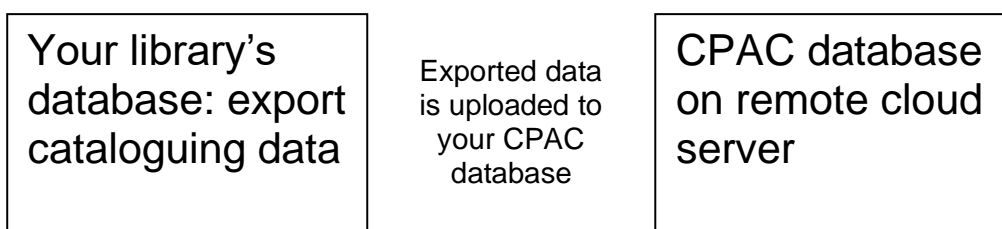# CPAC

Contents

What is CPAC?

CPAC stands for *Cloud-based Public Access Catalogue.*

CPAC allows users to search the library catalogue from anywhere - at home, book shopping, in the school - on any device with an Internet browser. Devices include desktop computer, laptop, tablet, iPad, phone, smart TV. Any operating system can be used Windows, Macintosh, iOS, Android, Linux, Unix, etc.

Due to firewalls surrounding school networks, CPAC is unable to tap directly into your library's database. Instead, CPAC works with a copy of your data that is uploaded to a cloud server.

The data is completely secure and cannot be altered in any way. *No borrower information is held in the CPAC database.*

Your library's database: export cataloguing data	Exported data is uploaded to your CPAC database	CPAC database on remote cloud server

Your copy of CPAC is a small website, located on our secure server.

The catalogue is searched by going online using a browser, such as Microsoft Edge, Google Chrome, Firefox, Safari and others. A normal Internet URL is used to bring up the "search entry page". A search is entered her the same as happens in Bookmark's Windows-based Search module and the Webopac. They then see a list of items found. Clicking on a title shows the item's details "Details page".

CPAC can be used for one site, but a single page can be set up to allow searching many different library databases at the same time. One search page can serve multiple schools.

There are two different forms of CPAC:

- Basic
  The basic form provides a "no frills" appearance to the search page. It is very easy and quick to set up.

- Custom
  You can design your own custom "search page" and choose other options to have a more unique presentation suited to your school or library. The Bookmark team can develop your design into pages on the Internet. IT support is not required.

