

axiell

Arena training guide for administrators



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Preface

Simple, stylish and engaging, Arena is perfect for archives, libraries and museums to showcase and organize their collections in the public domain. Social aspects like commenting, rating and reviewing content makes searching more relevant for all users.

About this guide

This guide describes basic administration tasks in Axiell Arena, such as adding new users, new pages and new functionality. The Arena search engine is also described.

In the Arena online help - help.arena.axiell.com - you find descriptions of how to work with the Arena user interface to add articles and images. Portlets developed by Axiell are also described in the online help.

Get to know Axiell

We provide innovative solutions and services for public libraries that facilitate the role librarians play in stimulating reading, life-long learning and community services for citizens.

See also: www.axiell.com

About Arena

An Arena system comprises the following two main parts:

- Back-end functionality - This may be a library, museum or archive system, with a public interface to the catalogues, user transactions such as loans and reservations, and Web 2.0 functions such as ratings, reviews and tags.
- Information base system - This is where the authority may publish information and offerings to the public, as an alternative to the services at the physical institution; articles about what is happening at the library, tips about activities etc.

Arena builds these into a website that institutions may use to present themselves, make their services available on the Internet, and enable users to contribute additional information.

Liferay

Liferay is the content management system (CMS) used to carry Arena. Liferay is a portlet based CMS. It is an open source system based on the Java platform. Liferay in itself has a lot of functionality that can be used in the portal and added to this is the whole Arena functionality.

See also dev.liferay.com/ru/discover/portal/-/knowledge_base/7-0/what-is-liferay

Portlets

A portlet is an independent function program. Portlets may be placed on a page in Arena, one or more times and also on many pages. A page is made up of several portlets that together form the complete information and/or transaction service provided by that page.

Arena's default delivery setup includes a structure of pages and portlets that provide Arena's essential services. You may add portlets to existing pages, and in general build the site to meet your requirements.

All portlets have some different sets of configuration:

- Look and feel - Includes information like what title to show in different languages. Most settings related to styling are done by Axiell at the time of installation.
- Configuration - Permissions to the portlet, and sharing of the portlet.
- Arena preference setup - portlets also have setup related specifically to the functionality available in Arena. For each portlet there is a default setup of the preferences which is applied for each instance.

Language handling

Arena uses a language system that makes it possible for pages and portlets therein to work in different languages. By using this system, text, such as labels, headers and information displayed in pages and portlets will change automatically when a different language is selected by the user. This system also handles web content, such as articles, which may be available in different languages. This means that it is not necessary to have a set of pages and portlets in different languages - each language is handled automatically within each page and portlet.

Note:

Use the same URL for all language versions of a page.

For Arena portlets all texts are available in English (GB and US), Finnish, Russian, Swedish, Norwegian (Bokmål and Nynorsk), German and French. You may also apply your own text variants to replace the ones delivered. Liferay portlet texts are available in many languages, and are included in the Liferay bundle.

Styling

The general layout and styling of an Arena site is handled by using a theme. Each theme comprises a set of CSS. Each theme has a basic configuration that applies to all pages, including the page layout, column arrangement, colouring, and the header bar. The theme also controls menu handling.

A theme may exist in different colour schemes variants. Each colour scheme may include different colour selections and rules, but must conform to the same basic structure of the theme.

Arena architecture

Arena provides a way for library, archive and museum members to access and use the library, archive or museum management system (LMS) catalogue, and to communicate with other members through reviews, recommendations and star ratings.

To do all this, Arena has to be more than just a web application. For this reason, we chose to build it inside the Liferay environment.

LMS

This is the Library Management System - the software used to manage the library (or archive or museum). It may work with one or several databases (catalogues), locally or countrywide. Examples of LMS software: Curia, BOOK-IT and OpenGalaxy. Example of museum software: EMu.

ALMA

This provides the interface between the LMS and Arena. It pairs related instructions from the LMS and Arena, so that instructions passed between the two systems are understood and acted upon correctly. A different ALMA is required for each different LMS.

Central services (CS)

This is the component in Arena that contains the centralized services. It provides web services for the locally installed part of Arena, and may also have other components installed, such as fail-over and clustering features. Reviews, ratings and tags are examples of Central services.

Local Services (LS)

This is the core of Arena. It also provides the web interface with which its users interact.

Liferay and portlets

Liferay is the software foundation of Arena. It provides the environment for small applications, known as portlets, to run. It includes a range of ready-made portlet, which perform many common tasks. Many other portlets have been written to provide Arena's features.

Administration in Arena

The administration of Arena is made partly in Liferay and partly in Arena.

The functions in the table below are administrated within Arena.

Function	Permission	Page
Installation administration on portal site-level	InstallationAdmin	/protected/admin
Assigning permissions for administrative Arena users	InstallationAdmin	/protected/admin
Handling of reviews and abuse	AbuseHandling	/protected/admin
Sending messages	Inbox	/protected/messages

A number of settings are made by Axiell at the time of installation, for example filtering that determines which units that will be shown in Arena. Please contact customer support if you want to change any of the default settings.

Arena articles

Starting with Arena 4.0, you are recommended to start using Liferay articles instead of Arena articles.

If you still prefer working with Arena articles, here is where you handle these:

Function	Permission	Page
Uploading of article templates	ArticleTemplateHandling	
Handling of articles	Articles	/protected/article-admin
Uploading of images	ImageHandling	/arena-images (or directly when writing articles)

Signing in to Arena

Patrons usually become Arena users automatically, but manual sign-in is also supported.

Automatically created Arena users

The feature to automatically create Arena users is activated in the Admin: installation details portlet by Axiell support.

When a patron signs in with library card number + PIN and there is no Arena user connected to the account, an Arena user is created automatically. The patron can then, without any further action, save searches, save media baskets, rate titles, etc., and also, of course, get access to library services such as loans, renewals, reservations, balances and payments.

Patrons that want to write reviews or contributions in a forum will be requested to enter a display name.

An automatically created Arena user can only sign in with library card number + PIN.

An automatically created Arena user cannot use their Arena user name at more than one library.

Forgotten PIN

A patron who has forgotten their PIN can click "Forgot PIN?" in the login portlet. The patron is then asked to type their library card number to receive a new PIN code via email.

The forgot password link cannot be used for an automatically created Arena user; as this patron has no Arena sign-in but only signs in with library card number + PIN.

Change password reminder

If the patron has not reset the password in a certain number of days, a warning message will appear in the Account portlet with a reset password link. This is configured in the Account portlet.

Locking a patron after x unsuccessful sign-in attempts

There is a feature that locks a patron after a certain number of attempts to sign in. This only applies to Arena sign-ins and is configured in the Account portlet. Make sure that these settings are aligned with settings made in the backend system.

Manually signing in to Arena

Patrons can sign in in different ways with different capabilities. In multi-agency installations, patrons also choose which library to sign in to.

Different sign-in options and capabilities:

- Using library card number + PIN, without being an Arena user. Access to transactions that exist only in the library system: loans, renewals, reservations (including editing) and balances (including payment).
- Using e-identification, if enabled (Sweden only; enabled by Axiell on request).

Signing in to Liferay

Only administrators sign in to Liferay:

1. Press **Ctrl+Shift+L**.
2. Click **Sign in**.
3. Enter your user name and password.
4. Check **Remember me** if you want Arena to fill in your details automatically next time you sign in.
5. Click **Sign in**. The Welcome page opens with the **Admin** menu and some extra functions.






To sign out of Liferay, click your name and select **Sign out**.

The Arena administration user interface

When you have signed into Liferay, you find a menu at the top of the screen.



The icons have the following functionality:

	Opens the administration menu to the left.
	Gives a preview of the page as it will look for an Arena user, without having to sign out from Liferay.
	Configuration the current page - you can for example hide it. You get additional options for pages, such as restructure pages and add pages under Navigation in the administration menu.
	Opens the portlet menu to the right.
	Lets you preview the page as it will appear in different devices, such as a mobile phone or a tablet.

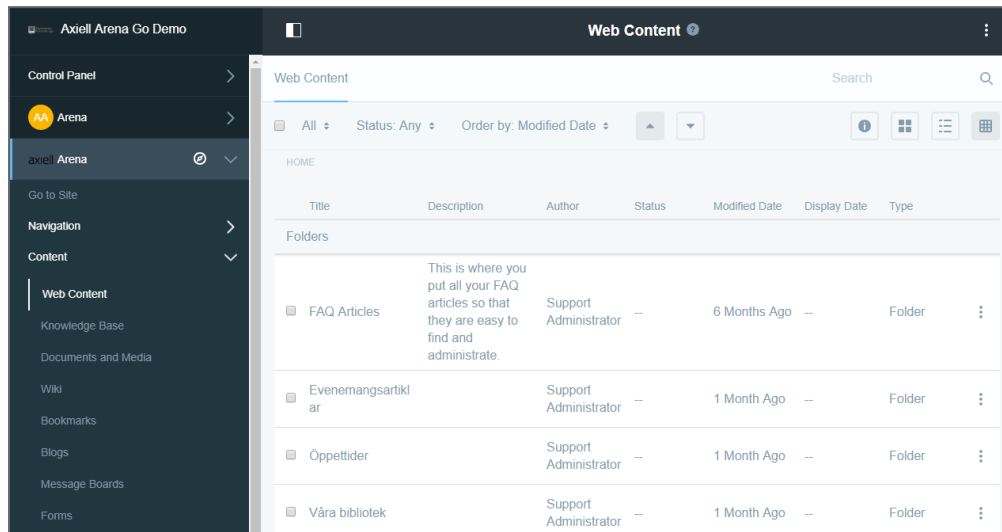
Administration menu

You find existing Liferay users in your Arena under the **Control panel** and you also create new users and roles here.

