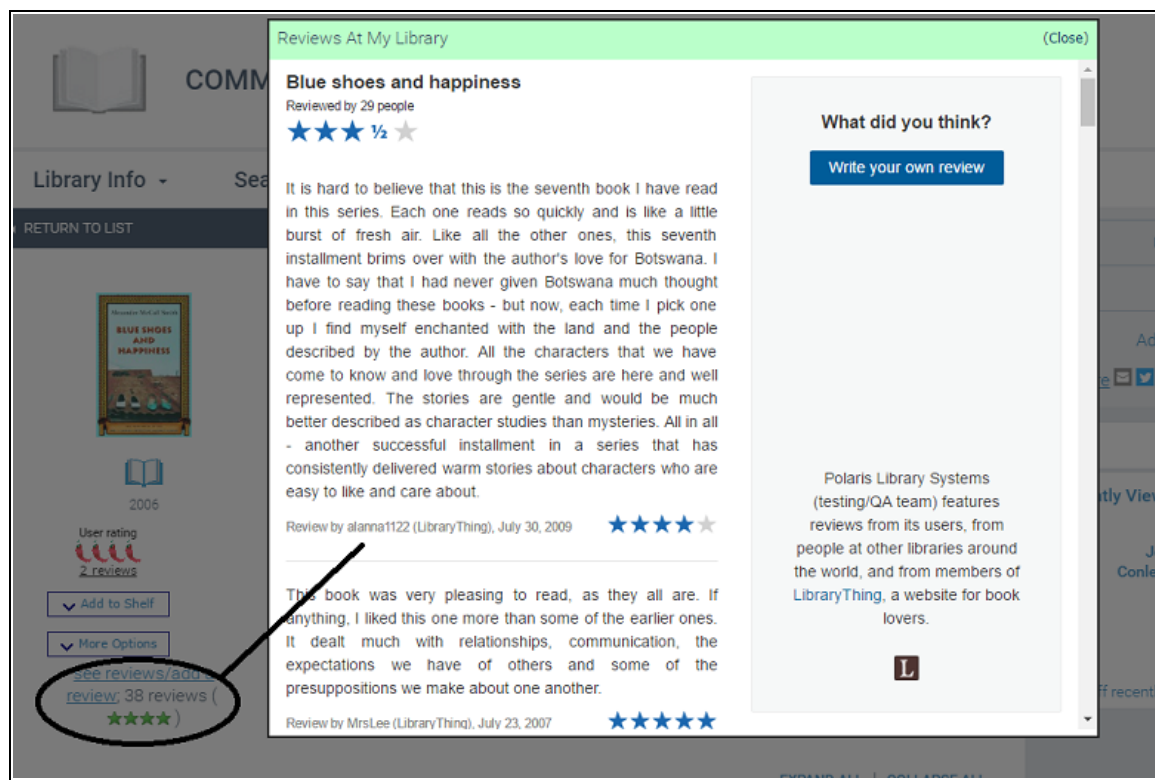
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## LibraryThing Enriched Data

LibraryThing for Libraries offers tag “clouds” and similar tagged titles to patrons, available from the product page for a title in PowerPAC search results. Patrons can browse for titles by clicking tags and links to other editions. Tags are based on LibraryThing’s database. Tag features appear in a lightbox (an inline frame dialog box). The illustration shows an example of tag cloud links and the Tag Browser lightbox that appears when the patron clicks or taps a link.



You can also offer reader reviews from the LibraryThing database. When this feature is enabled, a link to reviews appears under the book jacket image for the title in PowerPAC brief search results and in the full display for a title.



You can determine the text of this link when you specify your configuration on the LibraryThing Web site. You can configure your LibraryThing settings to display reviews from all participating libraries, from specific selected libraries, or from your library only.

### Notes

For LibraryThing port access requirements, see [Enriched Data Domains Requiring Port 80/443 Access](#).

You can export your catalog data to LibraryThing in MARC21 format using Polaris Export Express, a separately licensed feature of Polaris SimplyReports. Using SimplyReports scheduling features, you can run exports periodically to update LibraryThing content for your new titles. See your SimplyReports documentation for more information.

To set up Polaris PowerPAC to use tags, other edition, and similar title links from LibraryThing:



**Note:**

You can enable and receive enriched data from more than one vendor, except cover images. These must be enabled for one vendor only.

1. Contact your vendor's customer support department for help in obtaining your library's connection and authentication information for this enriched data provider.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
3. Double-click **Enriched Data**. The **Enriched Data** dialog box opens.
4. Click the **LibraryThing** tab.
5. Select **Enable tags and related titles** to display tags and related title links in PAC search results.
6. Select **Enable user reviews** to display reader ratings and the link to reader reviews. You can select either or both of these features.
7. Be sure the **Service URL** setting is  
**<http://ltfl.librarything.com/connector/connector.php?systype=polaris&id=>**
8. Type your account number in the **Account ID** box. Obtain your specific site setting from LibraryThing.
9. Click **OK**.

---

## OverDrive Enriched Data

OverDrive supplies enriched data including: reviews, cover images, summaries, star ratings, samples, and other content. The enriched data is supplied via the OverDrive Metadata API. If your library has a license for OverDrive, you can enable the enriched content and then configure its display in the PAC product page.

To set up Polaris to use enriched data from OverDrive:

**Note:**

You can enable and receive enriched data from more than one vendor, except cover images. These must be enabled for one vendor only.

1. Contact OverDrive's customer support department for help in obtaining your library's connection and authentication information for this enriched data provider.

2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
3. Double-click **Enriched data**.

The **Enriched Data** dialog box opens.

4. Click the **OverDrive** tab.
5. Click **Enable**.

Once the enriched content is enabled, configure the display of this content using the **Product page categories: Configure** profiles for PowerPAC and Mobile PAC. See [Set up the PowerPAC product page](#) and [Set up the Mobile PAC title \(product\) page](#).

## 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.

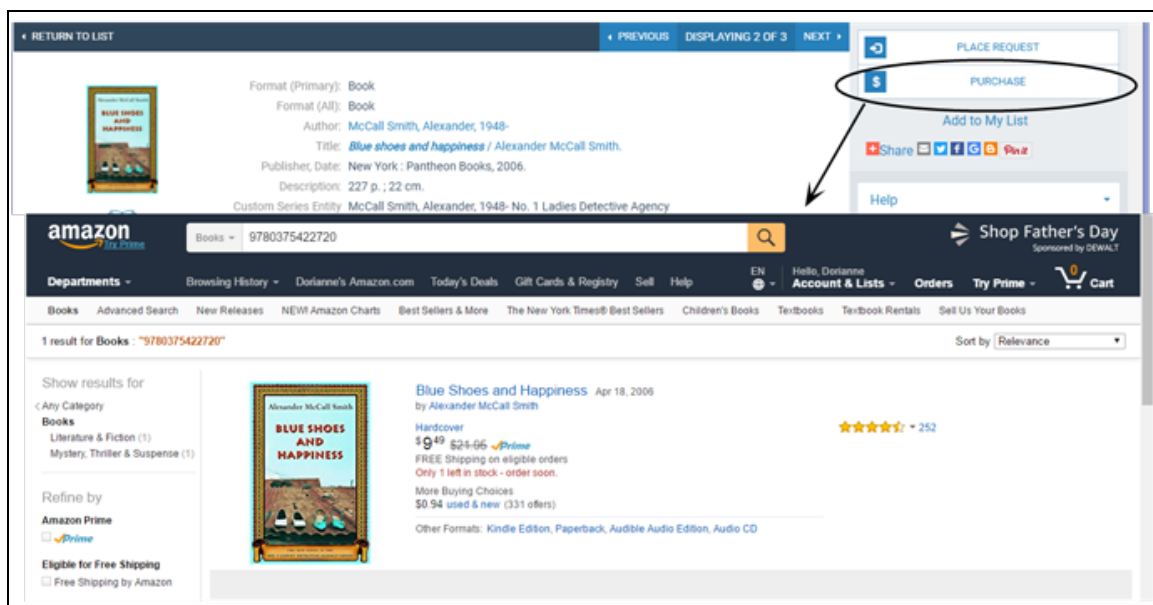
If you have a Polaris Bookstore contract and you enable both options, the **Buy It Now** link is displayed when the title is available at the Bookstore, and the **Purchase** link is displayed when the title is unavailable at the Bookstore and the title has an ISBN.

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### Setting Up Purchase Links

You can provide **Purchase** links for titles in Polaris PowerPAC and Mobile PAC search results. When a patron clicks or taps the link, a search for the title is launched at a specified online bookstore site, based on the ISBN or ISSN of the title. You can specify a local book store that offers online purchasing, or one of the larger online merchants such as Amazon.com®. Any purchase transaction takes place between the patron and the book vendor; the library does not mediate the transaction in any way. Each branch may define a different online book store.

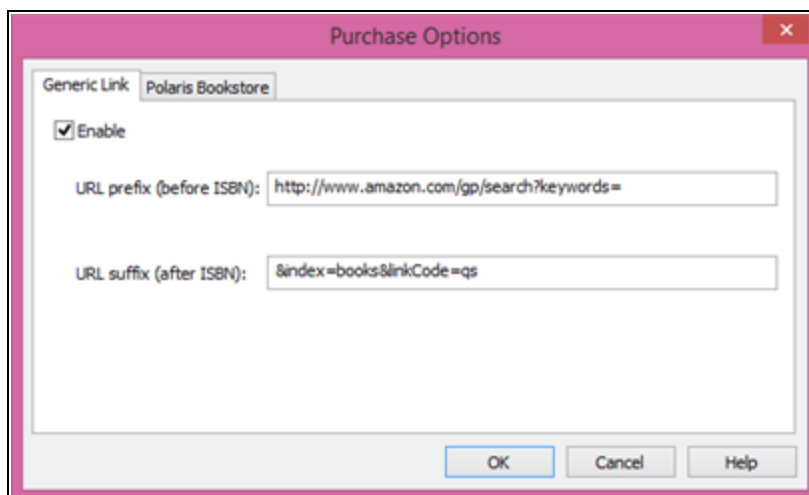
In Polaris PowerPAC, when the patron clicks or taps **Purchase** on the title product page, the vendor's site is displayed in a new browser window.

**Note:**

For information about Purchase links in Mobile PAC, see [Title Link: Purchase or Buy It Now](#).

To set up **Purchase** links for titles listed in Polaris PowerPAC and Mobile PAC search results:

1. Use a Web browser to display the search page for the online book store to which you want to direct your patrons for their purchases.
2. Do an ISBN search for any title and retrieve the title information, leaving your browser window open.
3. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
4. Double-click **Purchase Options**. The **Purchase Options** dialog box opens. The **Generic Link** tabbed page is displayed.



5. On the Generic Link tabbed page, select **Enable**. The other data fields become available.
6. In the Address (or Location) box on your browser, copy everything before the ISBN of the title you found, and paste it into the **URL prefix (before ISBN)** box.

**Note:**

Depending on the vendor's search methods, you may not be able to extract the information from the URL at the vendor's web site. In this case, check the vendor's online Help file or contact the vendor for instructions.

7. In the Address (or Location) box on your browser, copy everything after the ISBN, and paste it into the **URL suffix (after ISBN)** box.
8. Click **OK**.

**Related Information**

Polaris Bookstore - You can set up Polaris Bookstore by specific contract with Baker & Taylor, and receive back a portion of the sales as a donation to the library. See [Setting Up Polaris Bookstore](#).

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## Setting Up Polaris Bookstore

Through Polaris Bookstore and Baker & Taylor Inc., your library can establish an online bookstore where patrons can purchase materials at a discount comparable to other major online retailers, and your library receives a portion of the sales as a donation. The Bookstore is customized for your library, with your own graphics, URL prefix, and

custom packing slip text. Polaris Bookstore is available to your library by specific contract with Baker & Taylor.

When a title in a patron's search results is available in the Bookstore, the patron can click a **Buy It Now** link in the title product page to purchase the title. (If the title is not available at the Bookstore, no link is displayed.)

**Note:**

For information about Buy It Now links in Mobile PAC, see [Title Link: Purchase or Buy It Now](#).

You can also place a "shop now" button on your library's Web site, or promote the bookstore with a link in the custom content area of the portal page. Patrons can search or browse the store and order any available title, placing their purchases in an online shopping cart and paying by credit card.

Baker & Taylor maintains the bookstore site and handles any returns. You receive your portion of the proceeds at regular intervals as determined by your Polaris Bookstore contract. You work with your Polaris Site Manager to set up your bookstore profile. When the bookstore is implemented, ongoing support is provided by Innovative Interfaces®.

Polaris Bookstore works well for library consortia, because each organization that wants to participate can have its own bookstore. The proceeds are distributed to the appropriate organizations. (If the consortium office itself set up a bookstore for the whole consortium, the consortium office is responsible for dividing the proceeds appropriately.)

You can set up Polaris Bookstore at the system, library, or branch level. To make Polaris Bookstore available from Polaris PowerPAC and Mobile PAC:

**Important:**

This procedure is included for your information only. Your Polaris Site Manager enters the appropriate Polaris Bookstore settings for your site.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
2. Double-click **Purchase Options**. The Purchase Options dialog box opens.
3. Click the **Polaris Bookstore** tab.

The screenshot shows a 'Purchase Options' dialog box with a pink title bar. It has two tabs: 'Generic Link' and 'Polaris Bookstore'. The 'Polaris Bookstore' tab is active. Inside the tab, there is an 'Enable' checkbox. Below it are five text input fields: 'Home Page URL:', 'URL prefix (before ISBN):', 'URL suffix (after ISBN):', 'Username:', and 'Password:'. At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

4. Select **Enable**. The other data fields become available.
5. In the **Home Page URL** box, type the value specified by Baker & Taylor. This profile is the Bookstore home page link, typically displayed when the patron clicks **Shop Now**. The patron can browse the Bookstore from this page.
6. In the **URL prefix (before ISBN)** box, type the value specified by Baker & Taylor. The prefix and suffix settings control the Bookstore search result page that appears when the patron clicks **Buy It Now**.
7. In the **URL suffix (after ISBN)** box, type the value specified by Baker & Taylor.
8. Type your site's user name in the **Username** box.
9. Type your site's password in the **Password** box.
10. Click **OK**.

#### Related Information

- Shop Now dashboard link - You can place a link to the library's Polaris Bookstore site on the Polaris PowerPAC dashboard. See [Defining Web Parts for Dashboards](#).
- Polaris Bookstore on the portal page - You can promote the Polaris Bookstore on your Polaris PowerPAC portal page using custom content. See [Set up custom portal page content](#).
- Vendor purchase links - You can offer a **Purchase** link to another vendor's site. See [Setting Up Purchase Links](#).

## Setting Up Patron Account Access and Options

If you permit access to patron accounts from the PAC, patrons can log on to view and cancel requests, view and renew items out, estimate fines on currently overdue items, and view fines and fees. Depending on the features you offer, they can also manage messages, view their reading histories, pay fines or make donations by credit card, work with saved search agent searches, or view transcripts of sessions with a virtual reference service.

Additional Administration settings allow users to set up a new patron account from the PAC, create and change user names and passwords, and request address changes. You can also offer email communication with the library (Ask Us) to registered patrons and guests. In addition to the patron account options, you can set holds options that enable patrons to change the hold pickup branch. See the *Patron Services Administration Guide*.

### Notes:

- **Important:** Certain patron account settings apply to both Polaris PowerPAC and Mobile PAC. You may need to clear the page cache to see the results of some changes in either PAC. See [Updating Page Caches](#). Patrons cannot access their accounts from the PowerPAC Children's Edition.
- For Patron Access Options, PowerPAC and Mobile PAC honor system administration settings as follows:
  - If the patron is signed in, the system uses the setting for the patron's registered branch.
  - If the patron is not signed in, the system uses the setting for the connection branch.

See also:

- [Controlling Patron Account Login and Access](#)
- [Setting Patron Account Options](#)
- [Displaying Claimed and Lost Items in Patron Accounts in PAC](#)



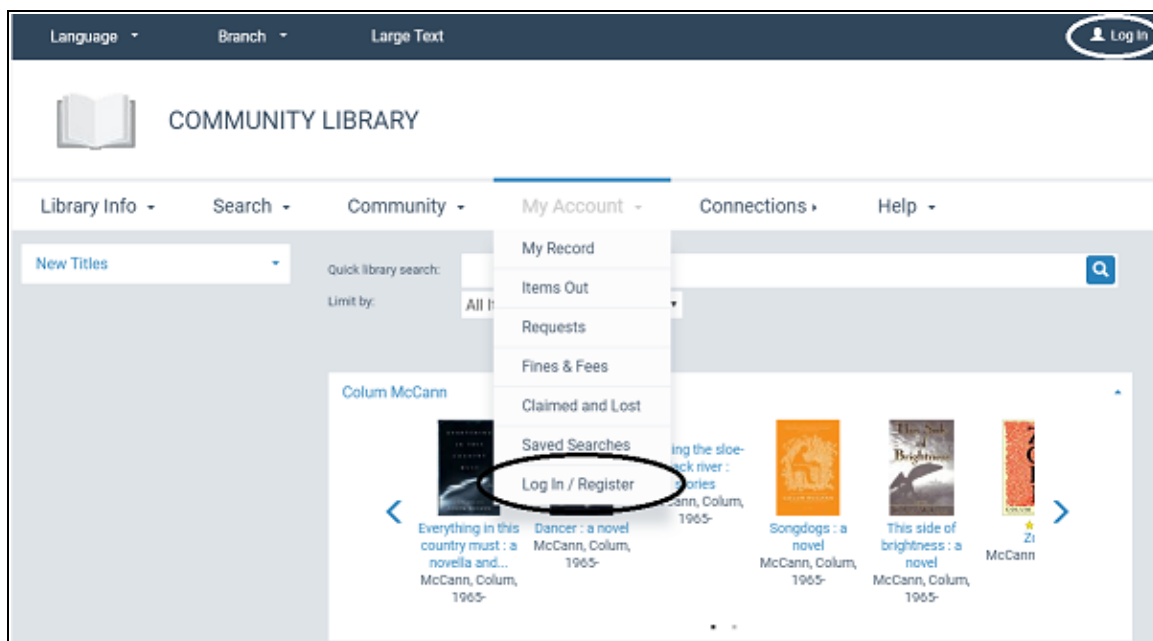
## Controlling Patron Account Login and Access

Use the following Polaris Administration settings to control PAC login and access to patron account information:

**Single Login: Enable** (PowerPAC profile) - If this profile is set to **Yes**, a **Log In/Register** option is displayed in the My Account menu and in the page footer. A **Log In** link is also displayed at the top of the page. This allows a patron to log in once for a session, instead of each time a function requires identification. When patrons provide log-in information for the first time (for example, in requesting a hold), they remain logged in until they select a log-out option, or until the Polaris PowerPAC session times out.

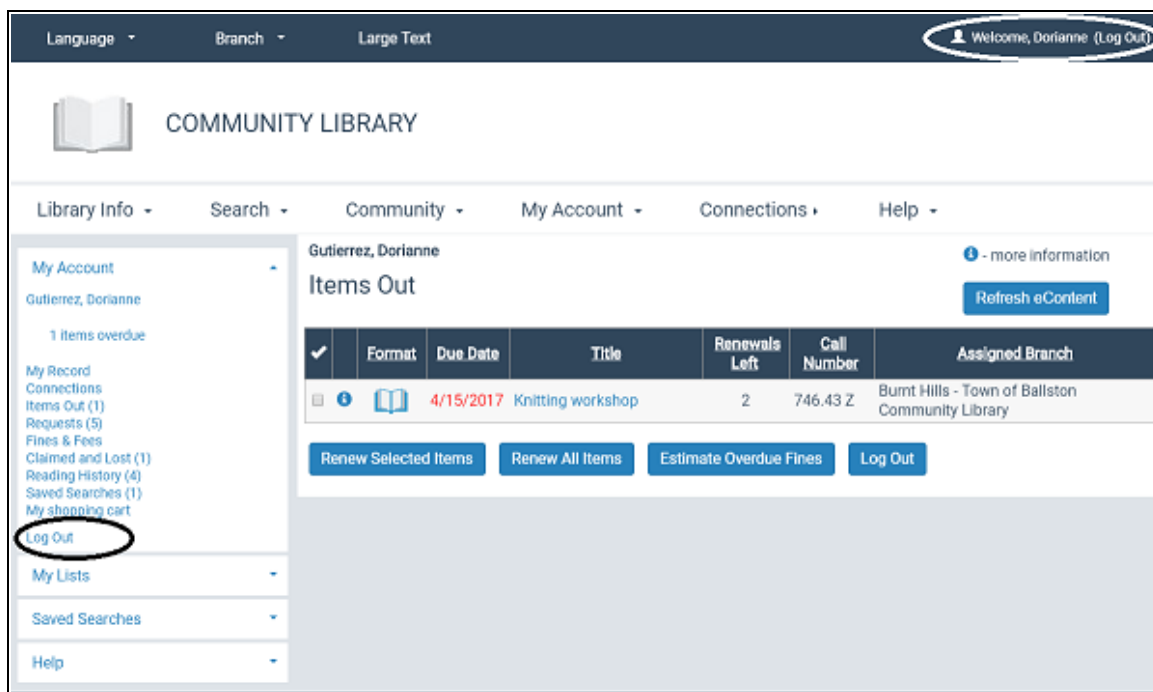
**Important:**

If you change this profile, you must clear the page cache. See [Updating Page Caches](#). If you do not, you may see unexpected results, and it may be possible for a patron to see another patron's account information at a library workstation.



When the patron has logged in, the PowerPAC page displays the patron's name and the **Log Out** option in the dashboard and at the top of the the page. The patron can click or

tap the **Welcome** link to display the Items Out page for the patron's account. When a patron logs in from the My Account menu, the Items Out page is automatically displayed



The logged-in patron can select an option in the **My Account** menu or on the dashboard to see their record, the items they have checked out, hold requests, fines and fees, and saved searches.

**Note:**

The Single Login profile also allows Polaris to cache patron log-in information for e-sources authentication. See [Setting Up E-Source Targets](#).

Polaris Mobile PAC allows a single log-in until the patron deliberately logs out, disconnects from the Mobile PAC site, or is inactive for 20 minutes. See [Patron Log-In Settings for Mobile PAC](#).

**Patron Access: policy statement hyper text link permitted** and **Patron Access: policy statement hyper text link** (PAC profile) - Enable the hyperlink text and define the text. See [Set up a privacy statement link \(Polaris PowerPAC\)](#).

**Login retries** (PAC profile) - Limits the number of times a patron can attempt to log into the PAC without success. See [Limit log-in attempts](#).

**Patron inactivity timeout** (PowerPAC profile) - Specifies the period of inactivity after which a logged-in patron at a library (in-house) workstation is automatically logged out. See [Set an inactivity timeout for in-house workstations](#).

**Active directory logon** (PAC profile) - Allows a PAC log-on using Active Directory credentials instead of the Polaris patron barcode or username and password. This feature is particularly suitable in academic settings, enabling students to authenticate into Polaris PowerPAC and Mobile PAC using their campus network credentials established in Active Directory. The user must have a Polaris patron record, but the authentication uses the user's network ID, contained in a Polaris patron record User Defined Field (UDF), rather than the patron record barcode and password. Although a patron record barcode is required by Polaris, it will not be used for any PAC authentication. When the user attempts to log in from Polaris PowerPAC or Mobile PAC, the log-in page prompts for the network credentials instead of the usual Polaris barcode/username and password. For set-up instructions, see [Set Up PAC Active Directory Log On](#).

**Navigation: Patron account** (PowerPAC and Mobile PAC profiles) - When this profile is set to **Yes**, the **My Account** option is displayed on the Polaris PowerPAC menu bar.

**Navigation: Fines & fees** (PowerPAC and Mobile PAC profiles) - When this profile is set to **Yes**, the **Fines & Fees** option is displayed on the My Account menu.

**Navigation: Items Out** (PowerPAC and Mobile PAC profiles) - When this profile is set to **Yes**, the **Items Out** option is displayed on the My Account menu and summary information is displayed in the patron account page dashboard.

**Navigation: My Record** - When the profile is set to **Yes**, the **My Record** option is displayed on the My Account menu.

**Navigation: Requests** (PowerPAC and Mobile PAC profiles) - When this profile is set to **Yes**, the **Requests** option is displayed on the My Account menu, summary information is displayed in the patron account page dashboard, and a link to the list of requests is displayed when a request is placed.

**Navigation: Claimed and Lost** (PowerPAC and Mobile PAC profiles) - When this profile is set to **Yes**, the Claimed and Lost view is displayed in the patron account.

**Patron access: Display hold queue information** (PAC profile) - When this profile is set to **Yes**, the position of a patron's request in the holds queue is displayed on the Requests page of the patron account.

**Patron Access: Renewal** (PAC profile) - When the **Renewal permitted** option is checked, patrons can renew all or selected items from the Items Out page in the patron account. If the **Allow renewal if patron registration will expire** option is selected, the patron sees the expiration message in PAC but the renewal is allowed. The system uses the setting of the governing library for patron blocks.

**Patron access options** (PAC profile) - Use the options available in this profile to set up self-registration; specify defaults; set password options; specify the reminder notices that patrons can opt out of receiving; specify the contact information the patron can change; specify the associated patron information that is displayed for patrons who have associations; specify which custom fields display and whether they are required; specify whether patrons can send "Ask us" emails. See [Setting Patron Account Options](#).

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## Setting Patron Access Options - Overview

You can use the **Patron access options** PAC profile in Polaris Administration to specify the options that are available to patrons for registering or updating their account information from the PowerPAC or Mobile PAC.

### Note:

For Patron Access Options, PowerPAC and Mobile PAC honor system administration settings as follows:

- If the patron is signed in, the system uses the setting for the patron's registered branch.
- If the patron is not signed in, the system uses the setting for the connection branch.

The Patron Access Options dialog box has separate tabs to specify the following types of patron account settings:

### Note:

In addition to the patron account options, you can set holds options that enable patrons to change the hold pickup branch. See the *Patron Services Administration Guide*.

- **Self-registration** - Enable self-registration and set up the fields for the form. This tab includes two subtabs for UDF and Custom Field Display.

- **Defaults** - Set defaults for patron code, language, expiration term, address check date, and UDFs/Custom Fields.
- **Log in** - Enable patrons to change their passwords, set up user names, create passwords, receive e-mail messages for forgotten passwords and set other log in options.
- **Contact Info** - Enable patrons to submit changes to their account contact information and opt out of receiving reminder notices.
- **Preferences** - Select options for displaying settings for associated patrons; define the UDF and Custom Field display and which fields are required.
- **Ask Us** - Enable patrons to send a reference question to a designated library email address. You set up a receiving email address on the branch level, then enable the feature in PowerPAC, Mobile PAC, or both. You can require a patron logon, or bypass the logon and allow anyone to send a question via Ask Us. The Sent From email address on the message to the library is the email address the user has specified in the Ask Us form, if any. If no address is specified, the user has logged in as a patron, and the patron account includes an email address, that address is used. If no email address is specified in the Ask Us form or the patron account, or the patron has cleared the address from the form, the Sent From address is that specified in the PAC profile **Email notification: Email address of sender**.

**Note:**

Any email from PAC, including Ask Us messages, requires you to specify the SMTP server in Polaris Administration. Double-click the PAC profile **Email notification: Server running SMTP service**, and type the domain name of the email SMTP server.

See also:

- [Set up online patron self-registration](#)
- [Set patron password and user name options](#)
- [Set up online patron account updates](#)
- [Set patron associations display in PAC](#)
- [Display and require UDFs in patron update pages in PAC](#)
- [Display and require PCDFs in patron update pages in PAC](#)
- [Set up and start Ask Us](#)

### Set up online patron self-registration

Polaris creates a patron record when a patron registers for a new library account online from Polaris PowerPAC or Mobile PAC. Polaris uses your self registration format, if you have one defined. By default, Polaris issues the patron a temporary barcode, beginning with **PACREG**. The temporary barcode allows the patron to do certain operations online, such as request a hold, but blocks the patron from checking out materials until the new record is verified by staff.

You can also set Polaris to send an automatic notification email to a library staff account. When the notification arrives, staff members can review the registration information and create the library card.

### To allow patrons to register for either type of barcode online

**Important:**

Do this procedure for each branch that allows patron self-registration.

1. In the Administration Explorer tree view, open the **Profiles** folder for the branch, and click the **PAC** tab in the details view.
2. Double-click **Patron access options**. The **Patron Access Options** dialog box opens.

Patron Access Options [ QA-FALCON 7.2 (sys) ]

Self-registration Defaults Log In Contact Info Preferences Ask us

☒ Patron can self-register

E-mail to: Add Delete

Name	Branch
JoAnne.Zukowski	Saratoga Springs Public Library

☒ Self-registration warning message enabled

Self-registration Instruction, Acknowledgement, and COPPA messages are defined on the Display Names and Message Text dialog box (Double-click 'Multiple language strings').

UDF Display Custom Field Display

User defined fields to display

<input checked="" type="checkbox"/> ID Number	<input type="checkbox"/> Required
<input checked="" type="checkbox"/> Privileges / Restrictions	<input type="checkbox"/> Required
<input type="checkbox"/> Voter Registration	<input type="checkbox"/> Required
<input type="checkbox"/> CybraryN Use Only (XXX,YYY)	<input type="checkbox"/> Required
<input type="checkbox"/> Not Currently in Use	<input type="checkbox"/> Required

☒ Birth date required ☒ Patron self-registration block

☐ Suppress gender selection

Save Cancel Apply Help

3. On the **Self-registration** tabbed page, select the **Patron can self-register** checkbox to make online registration available. When this option is selected, patrons see a **register now** link on PAC logon pages such as the Patron Account logon page and the Ask Us logon page. Clearing the checkbox removes the link, and self-registration is not available.
4. To specify a staff address for automatic notification email, do the following steps :
  - a. Click **Add**. The Polaris Find Tool appears.
  - b. Search for the staff member or members who should receive the registration notification messages, and select their names in the results list.
  - c. Right-click the highlighted names, and choose **Select** from the context menu. The **Patron Access Options** dialog box appears, and the selected names are displayed in the **E-mail to** list.

5. To enable a message regarding self-registration, select the **Self-registration warning message enabled** checkbox. This message allows the library to comply with the Children's Online Privacy Act. For information about editing the text of this message, see [Editing Messages and Labels](#).
6. To display user-defined fields in the patron self-registration pages in the PAC, and to specify that certain user-defined fields are required, do the following:
  - a. Select the **UDF Display** tab to display the available UDFs.

The screenshot shows a web interface with two tabs: "UDF Display" (selected) and "Custom Field Display". Under the "UDF Display" tab, there is a section titled "User defined fields to display". This section contains a table with five rows, each representing a user-defined field. The first two fields, "ID Number" and "Privileges / Restrictions", have their selection checkboxes checked. The last three fields, "Voter Registration", "CybraryN Use Only (XXX,YYY)", and "Not Currently in Use", have their selection checkboxes unchecked. To the right of each field name is a "Required" checkbox, all of which are currently unchecked.

User defined fields to display	Required
<input checked="" type="checkbox"/> ID Number	<input type="checkbox"/> Required
<input checked="" type="checkbox"/> Privileges / Restrictions	<input type="checkbox"/> Required
<input type="checkbox"/> Voter Registration	<input type="checkbox"/> Required
<input type="checkbox"/> CybraryN Use Only (XXX,YYY)	<input type="checkbox"/> Required
<input type="checkbox"/> Not Currently in Use	<input type="checkbox"/> Required

- b. To display user-defined fields (UDFs) in the patron self-registration page in the PAC, select the user-defined fields you want to display under **User defined fields to display**.
    - c. To indicate that a selected UDF is a required field, select the **Required** checkbox.
- See the *Patron Services Administration Guide*.
7. To display patron custom data fields (PCDFs) in the patron self-registration pages in the PAC, and to specify that certain PCDFs are required, do the following:
    - a. Select the **Custom Field Display** tab to display the available PCDFs.



UDF Display Custom Field Display

Enabled data fields (checkmark those to be displayed)

Label	Type	Required
<input checked="" type="checkbox"/> Parent/Guardian	String	No
<input checked="" type="checkbox"/> Parent/Guardian birth date	Date Time	No
<input checked="" type="checkbox"/> Circulation Status	Boolean	No
<input checked="" type="checkbox"/> License number	Integer	No
<input type="checkbox"/> Workform User Defaults	Boolean	No

Change Required Status

- b. To display a PCDF in the patron self-registration page in the PAC, select the appropriate left checkbox or boxes under **Label**.
- c. To indicate that a PCDF is a required field, select the PCDF and click **Change Required Status**. The status changes from **No** (the default) to **Yes**.