Search Page

Example of a *Basic Search Page*:
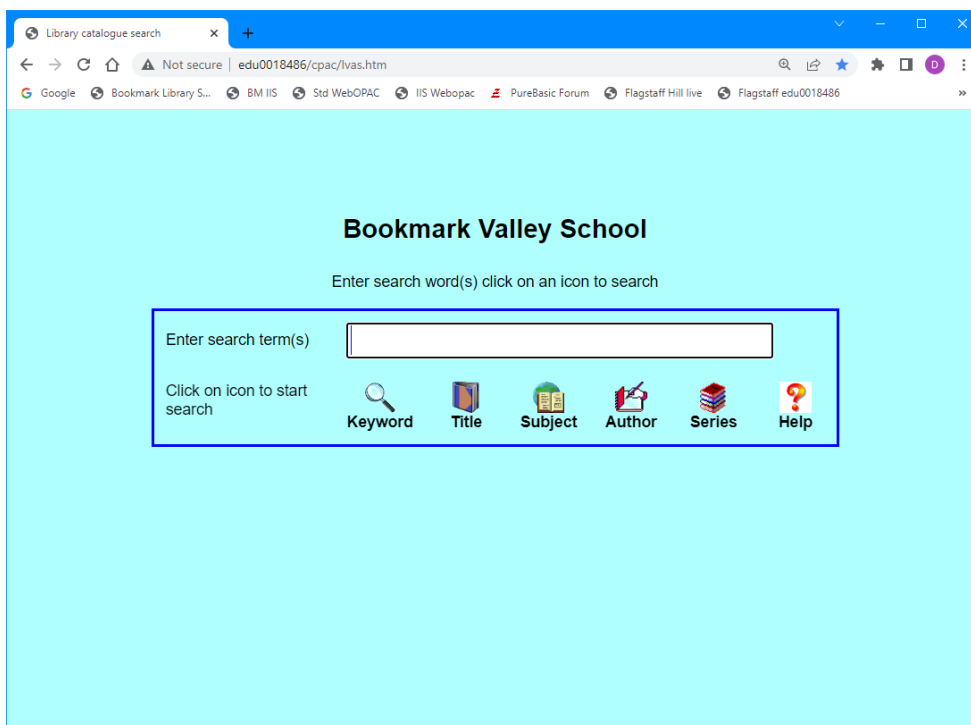
Example of a simple *Custom Search Page*:
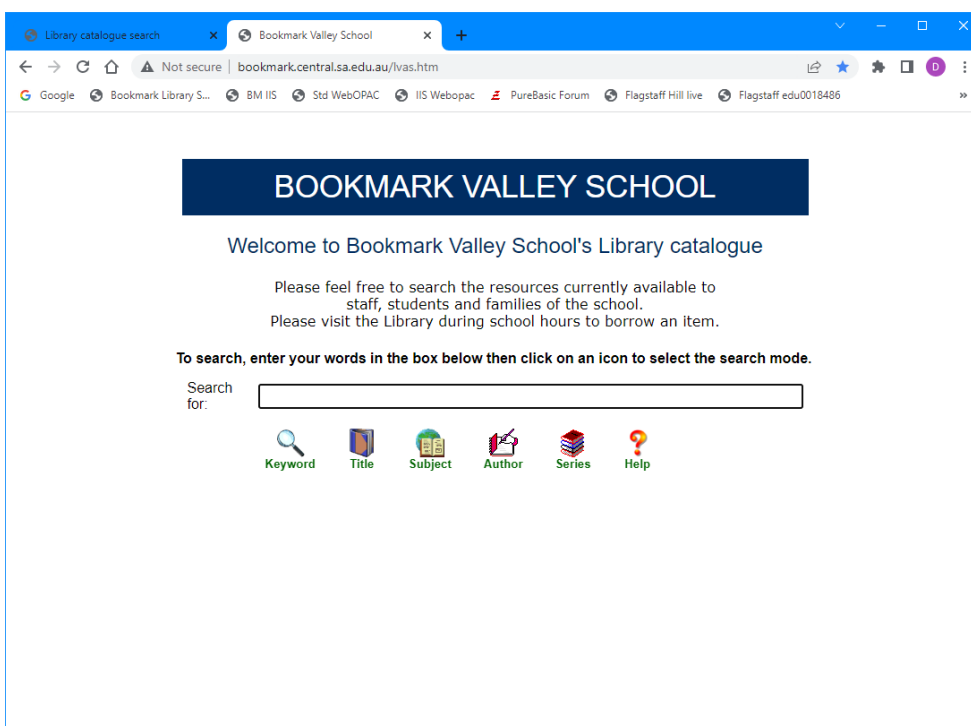
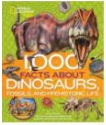Examples of many other CPAC custom seach pages can be viewed online at the Bookmark website in the CPAC section.
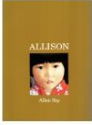
Results page

A list of items found by the search appears on the Title List page. Three presentations are available: Tile, Row or Column formats. Displaying book cover images is optional.

A maximum of 500 entries can be displayed on a page.

Click on a title or image to see the item's details.