You see which user is signed in.

You find the page structure in Arena under **Navigation**.

Content includes a connection to **Documents and media** where all kinds of files are stored. You can also create Liferay articles, forms, categories for tagging of articles etc from here.



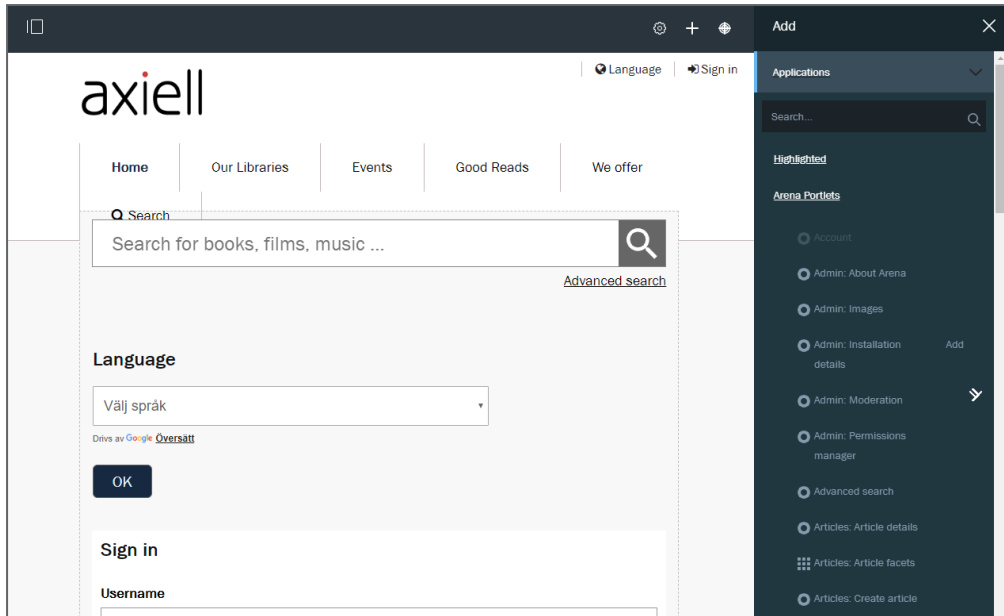
Portlet menu

The portlet menu includes **Applications** and **Content**.

All portlets that are included in the Arena default installation are listed under **Applications**. There is a number of Liferay functions that are not used in the default configuration of Arena, and that are not supported by Axiell. The following functions are supported:

- Documents and media (Content management)
- Navigation (Content management)
- Languages (Tools)
- Web content display (Content management)

Under **Highlighted**, you find the portlets that most often used. Under **Arena portlets**, you find the portlets that Axiell has developed.



Content displays the Liferay articles that is available in Arena and you can choose which articles to display on the page.

See also: **Portlets in Arena**

Accounts

Patrons sign in to Arena to be able to use all Arena features. Library staff may also sign in to Arena for some tasks; administrators are able to perform certain installation-level settings and manage reviews when logged in with the administrative Arena accounts.

Administrative tasks such as adding pages to the site and managing themes and design, require sign in to Liferay. The Liferay account is separated from the Arena account.

Note:

An administrator user needs to be a Liferay user as well as an Arena user with admin permissions, and to be signed in as both at the same time to have full access to all administrative tasks. Always sign in as a Liferay user first and then as an Arena user.

User types in Arena

A user type is assigned roles, and roles consist of different permissions. You find the roles under **Users** in the **Control panel**. Liferay includes a number of roles that are not used in Arena.

The definition of the organization in Arena is the complete Arena site with all its assets and users. All management of users requires signing in to Liferay.

The following table includes the new simplified model of user types, that are predefined in the system, starting with Arena 4.1.

User type	Description
Organization owner	The Organization owner has full access to configure the Arena site, its users and permissions, as well as all kinds of content. Usually, there are one or two Organization owners at the library, that have participated in administrator training. In addition to the Liferay Organization Owner role, the Arena Organization owner is also assigned the Arena Power User role.
Organization administrator	The Organization administrator can create and update all aspects of the content, including organizing pages, categories and articles, making settings to portlets etc.
Organization user	The Organization user can create and update articles and use assets such as categories that the Organization administrator has created. The Organization user can upload documents and images in the Documents and media library. All users that belong to an organization are assigned this role.
Patron	A patron that has signed in to Arena can reserve titles and borrow books. To be able to do something where they can no longer be anonymous, Arena will ask for a user name and for approval of terms. A patron is assigned the Guest role.

A non-authenticated user - anyone who visits the Arena site to for example search the catalogue, check out events or opening hours - is assigned the Guest role.

Legacy user types

Previously, Arena has included a number of user types that are now discontinued. There is nothing stopping you from continuing to use these types in your system if you already have them set up, but they will not be maintained and improved.

User type	Description
Not logged in user	A person that has not signed in to Arena - neither with card number and PIN nor with user name and password - can still search in the catalogue and for example view opening hours, read articles and search for events.
Library card holder	A user with a library card at this library but no Arena account signs in using their card number and PIN. A library card holder can access library services, such as reserving a title, but not write reviews, tag, rate etc. A library card holder can create an Arena account if they wish.
Arena editor	The Arena editor can create and update Arena articles only.

User type	Description
Axiell Arena user	When you create an Arena user, the user name and password is saved in the Arena Central services along with the connection to card number and PIN. This means that the user can sign in either with card number and PIN or with user name and password and still have access to all functions - library services, such as reserving a titles, as well as writing reviews, tag, rate etc. An automatically created Arena user has the same rights as a full Arena user, but cannot sign in as guest at another library. It is possible to let Arena create users automatically as soon as a user signs in. This user has access to everything without having to create an account. When a user, whose user name has been created this way, wants to do something where they can no longer be anonymous, Arena will ask for a user name and for approval of terms. Please contact Axiell support if you wish to enable this functionality.
Full Arena user	A full Arena user has a library card at this library and can access all library services, such as reserving a title, writing reviews, tagging, rating etc.
Administrator	An Arena administrator has access to some administration features such as handling articles and images and sending messages.
Liferay administrator	The Liferay administrator is separated from the Arena administrator. Liferay access is required for adding pages, adding portlets, changing themes etc.

Permissions

A user type is assigned roles, and roles consist of different permissions. You find the roles under **Users** in the **Control panel**. Liferay includes a number of roles that are not used in Arena.

Each permission group has general permissions that define all actions that can be performed for all applications in this section, such as their configurations, whether they can be viewed, accessed in the Control panel and Site administration, and more.

The table below lists all the permissions that the pre-defined (starting with Arena 4.1) Organization user has.

Permission group	Permission	Description	Permissions that a Organization user has
Categories	Asset categories	Permission to add categories and vocabularies and set permissions for these.	-
	Category vocabulary	Permission to view, update and delete vocabularies and set permission for these.	View
	Category	Permission to view, add, update add delete vocabularies and set permission for these.	View
Documents and media	Document and media libraries	Permission to view and organize the library, and to add different assets.	View Update Add document Add folder
	Documents folder	Permission to access, view, update, delete and subscribe to the folder, and to add different assets.	Access View Update Delete Add document Add subfolder
	Document	Permission to view, update and delete documents, to add, update and delete discussions, and to override checkout of documents	View document Update document Delete document
	Shortcut	Permission to view, update and delete shortcuts	-
	Document type	Permission to view, update and delete document types	-

Permission group	Permission	Description	Permissions that a Organization user has
	Document metadata	Permission to view, update and delete document metadata	-
Forms	Lists	Permission to add record sets, structures and templates.	-
	Dynamic data lists record set	Permission to view, update and delete record sets, and to add records.	-
	Dynamic data lists definition	Permission to view, update and delete definitions.	-
Site settings	Site	A selection of permissions for handling of the Arena site on all different levels.	View site administration menu
Tags	Asset tags	Permission to add asset tags.	-
	Tag	Permission to update and delete tags.	Update Delete
Web content	Web content	Permission to view and update content, and to add web content, feeds, folders and templates.	View Add web content Add folder
	Web content folder	Permission to access, view, update and delete content folders, and to add web content, and subfolders.	Access View Update Add web content Add subfolder
	Web content article	Permission to view, update, expire and delete articles, and to add, update and delete discussions.	View Update Expire Delete
	Web content feed	Permission to view, update and delete feeds.	-
	Web content structure	Permission to view, update and delete structures.	-
	Web content template	Permission to view, update and delete templates.	-

Assigning permissions to roles

1. Sign in to Liferay.
2. In the menu to the left, click **Control Panel**.
3. Click **Users/Roles**.
4. In the context menu for the role you want to modify, select **Define Permissions**.
In the page that opens, you see a panel to the left that contains **Summary**, **Control Panel**, **Site Administration** and **User**.

Summary displays all permissions that have already been set for the role, and you can change these if needed.