See the *Patron Services Administration Guide*.

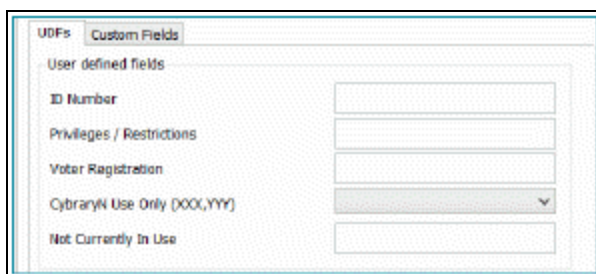
8. To continue setting self-registration display preferences, do the following:
  - a. To require a birth date for self-registration, select **Birth date required**.  
When a birth date is included in PAC self-registration, the system uses the birth date to check for duplicate patron records in addition to the first name and last name. If no birth date is supplied, duplicate checking uses only the first and last names.
  - b. To allow patrons to proceed through the self-registration without selecting a gender, select **Suppress gender selection**.
  - c. To include a verification block on all patrons who self-register in the PAC, Mobile PAC, or Polaris API, select **Patron self-registration block**.
9. Click the **Defaults** tab, and specify the default values for patron records created through self-registration:

**Notes:**

Library staff members can change the default values when they review the online registration.

The default notification method is set by the Patron Services parameter **Express patron registration options**. See the *Patron Services Administration Guide*.

- **Patron code** - Select the patron code to assign to all self-registered patrons. You may want all self-registered patrons to have the same code assigned to the majority of your patrons, or you may have a patron code specifically identifying self-registered patrons.
  - **Language** - Select the default language for self-registered patrons.
  - **Statistical Class** - Select the default statistical classification for self-registered patrons.
  - **Expiration term** - Set the default period of time before the library card expires. To set a date according to the current date (such as two years from today), select **months** or **years** in the second **Expiration term** box, and type a number in the first box. To set a precise date, select **exact date** in the second **Expiration term** box; then click the calendar icon and choose a date from the calendar in the first box (or type the date in the format shown in the **Expiration term** box).
  - **Address check term** - Set the default period of time when the registration address should be verified. To set a date according to the current date (such as two years from today), select **months** or **years** in the second **Address check term** box, and type a number in the first box. To set a precise date, select **exact date** in the second **Address check term** box; then click the calendar icon and choose a date from the calendar in the first box (or type the date in the format shown in the **Address check term** box).
10. To specify default values for user-defined fields (UDFs) in PAC self-registration pages, do the following:
- a. On the **Defaults** tabbed page, select the **UDFs** subtab to display the UDFs for your organization.



- b. To specify a default value for a text field, type the text.
- c. To specify a default value for a drop-down list, select an option in the list.

**Note:**

If you require a drop-menu UDF but do not specify a default option, the field is blank in a new record but the user must select an option.

- d. Click **Apply** to apply your settings.
11. To specify default values for patron custom data fields (PCDFs) in PAC self-registration pages, do the following:
- a. On the **Defaults** tabbed page, select the **Custom Fields** subtab to display the PCDFs that are available for your organization.

Label	Type	Default
Parent/Guardian	String	
Parent/Guardian birth date	Date ...	
Restricted patron	Boolean	
License number	Integer	
New PCDF	Boolean	

Parent/Guardian

Set Default

- b. Select the data field and do the following:

**Note:**

A Date field type cannot have a default value.

- String custom field - When you select a string field type, you can enter a default value of up to 255 characters.

The screenshot shows the 'Custom Fields' dialog box with the 'Parent/Guardian' field selected in the 'Enabled data fields' table. Below the table, there is a text input field for the default value, which is currently empty, and a 'Set Default' button.

Label	Type	Default
Parent/Guardian	String	
Parent/Guardian birth date	Date ...	
Restricted patron	Boolean	
License number	Integer	
New PCDF	Boolean	

Parent/Guardian

Set Default

- **Boolean custom field** - When you select a Boolean field type, you can select a default value of **Yes** or **No**. Boolean fields appear as checkboxes in the patron registration forms. If the default is set to **Yes**, the checkbox is checked. If the default is **No**, the checkbox is unchecked.

The screenshot shows the 'Custom Fields' dialog box with the 'Restricted patron' field selected in the 'Enabled data fields' table. Below the table, there are radio buttons for 'Yes' and 'No', and a 'Set Default' button.

Label	Type	Default
Parent/Guardian	String	
Parent/Guardian birth date	Date ...	
Restricted patron	Boolean	
License number	Integer	
New PCDF	Boolean	

Restricted patron

☐ Yes ☐ No ☒ Undefined

Set Default

- **Integer custom field**- When you select an Integer field type, you can enter a default value of up to 255 numbers in the box.

The screenshot shows the 'Custom Fields' dialog box with the 'License number' field selected in the 'Enabled data fields' table. Below the table, there is a text input field for the default value, which is currently empty, and a 'Set Default' button.

Label	Type	Default
Parent/Guardian	String	
Parent/Guardian birth date	Date ...	
Restricted patron	Boolean	
License number	Integer	
New PCDF	Boolean	

License number

Set Default

- c. After defining the default value for a field, click **Set Default**.
12. When you are finished making changes, click **Apply**.
13. Click **Save** and close the dialog box.

*Related Information*

- Remove block on self-registered patron record - See the *Patron Services Guide*.
- Notification preference - The default notification preference for self-registered patrons is the notification setting for the Patron Services parameter **Express patron registration options (General defaults tab)**. The patron can choose another method from the drop-down list during self-registration, and the notification preference can be changed when the registration is verified. You can filter the methods available for selection; see the *Patron Services Administration Guide*. If the patron chooses **Phone**, the patron must indicate the phone number to use for notification. If the patron chooses **TXT Messaging**, the patron must indicate the phone number to be used for TXT messages, and select a carrier for that number.
- EReceipts - If the patron's registered branch has enabled eReceipts (see the *Patron Services Administration Guide*), that organization can also offer the option to receive e-mail receipts, TXT receipts, or both for renewals from PAC. The option is available from both patron self-registration and account updates from PAC. To enable eReceipt preference options in PAC, use the PAC profile **Patron eReceipts**, available at the system, library, or branch level.
- Registered branch - The patron chooses a registered branch from a list during self-registration. The order of branches in the list is controlled by the PAC profile **Branch list order**. The setting for the current connection branch is used. When the profile is set to **Yes**, the branch names are displayed in ascending alphabetical order by name. When the profile is set to **No**, the branch names are displayed in ascending numerical order by internal organization ID. With either setting, the system organization is always first.

**Set patron password and user name options**

To set the password and user name options offered to patrons using Polaris PowerPAC or Mobile PAC:

**Important:**

Do this procedure for each branch that allows patron self-registration.

1. In the Administration Explorer tree view, open the **Profiles** folder for the branch, and click the **PAC** tab in the details view.
2. Double-click **Patron access options**. The **Patron Access Options** dialog box appears.
3. Click the **Log In** tab.

4. To allow patrons to change their passwords online, select the **Patron can change password** checkbox.
5. To specify an override password for staff, do these steps:

**Note:**

A staff member can use the staff override password to help a patron access the account in case the password has been forgotten. Once in the account, if the **Patron can change password** box is selected, the patron can specify a new password by clicking a link on the PAC patron account page.

- Select the **Enable staff override** checkbox.
  - Type a password in the **PAC override password** box. The password can be 4 to 16 characters (letters and numbers), but cannot include spaces.
6. (System level only) To allow patrons to set up and change user names, select **Enable patron username**.

A patron can enter her user name instead of a barcode when logging in to use PAC functions such as viewing the patron account or placing a hold request. The user name is displayed in the patron account in PAC, and the patron barcode is masked to display only the last four digits. The user name is also accepted for logging in to third-party self-service devices (devices that rely on SIP or SIP2) and in Polaris ExpressCheck. The user name must be a minimum of 4 alpha-numeric characters, not more than 50 characters, and cannot contain spaces. It must begin with an alpha character. The following special characters are also allowed: - (dash), \_ (underscore), . (period), and @ (at). The user name must not contain two adjacent special characters, and cannot match an existing patron barcode.

**Note:**

Patron user names are not available to staff. Staff cannot assign them during patron registration, they are not searchable or available for reports, and they are not displayed in the patron record. Only patrons can create or change user names.

7. (System level only) To allow patrons to receive an email message containing a time-sensitive link to reset their password, select **E-mail reset password link**.

When this option is set, the PAC, MobilePAC, or Polaris ExpressCheck sign in pages include a **Forgot password?** link. When the patron clicks the link, an email message containing a time-sensitive link to reset their password is sent to both the primary and alternate email addresses in the patron record. If no email address is present in the patron record, the system displays an error message.

**Note:**

If the patron has forgotten both user name and password, the patron must contact the library. Staff can assign a new password. Using this and the barcode, the patron can set up a new user name.

8. To restrict passwords to numeric characters (PINs), select **Passwords must be numeric only**.

This option is useful if you use Polaris Phone Attendant and allow patrons to log in by telephone to hear information about their accounts. (Alternatively, you can allow alpha-numeric passwords from the Phone Attendant. See the *Telephony Administration Guide*). If you choose to enable this option, existing alphanumeric passwords will continue to work but only numeric passwords are accepted when a

new account is created or when a patron password is changed from the staff client or from PAC.

9. Click **Apply** to apply your settings and continue working with Patron Access options, or click **Save** to save your settings and close the Patron Access options dialog box.
10. Select **File > Save**.

### Set up online patron account updates

You can allow patrons to request updates to their patron account information in Polaris PowerPAC or Mobile PAC and opt out of receiving certain email reminder notices.

#### Notes:

- When patrons request certain updates to their account information online, Polaris blocks the patron from checking out materials until staff verify the update. See the *Patron Services Guide*.
- For Patron Access Options, PowerPAC and Mobile PAC honor system administration settings as follows:
  - If the patron is signed in, the system uses the setting for the patron's registered branch.
  - If the patron is not signed in, the system uses the setting for the connection branch.

To set up online patron account updates:

1. In the Administration Explorer tree view, open the **Profiles** folder for the branch, and click the **PAC** tab in the details view.
2. Double-click **Patron Access options**.  
The **Patron Access Options** dialog box appears.



- Click the **Contact Info** tab.

The screenshot shows the 'Patron Access Options [ QA-DEWEY 7.0 (sys) ]' dialog box with the 'Contact Info' tab selected. The dialog has several sections for configuring patron options:

- Self-registration**: Includes checkboxes for 'Patron can change notification method' and 'Confirmation e-mail to patron'.
- Patron address**: Includes a checkbox for 'Change allowed' and radio buttons for 'Patron can submit change request' and 'Patron can change without verification'.
- E-mail address**: Includes a checkbox for 'Change allowed' and radio buttons for 'Patron can submit change request' and 'Patron can change without verification'.
- Phone number**: Includes a checkbox for 'Change allowed', radio buttons for 'Patron can submit change request' and 'Patron can change without verification', and a checkbox for 'Enable phone validation (system level)' with radio buttons for 'Phone call', 'TXT message', and 'Both'.
- Enable for patron codes:**: A list of codes with checkboxes, including CPH Outreach, CPH Resident, CPH Retired, CPH Staff / Board, Delinquent Borrower, ILL Agency, INNReach d2ir1, INNReach p2ir2, Juvenile, Juvenile with Restrictions, New Borrower, Outreach, Regular, Retired, Saratoga Outreach, Saratoga Resident, Saratoga Staff / Board, Schenectady resident, Self Registered, Staff / Board, Temporary, Test 1, Test 2, Test 3, and Test code for Community Lib.
- Patron can opt out of these reminder notices**: Includes checkboxes for 'Almost overdue/Auto-renew', 'Patron record expiration', and 'Inactive patron'.
- E-mail to:**: A section with 'Add' and 'Delete' buttons, and a table with columns 'Name' and 'Branch'. The table contains one entry: 'phelps' in the Name column and 'Schenectady Branch - Central' in the Branch column.

At the bottom of the dialog are buttons for 'Save', 'Cancel', 'Apply', and 'Help'.

- Select **Patron can change notification method** to allow patrons to change their notification method online. This option does not place a verification block on the patron account.
- Select **Confirmation e-mail to patron** to have the system send an acknowledgment message by email to the patron when he or she submits a request to change account information.

When you enable this option, a single email message is sent soon after the patron clicks **Submit Change Request**. The message is sent to both the primary and alternate email addresses. If the patron record does not have an email address, no message is sent.

- Select **Patron address - Change allowed** to allow patrons to change their physical address online, then select one of the following options:

- **Patron can submit change request** places a verification block on the patron account when the patron requests a change, and an email message is sent to the library staff, so library staff can verify and add the address.
- **Patron can change without verification** allows a patron to change the address online without incurring a verification block.

**Note:** PowerPAC and Mobile PAC perform basic validation against the postal codes table when updating the patron address, regardless of which option you select.

7. Select **E-mail address - Change allowed** to allow patrons to change an email address online, then select one of the following options:
  - **Patron can submit change request** places a verification block on the patron account when the patron requests a change, and an email message is sent to the address specified on this tabbed page.
  - **Patron can change without verification** allows a patron to change the email address online without incurring a verification block.
8. Select **Phone number - Change allowed** to allow patrons to change a contact telephone number online, then select one of the following options:
  - **Patron can submit change request** places a verification block on the patron account when the patron requests a change, and an email message is sent to the address specified on this tabbed page.
  - **Patron can change without verification** allows a patron to change the phone number online without incurring a verification block.
  - **Enable phone validation** (system level only) specifies whether Polaris validates phone numbers when they are entered in the Update Preferences page in Polaris PowerPAC or Mobile PAC. Libraries that require their patrons to enter an initial 1 with the phone number should leave this option cleared.

**Note:**

In Mobile PAC, when validation is not enabled, each phone number option is one entry field, similar to Polaris PowerPAC. When validation is enabled, each phone number option has three entry fields (area code/prefix/four-digit number).

9. Select the patron codes that can request account updates online. (Clear the appropriate patron code checkboxes to prevent these patrons from requesting account updates online.)
10. (Optional) You can click **Add** to add patron codes or **Delete** to delete them.
11. To allow patrons to opt out of receiving certain reminder notices, select from the following options:
  - Almost overdue/Auto-renew
  - Patron record expiration
  - Inactive patron
12. Select **Save** or **Apply**.
13. Select **File > Save**.

#### Related Information

- **Verify borrower blocks** - Patrons who have requested the specified account updates online are automatically blocked from check-out and renewal at the staff circulation desk until a library staff member has reviewed the change. (The block is not applied if you have chosen to allow the change without verification.) In addition, you can set Polaris to block renewals online or by telephone.
- **EReceipts** - If the patron's registered branch has enabled eReceipts, that organization can also offer the option to receive email receipts, TXT receipts, or both for renewals from PAC. The option is available from both patron self-registration and account updates from PAC. To enable eReceipt preference options in PAC, use the PAC profile **Patron eReceipts**, available at the system, library, or branch level.

See the *Patron Services Administration Guide*.

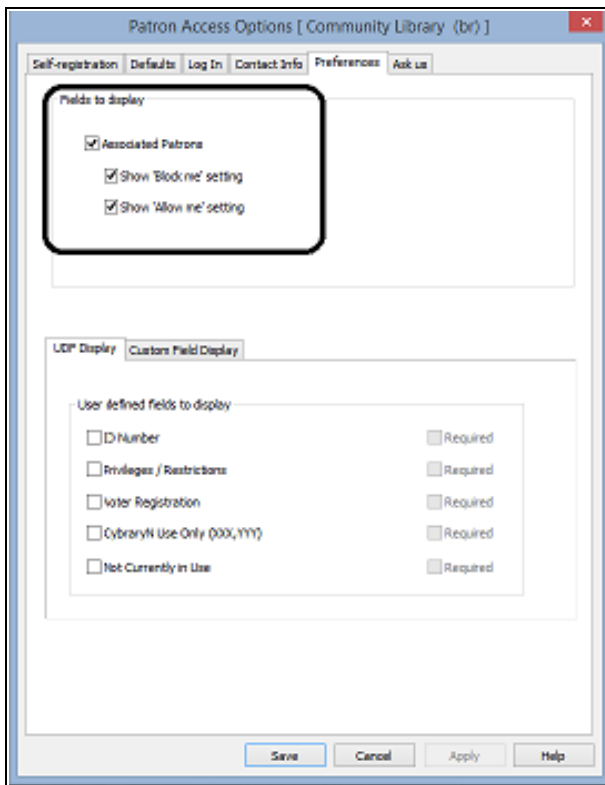
### Set patron associations display in PAC

If your library uses associated patrons functionality to link patron accounts together, you can specify whether to display the "block me" and/or "allow me" settings for associated patrons in the PAC.

To specify the settings that patrons can see about their associated patrons in the PowerPAC and Mobile PAC:

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

2. Double-click **Patron access options**. The **Patron Access Options** dialog box opens.
3. Select the **Preferences** tab.



4. Select the **Associated Patrons** checkbox, and select one or both of these checkboxes:
  - **Show 'Block me' setting** - When this checkbox is selected for a branch, patrons registered at this branch can see whether they are blocked when their associated patrons are blocked.
  - **Show 'Allow me' setting** - When this checkbox is selected for a branch, patrons registered at this branch can see whether they are permitted to pick up and check out held items for their associated patrons.
5. Click **Save**.

### Associated Patron Display in PowerPAC

If both the **Associated Patrons** options (**Show 'Block me' setting** and **Show 'Allow me' setting**) are selected in the **Patron Access Options** profile for the branch, patrons

registered at that branch who have associations can access their account in PowerPAC, expand the **Associated Patrons** area, and see the block and allow settings for each of their associated patrons.

Name:	Acosta, Sarah R
Barcode:	*****4202
Username:	[None]
Registered at:	Community Library
Patron code:	Regular
Date of original registration:	7/9/2003
Expiration date:	7/7/2018
Current blocks:	Patron has outstanding fines Block Patron has exceeded the maximum number of overdue items permitted
Last activity date:	4/26/2017

► Messages

► Contact Information and Preferences


▼ Associated Patrons (3)

Name	Blocks on this patron also block me	I can pick up holds
Acosta, Elena C	Yes	No
Ozolins, Genie R	Yes	Yes
Surento, Brandon S	No	Yes

## Associated Patron Display in Mobile PAC

If both the **Associated Patrons** options (**Show 'Block me' setting** and **Show 'Allow me' setting**) are selected in the **Patron Access Options** profile for the branch, patrons registered at that branch who have associations can access their account in Mobile PAC, expand the **Associated Patrons** area by selecting the right arrow, and see the block and allow settings for each associated patron.

*Patron account in Mobile PAC*


**QA-POLARIS**

[Home](#) > [My Account](#) - English custom System

**Acosta, Sarah R**  
 1001900144202  
 Community Library  
 Expiration Date: 7/7/2018  
 000-000-0000  
 tktjkajdkjfka@kajfkaj.com  
 Current blocks :  
**Patron has outstanding fines Block**

0 Messages >

14 Items checked out (14 overdue) >

2 Hold Requests >

Fines And Fees (owes \$58.19) >

3 Claimed and Lost >

0 Saved Searches >

0 Reading History >

Update Account and Preferences >


**3 Associated Patrons >**

Change Logon >

Saved Lists >

[Log Out](#)

*Block and Allow settings for associated patrons in Mobile PAC*


**QA-POLARIS**

[Home](#) > [My Account](#) - English custom System > [Associated Patrons](#)

**Acosta, Elena C**  
 - Blocks on this patron also block me  
 - I cannot pick up holds

**Ozolins, Genie R**  
 - Blocks on this patron also block me  
 - I can pick up holds

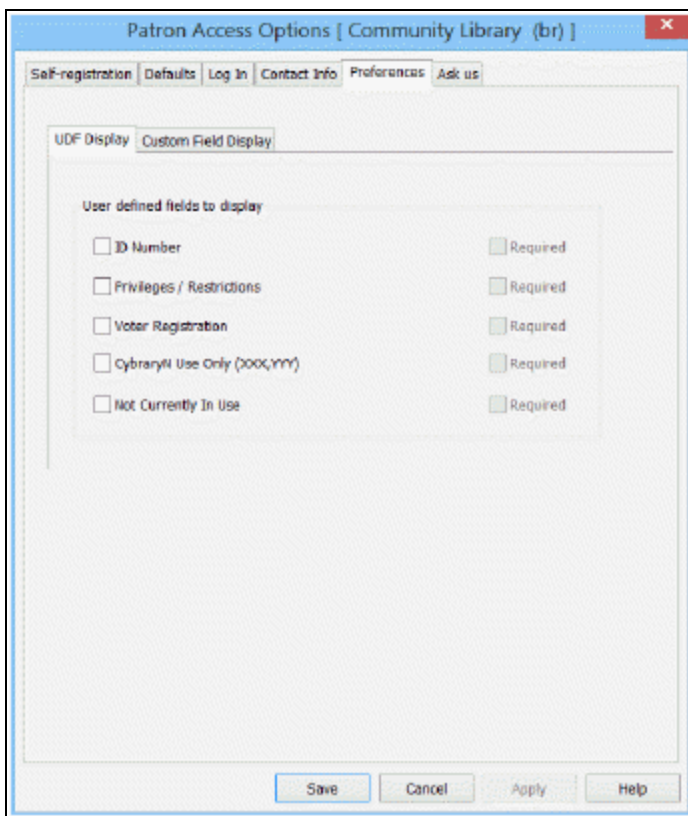
**Surento, Brandon S**  
 - Blocks on this patron do not block me  
 - I can pick up holds

[Log Out](#)

## Display and require UDFs in patron update pages in PAC

To display user-defined fields (UDFs) in the patron update pages in the PAC, and to specify that certain user-defined fields are required:

1. In the Administration Explorer tree view, open the **Profiles** folder for the branch, and click the **PAC** tab in the details view.
2. Double-click **Patron Access options**. The **Patron Access Options** dialog box appears.
  - a. Select the **Preferences** tab. The available UDFs are listed on the **UDF Display** subtab.



- b. To display UDFs in the patron account update pages in the PAC, select the left checkbox under **User defined fields to display**.
  - c. To indicate that a displayed UDF is a required field, select the **Required** checkbox. See "Setting Up User-Defined Fields" in the *Patron Services Administration Guide*.
3. Click **Apply** when you are finished setting up the UDFs.

## Display and require PCDFs in patron update pages in PAC

To display patron custom data fields (PCDFs) in the patron update pages in the PAC, and to specify that certain patron custom data fields are required:

1. In the Administration Explorer tree view, open the **Profiles** folder for the branch, and click the **PAC** tab in the details view.
2. Double-click **Patron Access options**. The **Patron Access Options** dialog box appears.
3. Select the **Preferences** tab.
  - a. Select the **Custom Field Display** tab to display the available PCDFs.

UDF Display Custom Field Display

Enabled data fields (checkmark these to be displayed)

Label	Type	Required
<input checked="" type="checkbox"/> Parent/Guardian	String	No
<input checked="" type="checkbox"/> Parent/Guardian birth date	Date Time	No
<input checked="" type="checkbox"/> Restricted patron	Boolean	No
<input checked="" type="checkbox"/> License number	Integer	No
<input type="checkbox"/> New PCDF	Boolean	No

Change Required Status

- b. To display a PCDF in the patron account update page in the PAC, select the left checkbox under **Label**.
- c. To indicate that a displayed PCDF is a required field, select the PCDF and click **Change Required Status**. The **Required** setting changes from **No** (the default) to **Yes**.

See the *Patron Services Administration Guide*.

4. Click **Apply** when you are finished setting up the PCDFs.

## Set up and start Ask Us

With the Ask Us feature, patrons can use Polaris PowerPAC or Mobile PAC to send a reference question to a designated library email address. You set up a receiving email address on the branch level, then enable the feature in PowerPAC, Mobile PAC, or both. You can require a patron logon, or bypass the logon and allow anyone to send a question via Ask Us.

The Sent From email address on the message to the library is the email address the user has specified in the Ask Us form, if any. If no address is specified, the user has



logged in as a patron, and the patron account includes an email address, that address is used. If no email address is specified in the Ask Us form or the patron account, or the patron has cleared the address from the form, the Sent From address is that specified in the PAC profile **Email notification: Email address of sender**.

**Note:**

Any email message from PAC, including Ask Us messages, requires you to specify the SMTP server in Polaris Administration. Double-click the PAC profile **Email notification: Server running SMTP service**, and type the domain name of the email SMTP server.

To set up the email addresses to receive questions sent from the PAC, and to start the Ask Us function:

1. In the Administration Explorer tree view, open the **Profiles** folder for the branch, and click the **PAC** tab in the details view.
2. Double-click **Patron Access options**. The **Patron Access Options** dialog box appears.
3. Click the **Ask Us** tab.

The screenshot shows the 'Patron Access Options [ Community Library (br) ]' dialog box with the 'Ask us' tab selected. The 'E-mail to:' section contains a table with two columns: 'Name' and 'Branch'. There are two entries in the table: 'Cobleskill Ask Us' and 'Cobleskill Patron Update', both associated with 'Community Library'. Above the table are 'Add' and 'Delete' buttons. At the bottom of the dialog are 'Save', 'Cancel', 'Apply', and 'Help' buttons.

Name	Branch
Cobleskill Ask Us	Community Library
Cobleskill Patron Update	Community Library

4. To specify the receiving address for Ask Us email messages, do these steps:
  - a. Click **Add**, and use the Find Tool to search for the staff member or members who should receive the Ask Us messages.
  - b. Select the names in the results list, right-click the highlighted names, and choose **Select** from the context menu.

The **Patron Access Options** dialog box appears, and the selected names are displayed in the **E-mail to** list.

5. Click **Apply** to apply your settings and continue working with patron access options, or click **Save** to save your settings and close the **Patron Access Options** dialog box.
6. To make the Ask Us feature available in Polaris PowerPAC, do these steps:
  - a. Click the **PowerPAC** tab in the details view of the Explorer.
  - b. Double-click **Navigation: Ask us**, and select **Yes**.
  - c. To require a patron login for Ask Us, double-click **Ask Us: Require Login**, and set the value to **Yes**.

If this value is set to **No**, a **Guest** button is displayed on the Ask Us logon page in Polaris PowerPAC. The user can click **Guest** to send a question without logging on.

7. To make the Ask Us feature available in Mobile PAC, do these steps:
  - a. Click the **MobilePAC** tab in the details view of the Explorer.
  - b. Double-click **Navigation: Ask us**, and select **Yes**.
  - c. To require a patron login for Ask Us, double-click **Ask Us: Require Login**, and set the value to **Yes**.

If this value is set to **No**, a **Guest** button is displayed on the Ask Us logon page in Mobile PAC. The user can click **Guest** to send a question without logging on.

**Note:**

Libraries that use Polaris Community Profiles and ContentXChange should set this option to **No** so that logon is not required. Organizations can place the Ask Us feature on their own Web sites, where any visitor to the site can send a question to the library. For more information, see the *Polaris Administration Guide*.

8. Select **File > Save**.

*Related Information*

The ContentXChange Ask Us widget uses the Ask Us settings for the organization specified in the **ContentXChange widgets link to:** box on the Community Record workform. See the *Community Profiles Guide*.

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## Enable patron account access - PowerPAC


To allow patrons to view their accounts from Polaris PowerPAC, and to specify the available account features:

**Note:**

Separate Mobile PAC profiles control patron account access, navigation, and features in Mobile PAC. See [Patron Account \(My Account\) in Mobile PAC](#).

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Navigation: Patron Account**, and set the value to **Yes**. When this profile is set to **Yes**, the **My Account** option is displayed on the Polaris PowerPAC menu bar.
3. Set the following PowerPAC profiles to control what features you offer when patrons access their accounts:
  - **Navigation: Fines & Fees** - Specifies whether patrons can view the fines and fees associated with their library accounts. When the profile is set to **Yes**, the **Fines & Fees** option is displayed on the My Account menu. The system uses the setting for the patron's registered branch.

**Note:**

Patrons can select an information icon  to see detailed information about an individual fine or fee. The history section on the details page includes the date, type, amount, payment, and staff name associated with the fine or fee. If you prefer to suppress the history section, set the PAC profile **Fines & Fees: Show history in detailed view** to **No**.

**Note:**

If you plan to accept online credit card payments, set **Navigation: Fines & Fees** to **Yes**. See the *Patron Services Administration Guide*.

- **Navigation: Items Out** - Specifies whether patrons can view a list of the items checked out to their account. When the profile is set to **Yes**, the **Items Out** option is displayed on the My Account menu and summary information is displayed in the patron account page dashboard. The system uses the setting for the patron's registered branch.

**Note:**

If you want to allow patrons to renew items from the Items Out page, set this option using the PAC profile **Patron Access: Renewal Permitted**. See step 4.

- **Navigation: My Record** - Specifies whether patrons can view their library registration information. When the profile is set to **Yes**, the **My Record** option is displayed on the My Account menu.
- **Navigation: Requests** - Specifies whether patrons can view a list of the titles they have requested. When the profile is set to **Yes**, the **Requests** option is displayed on the My Account menu, summary information is displayed in the patron account page dashboard, and a link to the list of requests is displayed when a request is placed. The system uses the setting for the patron's registered branch. The page shows the status of each request, and allows the patron to cancel, suspend and reactivate requests. From the Requests page, the patron can also see detailed information about each request.
- **Patron access: Display hold queue information** - Specifies whether the position of a patron's request in the holds queue is displayed on the Requests page of the patron account, and whether the patron receives a message about the current number of active requests for the material when she places a hold. The profile setting for the patron's registered branch controls whether the holds queue information is displayed.

**Note:**

You may want to suppress the holds queue information because it can be confusing in certain circumstances. For example, a request may be first in the queue, but if it is overridden for some reason, it may not be filled first. Also, if a branch uses primary and secondary routing groups, the queue

position of a request may change if the request is sent to the secondary routing group. For more information about holds processing, see the *Patron Services Administration Guide*.

4. To allow patrons to renew items from Polaris PowerPAC and Mobile PAC, do these steps:

- a. Click the **PAC** tab in the details view of the Administration Explorer.
- b. Double-click **Patron Access: Renewal**, and select **Renewal permitted**.

When this option is checked, patrons can renew all or selected items from the Items Out page in the patron account. (When the profile is set to **No**, the renewal links are not displayed on the Items Out page.)

**Note:**

Even when you permit renewals, renewal options are not displayed for items that cannot be renewed.

- c. To allow renewals where the patron registration will expire before the renewal due date, select **Allow renewal if patron registration will expire**.

If this option is selected, the patron sees the expiration message in PAC but the renewal is allowed. The system uses the setting of the governing library for patron blocks.

5. Select **File | Save**.

**Related Information**

- Patron messages - You can allow staff to post library-defined or free-text messages to patron accounts. Patrons can then read and delete the messages from the PowerPAC or Mobile PAC patron account. For more information about setting up patron messages, see the *Patron Services Administration Guide*. For more information about posting patron messages in the staff client, see the *Patron Services Guide*.
- Blocks on renewals and ebook circulation - You can set blocking conditions that apply to renewals and ebook circulation from the PAC or renewals by telephone. See the *Patron Services Administration Guide*. You can also block renewal from PAC if an associated patron has exceeded the 2nd level fine amount as determined by the governing library for patron blocks, or if the associated patron has exceeded the maximum overdue limit as determined by the governing library for

patron blocks. For more information about setting up blocking relationships, see the *Patron Services Guide*.

- Hold/ILL requests - You set conditions for requests from PAC with Requests parameters. See the *Patron Services Administration Guide*.
- Online registration, password changes, and account updates - See [Setting Patron Account Options](#).
- Setting a staff override password - See [Set patron password and user name options](#).
- Allowing credit card payments - See the *Patron Services Administration Guide*.
- Search agent (saved searches) - If you offer search agent functionality, patrons can view and work with their saved searches from the patron account pages. See [Setting Public Access Profiles and Parameters](#).
- Ask Us - Using Ask Us, registered patrons can log in and send an email message to designated library staff members. See [Set up and start Ask Us](#). You can optionally offer this feature to guest users (no logon required).
- 3M PAMS - 3M™ Public Access Management System “smart cards” allow patrons to log in by placing a smart card in a reader. See [Set up Polaris PowerPAC](#).
- Polaris® ExpressCheck™ - Use the SelfCheck Unit parameter **Polaris ExpressCheck: Options** to control access to the patron account from ExpressCheck.