Details Page

Clicking on a title displays details about the entry:

Setting Up a Basic CPAC Website

A Basic CPAC website or "site" can be created within Bookmark. *Technical knowledge is not required.*
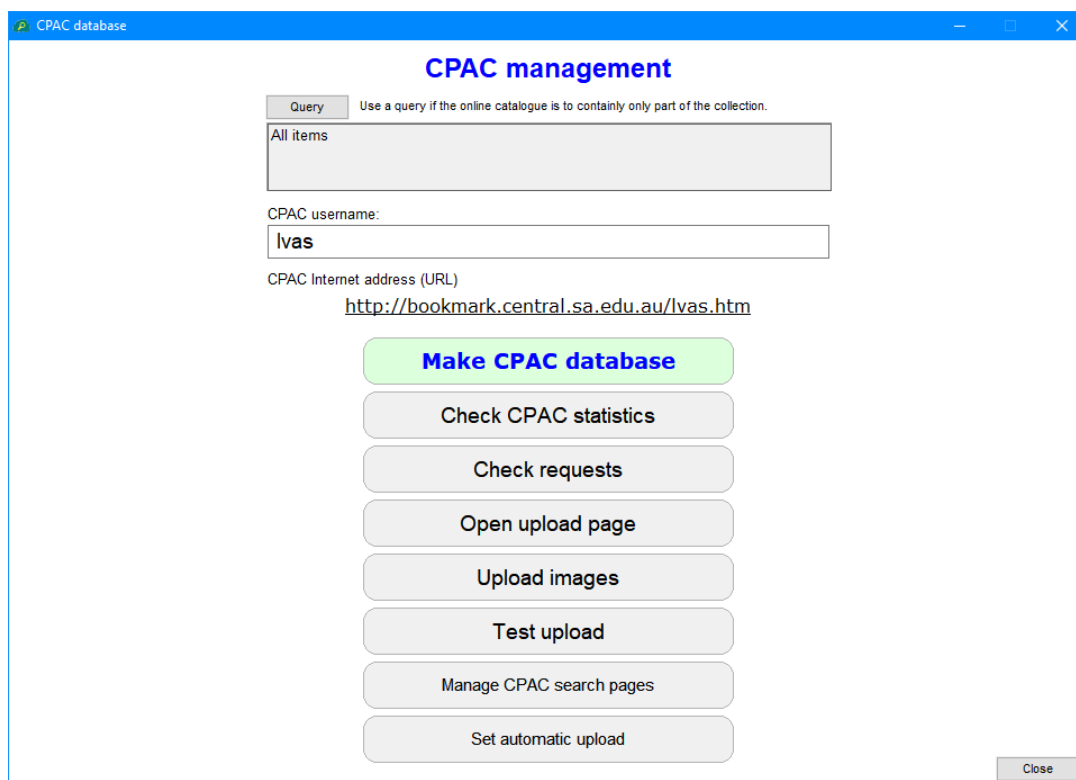
Simply fill out the form and then click on the Create CPAC Website button.

Bookmark compiles the webpages and uploads them to the CPAC webserver along with a blank database.

Note: firewall rules on some network systems block the uploading function. If blocked, Bookmark is unable to make a basic site. To see if you are blocked or not, go to Controls then General Controls. Click on the System tab then click on Test File Upload. Entering a proxy may solve the problem, especially for Department for Education schools in Victoria. (Not all networks require a proxy.) If unsuccessful even with a correct proxy, it is blocked. In this case, a Custom site can always be produced.

Extra note: a Basic site must be produced first! Custom pages can be added later. This approach is strongly recommended unless uploading is blocked.

Go to the Cataloguing menu. Click on the CPAC button.

To make a new Basic site, click on "Create CPAC search pages". (If it says Manage, as above, this means a CPAC site for the username has already been created.)

CPAC Username (required)

Make up a username that you wish to have. Type it into the first field. The username becomes part of the URL and the name of the database. ***The username can consist of only lower case letters***. *No blank spaces. No symbols or numbers. No upper case letters.* Underscores and dashes can be used but are discouraged. Short usernames are best. The username can be Initials of the site name such as fhps, bps, mpps, or full names like bookmarklibrary or myschool.

Note: when clicking on the "Create" button, if an existing username is entered, a notice appears. Try a different username.