Control Panel: Here you can modify general permissions for the current role, such as viewing the control panel menu and adding users, and if needed, update settings under **Users**. You do not need to make modifications under **Sites**, **Apps** or **Configuration**.

Site Administration: You find one useful option here - **Applications** - you do not need to modify the other sections. Under **Applications**, you get an overview of all portlets in Arena, regardless if these are Liferay portlets or portlets

developed specifically for Arena. Click on each portlet for which you want to modify permissions for the current role.

User: You do not need to make modifications here.

5. Once you are done with assigning permissions to the current role, you will see your modifications under **Summary**.

To test the permissions you granted, select **Users and organizations** in the Administration menu, and click the in the context menu for a user with the role you adapted, select **Impersonate user**.

Note:

Permissions can also be defined for individual assets such as portlets, by clicking its context menu. However, permissions granted or removed in the Control panel override those made at the more granular level.

Managing users in Liferay

Liferay access is necessary to add new pages on the portal, handle layout and design, add or remove features on the pages, etc. When Arena was installed you got sign-in data to Liferay for one user. You are recommended to create separate accounts for all users.

All management of users requires signing in to Liferay.

Under **My account** you can see and edit the data for your account; name, e-mail address, password, roles, etc.

Adding a new user in Arena 4.1

All users that you add will be assigned the role **Organization User**, provided that you select the Arena organisation.

1. Sign in to Liferay.
2. In the menu to the left, click **Control Panel**.
3. Click **Users/Users and Organizations** and select the **Organizations** tab.
4. In the context menu for your organisation, select **Add user**.
5. Fill in the details for the user. Mandatory fields are marked with an asterisk.
6. Click **Save**.
New fields appear below the fields filled in.
7. Enter a password. If you want to force the user to change the password at first sign-in, check **Require Password Reset**.
8. Click **Select** to select an organisation, and click on the Arena organisation that your installation belongs to.
9. Click **Select** to select a role, and click the role that you want to assign to the user.
10. Click **Save**.

You see the new user on the **Users** tab.

Assigning another role to a user in Arena 4.1

At some point, you may want to assign a user another role, such as Organization Administrator, rather than the default role Organization User.

1. Sign in to Liferay.
2. In the menu to the left, click **Control Panel**.
3. Click **Users/Users and Organizations** and select the **Users** tab.
4. In the list of users, select **Edit** in the context menu for the user for whom you want to assign a new role.
5. On the **User Information** tab, scroll down to **Roles**.
6. Under **Organization Roles**, click **Select**, and then click **Choose** for the role that you want to assign to the user.
7. Click **Save**.

Adding a new user in Arena 4

All library staff users should be assigned to the Arena organisation, to automatically become **Organisation users**.

1. Sign in to Liferay.
2. In the menu to the left, click **Control Panel**.
3. Click **Users/Users and Organizations**.
4. Click the plus sign in the bottom right corner and fill in the user details.
5. Click **Save**.
New fields appear below the fields filled in.
6. Enter a password. If you want to force the user to change the password at first sign-in, check **Require Password Reset**.
7. Click **Select** to select an organisation, and click on the Arena organisation that your installation belongs to.
8. Click **Select** to select a role, and click the role that you want to assign to the user.
9. Click **Save**.

Organization owner

The Organization owner is assigned to the Arena organization, and to the following roles:

- **Arena Power User**
- **Organization Owner**

Creating the first Organization owner

1. Create a user, and in the initial form, assign the user to the Arena organization, and save the settings.
2. Assign the user to the **Arena Power User** and **Organization Owner** roles.

Organization administrator and Organization user

For library staff to be able to create pages and configure portlets as well as updating content, assign the user the **Organization Administrator** role. For library staff to be able to only update content, assign the user the **Organization User** role.

Editing or deactivating a user

1. In the left hand menu, click **Control Panel/Users/Users and Organizations**.
2. Click the context menu to the right on the row for the user. Select **Edit** or **Deactivate**.

Accessing My account

1. In the left hand menu, click **[your name]/My account/Account settings**.

Assigning administrative permissions

An automatically created user that is to get administrative permissions in Arena first needs to select a username under My account - Username and password. You then assign permissions to this username.

First decide who is to handle what in the system, and then assign permissions. The very first time, a Liferay user has to assign someone, for example oneself, permissions in Arena, since among these rights you find permission to assign permissions. This is done on the page `/protected/admin`, in the portlet Admin: permissions manager.

Note:

You need to know the name of the users to find them - there is no way to display all the user names in the system.

1. Enter the display name of an Arena user in the search area and click **Search**.
2. Select the permissions that the users should be assigned and click the right arrow.

Forums and Groups are not yet implemented, so you don't need to assign those.

GeoCode Admin and SelfPubAdmin are not used.

My Array Admin is only used if Arena uses the extension module Collections.

Managing a roles in Liferay

A user type is assigned roles, and roles consist of different permissions.

The roles that are included in the installation are sufficient in many cases. But you may also want to create new roles that are tailored for your organisation. You create your own roles under **Organization roles**.

Creating a new role

1. Sign in to Liferay.
2. In the menu to the left, click **Control Panel**.
3. Under **Users**, click **Roles**.
4. Select the **Organization roles** tab.
5. Click the plus sign at the lower right of the screen.
The **New role** window opens.
6. In **Name** type a name for the role. **Title** and **Description** are optional fields.
7. Click **Save**. You return to the list of roles.
8. Click **Actions** for your new role and select **Define permissions**.
9. Select permission area in the dropdown. Each area has sub-areas to select from.
10. Click **Save** when you have selected the permissions for an area.
11. Select more permission areas in the dropdown if you want to add more permissions to the role.

You have now created your new role with its permissions, and you can continue to assign users to this role.

Editing permissions for a role

Note:

You cannot edit permissions for the Organization Owner and Organization Administrator roles.

1. In the menu to the left, click **Control Panel**.
2. Under **Users**, click **Roles**.
3. Select the **Organization roles** tab.
4. In the context menu for the role that you want to edit, select **Define permissions**.
5. Make changes in the same way as when creating a new role.

Arena portal site administration

The term *Agency* is used to describe a library system in Arena. A library system has at least one member, and for both these levels there are configuration settings made by Axiell at the time of installation. The *Portal site* level defines the user interface of the portal and can be configured by Arena/Liferay administrators. The other levels can be configured by Axiell only.

To access the rest of the settings on portal site level, click **View** for each group in the Admin: installation details portlet.

Admin: installation details

This portlet is used to set up the properties for all levels of the Arena installation. The contents of the portlet are only visible to administrators.

Note:

Changes made in this portal are not in effect until after five minutes.

Portal site admin

An Installation admin can see the installation on a portal site level.

For configuration on member or agency level, please contact Axiell.

The portlet presents the portal site data (this is set during installation and cannot be changed):

Setting	Description	Comment
Name of portal site	The ID of the portal site	Can only be changed by Axiell
Portal site description	The name of the web site. This name is shown in reviews and discussions. Also displayed when articles and images are published.	Can only be changed by Axiell
Portal site friendly URL		Can only be changed by Axiell
Virtual host-name		Can only be changed by Axiell
Portal site members	The members that exist on the same server. The members displayed in this portal are highlighted.	Can only be changed by Axiell
Filter	If you want to limit the search area when searching on the portal site, you can define a filter. You can, for example, filter on media class or target group.	Filtering on organization or branch level is done using other filters, turn to your Arena contact.
Allow Anonymous Login	Must be set to true to require the user to create an Arena account. If set to false, card sign-in must be allowed (Sign in via library card number is activated in the Account portlet must be true). The user logs in with card + PIN and can then create an Arena account (default: true). Should not be checked if the portal site is only includes libraries.	
User Agreement Id	The ID of the article with the Arena agreement for this site; defined during installation.	Should not be changed.
Favourite Agency Member	If a user is not logged-in, this agency member is chosen. It is recommended but not mandatory to set a favourite agency member. If not, the agency member with lowest ID will be used. Determines which library is default in hit lists and catalogue records.	Mandatory for Staff picks.

Media class icons

A list of all media class icons. Arena includes default icons, but to use other icons, type the URL:s for where to find them. First you need to upload the icons to Documents and Media. Not all media classes are relevant to all libraries.

Article search filters

Only used for Arena articles.

Portal

If you want to refer to a separate site for user help, enter the URL under Help URL.

Portal URL

These URL:s must be defined to use for example the News agent feature, for a link to the article or catalogue record to be included in the message to the Arena user.

Setting	Format of URL
URL to Article Detail	<code>https://[virtual_host_name]/detail?p_p_state=normal&p_p_lifecycle=1&p_p_action=1&p_p_id=articleDetail_WAR_arenaportlet&p_p_mode=view&p_r_p_arena_urn%3Aarena_search_item_id={0} /</code> <code>https://[virtual_host_name]/web/arena/detail?p_p_state=normal&p_p_lifecycle=1&p_p_action=1&p_p_id=articleDetail_WAR_arenaportlet&p_p_mode=view&p_r_p_arena_urn%3Aarena_search_item_id={0}</code>
URL to CRD	<code>https://[virtual_host_name]/results?p_p_state=normal&p_p_lifecycle=1&p_p_action=1&p_p_id=crDetailWicket_WAR_arenaportlets&p_p_mode=view&p_r_p_arena_urn%3Aarena_search_item_id={0}&p_r_p_arena_urn%3Aarena_agency_name={1} /</code> <code>https://[virtual_host_name]/web/arena/results?p_p_state=normal&p_p_lifecycle=1&p_p_action=1&p_p_id=crDetailWicket_WAR_arenaportlets&p_p_mode=view&p_r_p_arena_urn%3Aarena_search_item_id={0}&p_r_p_arena_urn%3Aarena_agency_name={1}</code>

Replace the parts in brackets with your Arena settings.