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## Limit log-in attempts

You can limit the number of times a patron can attempt to log in before being forced to wait 5 minutes. To limit the number of times a patron can attempt to log in before the waiting period is enforced:

### Note:

These settings apply to the following PAC applications:  
 Polaris PowerPAC - Main log-in page, hold request page  
 Polaris PowerPAC Children’s Edition - Hold request page  
 Mobile PAC - Main log-in page

1. In the Administration Explorer tree view, open the **Profiles** folder at the system level, and click the **PAC** tab in the details view.
2. Double-click **Login retries**. The **PAC Login Retries** dialog box appears.

3. Select **Enable limit on login retries**.
4. Set the number of attempts (5-99) allowed before the patron must wait 5 minutes.
5. Click **OK**.

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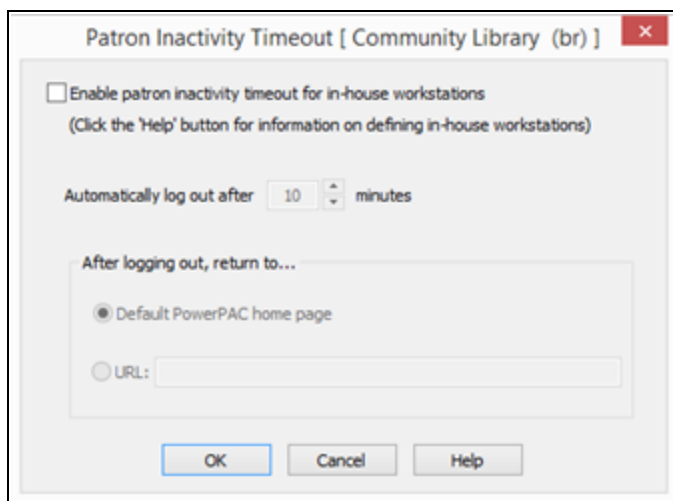
## Set an inactivity timeout for in-house workstations

To automatically log out patrons from in-house workstations after a specified period of inactivity:

**Note:**

These settings do not apply to patrons who are not logged in or those working outside the library.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PowerPAC** tab in the details view.
2. Double-click **Patron inactivity timeout**. The **Patron Inactivity Timeout** dialog box appears.



3. Select **Enable patron inactivity timeout for in-house workstations** to enable the inactivity timeout.
4. Set the time after which the patron is logged out and the specified page (see step 5) is displayed. You can specify a time from 1 to 20 minutes.
5. Specify the page to display after the inactivity period and automatic logout:

- Select **Default PowerPAC home page** to return to the page you have specified as the PowerPAC home page. See [Set up Polaris PowerPAC](#).
  - Select **URL** and type the complete URL of the page that should be displayed (255 characters maximum).
6. Click **OK** to save your settings.

### Patron Inactivity Timer

The patron inactivity timer starts only when a patron has stopped doing any of the following actions: clicking Polaris product buttons, links, cover images; clicking in the PowerPAC portion of the browser window; or entering a credit card payment. When any of these actions occur, activity is registered and the inactivity timer is restarted. Actions that are not counted as activity include resizing or moving the browser window; accessing browser menu options; scrolling; or accessing any third-party resource that opens in a lightbox, frameset, or new browser window.

When this feature is enabled, the browser status bar displays a count-down timer when 60 seconds are left before automatic logout. In addition, an alert box displays the following message 30 seconds before the session is due to time out: **Your session will end in 30 seconds**.

If the user clicks the **Continue session** button in the timeout alert box, the session timeout clock restarts, and the user remains on the current page. If a lightbox was open, it remains open. If the user does not click the **Continue session** button, the session ends, and the page defined in the **Patron inactivity timeout profile** displays.

#### Note:

When a credit card payment is submitted, the Patron Inactivity Timeout value is calculated by adding it to the credit card gateway timeout set in the Credit Card parameter **Online payments: Configure** plus 90 seconds.

The count-down timer text can be edited in Polaris Language Editor (string ID **PACML\_TIMEOUMSG**).

The following language strings can be edited in Polaris Language Editor:

- **PACML\_TIMEOUTALERT**
- **PACML\_TIMEOUTALERT2**
- **PACML\_CONTINUESESSION**
- **PACML\_TIMWINTITLE**



- **PACML\_TIMEOUTCLICK**
- **PACML\_TIMEOUTSECONDS**

**Note:**

The number of seconds cannot be modified.

**Note - Secure Socket Layer (SSL):**

If SSL is enabled for the entire site, the 60-second countdown timer appears in the status bar only if you add the site to the trusted sites list in Internet Explorer. For more information about SSL, see the *Polaris Administration Guide*.

**Note - Firefox browsers:**

You may need to clear the browser history to make the timer work correctly.

To display the count-down timer in the status bar, select **Tools, Options, Content** tabbed page, and click **Advanced**. On the Advanced JavaScript Settings dialog box, select **Change status bar text**.

The automatic logoff applies only to in-house workstations. A workstation is typically considered to be in-house if it is registered in Polaris Administration (staff client workstations) or if the workstation's IP address is listed in the In-House IP Addresses database table. If you use Polaris PowerPAC on workstations within the library and you are enabling the patron inactivity timeout, be sure to list them in the In-House IP Addresses database table.

For information about registering client workstations in Polaris Administration, see the *Polaris Administration Guide*.

For information about listing PowerPAC workstations in the In-House IP Addresses database table, see the *Polaris Administration Guide*.

You can determine whether the system checks both the In-House IP Addresses table and the registered workstations (the default setting), or only the In-House IP Addresses table, to determine whether a workstation is in-house. See the *Polaris Administration Guide*.

---

## Set up PAC Active Directory logon

You can allow users to log on to PAC using network credentials (Active Directory logon) instead of the Polaris patron record barcode/username and password. ActiveDirectory logon has these requirements and limitations:

- The Polaris production server must be in the same domain as the Active Directory service.
- The library must designate a user-defined field (UDF) to contain the network ID in the patron record. Staff can search for patron records by this UDF if trouble-shooting is necessary. For information about setting up UDFs, see the *Patron Services Administration Guide*.
- The Polaris patron record barcode and password will not work to log on to the patron record in PAC. Because the network ID is the standard for access and the Polaris patron barcode/password cannot be used to log on, the library must limit the user's ability to manage this Polaris patron data by suppressing certain options from PAC. In Polaris Administration, suppress the following options with the PAC profile **Patron access options** (see [Setting Patron Account Options](#)):
  - Create a username - On the Log In tabbed page (system level only), clear the **Enable patron username** checkbox.
  - Change passwords - On the Log In tabbed page, clear the **Patron can change password** checkbox.
  - Manage forgotten passwords - On the Log In tabbed page (system level only), clear the **E-mail forgotten password** checkbox.
  - Register for a patron account online - On the Self-registration tabbed page, clear the **Patron can self-register** checkbox.
- SIP applications, such as third-party self-check, will not work with the Active Directory credentials. They require the Polaris patron record barcode and password.
- Offline Polaris will not work with the Active Directory credentials. It requires the Polaris patron record barcode and password.

See [Active Directory Log On in PAC](#).

To allow users to log on to PAC using network credentials instead of the Polaris patron record barcode/username and password:

**Note:**

These settings apply to both Polaris PowerPAC and Mobile PAC.

1. In the Administration Explorer tree view, open the **Profiles** folder for the system, and click the **PAC** tab in the details view.
2. Double-click **Active directory logon**. The **Active Directory Logon** dialog box appears.
3. Select **Enable**.
4. Select the UDF (user-defined field) that contains the network ID from the list.
5. The options are the UDFs defined for the system. See the *Patron Services Administration Guide*.
6. Enter the network domain name (maximum 25 characters).
7. Click **Save**.
8. Suppress user name, password, and self-registration options from display in PAC, using the PAC profile **Patron access options**. See [Enable patron account access - PowerPAC](#).

**Important:**

There are no programmatic relationships between the **Active Directory Logon** settings and the **Patron access options** settings that control patron usernames, passwords, or self-registration. You must suppress these options in Polaris Administration as described here.

9. Using Polaris Language Editor (WebAdmin), reload Polaris PowerPAC and Mobile PAC.

### Active Directory Log On in PAC

When the Active Directory option is enabled, the PAC log-on page displays **Username** and **Password** fields. The user enters the network ID (username) and password. If the password is correct and the username matches that entered in a single patron record UDF, the user is logged on. The **Username** field label can be edited in Polaris Language Editor (WebAdmin).

Authentication fails in the following situations:

- The credentials cannot be validated according to network validation rules (for example, the user has entered a Polaris patron barcode instead of the network username). A message is displayed: **You have entered an invalid ID or password. Please try again.**

- The ID (username) entered does not match the designated UDF in any patron record. A message is displayed: **Your library account cannot be verified. Please contact the library for assistance.**
- The ID entered matches the designated UDF in more than one patron record. A message is displayed: **Your ID matches more than one library record. Please contact the library for assistance.**

These messages can be edited in Polaris Language Editor (WebAdmin). The language strings are:

- **PACML\_ADLOGON\_FAILED** (invalid ID or password)
- **PACML\_ADLOGON-NOPATRON** (library account cannot be verified)
- **PACML\_ADLOGON\_MULTPATRON** (more than one library record)

## Set up a privacy statement link (Polaris PowerPAC)

You can display a link to the library's privacy policy (*For more information on our privacy policy, click here*) on the patron self-registration pages and at all patron log-in points when Single Login is enabled and the patron has not yet logged in.

To display the link in Polaris PowerPAC:

1. In the Administration Explorer tree view, open the **Profiles** folder for the branch, and click the **PAC** tab in the details view.
2. Double-click **Patron Access: policy statement hyper text link permitted**, and set the value to **Yes**.
3. Double-click **Patron Access: policy statement hyper text link**, and type the complete URL to the Web page for the library privacy policy.
4. Select **File, Save**.

See the *Patron Services Administration Guide*.

## Displaying Claimed and Lost Items in Patron Accounts in PAC

The PowerPAC and Mobile PAC **Navigation: Claimed and Lost** profiles are available at the System, Library, and Branch levels. When a patron logs into the PowerPAC or Mobile PAC, the profile setting for the patron's registered branch determines whether claimed and lost items are displayed.

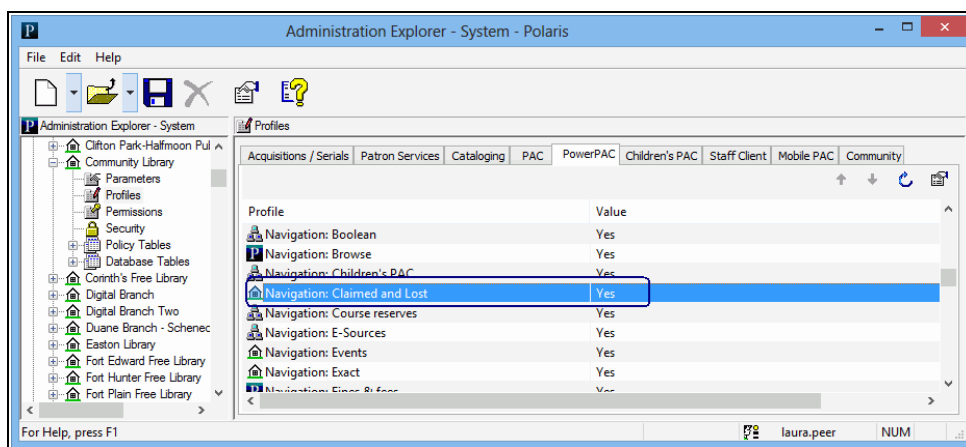
See also:

- [Enable display of claimed and lost items in PowerPAC](#)
- [Enable display of claimed and lost items in Mobile PAC](#)

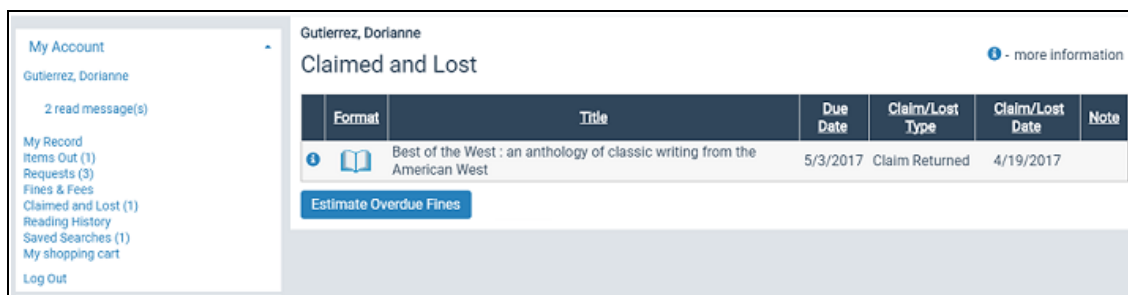
## Enable display of claimed and lost items in PowerPAC

To enable claimed and lost items to display in the patron account view in PowerPAC:

1. Select **Administration > Explorer**.
2. Select the organization (System, Library, or Branch).
3. Select **Profiles**, and select the **PowerPAC** tab.
4. Double-click **Navigation: Claimed and Lost**, and select **Yes**.



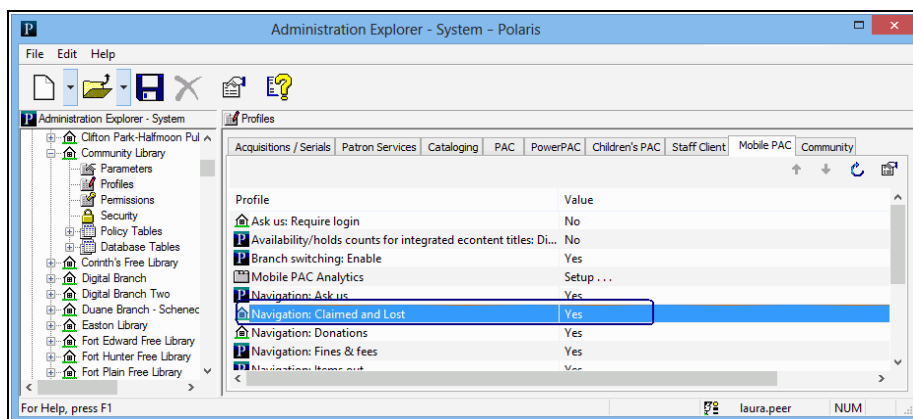
If this profile is set to **Yes** for the patron's registered branch, when the patron logs into his or her account in PowerPAC, any claimed or lost items the patron has are displayed in the Claimed and Lost view. See the example below.



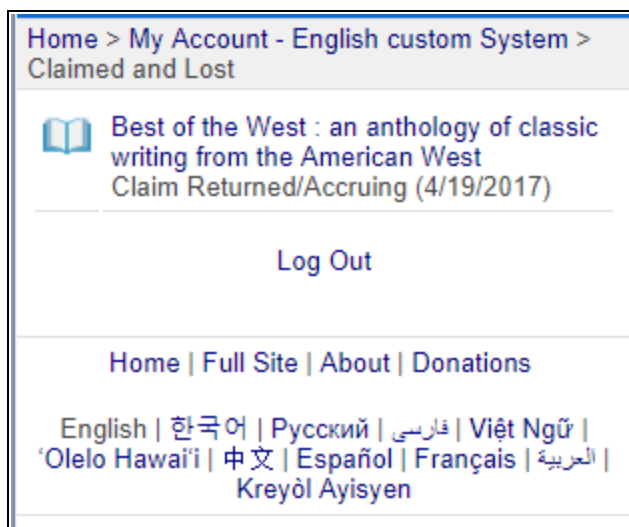
## Enable display of claimed and lost items in Mobile PAC

To enable claimed and lost items to display in the patron account view in Mobile PAC:

1. Select **Administration > Explorer**.
2. Select the organization (System, Library, or Branch).
3. Select **Profiles**, and select the **Mobile PAC** tab.
4. Double-click **Navigation: Claimed and Lost**, and select **Yes**.



If this profile is set to **Yes** for the patron's registered branch, when the patron logs into Mobile PAC, any items that were claimed or declared lost are displayed on the Claimed and Lost view. See the example below.



## 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.

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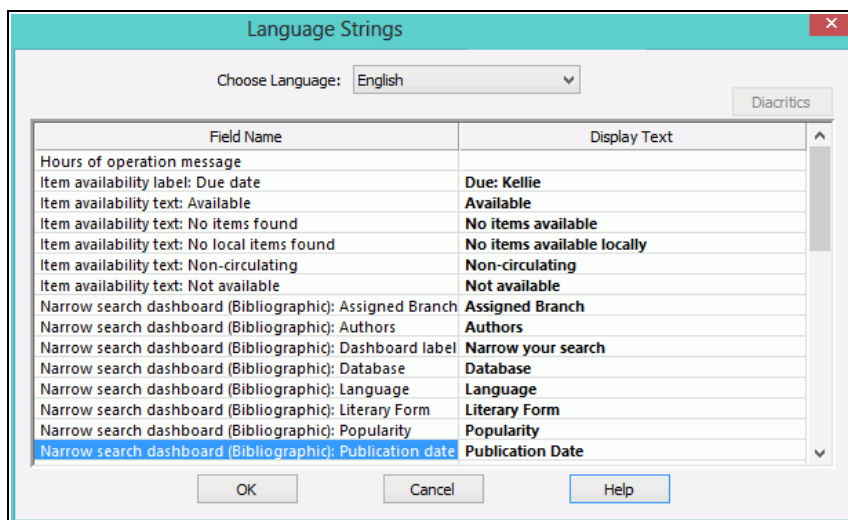
### Edit PowerPAC messages and labels

You can edit messages on the system, library, or branch level. To edit messages, labels, and news headings for Polaris PowerPAC:

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view.
2. Double-click **Multiple language strings**. The Language Strings dialog box appears. The **Field Name** column lists the messages and labels. The **Display Text** column lists the text that has been defined for each message or label.

**Note:**

For more information, see [PAC Messages and Labels Reference](#).



3. If you have Polaris PowerPAC Multilingual Version, select the language you want to edit in the **Choose Language** box.
4. Highlight the text you want to change.
5. Open the text box by pressing **ENTER** or double-clicking the text.
6. Type the text for the message, label, or news heading. You can use letters, numbers, and spaces. Polaris PowerPAC can display approximately 150 characters and spaces in a single line for messages. Text strings work well as plain text. You can format messages to have up to four lines of text, with up to 250 characters. In this case, you can use well-formed XML or HTML tags to place bold and italic formatting in your messages. Use the tag **<br/>** to designate the start of a new line in the message. The formatting tags count as characters and there is a 255-character maximum.
7. To insert a diacritic character, follow these steps:
  - a. Click **Diacritics**. The **Character Picker** dialog box opens.





- b. Select a graphic character set.
- c. Select the character, and click **Insert**. The **Character Picker** dialog box closes.
8. Press **ENTER** or select another message.
9. Repeat steps 4-8 for each message you want to edit.
10. Click **OK** on the dialog box.
11. Select **File | Save**.

---

## PAC Messages and Labels Reference

You can edit the following messages and labels using the **Multiple language strings** PAC profile. See [Edit PowerPAC messages and labels](#).

Field Name	Description	Default Display Text
Hours of operation message	The message you specify here is displayed on the Polaris PowerPAC Hours page and the Mobile PAC Hours & Contact Info page. For	—

Field Name	Description	Default Display Text
	more information about the PowerPAC Hours page, see <a href="#">Set Polaris PowerPAC features on the menu bar</a> .	
Item availability label: Due date		Due
Item availability text: Available	Indicates an item is available to request or check out. This text is used instead of the circulation status when you do not display the detailed item status in the Availability view.  Requirement: PAC profile settings Item Availability: Display status (Yes); Item Availability: Display detailed item status (No).	Available
Item availability text: No items found	Indicates that a title does not have any items associated with it anywhere in the entire Polaris system.	No items available
Item availability text: No local items found	Displayed when a selected title does not have linked items within the local area. The local area is defined by branches designated as local in the Item Availability Display Order policy table. See <a href="#">Setting Up Local and System Availability</a> . This message displays if items do exist elsewhere in the Polaris system; otherwise, the message for the Item Availability text: No items found message is displayed.	No items available locally

Field Name	Description	Default Display Text
Item availability text: Non-circulating	Indicates that an item does not circulate.	Non-circulating
Item availability text: Not available	Indicates an item is not available for check-out. This text is used as a status replacement when you do not display the detailed item status in the Availability view.  Requirement: PAC Profile settings Item Availability: Display status (Yes); Item Availability: Display detailed item status (No).	Not Available
Narrow search dashboard (Bibliographic): Assigned branch	The Narrow search dashboard (Bibliographic) labels apply to the bibliographic elements that appear in the Narrow Web part, which can be displayed with the Polaris PowerPAC search results pages. See <a href="#">Setting PowerPAC Narrow/Related Search Options</a> .	Assigned branch
Narrow search dashboard (Bibliographic): Authors		Authors
Narrow search dashboard (Bibliographic): Availability		Availability
Narrow search dashboard (Bibliographic): Dashboard label		Narrow your search
Narrow search dashboard (Bibliographic): Database		Database
Narrow search dashboard (Bibliographic): Language		Language
Narrow search dashboard (Bibliographic): Reading Level		Reading Level
Narrow search dashboard		Literary Form

Field Name	Description	Default Display Text
(Bibliographic): Literary Form		
Narrow search dashboard (Bibliographic): Popularity		Popularity
Narrow search dashboard (Bibliographic): Publication Date		Publication Date
Narrow search dashboard (Bibliographic): Record Owner		Record Owner
Narrow search dashboard (Bibliographic): Related Words		Related Words
Narrow search dashboard (Bibliographic): Series		Series
Narrow search dashboard (Bibliographic): Subjects		Subjects
Narrow search dashboard (Bibliographic): Target audience		Target Audience
Narrow search dashboard (Bibliographic): Type of Material		Type of Material
Narrow search dashboard (Community): Dashboard label	The Narrow search dashboard (Community) labels apply to the Community Profiles elements that appear in the Narrow Web part. For more information, see the <i>Community Profiles Guide</i> .	Narrow your search
Narrow search dashboard (Community):Event date		Event Date

Field Name	Description	Default Display Text
Narrow search dashboard (Community):Primary Name		Organization Name
Narrow search dashboard (Community): Services Available		Services
Narrow search dashboard (Community):Subject		Subject
Narrow search dashboard (Community):Type of organization		Type of Organization
Patron Access: Patron self-registration brief instruction	Displayed at the top of the patron self-registration form in Polaris PowerPAC. You can use this text to tell a new patron how to fill out the form, or include any message considered important to the self-registration process.	Please fill in the fields on this form and click Submit to register. Your online registration will be forwarded to the library. You can pick up your library card at the branch you specify in the form.
Patron Access: Privacy message	Confirmation message displayed when a patron initiates an action that saves information in connection with the patron account, such as saving a search or starting a reading history.	The feature you have selected is associated with personal data in your patron account. Such data may be accessed by law enforcement

Field Name	Description	Default Display Text
		personnel without your consent. Do you wish to continue?
Patron Access: Self-registration acknowledgment message	Displayed when a patron successfully completes the self-registration form.	Thank you! Your registration has been recorded. Your library card will be ready for you at the library you designated in your registration.
Patron Access: Self-registration warning message	<p>Displays when a patron selects click here to register now on the PowerPAC patron logon pages. This message allows the library to comply with the Children's Online Privacy Act.</p> <p>Requirement: Self-registration warning message enabled (PAC profile Patron Access Options)</p>	<p>In compliance with the Children's Online Privacy Protection act, you must be 13 or older in order to complete this registration.</p> <p>Note: In the default message, the apostrophe character is preceded by a backslash \ for programmatic purposes. In your custom text, you do not need to use the backslash before an</p>

Field Name	Description	Default Display Text
		apostrophe.
Related search dashboard (Bibliographic): Authors	The Related search dashboard (bibliographic) labels apply to the elements that appear in the Related Web part for bibliographic records, which can be displayed with the Polaris PowerPAC search results pages. For information about specifying bibliographic elements and their labels, see <a href="#">Setting PowerPAC Narrow/Related Search Options.</a>	Authors
Related search dashboard (Bibliographic): Dashboard label		Related searches
Related search dashboard (Bibliographic): Other databases		Other Databases
Related search dashboard (Bibliographic): Other searches		Other Searches
Related search dashboard (Bibliographic):Series		Series
Related search dashboard (Bibliographic):Subjects		Subjects
Related search dashboard (Community): Dashboard label	The Related search dashboard (Community) labels apply to the elements that appear in the Related Web part for community records. For more information, the <i>Community Profiles Guide</i> .	Related Searches
Related search dashboard (Community): Event Date		Event Date
Related search dashboard (Community): Primary Name		Organization Name
Related search dashboard (Community):Services Available		Services
Related search dashboard		Subject

Field Name	Description	Default Display Text
(Community): Subject		
Related search dashboard (Community): Type of organization		Organization



## 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](#)

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## Administering PowerPAC Children's Edition

Through Polaris Administration settings, you can set up and customize the following kinds of functions in Polaris PowerPAC Children's Edition:

- Themes (general appearance of the pages)
- Dashboards, including library-defined lists
- Pre-defined search limits, such as target audience=juvenile and designated collections (for example, children's periodicals)
- Search categories
- Item availability information
- Feature availability, such as online Help and Events page

An organization's settings control the features and functions the patron sees when connected to that organization. You can set most Children's PAC profiles at the system, library, and branch levels. If you are making settings unique to an organization, the Children's PAC URL must include the organization ID.

**Example:**

`http://library/Polaris/children/default.aspx?SessionOrgID=33`

See also:

- [Set up Polaris PowerPAC Children's Edition](#)
- [Add text to the children's Events page](#)

### Set up Polaris PowerPAC Children's Edition

To set basic operating features for Polaris PowerPAC Children's Edition:

1. Set up the Polaris PowerPAC Web server in Polaris Administration. See the *Administration Guide*.
2. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Children's PAC** tab in the details view.
3. To allow remote connections to Polaris PowerPAC Children's Edition, double-click **Remote user: Enable**, and select **Yes**. If you use Polaris PowerPAC Children's Edition only in the library, and you do not offer remote access, set this profile to **No**.
4. To allow patrons to select a theme for the Children's PAC interface, double-click **Select theme: Enable**, and select **Yes**.

**Note:**

This setting displays theme options in the dashboard area of the Polaris PowerPAC Children's Edition pages. If you want to display theme options, you must also set **Dashboards: Enable** to **Yes**. See step 5.

Polaris PowerPAC Children's Edition includes several default themes, and you can define your own. For more information, see [Managing Themes](#).

5. To display the dashboard on Polaris PowerPAC Children's Edition pages, double-click **Dashboards: Enable**, and select **Yes**.

Polaris PowerPAC Children's Edition includes automated Web parts for dashboards, and you can define your own. For more information, see [Managing Children's Dashboards](#).

6. To allow users to view an events page, double-click **Navigation: Events**, and select **Yes**.

This setting displays the **Events** link in the upper right portion of the Polaris PowerPAC Children's Edition pages. When the user selects the link, the Events page is displayed. For information about editing this page, see [Add text to the children's Events page](#).

7. To allow users to get quick help with searches, double-click **Navigation: Help**, and select **Yes**.

This setting displays the **Help** bookworm link in the upper right portion of the Polaris PowerPAC Children's Edition pages.

**Note:**

Polaris PowerPAC Children's Edition uses Did You Mean search suggestions. See [Setting Up Did You Mean Term Checking](#).

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

This setting displays the **Go to Polaris** link at the bottom left corner of the Polaris PowerPAC Children's Edition pages. If the user selects this link on the home page, the Polaris PowerPAC home page is displayed. If the user selects this link on the search results page, the same search is launched in Polaris PowerPAC.

9. Select **File | Save**.

*Related Information*

- Themes - You can offer default appearance themes for Polaris PowerPAC Children's Edition pages, or create your own. See [Managing Themes](#).
- Searching - You can set search filters to focus search results for children. See [Setting Children's Search Limits](#). In addition, categories offer predefined searches or links. See [Managing Search Categories](#).
- Search performance - Searches with large results sets may decrease performance if your server capacity is limited. To improve performance, you can adjust the maximum number of records to return. The Children's PAC profile **Result set: Maximum number of records to return**, available at the system, library, and branch levels, controls this limit.

**Note:**

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

- Results Display - See [Customizing the Children's Results Display](#).
- Requests - You set requests options (enable requests, specify whether item-level requests are offered, and select a default pickup branch) for Polaris PowerPAC Children's Edition with the Request parameter **Hold options**. If the library charges fees for hold requests, patrons cannot request holds from Polaris PowerPAC Children's Edition.
- Editing text on Polaris PowerPAC Children's Edition pages - You can edit most of the text on Polaris PowerPAC Children's Edition pages, and preserve your changes from being overwritten if the application is updated and reinstalled. See [Customizing Language Strings](#).

**Add text to the children's Events page**

The Events page is displayed when a patron selects the **Events** link on the Polaris PowerPAC Children's Edition pages. Since Polaris PowerPAC Children's Edition uses an Events page distinct from Polaris PowerPAC, you can focus the page on events specifically for children.

To add events or other text to the events page:

1. On the Web server, open the file **Polaris [version]/PowerPAC/children/events.aspx** in any HTML or text editor.
2. Find the following section:

```
SessionObject.GetLanguageString("CPACML_EVENTS_1000")%>:</div>
```

```
<p>&nbsp;</p>
```

```
<p>&nbsp;</p>
```

```
<p>&nbsp;</p>
```

Each segment `<p>&nbsp;</p>` creates a separate line on the Events page.

**Note:**

If you need more than three lines, copy the segment `<p>&nbsp;</p>` and paste it after the last segment `<p>&nbsp;</p>`, pasting once for each additional line you require.

3. For each line, insert your text between `&nbsp;` and `</p>`. You can format the text with basic HTML tags.
4. Save the file.

**Note:**

To display the Events link on the Polaris PowerPAC Children's Edition pages, set the Children's PAC profile **Navigation: Events** to **Yes**.

---

## Managing Themes

Themes determine the page appearance (background, icons, and other page elements) of Polaris PowerPAC Children's Edition. When you enable themes, children can choose a theme from the options you specify. You can offer some or all the themes that are shipped with Polaris PowerPAC Children's Edition, and you can develop your own themes.



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

Themes are stored in folders that contain sets of image files and a style sheet (.css) file that controls aspects of general page appearance, such as fonts, links, and colors. Each theme has a unique folder on the Web server

(**Polaris/PowerPAC/children/themes/<language folder>**). For example, files for the default Treasure theme (English) are located in the folder

**Polaris/PowerPAC/children/themes/1033/treasure**. If you are constructing your own theme, set up a unique folder for your files on the Web server, in **Polaris/PowerPAC/children/themes/<language folder>**.

**Note:**

Each language is represented by a number. English is represented by 1033, so theme folders for the English version are stored in **Polaris/PowerPAC/children/themes/1033**. If you have Polaris PowerPAC Children's Edition Multilingual Version, and you want to offer the same theme in other language versions, place the theme folder in all the appropriate language folders.

Theme folders also contain the image files specified for category and format icons, since these images can change when a different theme is chosen. Categories contain predefined targets, such as searches or Web site URLs. For more information about setting up categories, see [Managing Search Categories](#). Format icons identify the type

of material of a title listed in search results, such as a book or a musical sound recording.