Background colour

The default background colour is white. Use the Choose… button to select a different colour. Select a light colour for contrast as text is *always* displayed black. Good colour contrast affects colour acuity and readability.

Heading

The heading appears at the top of the page. To change the text colour, use the Colour… button. By default, the heading is the name of the library as entered into Bookmark.

Search entry

This is where users type in their query. Two types of "search entry" are available. Put the dot next to the one you would like to have on the page.

Icons (default)

| Enter search term(s) | |
| Click on icon to start search | Keyword Title Subject Author Series Help |

Radiobuttons

| Search for: | | Search |
| Search by: | ● Keyword ○ Title ○ Subject ○ Author ○ Series | Help With searching |

Format to list titles found

Dot against the type of display to list titles found by the search. "Tiles" is default and it includes any available book cover images. Tile also includes cover images. See later in this document for examples of the three formats.

Copy info displayed

Information about copies is displayed on the Item Details page. Choose the data to be included in this list.

Requests

Tick the box to include the Request function. Request allows searches to ask for items they find.

Covers

Where possible use the public folder for covers. CPAC has a large pool of shared book covers. All public covers are available to everyone. This is recommended. However, if you wish to have your images separate from the pool, put the dot next to Private.

Create CPAC search database and page.

When everything has been entered, click on Create CPAC Search Page.

A sample of the generated search entry page then appears. Click on Accept to send the page to the Internet, or Cancel if you would like to change something.

Bookmark will send a command through the Internet to create the CPAC pages and an empty database. Note: this may not work if *uploading is blocked by the network*. In which, case use the Custom Designed Search Page method and have a CPAC site made for you. See later.

The URL of the page is shown on the previous window. The URL will look something like https://bookmark.central.sa.edu.au/gps.htm. *The letters before 'htm' is the username.* This is the URL to use to access the CPAC search. The beginning can be either http or https.

The page can be changed later. No data is lost when changing as long as the same username is used.

Change Cover Images Folder

This is only used if you have been using the public images folder and wish to have a private one instead. It will adjust to whichever has the dot.

Changing from a private back to the public folder removes the private book cover images, not public ones.

Use of the public folder is strongly recommended.

Managing CPAC

CPAC works with a copy of the catalogue from the Bookmark database.