Cover Providers

Select a provider from which to get the cover images.

- URL Covers Store (covers stored in Arena (Solr), highest priority by default)
- Dbc
- Syndetics
- Amazon
- Adlibris
- Gyldendal

Click **Expand** for the provider, to make the following settings:

Setting	Description
Enabled	Check to enable the cover provider.
Covers path	The URL to the covers.
Min image size	The minimum size for an image to display
Priority	If using multiple cover providers, set the priority with the highest value first.

Note:

Despite the naming listed above, it is possible to connect to other providers by adding the cover path from the desired API.

There is a 24 hour cache on cover images, also including "no image". This means that when adding a new cover provider, it takes 24 h for the images to show.

Portal Emails

It is necessary to enter the following addresses to be able to for example send a hit list as e-mail.

Setting	Description
Administrator	Leave empty
General contact	The library's public e-mail address, for purchase suggestions, inter library loan requests and feedback to library etc. Note: This email address must be set.
Authorize contact	The sender email address in email sent from the system, related to administration of reviews and abuse reports, for example, no-reply@thelibrary.com.

Social Media

Enter the AddThis and Facebook IDs for the library's accounts in order to get statistics of Arena usage from these providers, and to enable the Facebook Like button in standard mode.

Search History

These settings for the News agent makes it possible for Arena users to save searches for titles or articles that they are interested in, and will receive an Arena message/e-mail when new titles or articles in their line of interest are available.

Setting	Description	Comment
Enabled	Check to enable the News agent.	
Alert on all hits first time	Check to enable the news agent setting to resend all results and not only the new ones	Special setting, rarely used
Language used in alert	The language to use in the inbox for Arena messages and e-mail messages	Sent by a locally running service that has no connection to the users' browsers

Search Suggestion Providers

You can enter a maximum of 5 different connections to external services, to display when a search has resulted in no hits.

Click **Expand** for the provider, to make the following settings:

Setting	Description
Enabled	Check to enable the search suggestion provider.
Logo URL	The URL to the search suggestion provider logo (not mandatory)
URL	The URL to the search suggestion provider. Format of URL: http://[[libraryname].[city].com/search?p_p_id=searchResult_WAR_arenaportlets&p_p_lifecycle=1 &p_p_state=normal&p_p_mode=view&search_query or http://[[libraryname].[city].com/web/arena/search?p_p_id=searchResult_WAR_arenaportlets&p_p_lifecycle=1 &p_p_state=normal&p_p_mode=view&search_query=
URL encoding	URL encoding
Title	What to call the search suggestion provider on the page.
Priority	If using multiple search suggestion providers, set the priority with the highest value first.

Configuration

Show Help link (default: false)

Site settings

The only settings that you need to consider under **Configuration** in the administration menu, are a few of the options under **Site Settings**:

Languages

Define which languages that should be available to the Arena users.

Advanced/Analytics

Enter the ID that Google Analytics or Piwik has provided you with, to get statistics about the Arena usage.

Advanced/Recycle bin

Define how long deleted items should be kept in the recycle bin before they are permanently deleted. The default value (43200 minutes) is the same as 30 days.

Managing pages

You can configure almost any aspect of a page. For example, you may add or remove a page, change a page's name, the way it looks, its dependency on other Arena features and settings, and its relationship to other pages.

Page permissions

In Arena, roles are used to define permissions. With the default delivery there are high level definitions of a couple of roles. We recommend not to use page permissions. For roles specific to page permissions, please contact Axiell support.

Navigation

You find the entire page structure of your Arena under **Administration/Navigation**. From here, you can add, remove and move pages, and change themes and css files of pages.

Many of the settings you can make here, are available also by clicking the cogwheel in the Liferay main menu. But it is only in this view that you can move pages.

Moving a page

You can move a page up or down in the hierarchy, or add a page as a sub page using drag-and-drop.

- To move a page to become a sub page, press the left mouse button and drag the page so that you point to the menu alternative that it should appear below.
- To move a page to become a stand alone menu alternative, press the left mouse button and drag the page so that you point to the menu alternative that it should appear above.

Configuring pages

1. Sign in to Liferay.
2. In the menu to the left, click **Navigation/Public pages**.
3. In the tree view, click the context menu for the page to configure. Select **Configure page**.
4. In **Name**, type the name of the page. This name will appear in the navigation bar.
5. You can select a particular flag to translate the wording for the languages that are activated.
Note: Do not create language versions of the URL of the page - only of the name.
6. Select **Hide from Navigation Menu** if you do not want the page to show in the menu. This is useful if the page is not yet ready for use.
7. In **Friendly URL** type the friendly URL for the page. Normally you do not need to change this.
Note: Use the same URL for all language versions of a page.
8. In **Type** you can change the page type that was set when creating the page.

Type	Description
Content Display Page	A regular page with portlets
Panel	Makes it possible to show alternative portlets in a list, for example for the users to choose between forms for acquisition proposals, inter library loans and contacting the library.
Embedded	Makes it possible to include a link to show an external website in an IFrame. You can do the same thing in any regular page by using the Arena portlet Dynamic IFrame or the Liferay portlet IFrame.
Link to URL	Reroutes from the current page to any URL that you type in the URL field. This means you can link to any other website.
Link to page of this Site	Reroutes from the current page to another page in the hierarchy - an internal link. You choose the destination page in the listbox Link to page .

9. Click **Save**.

Themes

Under **Menu - Navigation**, you can select which theme to use for the current page. The theme determines how you can position portlets on the page. There is a number of different Arena themes and it is recommended to only use the themes that starts with the word "Arena". The other themes are not tested with Arena functionality and accessibility in mind.

You can use different themes for different pages. Select the theme you want to use and click **Save**.

Search engine optimization

You can preview and send a site map to Google and Yahoo.

HTML Title: Enter the html title of the page. It is relevant to search engines and is shown as title in the browser.

MetaTags - You can enter content for three meta tags:

- **Description** is an important setting and should contain a short description of the site, to be shown, for example, in the Google hit list.
- **Keywords** is a comma separated list of keywords, and is less important than the description.
- **Robots** lets search robots know how to index the page.

The flags below each field represents the different languages used in your Arena. Select the flags for the languages that are used and translate the content of the fields.

If you want to exclude a page from indexing by search robots, enter NOINDEX, NOFOLLOW for **Robots**. If several languages are used, enter this for each language. Also select **No** for **Include**.

Sitemap - You can enter three settings:

- **Include** determines if the page is to be included int the XML file.
- **Page priority** determines how important this page is, compared to the other pages of the web site. Select a priority between 0.0 and 1.0.
- **Change frequency** indicates how often the page is updated and needs to be reindexed.

For more information about sitemaps, see: <http://www.->

[google.com/support/webmasters/bin/answer.py?answer=40318&cbid=-aol1bb624wc&src=cb&lev=answer](http://www.google.com/support/webmasters/bin/answer.py?answer=40318&cbid=-aol1bb624wc&src=cb&lev=answer)

Creating a page

Arena is delivered with a number of pages, but you can add more pages if you want to.

1. Sign in to Liferay.
2. In the menu to the left, select **Navigation/Public pages**.
3. In the tree view, click the context menu for the page that will be the parent page for the new page, and select **Add child page**.
4. Fill in a name for the new page.
This name will serve as a menu item when navigating in Arena and will be part of the URL that the system creates automatically.
5. If your website is multilingual, click the flag for the language you want to add and type the page name in that language as well.

Note:

Do not create language versions of the URL of the page - only of the name.

6. Select **Hide from navigation menu** if the page is not ready to be displayed to Arena users.
This is useful while the work with the new page is in progress.
7. Select page type.

Type	Description
Empty page	Creates an empty page with the layout you choose.
Full page	Not used

Type	Description
application	
Page set	Not used
Link to a Page of this Site	Functions as an immediate redirect to another page within the same site.
Panel	Can have any number of portlets on it but only one will be displayed at a time. The users select which portlet they want to use from a menu on the left side of the page, and the selected portlet takes up the entire page.
Embedded	Displays content from another website inside of your portal.
Link to URL	Redirects to any URL specified by an administrator.
Copy of a Page of this Site	Creates a copy of an existing page on the site.
Manage templates	Blog creates a page for editing and viewing blogs. Content Display Page has a layout which you can drag and drop portlets into. Wiki creates a wiki page Select Inherit changes if you want future changes to the template to automatically be applied to this page.

- Click **Add page** to save the changes.
The new page appears in the tree view.
- Go back to the page to configure the Friendly URL.

Note:
Use the same URL for all language versions of a page.

Using an existing page as template

It can be very useful to create some pages that include basic functionality, and use these as templates. You can for example create a page that contains the portlets **Search**, **Log in** and **Navigation**, and a footer. Once you have configured the portlets on the template page with the correct settings, regarding look and feel and functionality, you can copy this page and then just add portlets that are specific for the new page.

You use an existing page as template by selecting **Link to a Page of this Site** as page type. Please note, that if there was content on the page before linking to the template page, this will disappear.