See also:

- [Construct a theme](#)
- [Assign themes](#)

## Construct a Theme

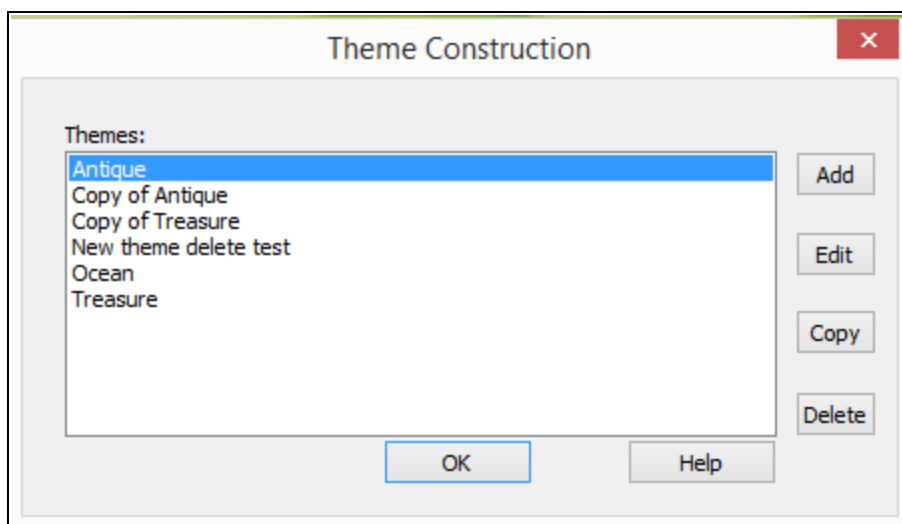
To construct a theme:

1. Set up a unique folder for the theme on the Web server, in **Polaris/PowerPAC/children/themes/language** folder.
2. Create the subfolders **categories** and **formats** in the new theme folder (or copy them from an existing theme folder).

### Note:

You may want to copy the style sheet (.css) file from a default theme to your own theme folder and then edit the file as you wish, rather than constructing a style sheet from scratch.

3. In the Administration Explorer tree view, open the **Profiles** folder at the system level, and select the **Children's PAC** tab in the details view.
4. Double-click **Theme Construction**. The **Theme Construction** dialog box is displayed.





**Note:**

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

**Tip:**

To use an existing theme as the basis of a new theme, select the theme and click **Copy**. Then select the copy and click **Edit**.

- Click **Add**. The Add Theme dialog box is displayed.

Description	File Name
3M Logo	
Background	
Check Out	
Events	
Footer	

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

**Note:**

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

- In the appropriate **File Name** boxes, type the filenames for the page graphic elements and for the stylesheet, as listed in the **Description** column.

**Note:**

The system constructs the appropriate URL. Type only the filename. For example, for the page background image, you might type the filename

**background.gif**. For the style sheet, you might type the filename **stylesheet.css**.

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

**Note:**

Type only the folder name. The system constructs the appropriate URL for the theme files to **Polaris/PowerPAC/children/themes/language folder/your folder** on the server, based on the theme folder you specify. All the files for the theme must be located in the same folder.

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

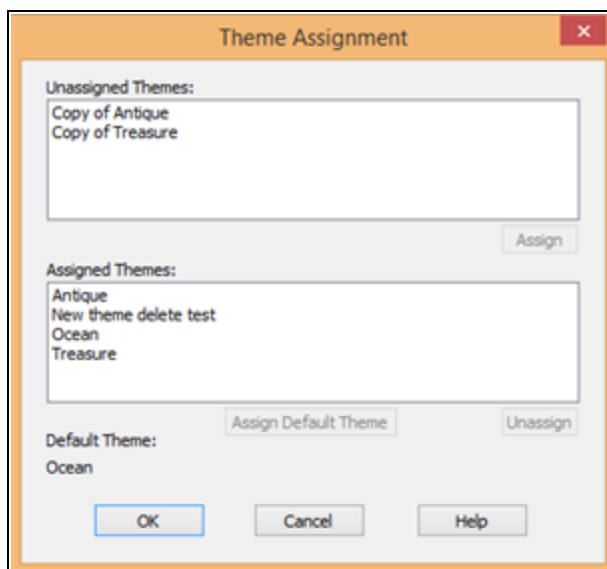
Related Information

Making themes available - See [Assign themes](#) for information about making the new theme available for selection in Polaris PowerPAC Children's Edition.

## Assign themes

When you assign themes, you make them available as choices from the Children's PAC. You can assign the themes that are provided with Polaris, or your own custom themes (see [Construct a theme](#)). To assign themes at the system, library, or branch level:

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Children's PAC** tab in the details view.
2. Double-click **Theme assignment**. The **Theme Assignment** dialog box opens.



3. To make a theme available for selection in Polaris PowerPAC Children's Edition, select the theme in the Unassigned Themes list, and click **Assign**. The theme is added to the Assigned Themes list.
4. To designate an assigned theme as the default theme, select the theme in the Assigned Themes list, and click **Assign Default Theme**.
5. Click **OK** on the dialog box. The dialog box closes, and your settings are automatically saved.

**Note:**

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

## Managing Children's Dashboards

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

**Note:**

The Select a Theme Web part is displayed on all pages when the Children's PAC profiles **Select theme: Enable** and **Dashboards: Enable** are set to **Yes**.

Separate Polaris Administration profiles control Web parts for Polaris PowerPAC and Polaris PowerPAC Children's Edition, but the process for setting up Web parts is the same for both PACs (see [Defining Web Parts for Dashboards](#)):

- Using the Children's PAC profile **Dashboards: Web Part Construction**, you define limits for automated lists and set up custom Web parts at the system level. See [Create a custom Web part](#).
- Using the Children's PAC profile **Dashboards: Web Page / Web Part Assignment**, you assign Web parts to specific Children's PAC pages at the branch level. See [Assign Web parts to public pages](#). For a summary of Polaris PowerPAC Children's Edition pages, see [Polaris PowerPAC Children's Edition Pages Reference](#).

Web parts set up for Polaris PowerPAC are available to be assigned to Children's PAC pages, and Web parts set up for Polaris PowerPAC Children's Edition are available to be assigned to Polaris PowerPAC pages. However, the New Titles Web part provided by Polaris may not be useful for Polaris PowerPAC Children's Edition, since the New Titles Web part elements are links that launch searches for recent additions to your catalog, regardless of the titles' target audience.

---

## Setting Children's Search Limits

In Polaris PowerPAC Children's Edition, users can search for a title in the library catalog by typing a word or words and selecting a field to search (**Anywhere**, **Subjects**, **Titles**, **Authors**, or **Series**). You control which of these choices are available. In addition, you can display **Fiction** and **Non-Fiction** buttons that launch subject searches for the search text, scoped to fiction or non-fiction. See [Set children's search buttons](#).



You can also filter all searches to make the results more useful for children by setting a free-text filter (expressed as a Common Query Language search term), by specifying which collections should be searched, or by using a combination of the two strategies. See [Filter children's searches](#).

**Note:**

Polaris PowerPAC Children's Edition also offers targets (predefined searches or Web links), organized in categories and subcategories. Children can use categories to find information without typing a search string. See [Managing Search Categories](#).

**Important:**

In addition to the filtering and scoping options you set, Polaris PowerPAC Children's Edition is designed to display item availability information only if there are items available at the local branch. You can set it so that item availability information is displayed for items at other branches if there are no items assigned to the local branch. See [Customize the children's item availability display](#).

See also:

- [Set children's search buttons](#)
- [Filter children's searches](#)

## Set Children's Search Buttons

To set which search buttons are available for text searches in Polaris PowerPAC Children's Edition:

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Children's PAC** tab in the details view.
2. Double-click the following profiles and set them to **Yes** or **No**:
  - **Search button visibility: Anywhere button** - Launches keyword search in all fields
  - **Search button visibility: Authors button** - Launches keyword search for author
  - **Search button visibility: Fiction button** - Launches search term subject search scoped to fiction
  - **Search button visibility: Non-Fiction button** - Launches search term subject search scoped to non-fiction
  - **Search button visibility: Series button** - Launches keyword search for series name
  - **Search button visibility: Subject button** - Launches keyword search for subject
  - **Search button visibility: Title button** - Launches keyword search for title

By default, each is set to **Yes** (search button is displayed).

If all seven profiles are set to **No**, the **Look for** text field remains displayed although no buttons appear. However, the user can type text in the field and press **ENTER**. A keyword search in all fields (**Anywhere**) is launched. This feature is available regardless of what buttons are displayed.

3. Select **File | Save**.

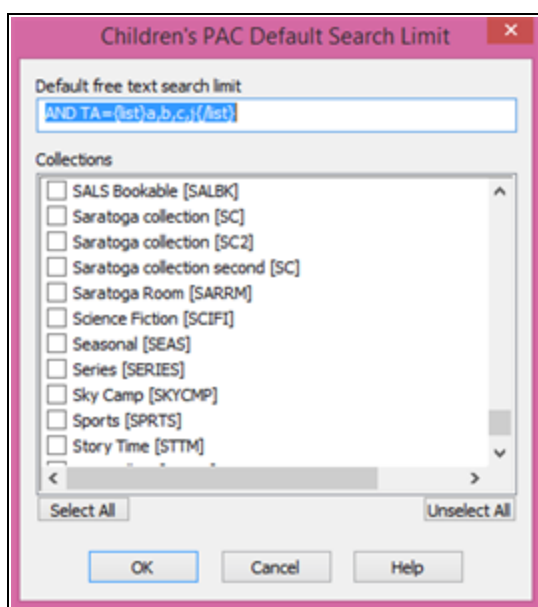
### Related Information

**Did You Mean** - When you enable "did you mean" search term checking, the search results page includes a suggested alternate search term if one can be identified. You can click the alternate term to launch a search on that term. The Did You Mean function applies to quick, keyword, phrase, and exact phrase searches in Polaris PowerPAC, and to searches typed in the **Look for** bar in Polaris PowerPAC Children's Edition when there are no results. See [Setting Up Did You Mean Term Checking](#).

## Filter children's searches

To set filters on searches from Polaris PowerPAC Children's Edition, and to allow subject searches scoped by fiction or non-fiction:

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Children's PAC** tab in the details view.
2. Double-click **Default search limits**. The **Children's PAC Default Search Limit** dialog box opens.



3. To filter searches with a free-text filter, type the Common Query Language command in the **Default free text search limit** box, beginning with the Boolean operator **and**.

The system constructs the full search command when the user launches a search. The first part of the command (before **and**) is determined by the user's selection in the interface. Your filter determines the second part. The default filter is **AND TA=j**, which limits the results to titles with a juvenile target audience.

**Note:**

Structure multi-part filters in either of these two ways:

**AND TA=j OR TA=a OR TA=b**

**AND TA={list}j, a, b {/list}**

Not valid:

**AND TA= j, a, b**

4. To limit search results to titles in certain collections, select the collections in the **Collections** list.

**Tip:**

If you have collections set up for children's periodicals, this is a good way to include the periodicals in Children's PAC search results, since serials records do not include target audience information. The results include titles from the collection **OR** the specified target audience filter.

Combining free-text and collections filters works best if you select only the collections intended for children. If all collections are selected, and you specify a free-text filter, the search applies the free-text filter but ignores the collections. If no free-text filter is specified, all the collections are searched, but records that do not specify a collection are ignored.

5. Click **OK** on the dialog box.
6. Select **File | Save**.

---

## Managing Search Categories

Polaris PowerPAC Children's Edition offers targets (predefined searches or Web links), organized in categories and subcategories. Children can use categories to find information without typing a search string. When the Children's PAC profile **Categories: Enable** is set to **Yes**, the default page of the Children's PAC displays the defined search categories.



Polaris PowerPAC Children's Edition includes a set of default categories and targets that you can use as they are, or edit to suit your purposes. You can also set up your own categories at the system, library, and branch levels. Using the Children's PAC profile **Category construction**, you define the categories and subcategories, and the targets to include in the categories and subcategories. You can offer the following types of search targets:



- Search - Launches a defined search in the Polaris database, and displays the results.
- Bibliography - Launches a search for titles you specified when you set up the target.
- URL - Connects to a Web site, which opens in a new browser window. The Polaris PowerPAC Children's Edition session is maintained.

**Note:**

To allow live-link Web targets, set the Children's PAC profile **Web access: Enable** to **Yes**. If this profile is set to **No**, the URL targets appear as text only.

A search target or subcategory can belong to as many categories as you wish. You can copy and paste search targets and categories to organize them in any way that suits the needs of your users. If you have Polaris PowerPAC Children's Edition multilingual version, you can translate category and target names so that they are displayed in the language the user has selected.

You can display a category or subcategory as a text link, an image link, or both. When a category link is selected, all the subcategory and target links are displayed. If icons are defined for search targets, these are organized in a matrix of links. If no icons are defined, the search targets are also displayed as a list of text links.

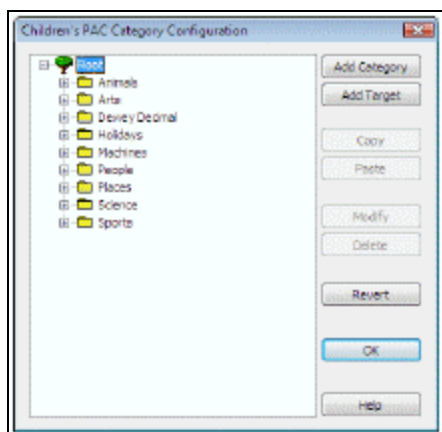
See also:

- [Add a new category](#)
- [Add a new search target to a category](#)
- [Copy a category or target](#)
- [Translate a category or target](#)
- [Translate all categories and targets](#)

## Add a New Category

You can define categories at the system, library, or branch level. To add a category or subcategory for Children's PAC searches:

1. In the Administration Explorer tree view, open the Profiles folder for the organization, and select the **Children's PAC** tab in the details view.
2. Double-click **Category construction**. The **Children's PAC Category Configuration** dialog box appears.

**Note:**

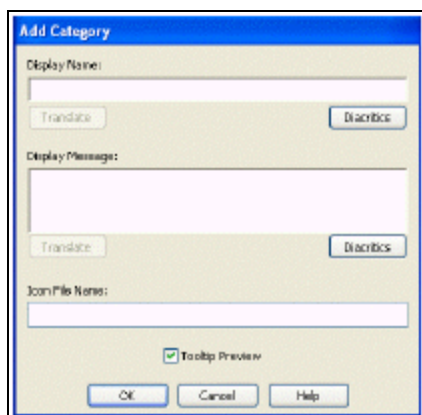
Existing categories and subcategories are represented by folder icons. Click the plus sign by a category to display its contents (subcategories and targets). To view specific characteristics of any category, subcategory, or target, select the item and click **Modify**.

3. Select (highlight) the folder to which you want to add a category.

**Note:**

The top-level Root category is always listed. The link for any category or target on the next level under Root is displayed directly on the Children's PAC home page. If you do not select an existing folder, the category is added directly under the Root group.

4. Click **Add Category**. The **Add Category** dialog box opens.



5. In the **Display Name** box, type a category name. The Display Name identifies the new category in the Category Configuration dialog box and in Children's PAC. If no category icon is defined, the Display Name is directly displayed as a link on the Children's PAC home page. If an icon is defined for the category, the category is displayed as a link when the icon is selected. (See step 8.)
6. To insert a diacritic character in the display name, follow these steps:

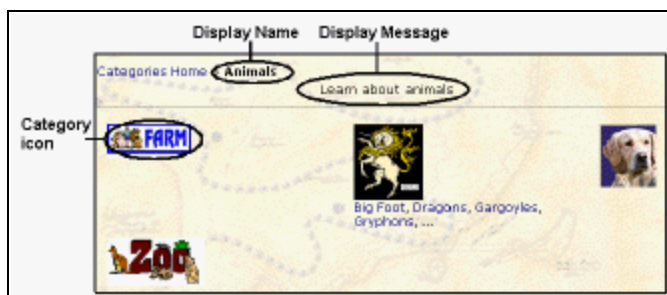
**Tip:**

If you frequently enter diacritics, you can add Input Method Editor (IME) keyboards and switch back and forth from the English keyboard to the international keyboards. See the *Cataloging Guide*.

- a. Click **Diacritics**. The **Character Picker** dialog box opens.



- b. Select a graphic character set.
- c. Select the character, and click **Insert**. The **Character Picker** dialog box closes.
7. (Optional) Type any text in the **Display Message** box that should be displayed below the category **Display Name** and above the matrix or list of targets.

**Tip:**

You can insert diacritic characters in the display message. See step 6.

8. Type the file name for the category icon graphic in the **Icon File Name** box. In the Children's PAC interface, the patron can click the category icon to see sub-categories or targets.

Type only the file name. Polaris constructs the appropriate URL to the **categories** folder of the theme the patron has selected, or to the default theme if you do not allow theme selection.

**Important:**

Be sure to place the category icon graphic file in the **categories** folder for each theme you offer. Although the actual image can be different, the filename must be the same in each theme. For example, if you specify a category icon graphic file **pets.gif**, the **categories** folder for each theme must contain a graphic file called **pets.gif**. Otherwise, if a theme is chosen that does not include the appropriate category icon graphic file, the interface displays a missing link. For more information about themes, see [Managing Themes](#).

9. Select or clear the **Tooltip Preview** checkbox. If the **Tooltip Preview** box is checked, targets for this category are displayed when the cursor hovers over the category link in the Children's PAC interface. To display tooltip previews, you must also specify an icon file name for the category (see step 7).

**Note:**

Use the Children's PAC profile **Number of tooltip entries displayed** to set the maximum number of tooltip entries to display. You must also check the **Preview Search Target** box for each target you want to display in the tooltip. See [Add a new search target to a category](#) for more information about setting up targets.

10. Click **OK** on the **Add Category** dialog box. The **Add Category** dialog box closes. The new category is displayed in the **Category Configuration** dialog box.
11. Click **OK** on the **Category Configuration** dialog box.

**Note:**

To display categories in the Children's PAC interface, be sure the Children's PAC profile **Categories: Enable** is set to **Yes** for the organization.

12. Add targets to the new category. See [Add a new search target to a category](#).

## Related Information

- Copy a category - See [Copy a category or target](#).
- Delete a category or subcategory - Select the category, and click **Delete**.
- Edit the settings for a category - Select the category, and click **Modify**.
- Translate category names - If your library system has purchased other language versions of Polaris PowerPAC Children's Edition, you can translate the category name or all category names. See [Translate a category or target](#) and [Translate all categories and targets](#).

**Add a New Search Target to a Category**

Within a category, a target may be displayed as a text link in a list of links, or as a graphic link in a matrix of target graphics. To set up a new search target of either display type, and add it to a category:

1. Double-click **Category construction** on the Children's PAC Profiles tabbed page for the organization. The **Children's PAC Category Configuration** dialog box appears.
2. Select the category (folder) to which you want to add the new search target.

**Note:**

You can add a target directly under the Root level. In this case, the target link displays directly on the home page.

**Tip:**

You can view the structure of default targets to get ideas about how to set up targets. Select a default target and click **Modify** to view the target.

3. Click **Add Target**. The **Add Children's PAC Search Target** dialog box appears.

The screenshot shows a Windows-style dialog box titled "Add Children's PAC Search Target". It contains the following elements from top to bottom:

- Display Name:** A text input field with a "Translate" button to its left and a "Diacritics" button to its right.
- Icon Display Name:** A text input field with a "Translate" button to its left and a "Diacritics" button to its right.
- Icon File Name:** A text input field.
- Target Type:** Three radio buttons labeled "Search", "Bibliography", and "URL". The "Search" radio button is selected. To the right of these is a checkbox labeled "Preview Search Target".
- Search:** A text input field.
- Bibliography:** A larger text input field with "Add" and "Delete" buttons to its right.
- URL:** A text input field.
- Buttons:** "OK", "Cancel", and "Help" buttons at the bottom.

4. In the **Display Name** box, type a target name. The Display Name identifies the new target in the Category Configuration dialog box and on the Children's PAC home page.
5. To insert a diacritic character in the display name, follow these steps:

**Tip:**

If you frequently enter diacritics, you can add Input Method Editor (IME) keyboards and switch back and forth from the English keyboard to the international keyboards. See the *Cataloging Guide*.

- a. Click **Diacritics**. The **Character Picker** dialog box opens.



- b. Select a graphic character set.
- c. Select the character, and click **Insert**. The **Character Picker** dialog box closes.
6. If you want this target to be part of a matrix of search targets for the category, do these steps:
  - a. Type the name of the target icon file in the **Icon File Name** box.

The search target icon is displayed in Polaris PowerPAC Children's Edition as a link, which you can click to launch the search. All targets with icons in a specific category are grouped together in the matrix. If you do not specify an icon, the target is displayed as a simple text link in a list with any other text-link targets.

**Important:**


Be sure to place the target icon graphic file in the **categories** folder for each theme you offer. Although the actual image can be different, the filename must be the same in each theme. For example, if you specify a target icon graphic file **dogs.gif**, the **categories** folder for each theme must contain a graphic file called **dogs.gif**. Otherwise, if a theme is chosen that does not include the appropriate target icon graphic file, the interface displays a missing link. For more information about themes, see [Managing Themes](#).

- b. If you want to display text along with the target icon in the matrix, type the text in the **Icon Display Name** box. (If you specify an Icon Display Name, be sure you specify an Icon File Name.)

**Note:**



You can insert diacritic characters in the icon display name. See step 5.

## 7. Select a target type:

- Search - Launches a defined search in the Polaris database. This target type is identified by a database icon  in the Category Configuration dialog box. If you select this target type, also do step 8.

**Note:**

If you want all search targets in this category to be organized in a matrix, specify both an Icon Display Name and a corresponding Icon File Name for each search target. Otherwise, the search target is displayed as a text link.

- Bibliography - Displays a search link. The link launches a search for titles you specify. This target type is identified by a book icon  in the Category Configuration dialog box. If you select this target type, also do step 9.
  - URL - Displays a text link that connects to a Web site. This target type is identified by a Web Site icon  in the Category Configuration dialog box. If you select this target type, also do step 10.
8. If you selected **Search** as the target type, input the search command as a Common Query Language (CQL) command in the **Search** box.

If the search string does not begin with **FIND**, the system automatically adds **Find** before the search is launched. For more information about using CQL search commands, see [PAC CQL Commands & Access Points](#).

Exception: You cannot set up a phrase search with quotation marks in the **Search** box; instead, use the AND operator. For example, if you are setting up a subject search for the subject heading \$aAnimals\$xAdaptation\$yJuvenile films, type

**su=animals AND su=adaptation AND su=juvenile films**

(not su= "Animals--Adaptation--Juvenile films").



9. If you selected **Bibliography** as the target type, add titles to the bibliography by following these steps:
  - a. Click **Add** next to the Bibliography box.

The screenshot shows a dialog box titled "Add Children's PAC Search Target". It contains several input fields and buttons. Under the "Target Type" section, the "Bibliography" radio button is selected. The "Add" button next to the "Bibliography" text box is circled. Other buttons include "OK", "Cancel", and "Help" at the bottom.

The Polaris Find Tool is displayed.

- b. Use the Find Tool to locate and select the bibliographic record for the title you want to add to the bibliography.

**Note:**

When the search is launched in the Children's PAC, any search filters you defined in the Children's PAC profile **Default search limits** are applied. If a title you selected does not meet the search filter criteria, it is not displayed in the search results.

- c. Repeat these steps to add each title to the bibliography. You can add up to 120 titles.

You can multi-select records from the Find Tool results.

10. If you selected **URL** as the target type, input the complete URL for the Web page search target in the **URL** box.

To allow live-link Web targets, set the Children's PAC profile **Web access: Enable to Yes**. Libraries where children's Internet access is a concern should use lockdown software or set this profile to **No**. In this case the URL target appears as text only, and does not allow Web access.

11. Select or clear the **Preview Search Target** checkbox.

If you are adding a target directly under the Root level, the **Preview Search Target** box is not available, since the interface does not display the preview target link if it is not associated with a category.

If the **Preview Search Target** box is checked, the target Display Name is displayed as a link under the category to which the target belongs.

**Note:**

The preview search target does not automatically display once the category is selected. If you want the same target link to be displayed once the category is selected, set it up again under the appropriate category, leaving **Preview Search Target** unchecked. You can copy and edit a target. See [Copy a category or target](#).



To display preview search targets, you must also specify an icon file name for the category (see [Add a new category](#)).

The illustration shows an example of preview search targets:



**Note:**

If the Preview Search Target box is checked for a target, the target icon is displayed with a small red flag in the Category Configuration dialog box.

For example, the search target icon  changes to .

12. Click **OK** on the **Add Children's PAC Search Target** dialog box. The **Add Children's PAC Search Target** dialog box closes. The new target is displayed in the **Category Configuration** dialog box.
13. Click **OK** on the Category Configuration dialog box.

**Note:**

To display the categories in the Children's PAC interface, be sure the

Children's PAC profile **Categories: Enable** is set to **Yes** for the organization.

#### Related Information

- Copy a target, and place the copy in another category - See [Copy a category or target](#).
- Remove a target from a category - In the **Category Configuration** dialog box, select the target you want to remove from the category, and click **Delete**.
- Edit the settings for a target - In the **Category Configuration** dialog box, select the target you want to edit, and click **Modify**.
- Translate categories and targets - If your library system has purchased other language versions of Polaris PowerPAC Children's Edition, you can translate the category and target names. See [Translate a category or target](#), and [Translate all categories and targets](#).

### Copy a category or target

You can copy categories and targets you have already defined, and place the copies in any categories you choose. When you copy a category, you also copy the contents (subcategories and targets) of the category. To copy a category or target into another category:

1. Double-click **Category construction** on the Children's PAC Profiles tabbed page for the organization. The **Children's PAC Category Configuration** dialog box appears.

#### Tip:

Click the plus sign by any category folder to display the contents of the folder.

2. Select the category or target you want to copy.
3. Click **Copy**.
4. Select the category folder into which you want to place the copy of the category or target.
5. Click **Paste**. The copied category or target is displayed in the selected folder.
6. Click **OK** to save your settings.

## Translate a category or target

If your library system has other language versions of Polaris PowerPAC Children's Edition, you can translate the names of categories and targets. To translate categories or targets one at a time:

1. Double-click **Category construction** on the Children's PAC Profiles tabbed page for the organization. The **Children's PAC Category Configuration** dialog box appears.

### Tip:

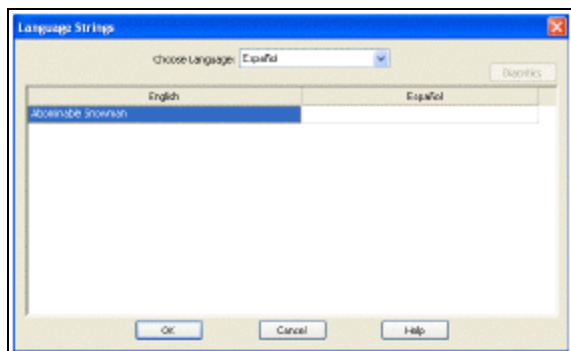
Click the plus sign by any category folder to display the contents of the folder.

2. Select the category or target you want to translate.
3. Click **Modify**. If you selected a category, the **Edit Category** dialog box opens. If you selected a target, the **Edit Children's PAC Search Target** dialog box opens.

4. Click **Translate** by the name you want to translate.

If you selected a category, you can translate the category name and the display message, if any (see [Add a new category](#)). If you selected a target, you can translate the display name and the icon display name, if any (see [Add a new search target to a category](#)).

The **Language Strings** dialog box opens.



5. Select a language from the **Choose Language** box. The options are determined by the language versions of Polaris PowerPac Children's Edition purchased by your library system.
6. Click the box in the language column next to the target or category name you want to translate, and type the translated word in the box.
7. To insert a diacritic character, follow these steps:

**Tip:**

If you frequently enter diacritics, you can add Input Method Editor (IME) keyboards and switch back and forth from the English keyboard to the international keyboards. See the *Cataloging Guide*.

- a. Click **Diacritics**. The **Character Picker** dialog box opens.



- b. Select a graphic character set.
- c. Select the character, and click **Insert**. The **Character Picker** dialog box closes.
8. Click **OK** on the **Language Strings** dialog box.
9. Click **OK** on the **Edit** dialog box.
10. Click **OK** on the **Children's PAC Category Configuration** dialog box.

Related Information

[Translate all categories and targets](#)

### Translate all categories and targets

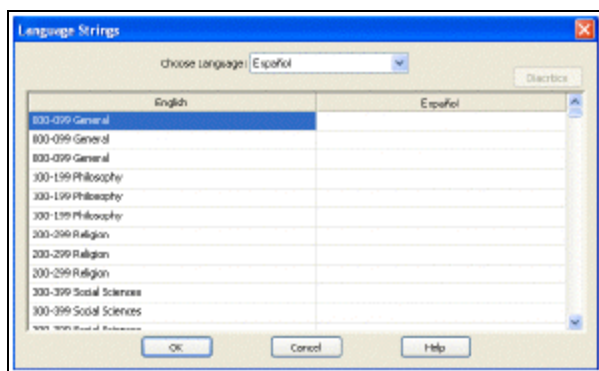
If your library system has purchased other language versions of Polaris PowerPAC Children's Edition, you can translate all the names of categories and targets to a language of your choice. To view and translate categories and targets:

#### Note:

You must set the translations at the system level.

1. In the Administration Explorer tree view, open the **Profiles** folder for the system, and select the **Children's PAC** tab in the details view.

2. Double-click **Multiple language strings**. The **Language Strings** dialog box lists all the category names, category display messages, target display names, and icon display names defined for your Polaris PowerPAC Children's Edition.



3. Select a language from the **Choose Language** box. The options are determined by the language versions of Polaris PowerPAC Children's Edition purchased by your library system.
4. Click the box in the language column next to each name you want to translate, and type the translated word in the box.

**Note:**

You can also edit the English names. Click the English word you want to edit, and type a new word in the space.

5. To insert a diacritic character, follow these steps:

**Tip:**

If you frequently enter diacritics, you can add Input Method Editor (IME) keyboards and switch back and forth from the English keyboard to the international keyboards. See the *Cataloging Guide*.

- a. Click **Diacritics**. The **Character Picker** dialog box opens.



- b. Select a graphic character set.
- c. Select the character, and click **Insert**. The **Character Picker** dialog box closes.
6. Click **OK** on the **Language Strings** dialog box.
7. Select **File | Save**.

---

## Customizing the Children's Results Display

When a patron selects a title or the **More** link for a title in the search results, Polaris PowerPAC Children's Edition displays detailed information about the title and the items associated with it.





	Location	Collection	Shelf Location	Call Number	Status	Type
	Clifton Park-Hallmoon Public Library	Children's Board Books		JP Fict Bri BB	Out	Book
	Galway Public Library	Children's Board Books		JP Fict Bri BB	Out	Book
	Margaret Raaney Memorial Library (St. Johnsville)	Children's Board Books		JP Fict Bri (D)	On Shelf	Book
	Northville Public Library	Children's Board Books		JP Fict Bri	On Shelf	Book
	Pember Library and Museum (Granville)	Children's Fiction		JP Fict Bri [Board Book]	Out	Book
	Richards Library (Warrensburg)	Children's Fiction		JP Fict Bri	On Shelf	Book
	Round Lake Library	Children's Board Books		JP Fict Bri	On Shelf	Book

**Note:**

The format/type of material icons in Polaris PowerPAC Children's Edition are the same as those used in Polaris PowerPAC. For a list, see [Setting Up Search Filters \(Limit By\)](#).

Using Children's PAC profiles, you can specify what information displays about the associated items, including branch location, collection, shelf location, call number, status, and material type. You can set these profiles at the system, library, or branch level.

See also:

- [Web Access from Children's PAC](#)
- [Customize the children's item availability display](#)

**Web Access from Children's PAC**

If the title information includes a Web link, you can specify whether children can access the associated Web site. Web links are indicated by the Web Site icon next to a title, and by the URL link text in the detailed information for the title. To allow Web access, set the Children's PAC profile **Web access: Enable** to **Yes** at the system, library, or branch level. When the patron clicks the Web Site icon, the Web site opens in a new browser window.

**Important:**

Libraries concerned about children's Internet access should use lockdown software or set the profile **Web access: Enable** to **No**. If this profile is set to **No**, the globe icon and URL links are not "live."

## Customize the Children's PAC item availability display

To customize the item availability display in Polaris PowerPAC Children's Edition:

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **Children's PAC** tab in the details view.
2. To display the item's owning branch, double-click **Item Availability: Display branch location**, and select **Yes**.

### Note:

Single-branch libraries may want to set this profile to **No** to save space in the availability display.

3. Double-click **Item Availability: Display local and system levels** to set which items are shown in the availability display. Select **Yes** or **No**:
  - **Yes** - If the logged-on branch is the system, information about items that are designated to display in PAC and owned throughout the system is displayed. If the logged-on branch is a local branch, only items held by that branch are displayed. If none are owned by the local branch, the system-level items are displayed.
  - **No** - If the logged-on branch is the system, information about items owned throughout the system is displayed. If the logged-on branch is a local branch, only the local items are displayed. If none are owned by the local branch, no items are displayed.