Due to filewalls it is not possible to easily 'sync' between Bookmark's database and CPAC's. Items catalogued or deleted, borrowed or returned are not automatically noted in CPAC.
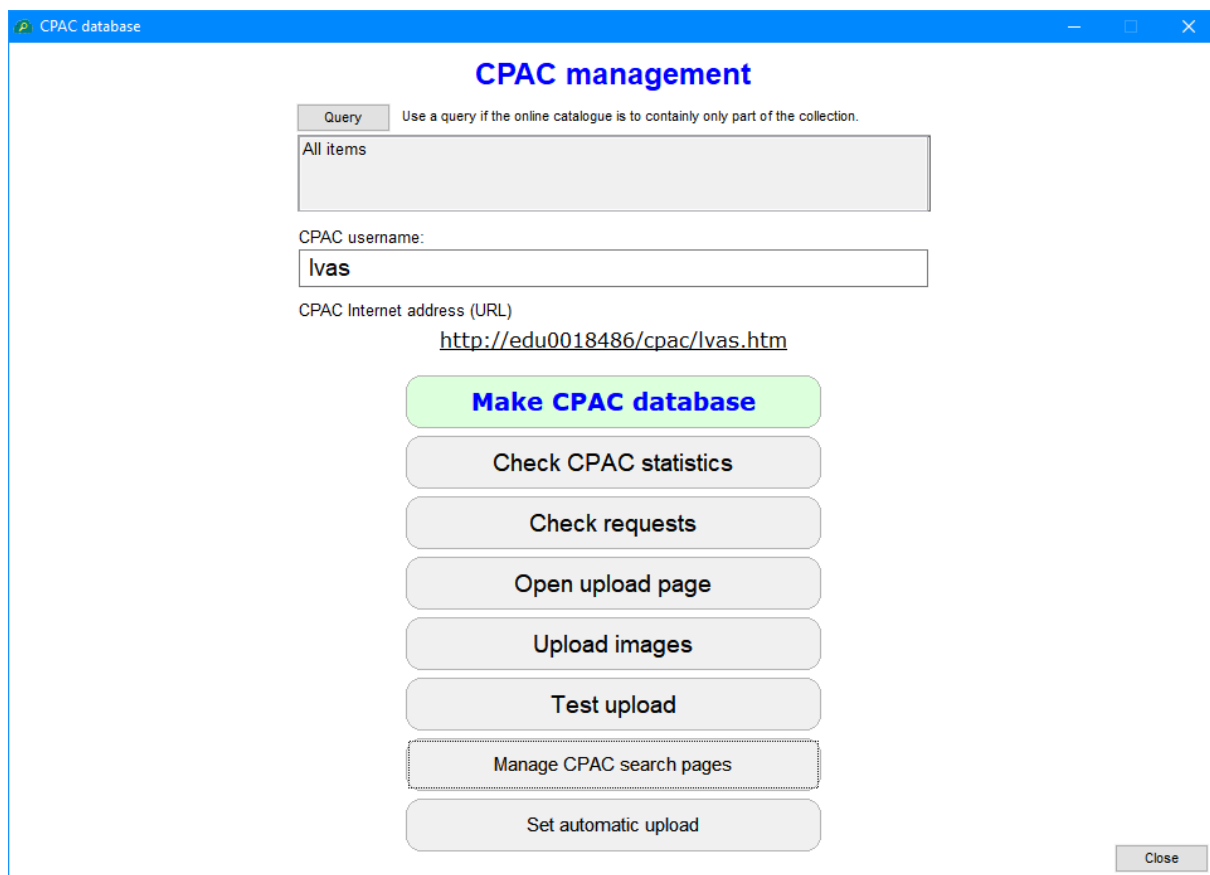
The CPAC database must be periodically updated to reflect newly catalogued and deleted items.

A setting can be made to allow Bookmark to regularly update CPAC or you can do manual updates.

Open Bookmark.

Open Cataloguing.

Click on CPAC

The CPAC database is empty when first created. *Data must be uploaded to the CPAC server to fill the database.* Once that is done searches can be made.

Note: Normally, everything is uploaded. However, if you would like to only have part of the collection, use the Query before making the database. This query is automatically saved and reused each time unless changed.

Make sure the CPAC username is correctly filled out.

Click on *Make CPAC database*.

Make CPAC database

This creates a CPAC database and uploads it to the CPAC webserver. There are several steps in the process.