Changes that you make to the template page after linking to it, will not be included on the new page - the only content that will appear identical is if the same article is included on both pages. If you change the article, the content will be updated everywhere it is used. The same goes for text included in portlets - if the same portlet is used in different places in Arena, updated text will have an impact everywhere.

Creating a copy of an existing page

It can be useful to create copies of pages, for example for backup purposes.

- Follow the instruction above for creating a page, but in the dropdown menu under **Type**, select **Copy of a page in this site**.
- Select the page in the **Copy from page** dropdown menu.
- Click **Add page**.

Deleting a page

Notes:
A deleted page cannot be restored.
When deleting a page, its sub pages will be deleted as well.

1. Click the context menu next to the name of the page that you want to delete and select **Delete**.
2. Check that you have selected the correct page and confirm.

Arena Nova

For Arena installations starting with version 4.0. there is a possibility to use Arena Nova for a smart and consistent user experience. Arena Nova is activated by Axiell. It includes several pieces of functionality that can be used as templates, for example featured spots, news articles and event articles. The following sections describe how you can make adaptations to suit your website.

Focus shortcuts

Focus shortcuts are positioned at the top of the start page to immediately catch the visitor's attention and interest. You can choose to highlight certain parts of the library activity or pages on the library site.

Follow the steps below to edit a focus shortcut:

1. Go to the start page. You find prepared examples of focus shortcuts.
2. Click the edit icon for the article that you want to update.
3. Change the header to the title that you prefer.
4. Add 2-3 lines of catchy text as description text.
5. Paste the link to the destination page - ideally you already have this page open in another browser tab.
6. Select an image from **Documents and media** or upload a new image from your computer. Make sure that the image is not in high resolution (adapted for print) to avoid that the page loads slowly. Make sure to enter an **Alt text** for accessibility.
7. Depending on the colors and brightness of the image, you may want to adapt the appearance of the text under **Text color and gradient options**. You can for example choose **White text / Black gradient** or vice versa - just try the different options to see which looks best with your selected image.
8. Alternatively, you may want to use a background color instead of an image - if so, enter the RGB code of the color you want to use in hexadecimal format.
9. Click **Publish** and refresh the page, to see that your focus shortcut has been saved and that the article is displayed the way you intended.

You can configure the order of the articles in the focus shortcut using the **Order** field. **1** is the largest image to the left. Make sure not to set the same value for the different articles - then the sorting will be made depending on the name of the article instead, and the order value has no effect.

That's how it works-articles

That's how it works-articles provide information about the library services that the library offers.

Some services can be described briefly and fits in a card without a link. Other services may need a more comprehensive description - then a link is provided to another page with all details.

Follow the steps below to add a That's how it works-article:

1. Go to the page with the information about the library services.
2. Click the **+** character in the asset publisher.
3. Select **That's how it works** in the list.
4. Fill in a title, a summary and content. If you only enter a summary and no content, there will be no link to the full-page view of the article.
5. If you want to link to another page from the That's how it works-article, use the **Link** field. Fill in the label of the link under **Link text**.
6. Select an image to be displayed in the full-page view of the article. Using an image is optional, but it enhances the article and the user experience. Select an image from **Documents and media** or upload a new image from your computer. Make sure that the image is not in high resolution (adapted for print) to avoid that the page loads slowly. Make sure to enter an **Alt text** for accessibility.

7. Select **Display Page** among the options at the bottom - in this case, **Article**.
8. Publish the article and refresh the page, to see that the article is displayed in the list.

News articles

The news articles can describe for example news and themes at the library. On the start page, you find the latest articles from the News category, with a link to the full-page view of the news article.

Follow the steps below to add a news article:

1. Go to the start page.
2. Click the **+** character in the asset publisher for news.
3. Select **Article** in the list.
4. Fill in a title, a summary and content. The summary is shown in the news list on the start page.
5. Select an image to be displayed in the full-page view of the article. Using an image is optional, but it enhances the article and the user experience. Select an image from **Documents and media** or upload a new image from your computer. Make sure that the image is not in high resolution (adapted for print) to avoid that the page loads slowly. Make sure to enter an **Alt text** for accessibility.
6. Select **Display Page** among the options at the bottom - in this case, **Article**.
7. Publish the article and refresh the start page, to see that the article is displayed in the list.
8. Click the article to see that the entire article is displayed in the full-page view.

Event articles

Event articles are used to describe events at the library that visitors can take part of, for example author readings, read-alouds of children's books or internet classes for seniors.

Events are presented on the start page (the six next events) and on the events page (all coming events).

Follow the steps below to add an event article:

1. Go to the events page.
2. Click the **+** character in the asset publisher for events.
3. Select **Events** in the list.
4. Fill in a title for the event.
5. Add a catchy yet descriptive text for the event under **Content**.
6. Enter a start date, start time and end time. If the event lasts for several days, also add an end date.
7. Fill in a location and an address.
8. Select an image from **Documents and media** or upload a new image from your computer. Make sure that the image is not in high resolution (adapted for print) to avoid that the page loads slowly. Make sure to enter an **Alt text** for accessibility.
9. Under **Metadata**, select categories such as location or target audience.
10. Under **Schedule**, enter the end date of the event as **Expiration Date**.
11. Select **Display Page** among the options at the bottom - in this case, **Single event**.
12. Publish the article and refresh the events page, to see that the event is displayed in the list.

Branch articles

The branches that are part of the library site are listed on a page that is typically named *Our Libraries*. You can click a branch to see a full-page view of that particular branch.

Follow the steps below to add a new branch:

1. Go to the page with the list of library branches.
2. Click the **+** character in the asset publisher for the library branches.

3. Select **Branch**.
4. Fill in a title - the name of the library branch.
5. Enter the address, zip code and city - this information is used to show the location of the library in Google Maps.
6. Enter an email address.
7. Select an image from **Documents and media** or upload a new image from your computer. Make sure that the image is not in high resolution (adapted for print) to avoid that the page loads slowly. Make sure to enter an **Alt text** for accessibility.
8. Add a short but brisk description of the branch. The text shows in a text box in the full-page view of the branch.
9. Under **Opening hours**, you can connect to Google Calendar or KIFI (Finland only).
Google Calendar: enter the name of the calendar for the branch, such as *Lagersberg library* - Axiell configures the connection to Google Calendar when it's time to activate the site.
KIFI (Finland only): Enter the exact string from KIFI.
10. Select **Display Page** among the options at the bottom - in this case, **Branch**.
11. Publish the article and refresh the page, to see that the branch is displayed in the list.
12. Click the article to see what the full-page view looks like. In case you want to update the description of the branch, just go back the list view and click **Edit** for the branch.

FAQ articles

FAQs are the kind of questions that visitors often ask the library. FAQ articles can be used to collect these questions on a page in a clever format where questions and answers can be displayed in a compact and user-friendly manner. For questions as well as answers - less is more!

Follow the steps below to add a new FAQ article:

1. Go to the FAQ page.
2. Click the **+** character in the asset publisher for the FAQs.
3. Select **FAQ** in the list.
4. Enter a title - the question.
5. Fill in the answer under **FAQ - answer**.
6. Publish the article and refresh the FAQ page, to see that the question and answer are displayed in the list.

Image resources and image handling

"A picture is worth a thousand words!" Just image what a text together with an image can accomplish on your library site.

If you don't have access to great images already - here are some examples of web sites where you can find free images to use.

- Unsplash - unsplash.com
- Pixabay - pixabay.com
- Picjumbo - picjumbo.com

Keep in mind that it's good practice to acknowledge the photographer by referring their name when you use images that others have taken, ideally at the end of the article or next to the image if it is used in running text.

The images that you find online may be in high resolution, and then need to be compressed in order not to slow down your web site. You can use a tool such as Photoshop or GIMP, or go to the site below, to quickly and easily change the size of an image:

- pinetools.com/resize-image

You simply upload the image, select **Pixels** and enter a value. *1500* is a value that works well with Arena articles. Then just click **Resize** and download the image.

For the articles used in this description of Arena Nova, it is recommended to use images in landscape format 4:3, approximately 1500 pixels wide. It is the format rather than the size that is essential, as Arena will display the image in the proper dimensions accordingly.

Portlets in Arena

There are more than 40 Arena-specific portlets that may be used to serve the needs for an Arena site.

A number of standard Liferay portlets are also supported and tested with Arena, and those are included in this documentation. There are many more Liferay portlets, of which most also works with Arena.

All portlets have a set of configurations. All configurations apply to the portlet instance only, which means that if a portlet is used several different times on a page or on different pages it can (and has to) be configured for each one. This means that a portlet can look and behave differently according to what is needed in the specific instance.

Note:

For personal security reasons, all patron-related pages in Arena must include /protected in its path, for example [https://www.\[libraryname\].com/protected/reservations](https://www.[libraryname].com/protected/reservations). For data security reasons, these pages are cleared when the user signs out, and you can for example not navigate back to these pages in the web browser.

Symbols in the list of portlets



A portlet with this symbol can be added several times on a page.



A portlet with this symbol can only be added once on each page.