The Item Availability Display Order table determines which branches' items should be displayed as "system" and which should be displayed as "local." See [Set up the local/system item availability display](#).

4. To display the items' shelf locations, double-click **Item Availability: Display shelf location**, and select **Yes**.
5. To display the items' circulation status, double-click **Item Availability: Display status**, and select **Yes**.
6. If you chose to display item status, specify the status text:
  - Double-click **Item availability text: Available**, and type the text that indicates an item is available. The default is **In Library**.
  - Double-click **Item availability text: Not available**, and type the text that indicates an item is not available. The default is **Checked Out**.

7. To display item-level call numbers, double-click **Item Availability: Display call number**, and select **Yes**.
8. To display the items' collection information, double-click **Item Availability: Display collection**, and select **Yes**. If the library does not use collections, you may want to set this profile to **No** to save space in the availability display.
9. To display the items' material types, double-click **Item Availability: Display type**, and select **Yes**.
10. To make public notes from the item record available, double-click **Item Availability: Display notes**, and select **Yes**. This setting displays a note icon for items whose records include public notes. Users can click the icon to read the note.
11. Select **File | Save**.

## 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 Basics

Polaris Mobile PAC provides a simple interface that has been optimized for mobile devices. Basic functions are available directly from the home page.

Users can click **Preferences** to set which links appear on the home page, and other preferences such as connection organization, language, and display options. These settings persist from session to session for one year, so that common selections are already made when the user connects to Mobile PAC.

See also:

- [Installation](#)
- [Secure Socket Layer \(SSL\)](#)
- [Updating Page Caches](#)
- [Analyzing Polaris Mobile PAC Use](#)
- [Customizing Mobile PAC](#)
- [Mobile PAC Device Compatibility](#)
- [Trouble-Shooting](#)

## Installation

You select Mobile PAC for installation when you install Polaris Web Server software. (By default, Mobile PAC is not selected for installation.)

## Secure Socket Layer (SSL)

Mobile PAC works without using SSL protocols (https:) to encrypt data, but personal data sent over the Internet is exposed to potential interception. If you have the appropriate site certificate, you can encrypt the entire Mobile PAC site to protect your patrons' logon and library account information when they log on to request holds, renew items, or review their accounts. To enable data encryption, set the **SSL: Enable: Mobile PAC** parameter for the Web server to **Yes**. For more information about SSL and Polaris,

see the *Administration Guide*. (You can set SSL for Polaris PowerPAC with a separate parameter.)

**Note:**

Some older mobile phones do not support SSL.

## Updating Page Caches

When you change Polaris Mobile PAC settings, you may need to update page caches to see the effects of your changes. Most cached information is stored at the application level on the Web server. You can update that information with the **Reload** tool in Polaris WebAdmin (Language Editor). For more information, see the WebAdmin online help.

**Note:**

The Reload function reloads settings only for those organizations whose settings have already been cached. You may have to do an IIS reset to see changes applied to other organizations. Polaris Hosted customers should contact Polaris Customer Support to perform an IIS reset.

## Analyzing Polaris Mobile PAC Use

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

For more information about Google Analytics, and to obtain a tracking code, go to: <http://www.google.com/analytics>

**Note:**

If you have already enabled Google Analytics for Polaris PowerPAC, you can use the same tracking code for Mobile PAC.

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

**Note:**

Cell phones that do not support JavaScript ignore the JavaScript code, so these connections are not calculated in your site analysis.

**Customizing Mobile PAC**

- Text customization - You can edit language strings for Mobile PAC pages in English and any licensed language using Polaris WebAdmin (Language Editor). For instructions, see the WebAdmin Help file.
- Page customization - With appropriate knowledge of XML, you can also customize Mobile PAC at the program level. For more information, see the *PAC Customization Guide*.

**Mobile Device Detection**

In Polaris version 5.2 and earlier, checks in Polaris code help to ensure that mobile device users were automatically redirected to the Mobile PAC site if they connected to the Polaris PowerPAC site.

Beginning with Polaris 5.5, mobile device users are not automatically redirected to the Mobile PAC site, since PowerPAC features responsive web design that adapts to the user's device. However, the Polaris PowerPAC page footer still displays a **Classic Mobile Site** link if the link has been set up and conditions are met as described in [Set the Mobile PAC Connection URL](#).

**Mobile PAC Device Compatibility**

To ensure compatibility with most mobile devices, Mobile PAC does not use any HTML syntax, such as HTML 5 or CSS3, that requires a more modern browser. Also, unlike PowerPAC, Mobile PAC's core functionality (searching, accessing the patron account, etc.) does not rely on JavaScript. Therefore, if a mobile device has JavaScript disabled, the user should be able to perform the majority of Mobile PAC functions, with the exception of some third-party products that require JavaScript, specifically NoveList and Google Maps. In some cases, the mobile device and/or browser may be too old to support Mobile PAC.

**Trouble-Shooting**

You can get a quick idea of whether Mobile PAC is installed and running properly by viewing a status page. Go to:

**http://[Your PAC site]/mobile/plsstatus**

The Mobile PAC status page lists five status items, each with a **Success** or **Failure** rating:

- AppCache initialized
- DisplayCache initialized
- Active SQL connection
- Active ERMS connection
- Test Keyword search

If you see a **Failure** status for any of these five items, check for details in the Mobile PAC logs in **C:\ProgramData**. For assistance, contact your Polaris Site Manager.

## Setting Up Mobile PAC Connections

To set up Mobile PAC connections, define the connection URL that the user enters to connect to your Mobile PAC; set the link to the full site; and specify whether patrons can switch branches.

See also:

- [Set the connection URL](#)
- [Set the Full Site link](#)
- [Enable branch switching and set branch display order](#)

### Set the Mobile PAC Connection URL

The connection URL is the address the user enters to connect to your Mobile PAC catalog, the destination address when the mobile device user is automatically re-directed from Polaris PowerPAC (Polaris version 5.2 and earlier), and the destination address when the user selects the **Class Mobile Site** link in the PowerPAC page footer. To specify the connection URL for Mobile PAC:

1. In the Administration Explorer tree view, open the **Server** folder and expand the server for which you want to set Web parameters.
2. Select **Parameters** under the server. The PAC parameters tabbed page is displayed in the details view.
3. Double-click **URL of the Mobile PAC's root** and type the full URL.



The default connection URL is **http://[localhost]/mobile**, which is the system organization.

If you plan to disable branch switching (see [Enable branch switching and set branch display order](#)) and you want to specify a connection organization other than the system organization, add

**/org/{orgid}**

to the end of the URL. For example, if the organization ID number is 25, type the URL in this format:

**http://[localhost]/mobile/org/25**

The organization ID is the number in the title bar of the organization workform. It is also available on the Properties dialog box - About tabbed page for the organization, which you can open from the Polaris Administration Explorer.

**Note:**

If you specify an organization that is suppressed from display in PAC, the connection organization defaults to the system. The system-level PAC profile **Suppress branches** controls which branches are suppressed from display. This profile also affects Polaris PowerPAC.

4. Select **File | Save**.

Related Information

- Link from PowerPAC - A **Classic Mobile Site** link is displayed in the Polaris PowerPAC footer if Mobile PAC is licensed for your library and you have set a value for **URL of the Mobile PAC's root** in Polaris Administration.

**Note:**

This feature does not apply to in-house workstations, as defined by the setting for patron actions in the PowerPAC profile **In-house access definitions**. This protects patron privacy if a PowerPAC user on an in-house workstation follows the **Mobile Site** link, perhaps logs into the patron account, and then leaves the workstation in Mobile PAC. (There is no inactivity timeout in Mobile PAC.) Staff members who need to access Mobile PAC can enter the URL directly into their workstation browsers. If you want the **Mobile Site** link to appear in PowerPAC for staff workstations, you must set the in-house definition to **In-house IP Addresses Table** only, and then make sure that no staff workstations

appear in the In-House IP Address Table. For more information about in-house definition settings, see the *Administration Guide*.

- Connection organization from PowerPAC redirect - When a redirection to Mobile PAC is made automatically (Polaris version 5.2 and earlier) or with the PowerPAC footer link, the PowerPAC connection organization is retained for the Mobile PAC connection. If the PowerPAC connection organization was the system, Mobile PAC uses the organization saved in the user's Mobile PAC **Preferences** settings. See [Enable branch switching and set branch display order](#).
- Display language from PowerPAC redirect - For multilingual versions, when a redirection to Mobile PAC is made automatically (Polaris version 5.2 and earlier) or with the PowerPAC footer link and the PowerPAC display language is not English, the language setting is retained for the Mobile PAC connection. If the PowerPAC display language was English, Mobile PAC uses the language saved in the user's Mobile PAC **Preferences** settings.
- Automatic redirection - In Polaris version 5.2 and earlier, PAC users with mobile devices are automatically redirected to Mobile PAC if they attempt to connect to Polaris PowerPAC on the home (portal) page, default search page, or patron account page. This feature accommodates libraries that have direct links from their library Web sites to search and patron account pages. Beginning with Polaris 5.5, users with mobile devices go directly to the appropriate PowerPAC page, which is designed to automatically adapt to the user's device.

### Set the Mobile PAC Full Site link

The **Full Site** link on the Mobile PAC home page is the URL specified in the parameter **URL of the PowerPAC's root** for the Web server in Polaris Administration. This destination is typically your library web site. Do not change this setting unless your Polaris PowerPAC root URL changes.

The **Full Site** link retains the user's preference settings for connection organization and display language when connecting to Polaris PowerPAC. See [Enable branch switching and set branch display order](#).

### Enable Mobile PAC branch switching and set branch display order

The Mobile PAC home page includes a **Preferences** link. You can allow Mobile PAC users to change the connection branch on the Preferences page, and you can set a display order for the branch names.

To set up branch switching:

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

**Note:**

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

2. Double-click **Branch Switching: Enable**, and select **Yes**. This setting allows patrons to choose branches in the **Branch** list on the Mobile PAC Preferences page. The chosen branch's Mobile PAC settings become effective. If you set this to **No**, the patron can connect only to the organization represented by the Mobile PAC connection URL. See [Set the Mobile PAC Connection URL](#).
3. If you set **Branch switching: Enable** to **Yes**, set the PAC profile **Branch list Order** to determine the display order of the branches:
  - Select **Yes** to display the branch names in ascending alphabetical order by name.
  - Select **No** to display the branch names in ascending numerical order by internal organization ID.

**Important:**

This setting also affects Polaris PowerPAC.

With either setting, the system organization is always first. The setting for the current connection branch is used. The profile also controls the display order of the list of pick-up branches for requests, but the setting for the patron's registered branch is used for the pick-up branch list.

**Note:**

Use the system-level PAC profile **Suppress branches** to suppress a branch from display in the **Switch to another branch** list. This setting also affects Polaris PowerPAC.

*Related Information*

Organization names - Mobile PAC uses the **Display Name** defined in the organization record. See the *Administration Guide*.

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## Setting Up Mobile PAC Library Information

The Mobile PAC home page displays a link for library hours and contact information. When the connection organization is a library or branch, the link opens information about the current connection organization. When the connection organization is the system, the link opens a page where the user selects a library or branch to see that organization's information.

The specific hours are set in the Patron Services parameter **Hours of operation** for the connection organization. The address and telephone number are taken from the organization record.

**Note:**

The system-level PAC profile **Suppress branches** controls whether a branch is listed in the drop list of organizations. If you choose to suppress a branch, it is also suppressed from display on the **Preferences** page. See [Enable Mobile PAC branch switching and set branch display order](#)

You can choose to display a message in addition to, or instead of, the formatted hours table. You can also choose to display a link to the library's Web site along with the address and telephone number.

To specify the information that should appear on the Library Hours & Contact page:

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PAC** tab in the details view.
2. To display the organization's hours formatted in a table, set the profile **Hours of operation: Display** to **Yes**.

**Note:**

This setting also applies to Polaris PowerPAC.

**Important:**

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

**Tip:**

The **Hours of operation message** option below is useful for organizations with split hours or other conditions that the usual Hours of Operation table does not accommodate.

3. To specify a message to display on the Hours & Contact page, follow these steps:
  - a. Double-click the **Hours of operation message** profile.

**Note:**

This setting also applies to Polaris PowerPAC.

The Language Strings dialog box opens.

- b. Select a language from the list of those licensed for Polaris PowerPAC.
  - c. Double-click the message field in the **Display text** column and type the message (up to 500 characters).

**Note:**

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

- d. Click **OK**.
4. To include a link to the library's Web site along with the address and telephone number, follow these steps:
  - a. Open the **Profiles** folder for the organization, and select the **Mobile PAC** tab in the details view.
  - b. Double-click **Navigation: Web site URL** and type the complete URL, beginning with **http://**
5. Select **File | Save**.

**Related Information**

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

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## Setting Up New and Popular Titles in Mobile PAC

The Mobile PAC home page displays a New and Popular Titles link. When the user clicks this link, **New at the Library**, **On Order Titles**, **Best Seller**, and **Popular at the Library** (most circulated) lists are displayed. When the user clicks a link in a list, such as **Books** under **New at the Library**, the appropriate search is launched in the library catalog.

To set up New and Popular Titles options:

**Note:**

You can set the **New and Popular Titles** profile at the system, library, or branch level. The connection organization's settings determine the options available to Mobile PAC users.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Mobile PAC** tab in the details view.
2. Double-click **New and Popular Titles**. The **New and Popular Titles** dialog box opens.
3. Select the **New at the Library** categories to include on the New and Popular page in Mobile PAC.

When the patron clicks a **New at the Library** category, the search is launched for titles in that category that have recently been added to your catalog. This feature uses the same processing as the New Titles Web part in Polaris PowerPAC. For details, see [Defining Web Parts for Dashboards](#).

**Note:**

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

4. Select the **Best Seller Lists** categories to include on the New and Popular page in Mobile PAC.

When a patron selects a title from one of these lists, a search for the title is launched in the Polaris database. The lists are updated automatically with content from IndieBound (formerly Book Sense), using the same process as Polaris PowerPAC. For details, see [Defining Web Parts for Dashboards](#).

**Important:**

If a title in the Best Seller list is not in the catalog, the list item for the title is not a live link. As best-seller titles are added to the catalog, the links are updated when MobilePAC is reloaded using the Reload tool in Polaris Language Editor, or when an IIS reset is performed on the server. Polaris Hosted customers should contact Polaris Customer Support to perform an IIS reset.

5. Select the **Popular** categories to include on the New and Popular page in Mobile PAC.

These categories use the same processing as the Most Circulated Web part in Polaris PowerPAC; that is, the **Popular** links launch searches for popular titles, authors, or subjects in the Polaris database, based on circulation statistics for the past 31 days.

6. Select **Show on-order items** to provide links that launch searches for titles in the Polaris database that have linked items with a status of On-Order.

This feature uses the same processing as the On-Order Items Web part in Polaris PowerPAC. For details, see [Defining Web Parts for Dashboards](#).

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## Setting Up Ask Us in Mobile PAC

As in Polaris PowerPAC, Mobile PAC users can send an “Ask Us” reference question to a designated library email address. When the user clicks the **Ask Us** link on the home page, and the library requires patrons to log on to use this feature, the logon page appears. Once logged on, the user can type the question and send it to the library.

You set up a receiving email address on the branch level with the PAC profile **Patron access options**, then enable the feature specifically for Mobile PAC. As with Polaris PowerPAC, you can require a patron logon for Ask Us in Mobile PAC, or bypass the logon and allow anyone to send a question via Ask Us. In this case, a Guest button is displayed on the logon page.

The Sent From email address on the message to the library is the email address the user has specified in the Ask Us form, if any. If no address is specified, the user has logged on as a patron, and the patron account includes an email address, that address is used. If no email address is specified in the Ask Us form or the patron account, or the

patron has cleared the address from the form, the Sent From address is that specified in the PAC profile **Email notification: Email address of sender**.

**Note:**

Any email from PAC, including Ask Us messages, requires you to specify the SMTP server in Polaris Administration. Double-click the PAC profile **Email notification: Server running SMTP service**, and type the domain name of the email SMTP server. This setting applies to all Polaris PAC applications and is also used by other Polaris processes, such as email notification.

To set up the Ask Us function in Mobile PAC:

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

**Important:**

These settings also affect Polaris PowerPAC.

2. Double-click **Patron Access options**. The **Patron Access Options** dialog box appears.
3. Click the **Ask Us** tab.
4. To specify the receiving address for Ask Us email messages, do these steps:
  - a. Click **Add**, and use the Find Tool to search for the staff member or members who should receive the Ask Us messages.
  - b. Select the names in the results list, right-click the highlighted names, and choose **Select** from the context menu. The **Patron Access Options** dialog box appears, and the selected names are displayed in the **E-mail to** list.
5. Click **Apply** to apply your settings and continue working with Patron Access options, or click **Save** to save your settings and close the **Patron Access options** dialog box.
6. To make the Ask Us feature available in Mobile PAC, do these steps:
  - a. Click the **MobilePAC** tab in the details view of the Explorer.
  - b. Double-click **Navigation: Ask us**, and select **Yes**.
  - c. To require a patron logon for Ask Us, double-click **Ask Us: Require Login**, and set the value to **Yes**. If this value is set to **No**, a **Guest** button is displayed on the Ask



Us logong page in Mobile PAC. The user can click **Guest** to send a question without logging on.

7. Select **File | Save**.

## Set Up and Start Ask Us

To set up the e-mail addresses to receive questions sent by e-mail from the PAC, and to enable the Ask Us function in Mobile PAC:

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

### Important:

These settings also affect Polaris PowerPAC.

2. Double-click **Patron Access options**.

The Patron Access Options dialog box appears.

3. Click the **Ask Us** tab.
4. Specify the receiving address for Ask Us e-mail messages as follows:
  - a. Click **Add**, and use the Find Tool to search for the staff member or members who should receive the Ask Us messages.
  - b. Select the names in the results list, right-click the highlighted names, and choose **Select** from the context menu. The Patron Access Options dialog box appears, and the selected names are displayed in the **E-mail to** list.
  - c. Click **Apply** to apply your settings and continue working with Patron Access options, or click **Save** to save your settings and close the Patron Access options dialog box. The Profiles tabbed pages appear in the Administration Explorer details view.
5. To make the Ask Us feature available in Mobile PAC, do these steps:
  - a. Click the **MobilePAC** tab in the details view of the Explorer.
  - b. Double-click **Navigation: Ask us**, and select **Yes**.
6. To require a patron log-in for Ask Us, double-click **Ask Us: Require Login**, and set the value to **Yes**.

If this value is set to **No**, a **Guest** button is displayed on the Ask Us login page in Mobile PAC. The user can click **Guest** to send a question without logging in.

7. Select **File | Save**.

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## Specifying Mobile PAC Search Settings

Mobile PAC offers a quick search and an advanced search. Both options are keyword searches.

**Quick Searches** - When the user clicks **Search the Catalog** on the main page, the quick search page opens. In this type of search, the user simply types a search term in the **Search for** box and clicks **Search**. This search uses the search by, limit by, and sort by settings for quick searches from the PAC profile **Search settings defaults**. See [Set default search selections](#). If the **Search by** setting in Polaris Administration is other than the default **Any Field** and the **Limit by** setting is other than the default **All formats** (TOM=\*), the settings currently in effect appear below the **Search for** text box in Mobile PAC.

**Advanced Search** - When the user clicks **Advanced Search** on the **Search** page, the advanced search page opens. On this page, users can select the **Search by** field, the **Limit by** filter, and a sort order. The default values for **Search by**, **Limit by**, and **Sort by** are taken from the advanced search settings in the PAC profile **Search settings defaults**. See [Set default search selections](#). The selections in the drop-down list for the **Limit by** filter are taken from the PAC **Limit by display** policy table. The user can also set the number of titles per page in the search results. The options are 5 (default), 10, 25, and 50.

The user's selected search settings are retained until the user closes the browser, clicks **Reset**, or reopens the Advanced Search page by selecting the **Advanced Search** link on the quick search page. The **Reset** button resets all controls in the Advanced Search page to their default values and clears the text from the **Search for** box.

When search results are displayed, if the user selects the **Search** link in the bread crumb trail at the top of the window, the options set for the user's most recent search are retained on the Advanced Search page.

To specify the default selections for quick and advanced searches:

**Important:**

These settings also affect Polaris PowerPAC.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **PAC** tab in the details view. Mobile PAC uses the settings for the user's current connection branch.

**Note:**

For information about allowing branch switching, see [Setting Up Mobile PAC Connections](#).

2. Double-click **Search settings defaults**. The **Search Settings Defaults** dialog box opens.
3. Set the quick search defaults:
  - a. Click the **Quick** tab.
  - b. Select the default search field in the **Search by** list. The setting applies to every quick search. The default is **Any Field**.
  - c. Select the default search filter in the **Limit by** list. The available selections depend on the organization's settings in the PAC Limit By Display policy table. The default selection is **All formats** (that is, no filter; TOM=\*).

**Note:**

You can change the labels of existing filters and set up custom filters. See [Setting Up Search Filters \(Limit By\)](#).

- d. Select the default sort order for search results in the **Sort by** list. The setting applies to every quick search. The default selection is **Relevance**. This selection sorts results based on weighted keyword frequency and proximity, so that those most likely to meet the user's needs appear first in the list. **Most Popular** sorts titles in the search results so that the titles most frequently checked out or requested over the past 120 days appear first in the list.

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

4. Set the advanced search defaults:
  - a. Click the **Advanced** tab.
  - b. Select the default search field in the **Search by** list. The default selection is **Any Field**.
  - c. Select the default search filter in the **Limit by** list. The default selection is **All formats** (that is, no filter; TOM=\*).

**Note:**

You can change the labels of existing filters and set up custom filters. See [Setting Up Search Filters \(Limit By\)](#).

- d. Select the default sort order for search results in the **Sort by - When searching local databases only** list. The default selection is **Relevance**.
5. Click **Save**.
6. (Optional) To set automatic subsorting by title for certain sort types, set the PAC profile **Search: Sub-sort-by-title** to **Yes**. This allows patrons to quickly find a known title in a large results set.

When the profile is set to **Yes**, the records are first sorted by the selected sort option and then sorted alphabetically by title, ignoring nonfiling characters (respecting the value of the 245 second indicator). The setting does not affect these sort types: relevance, most popular, title, author then title, title then author, title then publication date, title then format, publication date then title, call number then title.

**Note:**

This setting affects both Polaris PowerPAC and Mobile PAC. The profile is available at the system, library, and branch levels. It is set to **No** by default; you may want to leave this setting if you find the automatic subsort impacts performance.

**Related Information**

- TOM (Type of Material) - For more information about Type of Material and format icons in Polaris PAC applications, see the *Cataloging Guide* and [Setting Up Search Filters \(Limit By\)](#).
- Community Information - Mobile PAC supports keyword searches for community information for libraries that use Polaris Community Profiles, a separately licensed feature. For more information, see the *Community Profiles Guide*.

**Set Default Search Selections**

To specify the default selections for quick and advanced searches:

**Important:**

These settings also affect Polaris PowerPAC.

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

Mobile PAC uses the settings for the user's current connection branch.

**Note:**

For information about allowing branch switching, see [Setting Up Mobile PAC Connections](#).

2. Double-click **Search settings defaults**.

The Search Settings Defaults dialog box opens.

3. Click the **Quick** tab and set the quick search options as follows:
  - a. Select the default search field in the **Search by** list. The setting applies to every quick search. The default is **Any Field**.
  - b. Select the default search filter in the **Limit by** list. The available selections depend on the organization's settings in the PAC Limit By Display policy table. The default selection is **All formats** (that is, no filter; TOM=\*).

**Note:**

You can change the labels of existing filters and set up custom filters. See [Setting Up Search Filters \(Limit By\)](#).

- c. Select the default sort order for search results in the **Sort by** list. The setting applies to every quick search. The default selection is **Relevance**. This selection sorts results based on weighted keyword frequency and proximity, so that those most likely to meet the user's needs appear first in the list. **Most Popular** sorts titles in the search results so that the titles most frequently checked out or requested over the past 120 days appear first in the list.

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

4. Click the **Advanced** tab and set the advanced search options as follows:
  - a. Select the default search field in the **Search by** list. The default selection is **Any Field**.

- b. Select the default search filter in the **Limit by** list. The default selection is **All formats** (that is, no filter; TOM=\*).

**Note:**

You can change the labels of existing filters and set up custom filters. See [Setting Up Search Filters \(Limit By\)](#).

- c. Select the default sort order for search results in the **Sort by - When searching local databases** only list. The default selection is **Relevance**.

5. Click **Save**.

6. (Optional) To set automatic subsorting by title for certain sort types, set the PAC profile **Search: Sub-sort-by-title** to **Yes**. This allows patrons to quickly find a known title in a large results set.

When the profile is set to **Yes**, the records are first sorted by the selected sort option and then sorted alphabetically by title, ignoring nonfiling characters (respecting the value of the 245 second indicator). The setting does not affect these sort types: relevance, most popular, title, author then title, title then author, title then publication date, title then format, publication date then title, call number then title.

**Note:**

This setting affects both Polaris PowerPAC and Mobile PAC. The profile is available at the system, library, and branch levels. It is set to **No** by default; you may want to leave this setting if you find the automatic subsort impacts performance.

## Related Information

- TOM (Type of Material) - For more information about Type of Material and format icons in Polaris PAC applications, see the *Cataloging Guide* and [Setting Up Search Filters \(Limit By\)](#).
- Community Information - Mobile PAC supports keyword searches for community information for libraries that use Polaris Community Profiles, a separately licensed feature. For more information, see the *Administration Guide*.

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## Mobile PAC Results Settings

From the search results set, users can locate items, see more bibliographic information, and place hold requests. The initial search results display is a list of titles, with format icons and cover images if these are enabled.

**Note:**

You can configure the title information displayed in this view. See [Configuring the Mobile PAC Title Display](#).

By default, five titles are displayed per page, but the user can change this number on the Preferences page. The user can also sort the results list.

The initial search results display also includes links from the 856 MARC tag. The link text is displayed according to the following logic:

**Note:**

If there is text in the 856\$z, it displays as a note but not as part of the web link.

- 856\$y - Link Text - If the bibliographic record has an 856\$y, the text in the first occurrence of this tag is used for the Web link display instead of the URL in the 856\$u.
- 856\$3 - Material Specified - If the bibliographic record does not have an 856\$y, but it does have an 856\$3, the text in the first occurrence of this tag is used for the Web link display instead of the URL in the 856\$u.
- 856\$u - URL - If the bibliographic record does not have an 856\$y or an 856\$3, the default web link text is **Web Site**. You can change the label using the Mobile PAC profile **Title Display: Configure**. For more information, see [Configuring the Mobile PAC Title Display](#).

Mobile PAC supports integrated eContent. For details on this licensed feature, see EContent Vendors and Polaris.

See also:

- [Cover Images](#)
- [Title \(Product\) Page Links](#)
- [Title Link: Find It](#)
- [Title Link: Details](#)

- [Title Link: Request It](#)
- [Title Link: Purchase or Buy It Now](#)
- [Title Links: Enriched Content](#)
- [Title Link: Map It](#)
- [Title Link: Librarian's \(MARC\) View](#)
- [Set up the Mobile PAC title \(product\) page](#)
- [Configuring the Mobile PAC Title Display](#)
- [Polaris Fusion Results](#)

## Cover Images

Cover images are displayed according to the connection organization's settings for the content provider in the PAC profile **Enriched data**. For more information, see [Enabling Enriched Data](#). These settings also affect Polaris PowerPAC.

In Mobile PAC, when cover images are enabled, the user can choose to hide them. The **Hide Covers** option appears at the bottom of each search results page. This may improve the display on certain mobile phones. When cover images are hidden, the title format (Type of Material, or TOM) is also displayed as text instead of an icon. This setting is saved on the device until the user chooses to display the images again.

## Title (Product) Page Links

Users click a title in the search results list to see more choices related to the individual title. The following links may be displayed on the title (product) page:

- Find It - View availability information. See [Title Link: Find It](#).
- Details - View bibliographic information. See [Title Link: Details](#).
- Request It - Place a hold request. See [Title Link: Request It](#).
- Purchase - Purchase the title from a vendor's web site. See [Title Link: Purchase or Buy It Now](#).
- Enriched content links - View third-party content such as summaries and reviews. See [Title Links: Enriched Content](#).
- Librarian's View - Display the MARC view for the title. See [Title Link: Librarian's \(MARC\) View](#).



**Note:**

You can configure the title information displayed in this view. See [Configuring the Mobile PAC Title Display](#).

You can set the order of links on this page. See [Set up the Mobile PAC title \(product\) page](#).

**Title Link: Find It**

This link displays summary availability information for items linked to the title. Like other Mobile PAC displays, the list uses the branch **Display Name** defined in the organization record.

A branch is listed if it is selected for display as a system holding in the Item Availability Display Order policy table for the connection organization, and the branch is the Assigned Branch for at least one item linked to the title. Settings in the Item Availability Display Order policy table also determine the order in which branches are listed. (If at least one item is In at the branch, the summary availability information also includes the word **In**.) For more information about these settings, which are shared with Polaris PowerPAC, see [Setting Up Local and System Availability](#).

The user can click a branch name to see the call number and other information, if enabled, for that branch's items. If item-level or first-available-copy requests are enabled, a **Request It** link is also available.

**Note:**

You can suppress the Find It and Request links for designated types of material. See [Suppressing Request and Availability Options](#).

**Note:**

For more information about placing requests from Mobile PAC, see [Title Link: Request It](#). For information about enabling item-level or first-available-copy requests, see the *Patron Services Administration Guide*.

The connection organization's settings for the following PAC profiles determine what information is displayed for each item:

**Important:**

These settings also affect Polaris PowerPAC.

- **Item Availability: Display detailed item status** - Set to **Yes** to display the specific item circulation status of unavailable items, such as **Lost** or **Bindery**. Set to **No** to display **No items available** or your own text for items that are unavailable for circulation for any reason. (You must also set **Item Availability: Display status** to **Yes**.)
- **Item Availability: Display due date in detailed item status** - If you set **Item Availability: Display detailed item status** to **Yes**, you can set this parameter to display or suppress the item's due date. (If you set **Item Availability: Display detailed item status** to **No**, you cannot display the due date.)
- **Item Availability: Display status** - Set to **Yes** to display an item's availability status. If you set this to **Yes**, also review the setting for **Item Availability: Display detailed item status**.
- **Item Availability: Display shelf location** - Set to **Yes** to display an item's shelf location.
- **Item Availability: Display type** - Set to **Yes** to display the item's material type.
- **Suppress item display** - Specify item circulation statuses that should prevent an item from being displayed in search results. When a circulation status is selected, items with this status are not displayed in PAC even when **Display in PAC** is checked in the item record.

For more information, see [Displaying PAC Search Results](#).

### Text It in Mobile PAC

From the Mobile PAC item availability display, a patron can send an email text message containing the item call number to his or mobile phone via the mobile phone carrier's SMTP email service.

When you enable this feature, a Text It link appears for each item in the item availability display for Mobile PAC search results. When the patron clicks **Text It**, the Text It form opens.

If the user is logged in and the patron record includes a phone number that has been designated for TXT notification, the **Mobile phone number** and **Carrier** fields are already filled in. If the user is not logged in, or is logged in but does not have a phone number designated for TXT notification in the patron record, the user enters the mobile phone number and selects a carrier from the list. The carrier options are set in the system-level database table **Mobile Phone Carriers**. When the patron clicks **Send**, the text message is sent to the specified mobile phone.

To display the Text It link in Mobile PAC, set the PowerPAC profile **Item availability: "Text it" feature enabled** to **Yes** (the default setting). This setting also controls the feature in Polaris PowerPAC. For details, see [Sending Call Numbers by Text Message](#).

### Title Link: Details

When the user clicks **Details** for a title, more bibliographic information is displayed.

The connection organization's settings for the Mobile PAC profile **Title display configure** control which bibliographic fields are displayed and their label text. For more information, see [Configuring the Mobile PAC Title Display](#).

### Title Link: Request It

The user clicks **Request It** for a title to place a title-level hold request.

**Note:**

You can suppress the Request It link for designated types of material. See the *Public Access Administration Guide*.