Item records are first read into the computer's memory.
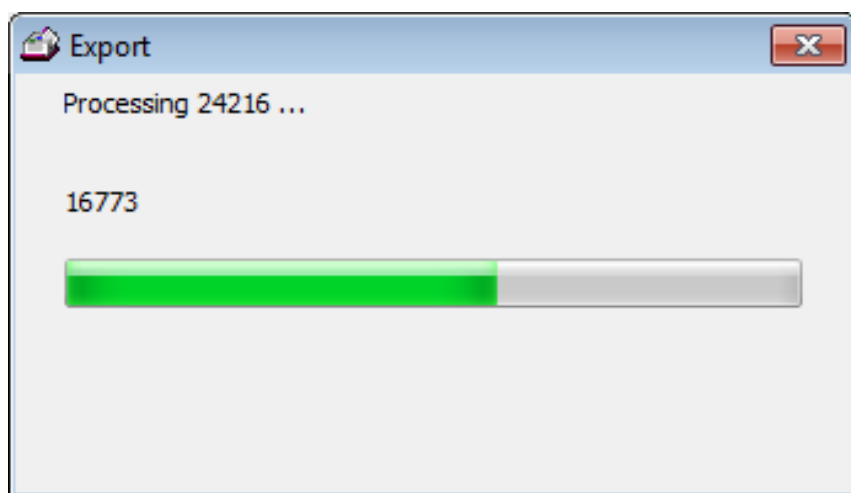
After reading the items, the CPAC database is generated.
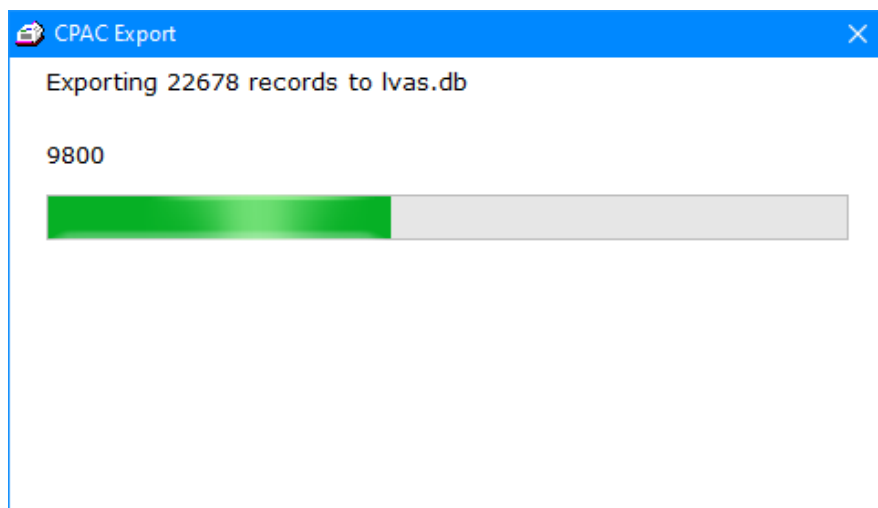
The CPAC database is then ready to be uploaded to the CPAC server on the Internet.
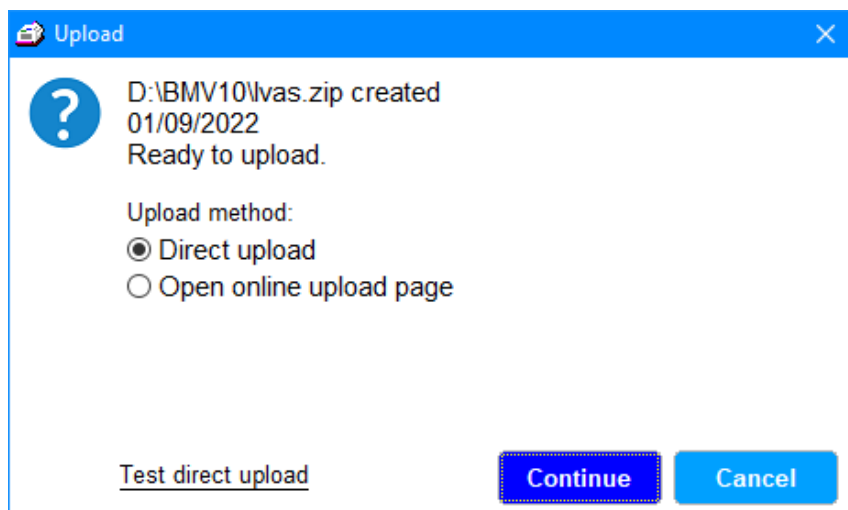
If you know the direct upload metehod will work, then click Continue.

If you are unsure, click on *Test direct upload*. If the test fails, then click on *Open Online Upload Page*. Then click Continue. If your system allows it, your Internet browser is opened and the Bookmark upload page appears. Note the name and location of the zip file. It is shown at the top of this dialog.