Portlets required for basic Arena functionality

The following portlets are needed to fulfill basic Arena functionality:

Portlet	Description
Account	This is where the user signs in to Arena. When signed in, the user can find links to loans, fees, reservations etc. here.
Admin: installation details	This portlet is used to set up the properties for all levels of the Arena installation. The contents of the portlet are only visible to administrators.
Catalogue record	This portlet displays the catalogue record in a detailed format. When you click on a catalogue title in a search results list, this is where you go, and will see the holding information. From here, you can make a reservation or download e-media.
Facets	This portlet displays facets for titles found by a search. You can display facets for subjects, authors, year, media type, and more. Facets can be used to filter search hits by for example selecting Book to show only that media type. On record level, you can use facets to expand the search, by for example creating a list of all other titles by the same author.
My fees or Charges + Payment history	My fees displays all active debts and payments that a user has provided that the library uses the online payment module and the payment provider Nets (not Easy from Nets). Charges and Payment history is used if the library uses the online payment module and the other payment providers than Nets.
My loans	This portlet displays the patron's current loans, and loans can be renewed from here.
My ratings	This portlet displays all titles that have been rated with stars by the user.
My reservations	This portlet displays the patron's current reservations, and reservations can be edited or deleted from here.
My reviews	This portlet displays the titles that the patron has reviewed, and reviews can be edited or deleted from here.
My tags	This portlet displays all tags (keywords) that the user has used to tag titles.
Search	This portlet is used for all searches. It usually appears within the page header. As this portlet is one of Arena's primary features, it is usually available on all pages. You can make a number of settings for this portlet and also create filters.

Portlet	Description
Search results	This portlet displays catalogue search results.
Tags: add tags	This portlet displays the user-generated tags (keywords) associated with titles. To be placed on the record page (/results).
Tags: tag cloud	This portlet displays frequently used tags added by Arena users. In search results used for tags based on search results, as individual cloud presenting most used tags. A maximum of 20 tags can be displayed.

The following Liferay portlets are used in the default Arena installation:

Portlet	Description
Navigation	This portlet is used to navigate in the underlying pages. It is automatically updated as new pages are added. It is available on most pages but only needed on pages with subpages.
Language	This portlet makes it possible to change languages.

Please see the online help for a description of the other portlets that can be used in Arena: help.arena.axiell.com/en_GB/Content/Portlets/portlets.htm

Placement of portlets

Although Arena is a very flexible system for web publishing, there are some portlets, such as Search results and patron-related portlets that are placed on particular pages in the default installation - keep these as is and do not move them to other pages. Do not change names or add translations for the pages that are part of the default installation.

The portlets Language, Navigation, Search, Account, Top list, Media list and Results list can be placed on any page. So can Purchase suggestion, Interlibrary loan request and Feedback to library, but Purchase suggestion and Interlibrary loan request require that the user signs in.

Any portlet that starts with "Admin" and the portlet About Arena are administrative pages, hidden from end users.

Configuring portlets

Portlets may be configured in many ways. For example, you may change the way a portlet looks, the captions it uses, the data entry that it may accept, and its position on the screen.

The control toolbar

Each portlet can be configured using the control toolbar.

You access the toolbar from the context menu in the top right corner of the portlet. The context menu becomes visible when you hover over the portlet.

Examples of settings that can be configured:

- The look and feel of a portlet. For example, you may change the fonts, colours and titles.
- Configuration of user types that may view this portlet.
- Preferences for a portlet, that is, how the portlet works. For example, you may set data entry parameters. This only appears for Arena-specific portlets.
- Export and import of settings and user preferences for a portlet.

When making changes in the control toolbar and clicking **Reset**, the settings will reset to default. If you click **Reset** by mistake, click **Cancel** and close the window.

Look and feel

Setting the portlet title or renaming a portlet

Each portlet has a title that appears on the screen. Portlet titles are set automatically in Arena, but you can also set them manually or adjust them.

You can rename a portlet in different ways, for example by clicking the title in the portlet or by entering the portlet preferences. You can also update the title using the control toolbar.

Changing the title using the control toolbar

1. Select **Look and Feel Configuration** in the context menu.
2. Select **Yes** for **Use Custom Title**.
3. In the title field, type the new title for the portlet.
4. Choose a language for the title. This must be the language in which the title has been written. When an Arena user chooses their preferred language, Arena will use the title in the chosen language for each portal.
5. Make sure that **Decorate** or **Borderless** is selected for **Application Decorators**. The **Barebone** setting displays no portlet title.
6. Click **Save**.

Setting advanced styling

You can specify a custom CSS for use with a portlet, and apply CSS rules to control how the CSS behaves with this portlet or all similar portlets.

It is recommended to create a class that refers to the CSS file rather than to add the code in this window.

Assigning user permissions to portlets and pages

Note:

Permissions can also be defined for assets such as portlets, under **Roles** in the Control panel. Permissions granted or removed in the Control panel override permissions set at the more granular level.

1. Select a portlet on a page and click its context menu at the top right, or click the context menu for the entire page.
2. Select **Permissions**.
The Permissions page opens.
3. Select the permissions different roles should have.
4. Click **Save**.

To test the permissions you granted, select **Users and organizations** in the Administration menu, and click the in the context menu for a user with the role you adapted, select **Impersonate user**.

Liferay articles

Liferay articles can be written by any Liferay user, to be published on the Arena site for patrons to read and comment upon. Liferay articles use the Web content display portlet.

Starting with Arena 4.0, you are recommended to start using Liferay articles instead of Arena articles. The workflow in Liferay articles is more intuitive and it is easier to work with images. There is also support for version handling and restoring of deleted articles. Articles can be published and unpublished at a certain date and time. Arena articles will still be supported but will not be further developed.

Liferay articles can only be shared locally; not with other Arena sites. Liferay articles cannot be linked to catalogue records - Staff picks is used for this functionality.

You find articles and assets related to these, such as the Documents and media library, forms, tags and categories, under **Content** in the administration menu.

Creating a Liferay article

1. Log in to Liferay, and click your site name (Arena) in the left hand menu, click **Content/Web content**. Then click the plus sign in the bottom right corner, and select **Basic web content**.
2. Fill in **Title** and **Content**, and upload images if you want to.
3. Save the article as draft or click **Publish** when it is ready.

You have now created the content of the article, to be imported into a Web content display portlet.

Adding a Liferay article on a page

You can add an article directly on a page without having added the Web content display portlet on the page first.

1. Sign in to Liferay and go to the page where you want to add the article.
2. Click the plus sign at the right of the top menu to open the portlet menu on the right-hand side.
3. Select **Content** and search for the article.
4. Drag the article from the menu on the right-hand side and drop it in a frame on the page.

The article is now present on the page and automatically included in the Web content display portlet.

Arena articles

Starting with Arena 4.0, you are recommended to start using Liferay articles instead of Arena articles.

All Arena users can write articles that may contain all kinds of editorial material, if the library allows this. The articles have to be approved by an Arena user with the Articles permission before they are published.

You find the interface for writing articles on the page `/article-write`. But since there is a particular portlet intended for writing articles, Articles: create article, it can be placed at any administrative page.

Approving articles

You can search for not yet approved articles on the page `/protected/article-admin`.

Note:

You need to be signed in as an Arena user with Articles permission in order to view and edit the not yet approved articles.

1. Click on the link **Not yet approved articles** to search for these. Alternatively, search using the syntax `status:Pending` in the search field on the page `/protected/article-admin`. Some older installations do not include `/protected` in the path to `article-admin`.
The articles are displayed in a list.
2. Click on a title to see the full text.
3. Click **Edit** and make the changes you wish including adding images, keywords, content groups etc.

Handling abuse and reviews

The library staff can approve or deny reviews (provided that you have selected that approval is needed) and handle abuse of reviews and discussions. The portlet used for this is called Admin: moderation and is only available for staff that has been assigned the AbuseHandling permission.

Admin: moderation

This portlet serves three tasks:

- Forum (posts and threads) abuse
- Review abuse
- Review authorization.

In a multi-agency system, responsibility for abuse handling depends on who owns the catalogue record being viewed when adding the review or posting. The portlet requires abuse handling permission and is placed on a staff's page.

The portlet comprises three fields. They display different information, depending on the current task.

Click the links to see the actual texts and the user data. The e-mail that is sent when approving a review or handling abuse has the sender address that you entered in the Admin: installation details portlet under Authorise.

Forum post

Here the staff can handle complaints on forum posts. A signed-in patron can send such a complaint and from here the posts can be deleted.

- Top field displays the thread title.
- Middle field displays the title and body of the post.
- Bottom field displays the abuse report.
- Ignore button: Click to delete the abuse report and send an e-mail to the user who sent the complaint.
- Remove button: Click to delete the post and e-mail the author of the post (as found in the editor field of the post).

Review abuse

Here the staff can handle complaints on reviews posts. A signed-in patron can send such a complaint and from here the posts can be deleted.

- Top field displays the title of the item being reviewed.
- Middle field displays the title and body of the review.
- Bottom field displays the abuse report.
- Ignore button: Click to delete the abuse report and send an e-mail to the user who sent the complaint.
- Remove button: Click to delete the post and e-mail the author of the review (as found in the editor field of the review).

Review authorize

If the library has chosen that all reviews should be approved of before publishing, that is handled from here.

- Top field displays the title of the item being reviewed.
- Middle field displays the title and body of the review.
- Bottom field is not used.
- Ignore button: Click to not authorize the review.
- Authorise button: Click to authorize the review and e-mail the author of the review (as found in the editor field of the review).