Hold requests from Mobile PAC are enabled from and use the settings in the **Holds Options** Request parameter. For more information about these settings, see the *Patron Services Administration Guide*. Rules set for specific patron codes or specific items also apply to Polaris PowerPAC.

When the patron clicks the **Request It** link, the logon page appears (see [Patron Logon Settings for Mobile PAC](#)). After logging in, the patron selects a pickup location from a list of locations. The default location is the patron's home library (registered branch).

Mobile PAC supports Borrow by Mail requests, and if these are enabled the patron can opt to have the requested item mailed instead of selecting a pick-up location. For more information about Borrow by Mail settings, see Setting Up Borrow by Mail Circulation.

**Note:**

Item-level or first-available-copy requests can be placed from the detailed item availability page (see [Title Link: Find It](#)) if these types of requests are enabled in the Holds Options Request parameter.

The patron can then submit the request or cancel it. If the patron selects **Submit Request**, a hold request is sent to the library and a confirmation message is displayed if the request is successful. (If the request is not successful, the patron is informed that request cannot be placed and is advised to contact the library for more information.)

### Title Link: Purchase or Buy It Now

A **Purchase** link is available in the Title page for a title in Mobile PAC search results. When the user clicks the link, a search is launched for the title in a specified vendor's Web site. As in Polaris PowerPAC, the purchase transaction takes place on the vendor's site. For more information, see [Setting Up Purchase Links](#).

Mobile PAC also supports Polaris Bookstore, available by separate contract. Through Polaris Bookstore and Baker & Taylor Inc., your library can establish an online bookstore where patrons can purchase materials at a discount comparable to other major online retailers, and your library receives a portion of the sales as a donation. As in Polaris PowerPAC, if you enable both links, the **Buy It Now** link is displayed when the title is available at the Bookstore. The **Purchase** link is displayed when the title is unavailable at the Bookstore and the title has an ISBN. For more information about Polaris Bookstore, see [Setting Up Polaris Bookstore](#).

To enable the **Purchase** link, **Buy It Now** link (if you have a contract), or both, use the PAC profile **Purchase options**. Your settings also apply to Polaris PowerPAC. See [Enabling Online Book Purchases](#).

You can edit the **Purchase** and **Buy It Now** link labels using Polaris Language Editor (WebAdmin). The strings IDs are **MP\_LBL\_SEARCH\_PURCHASE** and **MP\_LBL\_SEARCH\_BUY\_IT\_NOW**.

### Title Links: Enriched Content

Enriched content from third-party sources is available in Mobile PAC search results, from links in the title (product) page.

**Tip:**

If you use NoveList or NoveList Select, and you run Mobile PAC in SSL mode, your NoveList URL must begin with **https://**.

Mobile PAC shares enriched content settings with Polaris PowerPAC. For more information about setting up enriched data for PAC use, see [Enabling Enriched Data](#).

### Title Link: Map It

Using the JavaScript interface provided by Google Maps™, Mobile PAC offers the Map It feature (also available in PowerPAC), which provides a visual guide to the location of items linked to titles in the patron's search results list. When you enable this feature, the

Mobile PAC Map It link is available to users who have enabled JavaScript on their mobile devices.

When the user clicks **Map It** in the title product page (full display), a map displays bubble markers for branch locations that have linked items.

The user can place the cursor over a marker bubble to see the branch name, or click the branch marker to see the branch's address and hours.

When the user clicks **Get Directions** in the hours window, directions to the branch are available from any address. The user enters the address and clicks Go!. (If the user is logged in, the primary address from the patron record is already filled in for convenience, but it can be changed.)

As in PowerPAC, the Mobile PAC Map It link is displayed for titles whose **# system items** count in the PAC brief display is greater than 0.

Use the PAC profile **Google Maps** in Polaris Administration; check the **Enable in Mobile PAC** box to enable Map It in Mobile PAC. The profile is available at the system, library, and branch levels.

Mobile PAC and PowerPAC share the same geographic center and zoom level settings. For detailed information about these settings, see [Map It \(Google Maps\) in PAC](#).

When you enable Map It for Mobile PAC, the link is automatically enabled for the Mobile PAC product page and placed by default at the end of the list for the enabled product page categories. You can change the position of the link on the page using the Mobile PAC profile **Product Page categories: Configure**. See [Set up the Mobile PAC title \(product\) page](#).

### **Title Link: Librarian's (MARC) View**

When the user clicks the **Librarian's View** link in the Title page for a title in Mobile PAC search results, the MARC record view is displayed.

You can choose to display or suppress the **Librarian's View** link with the PowerPAC profile **Librarians (MARC) view: Enable**. (This profile also affects Polaris PowerPAC). You can edit the **Librarian's View** link label using Polaris WebAdmin (Language Editor). The string ID is **MP\_LBL\_MARCVIEW\_LIBRARIAN\_VIEW**.

### **Set up the Mobile PAC title (product) page**

To determine the display order of links on the Mobile PAC title page:

**Note:**

You need the permission **Modify product page categories: Allow** to do this procedure.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and click the **Mobile PAC** tab in the details view.
2. Double-click **Product page categories: Configure**. The **Product Page Categories: Configure** dialog box opens. The top portion lists the categories (features) that have been enabled for the organization.
3. To change the display order, select the category and click the appropriate arrow at the side of the dialog box to move the category up or down in the display order.
4. Click **OK**.

*Related Information*

- Editing category labels - The **Product Page Categories: Configure** dialog box lists the language string ID for each category for use in Polaris WebAdmin (Language Editor), where you can search for and edit the link labels. For more information, see WebAdmin online Help.
- Enabling categories - The bottom portion of the **Product Page Categories: Configure** dialog box lists the features that are possible to display on the product page, but have not been enabled for the organization. For information about setting up the features that can be displayed on the product page, see:
  - Enriched content from third parties - [Enabling Enriched Data](#)
  - Librarian's View - Set the PowerPAC profile **Librarian's (MARC) View: Enable** to **Yes**.
  - Purchase/Buy It Now - [Title Link: Purchase or Buy It Now](#)

**Note:**

You can also configure the product page for Polaris PowerPAC, using a separate profile. See [Configuring the PowerPAC Product Page](#).

**Configuring the Mobile PAC Title Display**

Using the Mobile PAC profile **Title Display: Configure**, you can do the following:

- Select which data elements (tags, subfields, and indicators) appear in the brief, summary, and full displays. The brief display is the information shown in initial

search results. The summary information is displayed on the Mobile PAC product page for title. The full display appears when the user clicks **Details** on the product page.

- Show multiple instances of a single tag in the brief display: for example, multiple 856 \$u fields.
- Specify different elements for monographs and serials.
- Edit existing data elements.
- Set the display order of data elements.
- Specify a custom label for each data element, and create translated versions of the data labels for languages you have licensed.
- Specify additional data elements by selecting the tags, indicator values, and sub-fields to include in each custom entity.
- Display a "requested" indicator for titles on which the patron has an active, pending, held, shipped, or located hold request. The indicator is a message: **You requested this on [date]**; the system supplies the date. The indicator can be displayed to logged-in patrons on the search results page, the title screen, the working title list, and saved title lists. The Brief and Full configuration view settings in the profile apply to both search results screens and title lists; that is, when you set the **Requested date** indicator to display in search results, it will also display in working and saved title lists.

**Note:**

When enabled, the indicator is displayed only for requests that have been placed in Polaris. The requested indicator does not apply to integrated eContent titles.

- Copy all these settings from any organization to any other organization.

The system uses the connection organization's settings for the Mobile PAC profile **Title Display: Configure**, but the setup workflow is the same as that for PowerPAC. For detailed procedures, see [Configuring the PowerPAC Title Display](#).

For libraries that use Polaris Community Profiles, a separate profile controls the Mobile PAC display of community information results, and a separate set of data elements is available for your community information displays. For details, see the *Community Profiles Guide*.

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

Mobile PAC Brief Display - Monograph			Mobile PAC Brief Display - Serial		
Entity	Display Order	Label	Entity	Display Order	Label
Primary Title	1	Title:	Primary Title	1	Title:
Primary Author	2	Author:	Primary Author	2	Author:
Publication Year	3	Publication Year:	Publication Year	3	Publication Year:
Web Link (Short)	4	Web Site:	Web Link (Short)	4	Web Site:

Mobile PAC Summary Display - Monograph			Mobile PAC Summary Display - Serial		
Entity	Display Order	Label	Entity	Display Order	Label
Primary Title	1	Title:	Primary Title	1	Title:
Primary Author	2	Author:	Primary Author	2	Author:
Publication Year	3	Publication Year:	Publication Year	3	Publication Year:
Web Link (Short)	4	Web Site:	Web Link (Short)	4	Web Site:

Mobile PAC Full Display - Monograph			Mobile PAC Full Display - Serial		
Entity	Display Order	Label	Entity	Display Order	Label
Type of Material	1	Format:	Type of Material	1	Format:




Mobile PAC Full Display - Monograph			Mobile PAC Full Display - Serial		
Uniform Title (Long)	2	Uniform Title:	Uniform Title (Long)	2	Uniform Title:
Author (Long)	3	Author:	Author (Long)	3	Author:
Title (Long)	4	Title:	Title (Long)	4	Title:
Edition (Long)	5	Edition:	Edition (Long)	5	Edition:
Publisher (Long)	6	Publisher, Date:	Publisher (Long)	6	Publisher, Date:
Description (Long)	7	Description:	Description (Long)	7	Description:
Summary (Long)	8	Summary:	Summary (Long)	8	Summary:
Target Audience Note (Long)	9	Target Audience Note:	Target Audience Note (Long)	9	Target Audience Note:
Series (Long)	10	Series:	Series (Long)	10	Series:
Volume (Long)	11	Volume:	Volume (Long)	11	Volume:
Frequency (Long)	12	Frequency:	Frequency (Long)	12	Frequency:
Subjects	13	Subjects:	Subjects	13	Subjects:
Other Author (Long)	14	Other Author:	Other Author (Long)	14	Other Author:
Other Title (Long)	15	Other Title:	Other Title (Long)	15	Other Title:
Former Title (Long)	16	Former Title:	Former Title (Long)	16	Former Title:
Later Title (Long)	17	Later Title:	Later Title (Long)	17	Later Title:

Mobile PAC Full Display - Monograph			Mobile PAC Full Display - Serial		
Web Link (Long)	18	Web Site:	Web Link (Long)	18	Web Site:
LCCN (Long)	19	LCCN:	LCCN (Long)	19	LCCN:
ISBN (Long)	20	ISBN:	ISBN (Long)	20	ISBN:
ISSN (Long)	21	ISSN:	ISSN (Long)	21	ISSN:
OCLC Control Number	22	Other Number:	OCLC Control Number	22	Other Number:
STRN (Long)	23	STRN:	STRN (Long)	23	STRN:
GPO (Long)	24	GPO Item No.:	GPO (Long)	24	GPO Item No.:
CODEN (Long)	25	CODEN:	CODEN (Long)	25	CODEN:
Total System Item Count	26	System Availability:	Total System Item Count	26	System Availability:
Hold Request Count	27	Current Holds:	Hold Request Count	27	Current Holds:
Control Number	28	Control Number:	Control Number	28	Control Number:
Bibliographic Call Number	29	Call Number:	Bibliographic Call Number	29	Call Number:
Course Reserve Count	30	Course Reserves:	Course Reserve Count	30	Course Reserves:
Medium (Long)	31	Medium:	Medium (Long)	31	Medium:

### Polaris Fusion Results

Mobile PAC supports Polaris Fusion (digital collection) searches and results. Materials in the digital collections may include images, video clips, sound files, and text files. To

limit search results to digital collection materials, the user selects **Digital Collection** in the **Limit by** box on the Advanced search page.

In the search results, the digital collection icon  identifies digital collection materials.

When the user clicks a title, more choices related to the title are displayed. Digital collection titles with a single linked resource, such as one image, offer a link to that resource. If there are no access restrictions, the user can click the link to see the resource.

**Note:**

Image resources open in the same browser window. Other types of digital resources open in a new browser window to ease navigation back to Mobile PAC.

When the user clicks a title with multiple linked resources, the title page displays a **Show Resources** link. The user clicks this link to see the attached resources.

If a resource has restricted access, the user can request access by clicking the **place access request** link. If purchase is required, the access request page offers a link to the full library catalog.

When the user clicks the full catalog link, the same search is launched and the title is displayed in Polaris PowerPAC. Like the **Full Site** link at the bottom of Mobile PAC pages, the **full library catalog** is the address specified in the parameter **URL of the PowerPAC's root** for the Web server in Polaris Administration. See [Set the Full Site link](#).

For more information about setting up and using Polaris Fusion to manage digital collections, see the Polaris Fusion online Help.

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## Saved Searches (Search Agent) in Mobile PAC

Registered patrons can save searches in Mobile PAC, and have the saved searches run automatically either weekly or monthly. Each search run looks for results that are new since the last run. The results are automatically sent to an e-mail address the patron specifies. By accessing their patron accounts, patrons can view, edit, and delete saved searches, or run them manually. (These features are also available in Polaris PowerPAC).

To save a search, the patron first searches the catalog using the criteria he wants for the saved search, then clicks **Save Search** at the bottom of any page in the search results.

If the patron has not logged on, the Log On page opens. After the patron logs on, he names the search, types an optional note, sets the notification criteria and number of times to run the search, and clicks **Save**.

All saved searches sent to the same patron email address must be in the same email format. If the patron specifies a format different from existing saved searches when saving a new search, a message provides the options to specify a different format for the new search or to change all the others.

Saved searches are available to delete, edit, or run manually from the patron account. On the My Account page, the patron clicks **Saved Searches** to access the list.

On the Saved Searches page, the patron can check searches to delete, or select a search name to edit the settings or run the search manually.

**Note:**

As in Polaris PowerPAC, the patron cannot edit the search criteria. Instead, the patron sets up and saves a new search, and deletes the old one if necessary.

To allow patrons to save searches in Mobile PAC:

1. Set the PAC profile **Search agent: Enable** to **Yes**.
2. Set up the PAC parameter **Search agent parameters**. See [Set up basic operating features for Polaris PowerPAC](#). Search agent settings also apply to Polaris PowerPAC.

You can edit text strings related to Mobile PAC save search functions using Polaris WebAdmin (Language Editor). For more information about using WebAdmin, see WebAdmin online Help.

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## Title Lists in Mobile PAC

Patrons using Mobile PAC can develop and save title lists from search results. From the working title list, individual title information or the whole list can be sent by email, and working title lists can be saved to the patron account. Titles can be copied or moved

among a patron's title lists, and patrons can place requests and view availability information and enriched content for titles in a title list.

See also:

- [Creating a Working List](#)
- [Email Options](#)
- [Saving Lists](#)
- [Copying and Moving Titles Among Lists](#)
- [Title Details](#)
- [Requested Indicator](#)
- [Setting Up Mobile PAC Title Lists](#)

### Creating a Working List

To create a working list, the user taps the **Add to my list** link for a title returned in search results. The link is displayed in the initial results list and in the detailed view for a title. Working title lists are limited to 100 titles. When the user tries to add more, the system displays a message advising the user to save the list.

After the title has been added, the link changes to **Remove**, which the user can tap to remove the title from the working list.

When at least one title has been added to the working list, the bottom of each search results page displays links to access or clear the working list. The user clicks **Working list** to display the working list. You can choose a **Sort by** option at the top of the page and tap **Go** to sort the list according to your selection.

### Email Options

From the working list page, the user can check and delete individual titles from the working list, check individual titles and tap **Email**, or tap **Email All** to send the entire list. When the user taps **Email** or **Email All**, the email page is displayed. Format options include **Brief Bibliographic** and **Full Bibliographic**.

After selecting a format, the user types an email address and taps **Email**.

Very long emails may exceed system or email service limits that prevent successful delivery. Very long emails may exceed system or email service limits that prevent successful delivery. In this case, the system displays an alert message. The user can tap

**OK** to close the alert and send the email, or **Cancel** to return to the title list. The user can then select a different display format, or select fewer titles.

## Saving Lists

Logged on patrons can access the working list and any previously saved lists by clicking **My Lists** on the My Account page. The Saved Lists page is displayed.

The working list is available for the current session. To create a new saved list, the patron taps **Create new saved title list**. The Create List page opens, where the patron can name and save the new list.

The new list is saved with no titles in it. Titles can be copied or moved from the working list or an existing saved list to the new list (or to any other saved list.)

## Copying and Moving Titles Among Lists

From the Saved Lists page, the patron opens the list that contains the title to be copied or moved.

From the list of titles, the patron checks the title or titles and taps **Copy** or **Move**. The Copy or Move page opens.

The patron chooses a destination list from the saved lists in the patron account, and taps **Copy to** or **Move to**. The selected title is copied or moved to the destination list.

## Title Details

When the patron taps a title in the title list, the Title Detail page opens.

From the Title Detail page, the patron can select a display format or tap the title link for further options on the product page; for example, viewing availability information, viewing detailed bibliographic information, placing a hold request on the title, viewing enriched data.

## Requested Indicator

You can display a "requested" indicator in Polaris PowerPAC and Mobile PAC title lists for titles on which the patron has an active, pending, held, shipped, or located hold request. The indicator is a message: **You requested this on [date]**; the system supplies the date. See [Configuring the PowerPAC Title Display](#) and [Configuring the Mobile PAC Title Display](#).

## Setting Up Mobile PAC Title Lists

To provide the title list option in Mobile PAC, set the PowerPAC profile **Title list: Enable** to **Yes** in Polaris Administration. To allow patrons to email selected titles or entire lists, set the PowerPAC profile **Title list: Email** to **Yes**. These settings also apply to Polaris PowerPAC. See [Enabling PAC Title Lists](#).

You can edit text strings related to Mobile PAC title lists using Polaris Language Editor (WebAdmin). For more information, see WebAdmin online Help.

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## Patron Registration in Mobile PAC

Mobile PAC supports online self-registration. To make this feature available and set self-registration options, use the PAC profile **Patron access options**. (Your settings for this profile also control self-registration for Polaris PowerPAC.) For more information, see [Set up online patron self-registration](#).

When online self-registration is enabled and the user taps **My Account**, a **Create one** link is displayed on the log-on page.

**Note:**

To make the **My Account** link available, set the Mobile PAC profile **Navigation: Patron account** to **Yes**. See [Patron Account \(My Account\) in Mobile PAC](#).

Self-registration in Mobile PAC is similar to Polaris PowerPAC functionality. When the user taps the registration link, the first screen displays the home library and postal code page. The user selects a registration branch, enters the postal code, and selects a country. When the user taps continue, the registration screen appears.

Required fields, verification blocks, recipient's email address, and other aspects of self-registration are set in the PAC profile **Patron access options**. (You can also provide the option to receive renewal receipts by email, TXT message, or both. See the *Patron Services Administration Guide*.)

**Note:**

If the preferred notification method is set to email, an email address must be supplied. If the preferred method is phone, the patron must indicate the phone number to use for notification. If the patron chooses TXT

Messaging, the patron must indicate the phone number to be used for TXT messages, and select a carrier for that number.

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## Patron Logon Settings for Mobile PAC

Mobile PAC users must log on to their patron accounts to place a hold request or access account information.

### **Note:**

To make the **My Account** link available, set the Mobile PAC profile **Navigation: Patron account** to **Yes**. See [Patron Account \(My Account\) in Mobile PAC](#).

Once logged on, the patron stays logged on until he or she deliberately logs off, disconnects from the Mobile PAC site, or is inactive for 20 minutes. When the patron is logged on, a **Log Out** link is available on every page.

When the patron logs off, the Mobile PAC home page is displayed.

## **User Names**

Mobile PAC accepts user names as well as patron account barcodes, if patron user names are enabled for PAC use in Polaris Administration. For more information, see [Set patron password and user name options](#). The same PAC setting displays a link on the logon page to allow patrons who have a barcode and password to set up the user name.

## **Remember Me**

The **Remember me** checkbox is available on the logon screen by default. When the patron checks this box and logs on, the user name or barcode the patron entered is preserved from session to session by a cookie on the patron's device. The next time the patron connects to Mobile PAC and chooses to log on, the information is already filled in. The cookie expires after one month. The patron must always enter the password, and can choose to clear the **Remember me** checkbox.

### **Note:**

Some browsers may retain the user name or barcode regardless of the Mobile PAC **Remember me** feature, depending on auto-save, auto-fill or other settings in the browser.



In Polaris Administration, the Mobile PAC profile **Remember me: Enabled** controls whether this feature is available. The profile is available at the system level. If you set the profile to **No**, the **Remember me** checkbox does not appear on the logon screen.

### Logon Attempt Limits

You can limit the number of times a patron can attempt to log on before being forced to wait five minutes. In Polaris Administration, use the system-level PAC profile **Login retries** to enable or disable the limit and set the number (5-99) of attempts allowed. By default, the limit is enabled and five attempts are allowed. These settings also apply to Polaris PowerPAC.

### Forgotten Passwords

Mobile PAC supports a **Forgot password?** link on the Account Log On page that appears when the patron selects a feature that requires logon. When the patron selects the link, a page opens where the patron supplies the username or barcode.

A patron who wishes to create or reset a password can click a link in Mobile PAC and receive an email message containing a time-sensitive link to a Reset Password page where the patron can configure a new password. Libraries can use the new **Reset password link timeout duration** setting to specify the time period during which the time-sensitive password reset link remains valid. If no email address is present in the patron record, the system displays an error message.

Your setting for this feature also applies to Polaris PowerPAC and Polaris ExpressCheck. For more information, see [Set up online patron self-registration](#).

### Active Directory Logon to Mobile PAC

You can allow logon to PAC using Active Directory credentials instead of the Polaris patron barcode or username and password. This feature is particularly suitable in academic settings, enabling students to authenticate into Polaris PowerPAC and Mobile PAC using their campus network credentials established in Active Directory. For details, see [Set Up PAC Active Directory Log On](#).

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## Patron Account (My Account) in Mobile PAC

To make the **My Account** link available, set the Mobile PAC profile **Navigation: Patron account** to **Yes**. This profile is available at the system, library, and branch levels. After

the patron clicks the **My Account** link and logs in, the Account Summary screen opens.

The top portion of the screen displays account information: patron name, barcode, registered branch, account expiration date, telephone number, email address, and any current blocks on the account. The lower portion displays links to the other patron account pages if these are enabled: messages, items checked out, hold requests, fines and fees, saved searches, reading list (reading history), update account information and preferences, and saved title lists.

## Messages


This link appears if you have enabled patron messages in the Polaris staff client. When the patron taps the **Messages** link, current messages from the library are listed. The patron can mark messages as read and delete them.

For more information about setting up patron messaging in Polaris Administration, see "Setting Up Patron Messages" in the *Patron Services Administration Guide*. For information about posting messages to patron accounts, see "Posting Patron Messages" in the *Patron Services Guide*.

## Items Checked Out

This patron account page lists all items currently checked out to the patron. To make this page available, set the Mobile PAC profile **Navigation: Items out** to **Yes**. This profile is available at the system, library, and branch levels. The system uses the setting for the patron's registered branch.

The patron can renew items by selecting the appropriate checkboxes and tapping

**Renew**. If there is a charge for renewal, the item is marked with a dollar icon . As in other Polaris PAC applications, if the renewal is allowed, a message with the new due date appears. If the renewal fails, an appropriate message appears.

### Note:

Mobile PAC shares the Polaris Administration settings for renewals, renewal charges, and blocks on renewals with Polaris PowerPAC. To allow renewals, set the PAC profile **Patron access: Renewals**. To set charges for renewals, see "Charging for Checkout and Renewal" in the *Patron Services Administration Guide*. To set blocks on renewals from PAC (and ebook circulation), use the Patron Services profile **Patron-**

**initiated circulation: Blocking conditions.** For more information, see the *Patron Services Administration Guide*.

When you select an item in the Items Out list, detailed information about the item is displayed. The patron can also renew the item from this screen if the renewal is allowed.

If the patron has currently checked out overdue items, the Items Out list also offers an option to estimate overdue fines. The patron taps **Estimate Overdue Fines** to display a view with a date option. The patron leaves today's date or specifies a date in the future and taps **Estimate Overdue Fines**. The calculated accrued fines are displayed according to the specified date. (This feature is also available from the Fines and Fees page).

**Note:**

If the library has opted to include lost or claimed item overdue amounts in the estimate, these are included in the calculation. For details about estimated accrued fines settings, see "Calculating, Blocking for, and Displaying Estimated Accrued Fines" in the *Patron Services Administration Guide*.

## Hold Requests

This patron account page lists the patron's hold requests. To make this page available, set the Mobile PAC profile **Navigation: Requests** to **Yes**. This profile is available at the system, library, and branch levels. The system uses the setting for the patron's registered branch.

The patron can select requests with the appropriate status and cancel, suspend, or renew them.

When the patron taps a title in the Hold Requests list, detailed information about the request is displayed. The patron can also cancel, suspend, or reactivate a request with the appropriate status from this detail page.

All Polaris Administration settings for PAC hold requests apply to Mobile PAC. For more information, see "Setting Up Hold and ILL Loan Request Processing" in the *Patron Services Administration Guide*.

## Fines and Fees

This patron account page summarizes fines and fees on the patron account. To make this page available, set the Mobile PAC profile **Navigation: Fines & Fees** to **Yes**. This

profile is available at the system, library, and branch levels. The system uses the setting for the patron's registered branch.

When the patron taps an item in the Fines and Fees List, detailed information about the transaction is displayed.

If the connection branch and the patron's registered branch accept credit card payments for fines and fees, the patron can select and pay charges from the Fines and Fees page. See [Credit Card Payments from Mobile PAC](#).

If the patron has overdue items, this page offers an option to estimate accrued fines, also available on the Items Out page. See [Items Checked Out](#).

### Claimed and Lost

This patron account page lists the patron's claimed and lost items. To make this page available, set the Mobile PAC profile **Navigation: Claimed and Lost** to Yes. See [Enable display of claimed and lost items in Mobile PAC](#).

### Saved Searches

This page shows the patrons' saved searches, if the Search Agent has been enabled in Polaris Administration. For details, see [Saved Searches \(Search Agent\) in Mobile PAC](#).

The patron can select saved searches and delete them from this page. When the patron taps a search name, details about the saved search are displayed. The patron can edit the name, notes, notification e-mail address and format, frequency, and number of times to run the search, and save the settings. (The saved search cannot be run manually from Mobile PAC.)

### Reading History

This page shows the patron's reading history, if reading histories have been enabled in Polaris Administration. See "Setting Reading History Options" in the *Patron Services Administration Guide*.

**Tip:**

If you enable reading histories, a patron can start or stop a reading history on the Update Account and Preferences page. See [Update Account and Preferences](#). Reading histories are always enabled for Outreach Services patrons.

When the patron taps a title in the reading history, detailed information about the title is displayed.

To allow patrons to remove individual items from the reading history, set the PAC profile **Patrons can remove reading history** to **Yes**. This setting also applies to Polaris PowerPAC. The system uses the setting for the patron's registered branch. The patron can check individual items and click **Delete Selected**, or click **Delete All**. When a patron removes an item from the reading history, the item is also removed from the reading history list in the staff client (Patron Status workform - Reader Services view).

### Saved Lists (Title Lists)

This page is available if you allow patrons to create and save title lists. The patron can copy or move titles from list to list, see details about and place requests for titles on a saved list, and e-mail selected titles or entire lists. For details, see [Title Lists in Mobile PAC](#).

### Update Account and Preferences

This page is available if you allow patrons to request updates to their accounts in Polaris Administration. Set these features with the PAC profile **Patron access options** (**Update Info** tabbed page). Your setting also applies to Polaris PowerPAC. For more information, see [Set up online patron account updates](#).

The Update Account page also offers a link to update preferences. These options can include email address, phone numbers, the ability to start and stop the reading history, email format, preferred language, preferred notification method, and e-receipts preference.

**Note:**

If the preferred notification method is set to email, an email address must be supplied. If the preferred method is phone, the patron must indicate the phone number to use for notification. If the patron chooses TXT Messaging or text message e-receipts, the patron must indicate the phone number to be used for TXT messages, and select a carrier for that number.

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## Credit Card Payments from Mobile PAC

Mobile PAC supports credit card payments for patron account charges and donations, using the any Polaris-supported gateway (see the *Patron Services Administration Guide*). E-commerce for Mobile PAC is a separately licensed feature, but there is no additional cost for the license.

When credit card payments for fines and fees are enabled, patrons can select charges to pay and click **Pay Fines** on the Fines and Fees page of the patron account. The Payment form opens, where the patron enters and submits billing and credit card information.

If donations are enabled, the link appears in the footer of Mobile PAC pages and as a **Make a Donation** link on the Home page. To display these links, set the Mobile PAC profile **Navigation: Donations** to **Yes**. (The user can choose to display or suppress the **Make a Donation** link on the home page from the User Preferences page.)

When the user taps the donation link, the donation form opens. Like Polaris PowerPAC, the user does not have to log on to make a donation.

The user completes the form and taps **Next** to open the credit card Payment form, where the user supplies and submits billing and credit card information.

For detailed information about setting up e-commerce in Polaris, see the *Patron Services Administration Guide*. Once you have set up e-commerce, use the Credit Card Payment parameter **Online payments: Configure** to set up credit card payments from Mobile PAC.

**Important:**

To accept Mobile PAC online payments, you must enable secure socket layer (SSL) in Polaris Administration. Set the **SSL: Enable Mobile PAC** parameter for the Web server to **Yes**. See the *Administration Guide*. Patrons must have SSL protocol enabled for their mobile device Web browser.

## PAC Administration Profiles Reference

These tables list the PAC, PowerPAC, Mobile PAC, and Children's PAC profiles in Polaris Administration and the organization level, description, and default setting for each profile.

- [PAC Profiles Reference](#)
- [Polaris PowerPAC Profiles Reference](#)
- [Mobile PAC Profiles Reference](#)
- [Children's PAC Profiles Reference](#)

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### Polaris PowerPAC Profiles Reference

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

Profile	Org Levels	Description	Default Setting
3M PAMS: Enabled	System, Library, Branch	Specifies whether 3M™ Public Access Management System “smart cards” are used at public access workstations in the library.  Requirement: Set Single Logon: Enable to Yes in PowerPAC Profiles. List workstation with readers in the In-House IP Addresses table.	No (no smart card use)
Ask us: Require login	System, Library, Branch	Determines whether users must be registered patrons to send a question to the library by email, using the Ask Us	Yes - Patrons must log in with a barcode and password to use Ask Us. If set to No, the Ask Us log-in

Profile	Org Levels	Description	Default Setting
		feature. Search Polaris online help for "Set up and start Ask Us."	page displays a Guest button that bypasses log-in.
Bookmarking & Sharing: Enable	System, Library, Branch	Enable social bookmarking for titles in PowerPAC search results. Search Polaris online help for "Social Bookmarking for Search Results (AddThis™)."	No
Bookmarking & Sharing: Profile ID for AddThis analytics	System, Library, Branch	Specify your AddThis profile ID for social bookmarking analytics. Search Polaris online help for "Social Bookmarking for Search Results (AddThis™)."	
Branch switching: Enable	System, Library, Branch	Determines whether the Switch to another branch list is displayed on Polaris PowerPAC pages. The Switch to another branch list allows patrons to select another library in the system. See Setting Up Polaris PowerPAC.	Yes - The Switch to another branch list is displayed in Polaris PowerPAC.
Categorization of ESource targets	System, Library, Branch	Displays the E-Source Target Categorization dialog box, which is used to set up e-sources (proprietary non-Z39.50 databases) and organize	



Profile	Org Levels	Description	Default Setting
		e-source targets as a finding aid. Search Polaris online help for "Setting Up E-Source Targets."	
Cookie acceptance: Enable	System	Determines whether PowerPAC displays the cookie policy message. Search Polaris online help for "Prompting PowerPAC Users to Accept Cookies."	No
Cookie acceptance: External workstation retention period	System	Determines how frequently the cookie policy message appears for external patrons. Search Polaris online help for "Configuring How Frequently the Cookie Policy Message Appears."	365 (days)
Dashboards: Expanded	System, Library, Branch	Sets the default display of most lists (Web parts) on the dashboard to expanded or closed. Patrons can select the title bar of any list to expand or close the list.	Yes - Dashboard lists are expanded by default.
Dashboards: Narrow your search & related searches	System, Library, Branch	Enables and sets up the Narrow and Related Web parts settings that are displayed with search results. Search Polaris	Both Web parts are enabled and all possible elements are displayed.