If it is uploaded successfully, something like this appears…
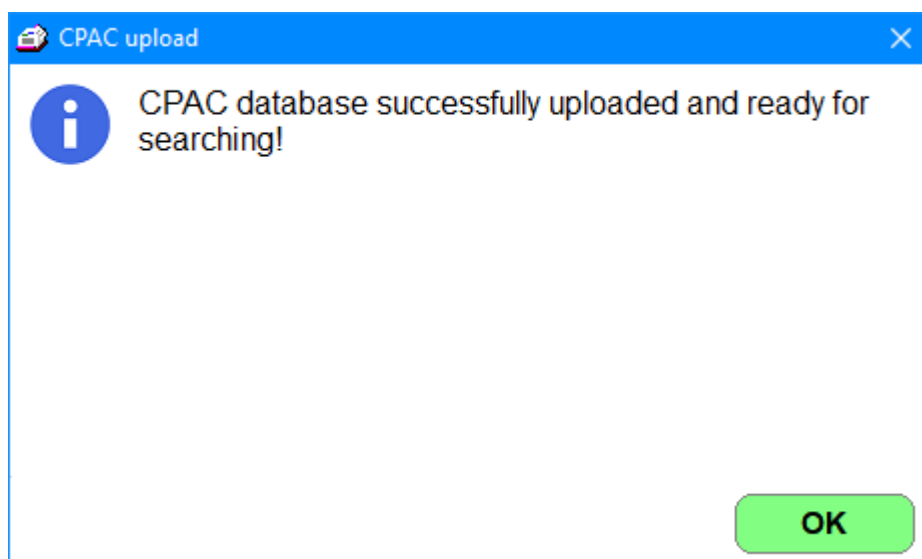
If the upload does not work, the Upload Page button can be used as an alternate method of uploading the data. This allows uploading the file via an Internet browser.

Important: The CPAC data resides on a server external to your site. *The data for CPAC is not automatically updated!* The Make Database and Upload procedure should be repeated periodically to update.

The CPAC data upload process can scheduled. The Set Automatic Upload function can be used to do this.

Check CPAC Statistics

This shows the number of times users searched your page.

CPAC statistics

File   Edit   View   Format

07/03/2023

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2017	0	0	0	0	0	0	0	0	1	0	3	1	5
2018	0	0	1	0	0	0	0	0	0	1	1	0	3
2019	0	0	1	4	1	0	5	0	0	1	1	1	14
2020	1	1	6	22	35	1	11	4	5	16	2	0	104
2021	21	4	4	6	20	10	4	3	3	7	1	3	86
2022	3	2	1	0	2	1	2	921	7	2	2	1	0
2023	2	5	2	0	0	0	0	0	0	0	0	0	9

Font: Arial   ...   Size: 10   7 lines, ~ 1 page   Remove   Print   Save   Close

Check requests
Click on this button to view requests.

Open Upload Page
This button calls the CPAC upload page on the Internet.
https://bookmark.central.sa.edu.au/upload.htm

Upload Images

CPAC maintains a very large pool of book cover images contributed by users. All covers in the shared public folder are available to everyone. Images you have on your own system are not automatically sent to CPAC. These, too, must be periodically updated. They are not only used by CPAC but also used for emailing overdue notices.

Clicking on Upload Images causes bookmark to send book cover images from your system to CPAC. If will only send the images that it does not already have.
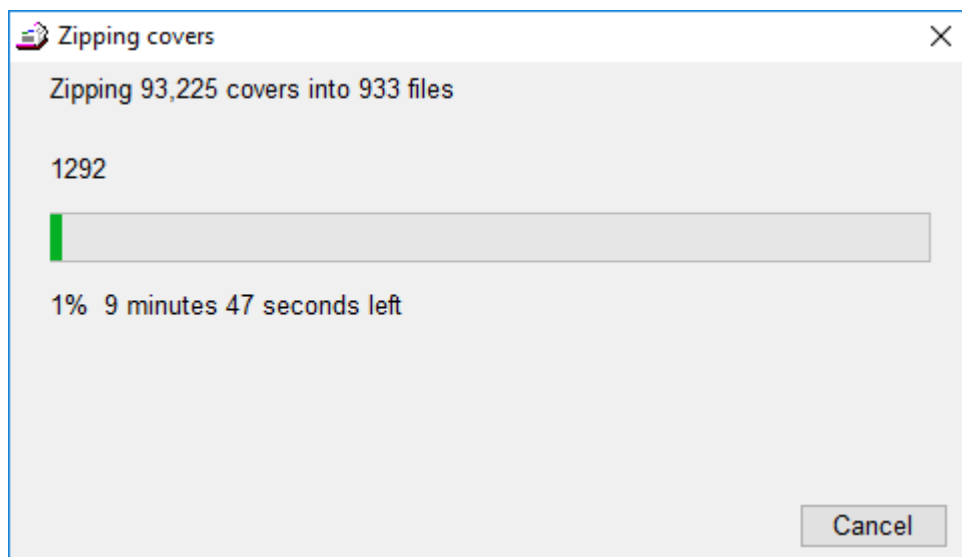
Images are collected in batches of 100 into a "zip file". Each batch is sent online to CPAC where they are then unzipped and popped into place. If a private covers folder has been set up, they are uploaded there.