Configuration

- Maximum number of characters: Here you define how many characters a report may contain. Default: 50
- Show Help link. Default: false
- Text of e-mail informing the user their post is not approved. Default: Your report of an abusive review/forum post is being ignored.

Searching in catalogue records

Arena doesn't search directly in the library system (for example BOOK-IT), but in an index of its own. Selected data is exported from the library system to Arena and is indexed there. This entails a delay of a maximum of five minutes before a newly imported record becomes searchable in Arena. The same goes for titles that have been deleted from the library system.

You search using the Search portlet that is already available on most pages, except the page with Advanced search. The free text search searches in all the fields under **Search parameters for catalogue records**, except id, organisationId, departmentId and branchId unless you enter a prefix (equivalent to qualifiers).

Very specific searches (used by library staff and not by patrons) are often performed using the Dynamic list functionality.

Single words

For example, typing *dolly* searches in free text for the word *dolly*.

Phrases

Quotation marks are used for phrases, for example *"hello dolly"*.

Multiple words

Multiple words are by default combined with the AND operator, for example, typing *hello dolly* gives the same result as *hello AND dolly*.

Truncation

You can mask a character using *?*, for example, typing *te?t* to find test, text etc.

You truncate one or more characters using ***, for example, typing *test** will find all words that begin with test, such as tests, tester etc.

You can also use *** inside a word, for example *te*t*.

You can use *** several times in the same word, for example *w*man**.

You can truncate after having typed the first character, and you can truncate to the left.

Boolean operators

You can combine searching for multiple words using the Boolean operators AND, NOT and OR. You type operators in upper case, and in English, or else they will be considered regular words. You can use *+* for AND and *-* for NOT.

dog OR cat searches for records that contain either "dog" or "cat".

dog AND cat searches for records that contain both "dog" and "cat".

dog NOT cat searches for records that contain "dog" but not "cat".

(dog OR cat) AND subject:pets searches for records that contain either "dog" or "cat" and the subject "pets". You need to group items that belong together using parentheses when you use OR together with other operators to get the correct search results.

Fuzzy search and the similarity factor

If the search phrase does not get an exact match, you can configure the system to run a fuzzy search (you set which fields to include in a fuzzy search) and then also define the similarity factor between 0 and 1. The closer to 1, the closer to the exact search phrase will the results be.

The portlets listed below are the portlets where to set fuzzy search. The reason for why you need to set fuzzy search and similarity factor in all the portlets is that, when there is a search in the Search portlet, each one of the portlets recognizes this and uses the same search string to run its own search. Thus, it is important that the fuzzy search and similarity factor settings are the same in the articles portlets (the five first) and catalogue portlets (five last) respectively.

- Articles: article details
- Articles: facets
- Articles: query search
- Articles: search results list
- Articles: show article
- Catalogue record
- Facets
- Results list
- Search results
- Tags: tag cloud

Search parameters for catalogue records

The following parameters are available to search on when it comes to catalogue records. You can use Boolean AND and OR to combine several fields. You can type the prefixes in lower case, except when truncating.

To search using prefixes, enter the prefix followed by colon, for example:

subject:horses

or

title:happiness

or

author:"lama, dalai" - note that the search author:lama, dalai searches in free text for "lama".

Parameter	Comment																																							
accessionDate	accessionDate:[NOW-6MONTH TO *] alt. accessionDate:[NOW-3WEEK TO *] alt. accessionDate:[NOW-7DAY TO *]																																							
agencyName	Code for the library, for example ASE000001																																							
author	The author																																							
branchId	agencyName followed by the ID of the organization and the unit, separated by the pipe character, for example ASE000001 10718 10720																																							
category	Fiction, non-fiction or music. Applied by using fictionCategory, nonFictionCategory and music																																							
classificationCode	Classification code is case-sensitive.																																							
contentType	Type of publication: <table border="0"> <tr> <td>abstractSummary</td> <td>handbook</td> <td>programmedText</td> </tr> <tr> <td>bibliography</td> <td>humorSatire</td> <td>review</td> </tr> <tr> <td>calendar</td> <td>index</td> <td>shortStory</td> </tr> <tr> <td>comicGraphicNovel</td> <td>lawReportDigest</td> <td>speech</td> </tr> <tr> <td>catalog</td> <td>legalArticle</td> <td>speech</td> </tr> <tr> <td>catalogue</td> <td>legalCaseNotes</td> <td>standardSpecification</td> </tr> <tr> <td>dictionary</td> <td>legislation</td> <td>statistics</td> </tr> <tr> <td>directory</td> <td>letter</td> <td>surveyLiterature</td> </tr> <tr> <td>discography</td> <td>mixedForm</td> <td>thesis</td> </tr> <tr> <td>drama</td> <td>novel</td> <td>technicalReport</td> </tr> <tr> <td>encyclopedia</td> <td>offprint</td> <td>treaty</td> </tr> <tr> <td>essay</td> <td>patentDocument</td> <td>yearbook</td> </tr> <tr> <td>filmography</td> <td>poetry</td> <td></td> </tr> </table>	abstractSummary	handbook	programmedText	bibliography	humorSatire	review	calendar	index	shortStory	comicGraphicNovel	lawReportDigest	speech	catalog	legalArticle	speech	catalogue	legalCaseNotes	standardSpecification	dictionary	legislation	statistics	directory	letter	surveyLiterature	discography	mixedForm	thesis	drama	novel	technicalReport	encyclopedia	offprint	treaty	essay	patentDocument	yearbook	filmography	poetry	
abstractSummary	handbook	programmedText																																						
bibliography	humorSatire	review																																						
calendar	index	shortStory																																						
comicGraphicNovel	lawReportDigest	speech																																						
catalog	legalArticle	speech																																						
catalogue	legalCaseNotes	standardSpecification																																						
dictionary	legislation	statistics																																						
directory	letter	surveyLiterature																																						
discography	mixedForm	thesis																																						
drama	novel	technicalReport																																						
encyclopedia	offprint	treaty																																						
essay	patentDocument	yearbook																																						
filmography	poetry																																							
departmentId	agencyName followed by the ID:s for the organization, unit and department, separated by the pipe character, for example ASE000001 10718 10720 1217																																							