Profile	Org Levels	Description	Default Setting
		online help for "Setting PowerPAC Narrow/Related Search Options."	
Dashboards: Web page / web part assignment	System, Library, Branch	<p>Displays the Web Page - Web Part Configuration dialog box, to specify which Web parts display in the dashboards on specific Web pages for each branch. Search Polaris online help for "Defining Web Parts for Dashboards."</p> <p>Requirement: Define Web parts at the system level, using the profile Dashboards: Web Part Construction (PowerPAC profiles).</p>	
Dashboards: Web part construction	System	<p>Displays the Web Part Editor dialog box, to create custom Web parts for dashboards and limit the number of items on automated lists in Web parts. Search Polaris online help for "Defining Web Parts for Dashboards."</p> <p>Requirement: Assign the Web parts to specific Polaris PowerPAC pages using the profile</p>	

Profile	Org Levels	Description	Default Setting
		Dashboards: Web Page / Web Part Assignment (PowerPAC profiles).	
Did you mean: Suggestions are to display even when hits are returned	System, Library, Branch	For Polaris PowerPAC, specifies whether Did You Mean search suggestions are displayed with search results (Y), or only when a search returns no hits (N). (Profile does not affect Polaris PowerPAC Children's Edition.) Search Polaris online help for "Setting Up Did You Mean Term Checking."	No (suggestions are displayed only when a search returns no hits)
Enable logging of transactions	System	Determines whether transactions (such as hold requests and self-registration) initiated through Polaris PowerPAC are logged.	No - No recording of activity in Polaris PowerPAC is done.
Feature It: Screen display options	System, Library, Branch	Enables Feature It promotions in Polaris PowerPAC and specifies the promotion position in the search results display. Search Polaris online help for "Feature It Promotions."  Note: Feature It is available by	

Profile	Org Levels	Description	Default Setting
		specific contract to your library.	
Google Preview: Enable on full display	System, Library, Branch	Enables the Google Preview (book viewer) feature on the product page for a title in PowerPAC search results. Search Polaris online Help for "Google Preview for PowerPAC Search Results."	Yes - Google Preview button is displayed for titles that have previews in Google Book Search.
Google Preview: Enable on search results pages	System, Library, Branch	Enables the Google Preview (book viewer) feature on the initial search results pages. Search Polaris online Help for "Google Preview for PowerPAC Search Results."	Yes - On the initial search results page, the Google Preview button is displayed for titles that have previews in Google Book Search.
Highlight local items in matching title view	System, Library, Branch	Determines whether titles with at least one local item are highlighted in search results. Search Polaris online help for "Highlighting Titles with Local Items (PowerPAC)."	No - No titles are highlighted.
In-house access definitions: Setup	System, Library, Branch	Controls how a workstation's in-house status is determined for PAC patron actions (patron inactivity	

Profile	Org Levels	Description	Default Setting
		timeout, Recently Viewed Titles) and e-source access. The system uses the settings of the Polaris PowerPAC connection organization. If you select In-House IP Addresses Table only, a workstation's IP address must be included in that table to be considered in-house. If you select In-House IP Addresses Table AND registered workstations (default), a workstation's IP address can either be included in the In-House IP Addresses table or the workstation can be registered in Polaris to be considered in-house.	
Item availability: "Text it" feature enabled	System, Library, Branch	Allows patrons to send a call number by text message from the item availability view in PowerPAC or Mobile PAC search results. Search Polaris online help for "Sending Call Numbers by Text Message" and "Text It in Mobile PAC."	Yes
Item availability: Display last circ date	System,	Specifies whether the	Yes (displays last circulation date)

Profile	Org Levels	Description	Default Setting
	Library, Branch	Item Availability display includes the last circulation date of the item.	
Item availability: Display local and system levels	System, Library, Branch	Determines whether all system holdings are displayed in one list (setting is No), or local and system holdings are displayed in separate lists (setting is Yes).	Yes
Item availability: Display notes	System, Library, Branch	Offers options for item/issue public notes display: hover over icon to display note text, display text, or do not display.	Icon display
Item availability: Display textual holdings notes	System, Library, Branch	Offers options for displaying serials textual holdings notes: hover over/tap icon to display note, display text or do not display.	Icon display
Item availability: Expand non-serial titles	System, Library, Branch	Sets the default item availability display to expanded or closed for non-serial items (those with no holdings statement for the branch). Patrons can select branch and collection controls to expand or close the list	Yes - Branches and collections in the item availability display are expanded by default.

Profile	Org Levels	Description	Default Setting
		of items under each branch and collection.	
Item availability: Expand serial titles	System, Library, Branch	Sets the default item availability display to expanded or collapsed for serial items (those with a holdings statement for the branch). Patrons can select branch and collection controls to expand or collapse the list of items under each branch and collection.	No - Branches and collections in the item availability display collapsed by default.
Librarian's (MARC) View: Enable	System, Library, Branch	Displays (default) or suppresses the Librarian's View (MARC record view) in PAC search results when the patron clicks the format icon for a title in Polaris PowerPAC, the Librarian's View option on the product page for a title in PowerPAC, or the Librarian's View link for a title in Mobile PAC search results.	Displays
Local call number indexed field: Limit choice	System, Library, Branch	Specifies whether patrons can browse-search the local (item-level) call number index only, or browse-search the Dewey or LC call	Yes - Allows patrons to browse-search the local item-level call number index only, and suppress

Profile	Org Levels	Description	Default Setting
		number indexes for bibliographic records, as well as the local call number index.	<p>the Dewey and LC bibliographic record choices. Set at the system level, when Polaris PowerPAC users are connected to the system organization, this setting suppresses all call number options for browse searching.</p> <p>When set to No, provides choices for call number browse searches: local (item-level), LC (bibliographic record level), and Dewey (bibliographic record level). Set at the system level, when Polaris PowerPAC users are connected to the system organization, this setting offers the Dewey and LC bibliographic record choices for browsing call numbers.</p>
Navigation: Advanced	System, Library, Branch	Specifies whether patrons can use the	Yes - The Advanced option is displayed on the Search



Profile	Org Levels	Description	Default Setting
		Advanced search dialog box to create complex Boolean searches. Search Polaris online help for "Setting Available Search Types."	submenu.
Navigation: Ask us	System, Library, Branch	Specifies whether patrons can send suggestions, questions, and comments via email message to the library.	Yes - The Ask Us option is displayed on the Library Info menu.
Navigation: Boolean	System, Library, Branch	Specifies whether patrons can use the Common Query Language (CQL) syntax to create complex searches. Search Polaris online help for "Setting Available Search Types."	Yes - The Boolean option is displayed on the Search menu.
Navigation: Browse	System, Library, Branch	Specifies whether patrons can browse the heading indexes. Search Polaris online help for "Setting Available Search Types."	Yes - The Browse option is displayed on the Search menu.
Navigation: Children's PAC	System, Library, Branch	Specifies whether patrons can access Polaris PowerPAC Children's Edition from Polaris PowerPAC.	No - The Kid's Catalog link is not available.  Note: Polaris PowerPAC Children's Edition is available by specific contract to your

Profile	Org Levels	Description	Default Setting
			library. If your Polaris installation does not include Polaris PowerPAC Children's Edition, this option is not available.
Navigation: Claimed and Lost	System, Library, Branch	Specifies whether patrons can see their claimed and lost items.	No - Claimed and lost items do not appear on patron's account.  If the profile is set to Yes for the patron's registered branch, any claimed or lost items the patron has are displayed in their PowerPAC account.
Navigation: Course reserves	System, Library, Branch	Specifies whether patrons can search for course reserve records and reserve item records.	No - Course reserve searching is not available.  Note: Polaris course reserve functions are available by specific contract to your library. If your Polaris installation does not include Polaris course reserves, this option is not available.
Navigation: E-	System,	Specifies whether	Yes - The E-Sources

Profile	Org Levels	Description	Default Setting
Sources	Library, Branch	patrons can access E-Sources, which are non-Z39.50, proprietary databases that may require authentication for use. Search Polaris online help for "Setting Up E-Source Targets."	option is displayed on the Search menu.
Navigation: Events	System, Library, Branch	Specifies whether patrons can display the Events page. For information about editing the Events page, search the Polaris online help for "Add text to the Events page."	Yes - The Events option is displayed on the Library Info menu.
Navigation: Exact	System, Library, Branch	Specifies whether patrons can search the public catalog with the exact text (including stop words) shown in the Search box. Search Polaris online help for "Setting Available Search Types."	Yes - The Exact option is displayed on the Search menu.
Navigation: Fines & Fees	System, Library, Branch	Specifies whether patrons can view the fines and fees associated with their library accounts. The system uses the setting for the patron's registered branch.	Yes - The Fines & Fees option is displayed on the My Account menu.

Profile	Org Levels	Description	Default Setting
		Requirement: Set Navigation: Patron Account to Yes (PowerPAC profile).	
Navigation: Hours	System, Library, Branch	Specifies whether patrons can display the Hours page. For information about specifying information for the Hours page, search the Polaris online help for "Set Polaris PowerPAC features on the menu bar."	Yes - The Hours option is displayed on the Library Info menu.
Navigation: Items out	System, Library, Branch	Specifies whether patrons can view the items checked out to their library card. If you allow renewals from the PAC, patrons select the items on this page. The system uses the setting for the patron's registered branch. Requirement: Set Navigation: Patron Account to Yes (PowerPAC profile). To allow patrons to renew items, set Patron Access: Renew permitted to Yes (PAC profile). You can block renewals under certain circumstances.	Yes - The Items Out option is displayed on the My Account menu.

Profile	Org Levels	Description	Default Setting
Navigation: Keyword	System, Library, Branch	Specifies whether patrons can do a keyword search. Search the Polaris online help for "Setting Available Search Types."	Yes - The Keyword option is displayed on the Search menu.
Navigation: My record	System, Library, Branch	Specifies whether patrons can view their library account information. For example, if you allow patrons to update their registration information, change their passwords from the PAC, or manage reading histories, this page provides the appropriate links.  Requirement: Set Navigation: Patron Account to Yes (PowerPAC profile). For information on allowing patrons to update their accounts from the PAC, search Polaris online help for "Setting Patron Account Options."	Yes - The My Record option is displayed on the My Account menu.
Navigation: PAC help	System, Library, Branch)	Specifies whether patrons can access the Polaris-supplied Help page. Search Polaris online help for "Polaris PowerPAC Help."	Yes - The Help option is displayed on the main menu.

Profile	Org Levels	Description	Default Setting
Navigation: Patron account	System, Library, Branch	Specifies whether patrons can access their patron accounts. See <a href="#">Editing Messages and Labels</a> .	Yes - The My Account option is displayed on the menu bar.
Navigation: Phrase	System, Library, Branch	Specifies whether patrons can search the public catalog based on a phrase. Search Polaris online help for "Setting Available Search Types."	Yes - The Phrase option is displayed on the Search menu.
Navigation: Policies	System, Library, Branch)	Specifies whether patrons can view the library policy page. Search Polaris online help for "Add text to the Policies page."	Yes - The Policy option is displayed on the Library Info menu.
Navigation: Portal	System, Library, Branch)	Specifies whether patrons can view the portal page, which may include the quick search feature, content carousels and/or rotating book jacket, and custom content. Search Polaris online help for "Setting Up Polaris PowerPAC - Overview."	Yes - The Portal option is displayed on the Library Info menu. Select this option when you are using Polaris as the library home page.
Navigation: Requests	System, Library, Branch	Specifies whether patrons can see a list of their hold/ILL requests, and cancel or reactivate requests. The system	Yes - The Requests option is available on the My Account menu.

Profile	Org Levels	Description	Default Setting
		uses the setting for the patron's registered branch. You set conditions for requests from PAC, and whether they can be canceled and reactivated, with the Requests parameter Holds options.  Requirement: Set Navigation: Patron Account to Yes (PowerPAC profile).	If set to No, patrons cannot review or cancel hold/ILL requests. The Requests menu option, summary information in the My Account dashboard, and option to go to list of requests when a request is placed are suppressed.
Navigation: Web site	System, Library, Branch	Specifies whether patrons can access the links of interest page provided by the library in Polaris PowerPAC.	Yes - The Web Site option is available on the Library Info menu.
Navigation: Web site URL	System, Library, Branch	Specifies an address for the web page to display when a patron selects Web Site on the Library Info menu.  Requirement: Navigation: Web Site - Yes (PowerPAC profiles).	blank (empty address field) - The default website.asp page is displayed if this field is empty. The default page allows you to provide links to multiple Web sites.  url (web page address or path) - Automatically displays the page when Web Site is selected from the Library Info

Profile	Org Levels	Description	Default Setting
			submenu.
OverDrive download: Enable on in-house workstations	System, Library, Branch	Specifies whether patrons can access and download OverDrive eContent on library computers designated as in-house workstations.	No
OverDrive Preview: Enable on full display	System, Library, Branch	Specifies whether the OverDrive Sample button appears on the eContent title's full display in PowerPAC	Yes
OverDrive Preview: Enable on search results pages	System, Library, Branch	Specifies whether the OverDrive Sample button appears on the search results page when the results are eContent titles from OverDrive.	Yes
Page header options	System, Library, Branch	Settings to customize the PowerPAC page header, including the logo image, return link URL for the logo image, background and branch name text colors, logo and branch name position, and suppressing the branch name text. Search Polaris online help for "Customize the page header."	
Patron inactivity	System,	Sets a period of inactivity	Not enabled



Profile	Org Levels	Description	Default Setting
timeout	Library, Branch	<p>after which a logged-in patron at a library workstation is automatically logged out.</p> <p>Applies to in-house workstations only. Search Polaris online help for "Set an inactivity timeout for in-house workstations."</p> <p>Also determines how frequently the cookie policy message appears on in-house workstations. Search Polaris online help for "Configuring How Frequently the Cookie Policy Message Appears."</p>	
Perform a new search if a cross-reference is selected	System, Library, Branch	Determines whether the location in the headings display changes to the cross-reference location when the cross-reference is selected.	Yes - Search from selected cross-reference, so that the display is set to the new location in the browse headings index.
Portal custom content (URL)	System, Library, Branch	Specifies the URL for custom content you want to include on the Polaris PowerPAC portal page. Type the complete URL, beginning with http://. Search Polaris online	

Profile	Org Levels	Description	Default Setting
		help for "Customizing Portal Page Features."	
Portal page content carousels	System, Library, Branch	Sets up content carousels (rotating images of library-specified titles in the library catalog) for display on the Polaris PowerPAC portal page. Search Polaris online help for "Content Carousels on the PowerPAC Portal Page."  Requirement: Navigation: Portal - Yes (PowerPAC profiles).	None defined.
PowerPAC Analytics	System, Library, Branch	Enables Google Analytics or custom analytics use in Polaris PowerPAC. The same code is also used in Polaris PowerPAC Children's Edition. See Analyzing Polaris PowerPAC Use.	No (no page use analysis)
Product page categories: Configure	System, Library, Branch	Sets the default state of categories (expanded or collapsed) on the Polaris PowerPAC product page for a title in search results, and determines the display order of the categories. Search Polaris online help for	

Profile	Org Levels	Description	Default Setting
		"Configuring the PowerPAC Product Page."	
Quick search button configuration	System, Library, Branch	These settings enable a quick search feature with search option buttons on the Polaris PowerPAC portal page. You can specify which search option buttons to display and what type of search each launches. Search the Polaris online help for "Customizing Portal Page Features" and "Set up quick search with search option buttons."	Feature is not enabled. The default quick search feature is used on the portal page.
Recently viewed titles	System, Library, Branch	Enables the Recently Viewed Titles feature for in-house workstations, remote workstations, or both; sets the maximum number of titles that can be displayed. Search Polaris online help for "Setting Up Recently Viewed Titles."	
Related words options	System, Library, Branch	Enables the Include related words feature for PowerPAC keyword and phrase search results; sets the maximum number of titles that can compose results lists	Yes; 1,000

Profile	Org Levels	Description	Default Setting
		and still display the <b>Included related words</b> link. Search Polaris online help for "Related Words in PowerPAC Searches."	
Remote databases: Categorization of target databases	System, Library, Branch	Displays the Z39.50 Target Categorization dialog box, to allow an organization to group remote search targets as a finding aid. See <a href="#">Editing Messages and Labels</a> for detailed instructions on using target categories.  Requirement: Make remote resources available for searching.	
Remote databases: Maximum number that can be searched at once	System, Library, Branch	Set the number of remote databases that can be searched at one time. Search Polaris online help for "Maximum Number of Databases Searchable at One Time."	
Remote databases: Usage settings	System, Library, Branch	Set usage conditions for specific remote resources, including authentication requirements and search access points. Enable follow-on searches and	

Profile	Org Levels	Description	Default Setting
		specify follow-on search targets. Set PAC display name; specify databases for Using drop-down list in PowerPAC search forms. Search Polaris online help for "Remote Database Usage Settings for PowerPAC."	
Remote user PowerPAC: Enable	System, Library, Branch	Specifies whether patrons use Polaris PowerPAC to access the library catalog from remote locations (that is, from computers that are not in the library or are not defined in the In-House IP Addresses table)	Yes - Patrons can use Polaris PowerPAC from remote locations.  If set to No, Polaris PowerPAC access is available only from workstations defined in the In-House IP Addresses database table.
Results set: Maximum number of records to return	System, Library, Branch	Sets the maximum number of records that can be returned in a results set. If you experience decreased performance for searches with large results due to limited server capacity, you can lower the maximum number of records to return. However, relevancy ranking may be less effective at lower	100,000 (maximum)

Profile	Org Levels	Description	Default Setting
		maximum value.	
Rotating best seller jacket on Portal page	System, Library, Branch	Displays a random book jacket image drawn from best-seller lists on the portal page. When the image is selected, a search is launched for the title. Search Polaris online help for "Set up rotating book jackets."  Requirement: Set up an enriched data source. See <a href="#">Polaris Social with ChiliFresh Connections</a> .	Yes - Book jacket images are displayed on the portal page.
RSS Feeds: Enable	System, Library, Branch	Provides RSS feeds from the New Titles dashboard list. Search Polaris online help for "Setting Up RSS Feeds." When this profile is set to Yes, an orange XML icon is displayed by the elements of the New Titles list.	Yes
RSS Feeds: Maximum new releases	System	Specifies how many titles should be listed in the RSS feed that the patron receives. This profile is available at the system level only; that is, it controls the number for every branch that enables RSS feeds.	5

Profile	Org Levels	Description	Default Setting
Scoping: Use MARC language scoping display table	System, Library, Branch	<p>Determines whether catalog searches can be limited only by certain languages, or by any language defined by the MARC 21 format. This profile controls the languages displayed for selection in the PowerPAC Search Options list.</p> <p>Requirement: Specify languages in Policy Tables, MARC Language Scoping.</p>	<p>Yes - Allow language scoping by the languages specified in the MARC Language Scoping Display table.</p> <p>If set to No, all languages defined by the MARC 21 format are displayed for search scoping.</p>
Search: Display search criteria in search box for link-produced searches	System, Library, Branch	Specifies whether search terms such as an ISBN are displayed in the search box when the user clicks a link (for example, in the New Titles list) to launch a search.	No. Only search terms actually typed by the user are displayed in the search box.
Search options: Limit by collection enabled	System, Library, Branch	Specifies whether collections are available as a scoping option on the Polaris PowerPAC Search Options page.	No (the Collections list does not appear as a scoping option)
Single login: Enable	System, Library, Branch	Displays a Log In option on the My Account menu that allows a patron to log on once for a PAC session, instead of each	Yes (the Login option is displayed on the menu)

Profile	Org Levels	Description	Default Setting
		time the patron selects a function that requires identification. Search Polaris online help for "Controlling Patron Account Login & Access."	
Text: Headings count column for "see from" headings	System, Library, Branch	Specifies the text to display in the number of titles column of the headings list when the headings entry is a SEE heading.	—
Theme dashboard position	System, Library, Branch	Sets the position of the dashboard on Polaris PowerPAC pages. (Does not affect the dashboard position on the product page, which is always on the right.) Search the Polaris online help for "Setting Polaris PowerPAC Themes."	Left
Theme selection	System, Library, Branch	Specifies the overall appearance of Polaris PowerPAC pages by providing several ready-made skin choices. Search the Polaris online help for "Setting Polaris PowerPAC Themes."	Classic
Title Display: Configure	System, Library,	Specifies the data elements that are	



Profile	Org Levels	Description	Default Setting
	Branch	displayed in brief, full, and summary search results views for a title in the Polaris PowerPAC. You can customize and order the elements you select, and customize and translate their labels. Search Polaris online help for "Configuring the PowerPAC Title Display."	
Title Display: Number of characters in the Summary (Short)	System, Library, Branch	Specifies the maximum number of characters of the Summary (Short) field that are displayed in the brief and full search results views for a title in the Polaris PowerPAC. Enter a value between 0 and 4000.  Search Polaris online help for "Configuring the PowerPAC Title Display."	0 (the number of characters is not limited)
Title list: Email	System, Library, Branch	Specifies whether patrons can send their title list as an email message from Polaris PowerPAC or Mobile PAC.  Requirements: Set Title List: Enable to Yes (PowerPAC profiles) and specify an email address for sender in Email	Yes - Allows patrons to send their title list as an email message.

Profile	Org Levels	Description	Default Setting
		Notification: Email address of sender (PAC Profile)	
Title list: Enable	System, Library, Branch	Specifies whether patrons can create a bibliography of titles they select from search results. This profile also affects Mobile PAC.	Yes - Allows patrons to add titles to a bibliography, and view and modify the contents of the list.
Title list: Enable bulk holds	System, Library, Branch	Specifies whether patrons can place multiple hold requests at once from PowerPAC working or saved title lists. Search Polaris online help for "Bulk Hold Requests from Polaris PowerPAC Title Lists."  Requirement: Set Title List: Enable to Yes (PowerPAC profiles).	No - The Place Request button does not appear on PowerPAC working or saved title lists.
Title list: Maximum number of titles to request in bulk	System, Library, Branch	Limits how many titles from working or saved title lists can be requested at once. Search Polaris online help for "Bulk Hold Requests from Polaris PowerPAC Title Lists."	10
Title list: Print	System, Library, Branch	Specifies whether patrons can print their title lists.	Yes - Allows patrons to print their title lists to any printer available from the

Profile	Org Levels	Description	Default Setting
		Requirement: Set Title List: Enable to Yes (PowerPAC profiles).	workstation. If set to No, the printer icon does not appear.
Title list: Save	System, Library, Branch	Specifies whether patrons can save their title list to a file.  Requirement: Set Title List: Enable to Yes (PowerPAC profiles).	Yes - Allows patrons to save the contents of the title list to a text file. If set to No, the Save icon does not appear.
Virtual reference: Configure	System, Library, Branch	If you contract with a virtual reference service, use this dialog box to set up the specific profiles for that service. For more information, search Polaris online help for "Setting Up Live Virtual Reference Services."  Requirement: Virtual reference: Enable - Yes (PowerPAC profiles)	
Virtual reference: Enable	System, Library, Branch	Specifies whether patrons can use a virtual reference service from Polaris PowerPAC. This feature provides interactive, online reference services. Search Polaris online help for "Setting Up Live Virtual Reference Services."	Yes - The virtual reference link is available in Polaris PowerPAC.

Profile	Org Levels	Description	Default Setting
Virtual reference: Supplier	System, Library, Branch	<p>Specifies your virtual reference service provider. If you contract with a virtual reference service, select the provider here. Search Polaris online help for "Setting Up Live Virtual Reference Services."</p> <p>Requirements: Set Virtual reference: Enable to Yes (PowerPAC profiles) and Virtual reference: Configure - PowerPAC profile - specific settings for the provider you selected.</p>	

## Polaris PowerPAC Profiles Reference

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

Profile	Org Levels	Description	Default Setting
3M PAMS: Enabled	System, Library, Branch	<p>Specifies whether 3M™ Public Access Management System "smart cards" are used at public access workstations in the library.</p> <p>Requirement: Set Single Logon: Enable to Yes in PowerPAC Profiles. List</p>	No (no smart card use)

Profile	Org Levels	Description	Default Setting
		workstation with readers in the In-House IP Addresses table.	
Ask us: Require login	System, Library, Branch	Determines whether users must be registered patrons to send a question to the library by email, using the Ask Us feature. Search Polaris online help for "Set up and start Ask Us."	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.
Bookmarking & Sharing: Enable	System, Library, Branch	Enable social bookmarking for titles in PowerPAC search results. Search Polaris online help for "Social Bookmarking for Search Results (AddThis™)."	No
Bookmarking & Sharing: Profile ID for AddThis analytics	System, Library, Branch	Specify your AddThis profile ID for social bookmarking analytics. Search Polaris online help for "Social Bookmarking for Search Results (AddThis™)."	
Branch switching: Enable	System, Library, Branch	Determines whether the Switch to another branch list is displayed on Polaris PowerPAC pages. The Switch to another branch list allows patrons to select another library in the	Yes - The Switch to another branch list is displayed in Polaris PowerPAC.

Profile	Org Levels	Description	Default Setting
		system. See Setting Up Polaris PowerPAC.	
Categorization of ESource targets	System, Library, Branch	Displays the E-Source Target Categorization dialog box, which is used to set up e-sources (proprietary non-Z39.50 databases) and organize e-source targets as a finding aid. Search Polaris online help for "Setting Up E-Source Targets."	
Cookie acceptance: Enable	System	Determines whether PowerPAC displays the cookie policy message. Search Polaris online help for "Prompting PowerPAC Users to Accept Cookies."	No
Cookie acceptance: External workstation retention period	System	Determines how frequently the cookie policy message appears for external patrons. Search Polaris online help for "Configuring How Frequently the Cookie Policy Message Appears."	365 (days)
Dashboards: Expanded	System, Library, Branch	Sets the default display of most lists (Web parts) on the dashboard to expanded or closed.	Yes - Dashboard lists are expanded by default.

Profile	Org Levels	Description	Default Setting
		Patrons can select the title bar of any list to expand or close the list.	
Dashboards: Narrow your search & related searches	System, Library, Branch	Enables and sets up the Narrow and Related Web parts settings that are displayed with search results. Search Polaris online help for "Setting PowerPAC Narrow/Related Search Options."	Both Web parts are enabled and all possible elements are displayed.
Dashboards: Web page / web part assignment	System, Library, Branch	Displays the Web Page - Web Part Configuration dialog box, to specify which Web parts display in the dashboards on specific Web pages for each branch. Search Polaris online help for "Defining Web Parts for Dashboards."  Requirement: Define Web parts at the system level, using the profile Dashboards: Web Part Construction (PowerPAC profiles).	
Dashboards: Web part construction	System	Displays the Web Part Editor dialog box, to create custom Web parts for dashboards and limit the number of items on	

Profile	Org Levels	Description	Default Setting
		<p>automated lists in Web parts. Search Polaris online help for "Defining Web Parts for Dashboards."</p> <p>Requirement: Assign the Web parts to specific Polaris PowerPAC pages using the profile Dashboards: Web Page / Web Part Assignment (PowerPAC profiles).</p>	
Did you mean: Suggestions are to display even when hits are returned	System, Library, Branch	<p>For Polaris PowerPAC, specifies whether Did You Mean search suggestions are displayed with search results (Y), or only when a search returns no hits (N). (Profile does not affect Polaris PowerPAC Children's Edition.) Search Polaris online help for "Setting Up Did You Mean Term Checking."</p>	No (suggestions are displayed only when a search returns no hits)
Enable logging of transactions	System	Determines whether transactions (such as hold requests and self-registration) initiated through Polaris PowerPAC are logged.	No - No recording of activity in Polaris PowerPAC is done.
Feature It: Screen display options	System,	Enables Feature It	



Profile	Org Levels	Description	Default Setting
	Library, Branch	<p>promotions in Polaris PowerPAC and specifies the promotion position in the search results display. Search Polaris online help for "Feature It Promotions."</p> <p>Note: Feature It is available by specific contract to your library.</p>	
Google Preview: Enable on full display	System, Library, Branch	Enables the Google Preview (book viewer) feature on the product page for a title in PowerPAC search results. Search Polaris online Help for "Google Preview for PowerPAC Search Results."	Yes - Google Preview button is displayed for titles that have previews in Google Book Search.
Google Preview: Enable on search results pages	System, Library, Branch	Enables the Google Preview (book viewer) feature on the initial search results pages. Search Polaris online Help for "Google Preview for PowerPAC Search Results."	Yes - On the initial search results page, the Google Preview button is displayed for titles that have previews in Google Book Search.
Highlight local items in matching title view	System, Library, Branch	Determines whether titles with at least one local item are highlighted in search results. Search Polaris online help for	No - No titles are highlighted.

Profile	Org Levels	Description	Default Setting
		"Highlighting Titles with Local Items (PowerPAC)."	
In-house access definitions: Setup	System, Library, Branch	Controls how a workstation's in-house status is determined for PAC patron actions (patron inactivity timeout, Recently Viewed Titles) and e-source access. The system uses the settings of the Polaris PowerPAC connection organization. If you select In-House IP Addresses Table only, a workstation's IP address must be included in that table to be considered in-house. If you select In-House IP Addresses Table AND registered workstations (default), a workstation's IP address can either be included in the In-House IP Addresses table or the workstation can be registered in Polaris to be considered in-house.	
Item availability: "Text it" feature enabled	System, Library, Branch	Allows patrons to send a call number by text message from the item availability view in	Yes

Profile	Org Levels	Description	Default Setting
		PowerPAC or Mobile PAC search results. Search Polaris online help for "Sending Call Numbers by Text Message" and "Text It in Mobile PAC."	
Item availability: Display last circ date	System, Library, Branch	Specifies whether the Item Availability display includes the last circulation date of the item.	Yes (displays last circulation date)
Item availability: Display local and system levels	System, Library, Branch	Determines whether all system holdings are displayed in one list (setting is No), or local and system holdings are displayed in separate lists (setting is Yes).	Yes
Item availability: Display notes	System, Library, Branch	Offers options for item/issue public notes display: hover over icon to display note text, display text, or do not display.	Icon display
Item availability: Display textual holdings notes	System, Library, Branch	Offers options for displaying serials textual holdings notes: hover over/tap icon to display note, display text or do not display.	Icon display
Item availability: Expand non-serial	System, Library,	Sets the default item	Yes - Branches and collections in the

Profile	Org Levels	Description	Default Setting
titles	Branch	availability display to expanded or closed for non-serial items (those with no holdings statement for the branch). Patrons can select branch and collection controls to expand or close the list of items under each branch and collection.	item availability display are expanded by default.
Item availability: Expand serial titles	System, Library, Branch	Sets the default item availability display to expanded or collapsed for serial items (those with a holdings statement for the branch). Patrons can select branch and collection controls to expand or collapse the list of items under each branch and collection.	No - Branches and collections in the item availability display collapsed by default.
Librarian's (MARC) View: Enable	System, Library, Branch	Displays (default) or suppresses the Librarian's View (MARC record view) in PAC search results when the patron clicks the format icon for a title in Polaris PowerPAC, the Librarian's View option on the product page for a title in PowerPAC, or the	Displays

Profile	Org Levels	Description	Default Setting
		Librarian's View link for a title in Mobile PAC search results.	
Local call number indexed field: Limit choice	System, Library, Branch	Specifies whether patrons can browse-search the local (item-level) call number index only, or browse-search the Dewey or LC call number indexes for bibliographic records, as well as the local call number index.	<p>Yes - Allows patrons to browse-search the local item-level call number index only, and suppress the Dewey and LC bibliographic record choices. Set at the system level, when Polaris PowerPAC users are connected to the system organization, this setting suppresses all call number options for browse searching.</p> <p>When set to No, provides choices for call number browse searches: local (item-level), LC (bibliographic record level), and Dewey (bibliographic record level). Set at the system level, when Polaris PowerPAC users are connected to the system organization, this</p>

Profile	Org Levels	Description	Default Setting
			setting offers the Dewey and LC bibliographic record choices for browsing call numbers.
Navigation: Advanced	System, Library, Branch	Specifies whether patrons can use the Advanced search dialog box to create complex Boolean searches. Search Polaris online help for "Setting Available Search Types."	Yes - The Advanced option is displayed on the Search submenu.
Navigation: Ask us	System, Library, Branch	Specifies whether patrons can send suggestions, questions, and comments via email message to the library.	Yes - The Ask Us option is displayed on the Library Info menu.
Navigation: Boolean	System, Library, Branch	Specifies whether patrons can use the Common Query Language (CQL) syntax to create complex searches. Search Polaris online help for "Setting Available Search Types."	Yes - The Boolean option is displayed on the Search menu.
Navigation: Browse	System, Library, Branch	Specifies whether patrons can browse the heading indexes. Search Polaris online help for "Setting Available Search Types."	Yes - The Browse option is displayed on the Search menu.

Profile	Org Levels	Description	Default Setting
Navigation: Children's PAC	System, Library, Branch	Specifies whether patrons can access Polaris PowerPAC Children's Edition from Polaris PowerPAC.	No - The Kid's Catalog link is not available.  Note: Polaris PowerPAC Children's Edition is available by specific contract to your library. If your Polaris installation does not include Polaris PowerPAC Children's Edition, this option is not available.
Navigation: Claimed and Lost	System, Library, Branch	Specifies whether patrons can see their claimed and lost items.	No - Claimed and lost items do not appear on patron's account.  If the profile is set to Yes for the patron's registered branch, any claimed or lost items the patron has are displayed in their PowerPAC account.
Navigation: Course reserves	System, Library, Branch	Specifies whether patrons can search for course reserve records and reserve item records.	No - Course reserve searching is not available.  Note: Polaris course reserve functions are available by

Profile	Org Levels	Description	Default Setting
			specific contract to your library. If your Polaris installation does not include Polaris course reserves, this option is not available.
Navigation: E-Sources	System, Library, Branch	Specifies whether patrons can access E-Sources, which are non-Z39.50, proprietary databases that may require authentication for use. Search Polaris online help for "Setting Up E-Source Targets."	Yes - The E-Sources option is displayed on the Search menu.
Navigation: Events	System, Library, Branch	Specifies whether patrons can display the Events page. For information about editing the Events page, search the Polaris online help for "Add text to the Events page."	Yes - The Events option is displayed on the Library Info menu.
Navigation: Exact	System, Library, Branch	Specifies whether patrons can search the public catalog with the exact text (including stop words) shown in the Search box. Search Polaris online help for "Setting Available Search Types."	Yes - The Exact option is displayed on the Search menu.



Profile	Org Levels	Description	Default Setting
Navigation: Fines & Fees	System, Library, Branch	<p>Specifies whether patrons can view the fines and fees associated with their library accounts. The system uses the setting for the patron's registered branch.</p> <p>Requirement: Set Navigation: Patron Account to Yes (PowerPAC profile).</p>	Yes - The Fines & Fees option is displayed on the My Account menu.
Navigation: Hours	System, Library, Branch	<p>Specifies whether patrons can display the Hours page. For information about specifying information for the Hours page, search the Polaris online help for "Set Polaris PowerPAC features on the menu bar."</p>	Yes - The Hours option is displayed on the Library Info menu.
Navigation: Items out	System, Library, Branch	<p>Specifies whether patrons can view the items checked out to their library card. If you allow renewals from the PAC, patrons select the items on this page. The system uses the setting for the patron's registered branch.</p> <p>Requirement: Set</p>	Yes - The Items Out option is displayed on the My Account menu.

Profile	Org Levels	Description	Default Setting
		Navigation: Patron Account to Yes (PowerPAC profile). To allow patrons to renew items, set Patron Access: Renew permitted to Yes (PAC profile). You can block renewals under certain circumstances.	
Navigation: Keyword	System, Library, Branch	Specifies whether patrons can do a keyword search. Search the Polaris online help for "Setting Available Search Types."	Yes - The Keyword option is displayed on the Search menu.
Navigation: My record	System, Library, Branch	Specifies whether patrons can view their library account information. For example, if you allow patrons to update their registration information, change their passwords from the PAC, or manage reading histories, this page provides the appropriate links.  Requirement: Set Navigation: Patron Account to Yes (PowerPAC profile). For information on allowing patrons to update their accounts from the PAC,	Yes - The My Record option is displayed on the My Account menu.

Profile	Org Levels	Description	Default Setting
		search Polaris online help for "Setting Patron Account Options."	
Navigation: PAC help	System, Library, Branch)	Specifies whether patrons can access the Polaris-supplied Help page. Search Polaris online help for "Polaris PowerPAC Help."	Yes - The Help option is displayed on the main menu.
Navigation: Patron account	System, Library, Branch	Specifies whether patrons can access their patron accounts. See <a href="#">Editing Messages and Labels</a> .	Yes - The My Account option is displayed on the menu bar.
Navigation: Phrase	System, Library, Branch	Specifies whether patrons can search the public catalog based on a phrase. Search Polaris online help for "Setting Available Search Types."	Yes - The Phrase option is displayed on the Search menu.
Navigation: Policies	System, Library, Branch)	Specifies whether patrons can view the library policy page. Search Polaris online help for "Add text to the Policies page."	Yes - The Policy option is displayed on the Library Info menu.
Navigation: Portal	System, Library, Branch)	Specifies whether patrons can view the portal page, which may include the quick search feature, content carousels and/or rotating book jacket, and custom	Yes - The Portal option is displayed on the Library Info menu. Select this option when you are using Polaris as the library home page.

Profile	Org Levels	Description	Default Setting
		content. Search Polaris online help for "Setting Up Polaris PowerPAC - Overview."	
Navigation: Requests	System, Library, Branch	Specifies whether patrons can see a list of their hold/ILL requests, and cancel or reactivate requests. The system uses the setting for the patron's registered branch. You set conditions for requests from PAC, and whether they can be canceled and reactivated, with the Requests parameter Holds options.  Requirement: Set Navigation: Patron Account to Yes (PowerPAC profile).	Yes - The Requests option is available on the My Account menu.  If set to No, patrons cannot review or cancel hold/ILL requests. The Requests menu option, summary information in the My Account dashboard, and option to go to list of requests when a request is placed are suppressed.
Navigation: Web site	System, Library, Branch	Specifies whether patrons can access the links of interest page provided by the library in Polaris PowerPAC.	Yes - The Web Site option is available on the Library Info menu.
Navigation: Web site URL	System, Library, Branch	Specifies an address for the web page to display when a patron selects Web Site on the Library Info menu.  Requirement: Navigation:	blank (empty address field) - The default website.asp page is displayed if this field is empty. The default page

Profile	Org Levels	Description	Default Setting
		Web Site - Yes (PowerPAC profiles).	allows you to provide links to multiple Web sites.  url (web page address or path) - Automatically displays the page when Web Site is selected from the Library Info submenu.
OverDrive download: Enable on in-house workstations	System, Library, Branch	Specifies whether patrons can access and download OverDrive eContent on library computers designated as in-house workstations.	No
OverDrive Preview: Enable on full display	System, Library, Branch	Specifies whether the OverDrive Sample button appears on the eContent title's full display in PowerPAC	Yes
OverDrive Preview: Enable on search results pages	System, Library, Branch	Specifies whether the OverDrive Sample button appears on the search results page when the results are eContent titles from OverDrive.	Yes
Page header options	System, Library, Branch	Settings to customize the PowerPAC page header, including the logo image, return link URL for the logo image,	

Profile	Org Levels	Description	Default Setting
		background and branch name text colors, logo and branch name position, and suppressing the branch name text. Search Polaris online help for "Customize the page header."	
Patron inactivity timeout	System, Library, Branch	<p>Sets a period of inactivity after which a logged-in patron at a library workstation is automatically logged out.</p> <p>Applies to in-house workstations only. Search Polaris online help for "Set an inactivity timeout for in-house workstations."</p> <p>Also determines how frequently the cookie policy message appears on in-house workstations. Search Polaris online help for "Configuring How Frequently the Cookie Policy Message Appears."</p>	Not enabled
Perform a new search if a cross-reference is selected	System, Library, Branch	Determines whether the location in the headings display changes to the cross-reference location	Yes - Search from selected cross-reference, so that the display is set to

Profile	Org Levels	Description	Default Setting
		when the cross-reference is selected.	the new location in the browse headings index.
Portal custom content (URL)	System, Library, Branch	Specifies the URL for custom content you want to include on the Polaris PowerPAC portal page. Type the complete URL, beginning with http://. Search Polaris online help for "Customizing Portal Page Features."	
Portal page content carousels	System, Library, Branch	Sets up content carousels (rotating images of library-specified titles in the library catalog) for display on the Polaris PowerPAC portal page. Search Polaris online help for "Content Carousels on the PowerPAC Portal Page."  Requirement: Navigation: Portal - Yes (PowerPAC profiles).	None defined.
PowerPAC Analytics	System, Library, Branch	Enables Google Analytics or custom analytics use in Polaris PowerPAC. The same code is also used in Polaris PowerPAC Children's Edition. See Analyzing Polaris PowerPAC Use.	No (no page use analysis)

Profile	Org Levels	Description	Default Setting
Product page categories: Configure	System, Library, Branch	Sets the default state of categories (expanded or collapsed) on the Polaris PowerPAC product page for a title in search results, and determines the display order of the categories. Search Polaris online help for "Configuring the PowerPAC Product Page."	
Quick search button configuration	System, Library, Branch	These settings enable a quick search feature with search option buttons on the Polaris PowerPAC portal page. You can specify which search option buttons to display and what type of search each launches. Search the Polaris online help for "Customizing Portal Page Features" and "Set up quick search with search option buttons."	Feature is not enabled. The default quick search feature is used on the portal page.
Recently viewed titles	System, Library, Branch	Enables the Recently Viewed Titles feature for in-house workstations, remote workstations, or both; sets the maximum number of titles that can be displayed. Search Polaris online help for	



Profile	Org Levels	Description	Default Setting
		"Setting Up Recently Viewed Titles."	
Related words options	System, Library, Branch	Enables the Include related words feature for PowerPAC keyword and phrase search results; sets the maximum number of titles that can compose results lists and still display the <b>Included related words</b> link. Search Polaris online help for "Related Words in PowerPAC Searches."	Yes; 1,000
Remote databases: Categorization of target databases	System, Library, Branch	Displays the Z39.50 Target Categorization dialog box, to allow an organization to group remote search targets as a finding aid. See <a href="#">Editing Messages and Labels</a> for detailed instructions on using target categories.  Requirement: Make remote resources available for searching.	
Remote databases: Maximum number that can be searched at once	System, Library, Branch	Set the number of remote databases that can be searched at one time. Search Polaris online help for "Maximum Number of	

Profile	Org Levels	Description	Default Setting
		Databases Searchable at One Time."	
Remote databases: Usage settings	System, Library, Branch	Set usage conditions for specific remote resources, including authentication requirements and search access points. Enable follow-on searches and specify follow-on search targets. Set PAC display name; specify databases for Using drop-down list in PowerPAC search forms. Search Polaris online help for "Remote Database Usage Settings for PowerPAC."	
Remote user PowerPAC: Enable	System, Library, Branch	Specifies whether patrons use Polaris PowerPAC to access the library catalog from remote locations (that is, from computers that are not in the library or are not defined in the In-House IP Addresses table)	Yes - Patrons can use Polaris PowerPAC from remote locations.  If set to No, Polaris PowerPAC access is available only from workstations defined in the In-House IP Addresses database table.
Results set: Maximum number of records to return	System, Library, Branch	Sets the maximum number of records that can be returned in a results set. If you	100,000 (maximum)

Profile	Org Levels	Description	Default Setting
		experience decreased performance for searches with large results due to limited server capacity, you can lower the maximum number of records to return. However, relevancy ranking may be less effective at lower maximum value.	
Rotating best seller jacket on Portal page	System, Library, Branch	Displays a random book jacket image drawn from best-seller lists on the portal page. When the image is selected, a search is launched for the title. Search Polaris online help for "Set up rotating book jackets."  Requirement: Set up an enriched data source. See <a href="#">Polaris Social with ChiliFresh Connections</a> .	Yes - Book jacket images are displayed on the portal page.
RSS Feeds: Enable	System, Library, Branch	Provides RSS feeds from the New Titles dashboard list. Search Polaris online help for "Setting Up RSS Feeds." When this profile is set to Yes, an orange XML icon is displayed by the elements of the New Titles list.	Yes

Profile	Org Levels	Description	Default Setting
RSS Feeds: Maximum new releases	System	Specifies how many titles should be listed in the RSS feed that the patron receives. This profile is available at the system level only; that is, it controls the number for every branch that enables RSS feeds.	5
Scoping: Use MARC language scoping display table	System, Library, Branch	Determines whether catalog searches can be limited only by certain languages, or by any language defined by the MARC 21 format. This profile controls the languages displayed for selection in the PowerPAC Search Options list.  Requirement: Specify languages in Policy Tables, MARC Language Scoping.	Yes - Allow language scoping by the languages specified in the MARC Language Scoping Display table.  If set to No, all languages defined by the MARC 21 format are displayed for search scoping.
Search: Display search criteria in search box for link-produced searches	System, Library, Branch	Specifies whether search terms such as an ISBN are displayed in the search box when the user clicks a link (for example, in the New Titles list) to launch a search.	No. Only search terms actually typed by the user are displayed in the search box.
Search options: Limit by collection enabled	System,	Specifies whether	No (the Collections

Profile	Org Levels	Description	Default Setting
	Library, Branch	collections are available as a scoping option on the Polaris PowerPAC Search Options page.	list does not appear as a scoping option)
Single login: Enable	System, Library, Branch	Displays a Log In option on the My Account menu that allows a patron to log on once for a PAC session, instead of each time the patron selects a function that requires identification. Search Polaris online help for "Controlling Patron Account Login & Access."	Yes (the Login option is displayed on the menu)
Text: Headings count column for "see from" headings	System, Library, Branch	Specifies the text to display in the number of titles column of the headings list when the headings entry is a SEE heading.	—
Theme dashboard position	System, Library, Branch	Sets the position of the dashboard on Polaris PowerPAC pages. (Does not affect the dashboard position on the product page, which is always on the right.) Search the Polaris online help for "Setting Polaris PowerPAC Themes."	Left
Theme selection	System,	Specifies the overall	Classic

Profile	Org Levels	Description	Default Setting
	Library, Branch	appearance of Polaris PowerPAC pages by providing several ready-made skin choices. Search the Polaris online help for "Setting Polaris PowerPAC Themes."	
Title Display: Configure	System, Library, Branch	Specifies the data elements that are displayed in brief, full, and summary search results views for a title in the Polaris PowerPAC. You can customize and order the elements you select, and customize and translate their labels. Search Polaris online help for "Configuring the PowerPAC Title Display."	
Title Display: Number of characters in the Summary (Short)	System, Library, Branch	Specifies the maximum number of characters of the Summary (Short) field that are displayed in the brief and full search results views for a title in the Polaris PowerPAC. Enter a value between 0 and 4000.  Search Polaris online help for "Configuring the PowerPAC Title Display."	0 (the number of characters is not limited)
Title list: Email	System,	Specifies whether	Yes - Allows patrons

Profile	Org Levels	Description	Default Setting
	Library, Branch	patrons can send their title list as an email message from Polaris PowerPAC or Mobile PAC.  Requirements: Set Title List: Enable to Yes (PowerPAC profiles) and specify an email address for sender in Email Notification: Email address of sender (PAC Profile)	to send their title list as an email message.
Title list: Enable	System, Library, Branch	Specifies whether patrons can create a bibliography of titles they select from search results. This profile also affects Mobile PAC.	Yes - Allows patrons to add titles to a bibliography, and view and modify the contents of the list.
Title list: Enable bulk holds	System, Library, Branch	Specifies whether patrons can place multiple hold requests at once from PowerPAC working or saved title lists. Search Polaris online help for "Bulk Hold Requests from Polaris PowerPAC Title Lists."  Requirement: Set Title List: Enable to Yes (PowerPAC profiles).	No - The Place Request button does not appear on PowerPAC working or saved title lists.
Title list: Maximum number of titles to	System, Library,	Limits how many titles from working or saved	10

Profile	Org Levels	Description	Default Setting
request in bulk	Branch	title lists can be requested at once. Search Polaris online help for "Bulk Hold Requests from Polaris PowerPAC Title Lists."	
Title list: Print	System, Library, Branch	Specifies whether patrons can print their title lists.  Requirement: Set Title List: Enable to Yes (PowerPAC profiles).	Yes - Allows patrons to print their title lists to any printer available from the workstation. If set to No, the printer icon does not appear.
Title list: Save	System, Library, Branch	Specifies whether patrons can save their title list to a file.  Requirement: Set Title List: Enable to Yes (PowerPAC profiles).	Yes - Allows patrons to save the contents of the title list to a text file. If set to No, the Save icon does not appear.
Virtual reference: Configure	System, Library, Branch	If you contract with a virtual reference service, use this dialog box to set up the specific profiles for that service. For more information, search Polaris online help for "Setting Up Live Virtual Reference Services."  Requirement: Virtual reference: Enable - Yes (PowerPAC profiles)	
Virtual reference: Enable	System,	Specifies whether	Yes - The virtual



Profile	Org Levels	Description	Default Setting
	Library, Branch	patrons can use a virtual reference service from Polaris PowerPAC. This feature provides interactive, online reference services. Search Polaris online help for "Setting Up Live Virtual Reference Services."	reference link is available in Polaris PowerPAC.
Virtual reference: Supplier	System, Library, Branch	Specifies your virtual reference service provider. If you contract with a virtual reference service, select the provider here. Search Polaris online help for "Setting Up Live Virtual Reference Services."  Requirements: Set Virtual reference: Enable to Yes (PowerPAC profiles) and Virtual reference: Configure - PowerPAC profile - specific settings for the provider you selected.	

## 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	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Determines whether users must be registered patrons to send a question to the library by e-mail, using the Ask Us feature. Search Polaris online help for "Setting Up Ask Us in Mobile PAC."	<p>Yes - Patrons must log in with a barcode and password to use Ask Us.</p> <p>If set to No, the Ask Us log-in page displays a Guest button that bypasses log-in.</p>
Branch switching: Enable	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Allows users to change connection branches. Search Polaris online help for "Setting Up Mobile PAC Connections."	Yes
Mobile PAC Analytics	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Specify Google Analytics or custom coding to track site usage. Search Polaris online help for "Analyzing Polaris Mobile PAC Use."	
Navigation: Ask us	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Places the Ask Us link on the Mobile PAC home page. Search Polaris online help for "Setting Up Ask Us in Mobile PAC."	Yes
Navigation: Claimed and Lost	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Specifies whether claimed and lost items are displayed in the patron's Mobile PAC account.	
Navigation: Donations	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Places the Donations link on Mobile PAC pages. The system uses the setting for the patron's registered branch. Search Polaris	No

Profile	Org Levels	Description	Default Setting
		online help for "Credit Card Payments from Mobile PAC."	
Navigation: Fines & fees	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Places the Fines and Fees link on the Patron Account page. The system uses the setting for the patron's registered branch. Search Polaris online help for "Patron Account (My Account) in Mobile PAC."	Yes
Navigation: Items out	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Places the Items checked out link on the Patron Account page. The system uses the setting for the patron's registered branch. Search Polaris online help for "Patron Account (My Account) in Mobile PAC."	Yes
Navigation: Patron account	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Places the My Account link on the Mobile PAC home page. Search Polaris online help for "Patron Account (My Account) in Mobile PAC."	Yes
Navigation: Requests	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Places the Hold requests link on the Patron Account page. The system uses the setting for the patron's registered branch. Search Polaris online help for "Patron Account (My Account) in Mobile PAC."	Yes

Profile	Org Levels	Description	Default Setting
Navigation: Web site URL	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Displays the organization's Web site address on the Hours and Contact page. Search Polaris online help for "Setting Up Mobile PAC Library Information."	
New and Popular Titles	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Displays the <b>New and Popular</b> link on the home page, and sets up the lists of new, best seller, on-order, and most circulated (popular) titles. Search Polaris online help for "New & Popular Titles in Mobile PAC."	
Product page categories: Configure	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Determines the display order of links on the Mobile PAC product page for a title in search results. Search Polaris online help for "Set up the Mobile PAC title (product) page."	
Remember me: Enable	<ul style="list-style-type: none"> <li>• System</li> </ul>	Displays the <b>Remember me</b> checkbox on the patron login page. Search Polaris online help for "Patron Log-In Settings for Mobile PAC."	Yes
Title Display: Configure	<ul style="list-style-type: none"> <li>• System</li> <li>• Library</li> <li>• Branch</li> </ul>	Specify the data elements that appear in the brief, full, and summary results for Mobile PAC bibliographic searches. You can	

Profile	Org Levels	Description	Default Setting
		customize and order the elements you select, and customize and translate their labels. Search Polaris online help for "Configuring the Mobile PAC Title Display."	

## 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 <b>Yes</b> , 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 searching. See <a href="#">Managing Search Categories</a> .	Yes Requirement: If yes, define categories with the profile <b>Category construction</b>

Profile	Org Levels	Description	Default Setting
Category construction	System, Library, Branch	Displays the Category Construction dialog box. Set up subject categories, define search targets within the categories, and edit existing categories and targets. See <a href="#">Managing Search Categories</a> .	Polaris PowerPAC Children's Edition includes a set of default categories.  Requirement: Set <b>Categories: Enable to Yes (Children's PAC profiles)</b>
Dashboards: Enable	System, Library, Branch	Determines whether library-defined elements and theme choices are displayed in lists on the left portion ("dashboard") of the Children's PAC interface. See <a href="#">Managing Children's Dashboards</a> , and <a href="#">Managing Themes</a> .	Yes
Dashboards: Webpage/web part assignment	System, Library, Branch	Displays the Web Page - Web Part Configuration dialog box. Specify which Web parts to display in the dashboard on specific Web pages for the Children's PAC at each branch. See <a href="#">Managing Children's Dashboards</a> .	Requirements:  Define Web parts at the system level, using the profile <b>Dashboards: Web part construction (Children's PAC profiles)</b> .  Set <b>Dashboards: Enable to Yes (Children's PAC profiles)</b> 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 <a href="#">Managing Children's Dashboards</a> .	Requirements:  Assign the Web parts to specific Children's PAC pages using the profile <b>Dashboards: Web page / web part assignment (Children's PAC profiles)</b> .  Set <b>Dashboards: Enable</b> to <b>Yes (Children's PAC profiles)</b> 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 <b>free text search limit</b> box. In addition, you can specify which collections defined in the system should be included in Children's PAC search results. See <a href="#">Setting Children's Search Limits</a> .	<b>AND TA=j</b> (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 <b>Item Availability: Display</b>

Profile	Org Levels	Description	Default Setting
			<b>status to Yes</b> ( <b>Children's PAC</b> profiles)
Item availability text: Not available	System, Library, Branch	Specifies the text that indicates an item is not available.	Checked Out Requirement: Set <b>Item Availability: Display status to Yes</b> ( <b>Children's PAC</b> 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 <a href="#">Customize the children's item availability display</a> .	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



Profile	Org Levels	Description	Default Setting
			<p>local branch, the system-level items are displayed.</p> <p>If set to No, if the logged-on branch is the system, information about items owned throughout the system is displayed. If the logged-on branch is a local branch, only the local items are displayed. If none are owned by the local branch, no items are displayed.</p>
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	Yes

Profile	Org Levels	Description	Default Setting
		the item record) is displayed in the item information.	
Multiple language strings	System	Displays a dialog box that allows you to specify a language and translate all search categories and targets from English to the language of your choice. Other languages are available in this dialog box only if your library system has purchased other language versions of Polaris PowerPAC Children's Edition. You can also edit the English names. See <a href="#">Translate all categories and targets.</a>	No translations (lists English categories and targets only)
Navigation: Events	System, Library, Branch	Determines whether the Children's PAC interface includes the Events button, which is used to access a library-maintained Events page. See <a href="#">Add text to the children's Events page.</a>	Yes
Navigation: Help	System, Library, Branch	Determines whether the Children's PAC interface includes the	Yes

Profile	Org Levels	Description	Default Setting
		Help button, which is used to access online Help for the Children's PAC.	
Navigation: PowerPAC	System, Library, Branch	Determines whether a link to Polaris PowerPAC is displayed in the Children's PAC interface.	Yes
Number of tooltip entries displayed	System, Library, Branch	For categories, defines the number of targets that display in a tooltip when the cursor hovers over the category link. See <a href="#">Managing Search Categories</a> .	5  Requirements:  Use the profile <b>Category construction (Children's PAC profiles)</b> to set up search categories.  Set the profile <b>Categories: Enable to Yes (Children's PAC profiles)</b> 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.

Profile	Org Levels	Description	Default Setting
Results set: Maximum number of records to return	System, Library, Branch	Sets the maximum number of records that can be returned in a results set. If you experience decreased performance for searches with large results due to limited server capacity, you can lower the maximum number of records to return. However, relevancy ranking may be less effective at lower maximum values.	1,000 (maximum = 10,000)
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 <a href="#">Set children's search buttons.</a>	Yes

Profile	Org Levels	Description	Default Setting
Search button visibility: Authors button	System, Library, Branch	Displays a search button that launches a keyword search for author. See <a href="#">Set children's search buttons.</a>	Yes
Search button visibility: Fiction button	System, Library, Branch	Displays a search button that launches a keyword subject search scoped to fiction. See <a href="#">Set children's search buttons.</a>	Yes
Search button visibility: Non-Fiction button	System, Library, Branch	Displays a search button that launches a keyword subject search scoped to non-fiction. See <a href="#">Set children's search buttons.</a>	Yes
Search button visibility: Series button	System, Library, Branch	Displays a search button that launches a keyword search for series name. See <a href="#">Set children's search buttons.</a>	Yes
Search button visibility: Subjects button	System, Library, Branch	Displays a search button that launches a keyword search for subject. See <a href="#">Set children's search buttons.</a>	Yes
Search button visibility: Titles button	System, Library, Branch	Displays a search button that launches a keyword search for	Yes

Profile	Org Levels	Description	Default Setting
		title. See <a href="#">Set children's search buttons.</a>	
Select theme: Enable	System, Library, Branch	Allows users of Children's PAC to select an interface theme from choices you specify. See <a href="#">Managing Themes.</a>	Yes  Requirements:  Specify which themes are available as choices with the profile <b>Theme assignment (Children's PAC profiles)</b> .  Set <b>Dashboards: Enable to Yes (Children's PAC profiles)</b> , because the theme options are displayed in the dashboard.
Theme assignment	System, Library, Branch	Displays the Theme Assignment dialog box, where you can specify which library-defined or system-provided interface themes are available as choices from the Children's PAC. You can also set a default theme here. See <a href="#">Managing Themes</a> for more information.	Requirements:  Set up and edit themes at the system level, with the Children's PAC profile <b>Theme construction (Children's PAC profiles)</b> .  Set the profile <b>Select theme: Enable to Yes (Children's PAC profiles)</b> to display the assigned themes in the Children's PAC  Set <b>Dashboards: Enable to Yes (Children's</b>

Profile	Org Levels	Description	Default Setting
			<b>PAC</b> profiles) for the organization, because the theme options are displayed in the dashboard.
Theme construction	System	Displays the Theme Construction dialog box. Set up and edit themes for the Children's PAC interface. See <a href="#">Managing Themes</a> for more information	Requirement: Specify which themes are available to specific organizations using the <b>Children's PAC</b> profile <b>Theme assignment</b> .
Web access: Enable	System, Library, Branch	Allows live Web links in Children's PAC search results. See <a href="#">Customizing the Children's Results Display</a> .	No - Web links are text-only, and do not allow Internet access.  If set to Yes, users can click the Web Site icon or a web link to view the site.

## 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](#)

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### 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 library staff.
library\events.aspx	3	Displayed when Events on the Library Info menu is selected. The Events page is where you can show information about upcoming library and community programs. If you add custom html content to this page, be

Page	PageID	Function
		sure that it is responsive. For information about editing the Events page, see <a href="#">Setting Public Access Profiles and Parameters</a>
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 <a href="#">Setting Public Access Profiles and Parameters</a>
library\vrquestion.aspx	43	Displayed after a patron selects the virtual reference link and logs on. This page allows the patron to send a question to the virtual reference service.
library\website.aspx	6	Displayed when Web Site on the Library Info menu is selected. The Web Site page is where you can list links to library-selected Web pages in the library or on the

Page	PageID	Function
		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.
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.

Page	PageID	Function
patronaccount\finestfees.aspx	14	Displayed when Fines & Fees is selected on the My Account menu. The Fines page lists the fines and fees the patron owes.
patronaccount\itemsout.aspx	16	Displayed when Items Out is selected on the My Account menu. The Items Out page shows the items currently checked out by the patron.
patronaccount\patroncommunity.aspx	64	Licensed feature. Displayed when an organization representative selects Community on the My Account menu.
patronaccount\readinghistory.aspx	31	Displayed when Reading History is selected on the My Account menu. The Reading History page displays a list of the items the patron has checked out since the reading history began.
patronaccount\registerconnections.aspx	67	Polaris Social. Displayed when a patron clicks the appropriate link on the PowerPAC log-on page. This page provides options for setting up a new ChiliFresh account or linking an existing account to the patron's library account.
patronaccount\requests.aspx	18	Displayed when Requests is selected on the My Account

Page	PageID	Function
		menu. The Request page lists the hold and interlibrary loan requests the patron has made.
patronaccount\searchagent.aspx	40	Displayed when Saved Searches is selected on the My Account menu. The Saved Searches page lists information about saved (automatic) searches and provides links for editing and deleting the searches.
patronaccount\selfregister.aspx	20	Displayed when click here to register on any log-on page is selected. The Self Register page allows patrons to register for a library card.
patronaccount\shoppingcart.aspx	57	Displayed when My Shopping Cart is selected on the My Account menu. This page displays a list of digital materials a patron has placed in the shopping cart for purchase. Used with Polaris Fusion, a separately licensed product.
patronaccount\social.aspx	66	Polaris Social. Available to logged-in patrons from the PowerPAC patron account; displayed when the patron clicks Connections in the dashboard or the menu bar.

Page	PageID	Function
patronaccount\virtualreference.aspx	33	Displayed when Virtual Reference is selected on the My Account menu. The Virtual Reference page provides access to transcripts of the patron's interaction with a virtual reference service, if the service provides this feature.
search\browse.aspx	52	Displayed in response to a Browse search. This page allows patrons to browse the appropriate index headings.
search\changedatabases.aspx	50	Displayed when the Select Databases link is chosen on a search page. This is the Other Databases page, where patrons can select Z39.50 databases to search simultaneously with the library catalog.
search\communityinformation.aspx	61	Licensed feature. Displayed when the user selects Community Keyword on the Community menu.
search\communityinformationbrowse.aspx	62	Licensed feature. Displayed when the user selects Community Browse on the Community menu.
search\communityinformationfull.aspx	63	Licensed feature. Displayed when the user selects a community entry in the community search results list.

Page	PageID	Function
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.aspx?type=Keyword (before search)	21	Displayed when Keyword is selected from the Search menu. You set up and launch a keyword search from this

Page	PageID	Function
		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 proprietary, non-Z39.50 databases available for patron searches.
search\misc\thesaurus.aspx	N/A	Obsolete
search\newreleases.aspx	35	Displayed when you click a category in the New Titles Web part on the dashboard. The page displays title links for new library acquisitions.
search\related.aspx	53	Displayed when you click More in the Related Web part on the dashboard for the search results page.
search\searchresults.aspx	51	Displays the initial bib search results list (brief information).
search\title.aspx	54	Displays the title product page when a title listed in search results is selected for full display.



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).

### 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

Page	PageID	Function
		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.

## Glossary

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#### **006 field**

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

#### **007 field**

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

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**008 field**

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

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**A****added entry**

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

**approval plan**

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

**ASN (Advanced Shipping Notice)**

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

---

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

---

## B

### **blanket plan**

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

### **blind reference**

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

---

## C

### **cataloging source**

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

### **chronology**

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

### **content designators**

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

---

**D**

---

**delimiter**

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

**deposit account**

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

**diacritical mark**

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

---

**E**

---

**enumeration**

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

**express registration**

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

---

**F**

---

**first available copy requests**

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

---

**form subdivision**

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

**free days**

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

---

**G****geographic qualifier**

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

**geographic subdivision**

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

---

**M****monographic series**

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

---

**R****RTF**

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

---

## **S**

---

### **SICI**

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

### **SISAC**

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

### **standing order**

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

---

## **T**

---

### **trapped**

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



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