Parameter	Comment																																																																														
description	From the field for the description of the story (from BTJ, field 513)																																																																														
edition	The edition																																																																														
id	Catalogue ID in the library system																																																																														
language	Use the standard MARC21 language code (3 letters), for example language:swe for Swedish																																																																														
languageOriginal	Use the standard MARC21 language code (3 letters), for example languageOriginal:swe for Swedish																																																																														
mediaClass	<p>Media type / publication type:</p> <table border="0"> <tr> <td>artefact</td> <td>eAudio</td> <td>paperback</td> </tr> <tr> <td>article</td> <td>eBook</td> <td>periodical</td> </tr> <tr> <td>audioBook</td> <td>eBraille</td> <td>photograph</td> </tr> <tr> <td>bibliography</td> <td>eLearning</td> <td>picture</td> </tr> <tr> <td>blueray</td> <td>eMusic</td> <td>pictureBookWithBrailleText</td> </tr> <tr> <td>book</td> <td>ePaper</td> <td>printedMusic</td> </tr> <tr> <td>bookAndCassette</td> <td>ePeriodical</td> <td>ps2Game (=Playstation 2 game)</td> </tr> <tr> <td>bookAndVisualRecording</td> <td>eVideo</td> <td>ps3Game (=Playstation 3 game)</td> </tr> <tr> <td>braille</td> <td>easyRead</td> <td>ps4Game (=Playstation 4 game)</td> </tr> <tr> <td>brailleAndText</td> <td>electronicMaterial</td> <td>psGame (=Playstation game)</td> </tr> <tr> <td>brailleMusic</td> <td>excessBooksgame (=non-electronic game)</td> <td>score</td> </tr> <tr> <td>cassette</td> <td>gameboyGame</td> <td>serial</td> </tr> <tr> <td>cd</td> <td>giantPrint</td> <td>sheetMusic</td> </tr> <tr> <td>cdAndBook</td> <td>hardback</td> <td>soundRecording</td> </tr> <tr> <td>cdBook</td> <td>hybridBook</td> <td>sportEquipment</td> </tr> <tr> <td>cdRom</td> <td>internet</td> <td>tactileBook</td> </tr> <tr> <td>computerGame</td> <td>largePrint (only applies to MARC21 in the default configuration of BOOK-IT)</td> <td>talkingBook</td> </tr> <tr> <td>daisy</td> <td>map</td> <td>talkingBookMp3</td> </tr> <tr> <td>data (not used in the default settings in the window Icon rules/Media classes)</td> <td>microFilm</td> <td>text</td> </tr> <tr> <td>digitalAudioFile</td> <td>microForm</td> <td>topicBox</td> </tr> <tr> <td>dissertation</td> <td>mixedMedia</td> <td>toy</td> </tr> <tr> <td>document</td> <td>moonAlphabet</td> <td>video (=film that is not VHS, DVD or blueray)</td> </tr> <tr> <td>dvd</td> <td>music</td> <td>videoGame</td> </tr> <tr> <td>dvdRom</td> <td>newspaper</td> <td>videoTape (=VHS film)</td> </tr> <tr> <td>dvdVideo</td> <td>otherMaterial</td> <td>vinyl</td> </tr> <tr> <td></td> <td></td> <td>wiiGame (=Nintendo wii game)</td> </tr> </table>	artefact	eAudio	paperback	article	eBook	periodical	audioBook	eBraille	photograph	bibliography	eLearning	picture	blueray	eMusic	pictureBookWithBrailleText	book	ePaper	printedMusic	bookAndCassette	ePeriodical	ps2Game (=Playstation 2 game)	bookAndVisualRecording	eVideo	ps3Game (=Playstation 3 game)	braille	easyRead	ps4Game (=Playstation 4 game)	brailleAndText	electronicMaterial	psGame (=Playstation game)	brailleMusic	excessBooksgame (=non-electronic game)	score	cassette	gameboyGame	serial	cd	giantPrint	sheetMusic	cdAndBook	hardback	soundRecording	cdBook	hybridBook	sportEquipment	cdRom	internet	tactileBook	computerGame	largePrint (only applies to MARC21 in the default configuration of BOOK-IT)	talkingBook	daisy	map	talkingBookMp3	data (not used in the default settings in the window Icon rules/Media classes)	microFilm	text	digitalAudioFile	microForm	topicBox	dissertation	mixedMedia	toy	document	moonAlphabet	video (=film that is not VHS, DVD or blueray)	dvd	music	videoGame	dvdRom	newspaper	videoTape (=VHS film)	dvdVideo	otherMaterial	vinyl			wiiGame (=Nintendo wii game)
artefact	eAudio	paperback																																																																													
article	eBook	periodical																																																																													
audioBook	eBraille	photograph																																																																													
bibliography	eLearning	picture																																																																													
blueray	eMusic	pictureBookWithBrailleText																																																																													
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bookAndVisualRecording	eVideo	ps3Game (=Playstation 3 game)																																																																													
braille	easyRead	ps4Game (=Playstation 4 game)																																																																													
brailleAndText	electronicMaterial	psGame (=Playstation game)																																																																													
brailleMusic	excessBooksgame (=non-electronic game)	score																																																																													
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cd	giantPrint	sheetMusic																																																																													
cdAndBook	hardback	soundRecording																																																																													
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daisy	map	talkingBookMp3																																																																													
data (not used in the default settings in the window Icon rules/Media classes)	microFilm	text																																																																													
digitalAudioFile	microForm	topicBox																																																																													
dissertation	mixedMedia	toy																																																																													
document	moonAlphabet	video (=film that is not VHS, DVD or blueray)																																																																													
dvd	music	videoGame																																																																													
dvdRom	newspaper	videoTape (=VHS film)																																																																													
dvdVideo	otherMaterial	vinyl																																																																													
		wiiGame (=Nintendo wii game)																																																																													
note	Comments																																																																														
number	For example ISBN, ISSN, volume number																																																																														
organisationId	agencyName followed by organization ID, separated by the pipe character, for example ASE000001 10718																																																																														
other	Item supplier																																																																														
publicationYear	Can also be used for range, for example, publicationYear: [2010 TO 2013]																																																																														
publisher	The name of the publisher																																																																														
recordControlNumber	Title number for example BTJ-number)																																																																														
resourceType	Search either physical or electronical																																																																														
shelfMark	Shelf marks are case-sensitive. Shelf marks usually begins with a capital letter but there are exceptions such as uHc.																																																																														

Parameter	Comment
subject	Keywords in the catalogue records
tag	Keywords/tags
targetAudience	Adult, youth or children. Search either a (adult), y (youth) or j (juvenile)
title	The title
titleMain	Main title
titleOriginal	Original title - only applies to translated items
titleSeries	Title of series

If you don't know the IDs for your departments, please contact Axiell support.

Search parameters for Arena articles

You can search using parameters when it comes to Arena articles.

Examples

status:Ready shows all approved articles

status:Draft shows all article drafts

status:Pending shows all articles that are not yet approved

subject:nature shows all articles with the subject "nature" (same subjects as in the library system)

content_type:"News on the start page" shows all articles of the type "News on the start page" (fetched from metadata set in the articles).

Linking and syntaxes

Dynamic links

You can link to any services and websites from the hit list and the record page in the Dynamic links portlet. Using a particular syntax makes the link bring the performed search that resulted in a hit list in Arena, or the title information from the record page.

You find some useful links below. If you want to link to other services, you will have to find out the correct syntax by performing a search on the website you want to link to. Copy the URL that is missing in the address field and replace your search query with the syntax `${externalQuery?url}`. Paste the link in Dynamic links. You need to specify if the page is coded in UTF-8 or ISO-8859-1 before the link. If you don't know the coding, you can test the different variants and search for a word that contains special characters such as Swedish å, ä or ö. The website interprets the query if the coding was correct.

```
[#setting url_escaping_charset="UTF-8"]
```

```
[#setting url_escaping_charset="ISO-8859-1"]
```

Links in Dynamic links from the record page

Libraries using Arena 4 and later

```
[#setting url_escaping_charset="UTF-8"]https://libraryname.city.com/search?p_p_id=searchResult_WAR_arenaportlet&p_p_lifecycle=1&p_p_state=normal&p_p_mode=view&p_r_p_arena_urn%3AArena_search_query=${query?url}
```

```
[#setting url_escaping_charset="UTF-8"]https://libraryname.city.com/web/arena/search?p_p_id=searchResult_WAR_arenaportlet&p_p_lifecycle=1&p_p_state=normal&p_p_mode=view&p_r_p_arena_urn%3AArena_search_query-y=${query?url}
```

Replace domain and domain name

Libraries using BOOK-IT PUB v.4.0 and later

```
[#setting url_escaping_charset="UTF-8"]https://libraryname.city.com/web/pub/search?p_p_id=searchResult_WAR_arenaportlet&p_p_lifecycle=1&p_p_state=normal&p_p_mode=view&p_r_p_arena_urn%3AArena_search_query-y=${query?url}
```

Replace domain and domain name

LIBRIS

```
[#setting url_escaping_charset="UTF-8"]http://libris.kb.se/hitlist?d=libris&q=${externalQuery?url}&f=simp&spell=true&hist=true&p=1
```

Göteborgs stadsbibliotek

```
[#setting url_escaping_charset="UTF-8"]http://www.gotlib.goteborg.se/search*swe/X${externalQuery?url}
```

Biblioteket.se

```
[#setting url_escaping_charset="UTF-8"]https://biblioteket.stockholm.se/sok?freetext=${externalQuery?url}
```

Wikipedia

```
[#setting url_escaping_charset="UTF-8"]http://sv.wikipedia.org/wiki/${externalQuery?url} check-&mode=simple&ckbox=SIM03163&ckbox=SIM03287&ckbox=SIM03204&ckbox=SIM03932&ckbox=SIM03219&find_request_1=[#if title?]?${title?url}[/#if][#if author?? && title??]+[/#if][#if author??]?${author?url}[/#if]
```

Legimus

```
[#setting url_escaping_charset="UTF-8"]http://www.legimus.se/search?query=${externalQuery?url}
```

Syntax for links with 0 hits

Links to libraries with Arena

http://libaryname.city.com/search?p_p_id=searchResult_WAR_arenaportlets&p_p_lifecycle=1&p_p_state=normal&p_p_mode=view&search_query=

http://libaryname.city.com/web/arena/search?p_p_id=searchResult_WAR_arenaportlets&p_p_lifecycle=1&p_p_state=normal&p_p_mode=view&search_query=

Syntax for similar titles

You use the Dynamic list portlet to provide suggestions of similar titles of the same media type and language based on subject. Paste the syntax below in the **Query** field:

```
[#if mediaClass?? && mediaClass != "" && subjects?? && (subjects?size > 0) && catalogueLanguages?? && (catalogueLanguages?size > 0)]([#list subjects as subject]subject:"${subject}"[#if subject_index < subjects?size-1] OR [#if][/#list]) AND ([#list catalogueLanguages as catalogueLanguage]language:"${catalogueLanguage}"[#if catalogueLanguage_index < catalogueLanguages?size-1] OR [#if][/#list]) AND mediaclass:"${mediaClass}" AND NOT uberkey:"${catalogueUuid}"[#if]
```

Make other settings according to your preferences.

Syntax for other titles by the same author

You use the Dynamic list portlet to provide suggestions of other titles of the same media type and language by the same author. Paste the syntax below in the **Query** field:

```
[#if author?? && catalogueUuid?? && catalogueLanguages?? && (catalogueLanguages?size > 0) && mediaClass?? && mediaClass != ""]author:"${author}" AND ([#list catalogueLanguages as catalogueLanguage]language:"${catalogueLanguage}"[#if catalogueLanguage_index < catalogueLanguages?size-1] OR [#if][/#list]) AND mediaclass:"${mediaClass}" AND NOT title:"${title}" NOT uberkey:"${catalogueUuid}"[#if]
```

Make other settings according to your preferences.

Syntax for dynamic news list

You use the Dynamic list portlet to create a list that shows the latest catalogued items.

In the **Query** field, enter a syntax using the prefixes described above.

Make sure that **Arena index** is selected for **Type of search** and that **Default accession date** is selected for **Sorting**. This means that the latest added title is shown first.

To avoid that titles before a defined day are shown, you can also add the syntax below, and adjust it according to your preferences, for example using **MONTH** instead of **DAY**.

```
accessionDate_index:[NOW/DAY-7DAY TO NOW]
```