The time required to upload covers varies considerably. It depends heavily on the Internet speed, not so much the computer itself.

Click on Cancel to stop. The process can be stopped and re-started as many times as needed.
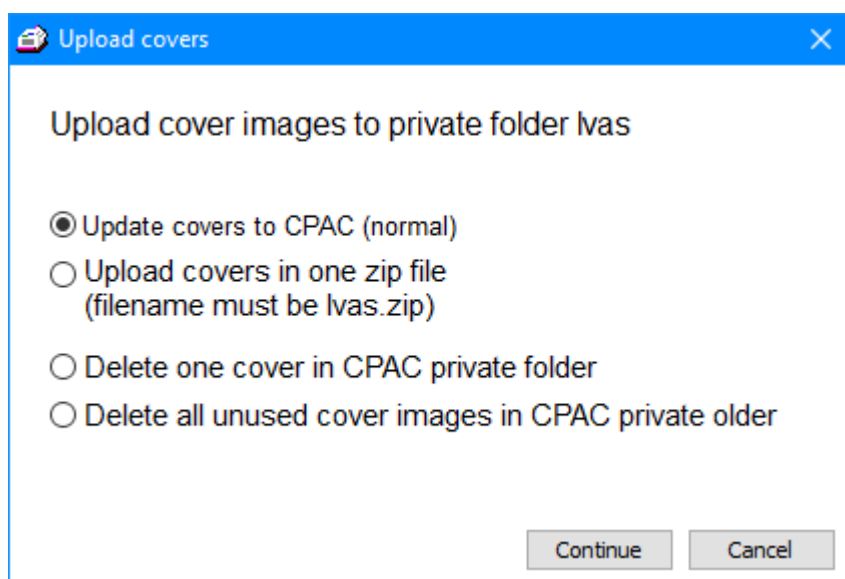
The last two options are only available for private covers.

Custom CPAC Website

Outline of the Steps to Create a Custom CPAC Site

A fancier search entry page can be made with a different, more appealing design. It can contain school logo and other images. Other options are available, too.

First, create a basic CPAC website. The custom pages can then be designed later.

Prepare a custom design using the information below and submit it to the Bookmark team. They will put it together. The same URL is used.

An IT person is normally not required unless something advanced is designed that needs special knowledge of webpage programming.

Step 1 – Look at many of the CPAC example pages to see how others have designed their search page. Collect ideas. Go to https://bookmark.central.sa.edu.au/ . Click on CPAC and Examples. This is very important!

Step 2 – Design your own Search, Results and Details pages. *There are many choices available!* Make a mockup in *Word.* (Do not make it in Publisher or the design may be rejected). Fill out the **CPAC Design Form**. (See below) The Word mockup is used by the Bookmark team to produce the custom pages.

Step 3 – Email the form to the Bookmark team. Attach image files and the mockup file. The email address is dean.hodgson@sa.gov.au.

Step 4 – The team produces the pages and creates a CPAC database.

Step 5 – The CPAC URL is emailed to you along with a username.

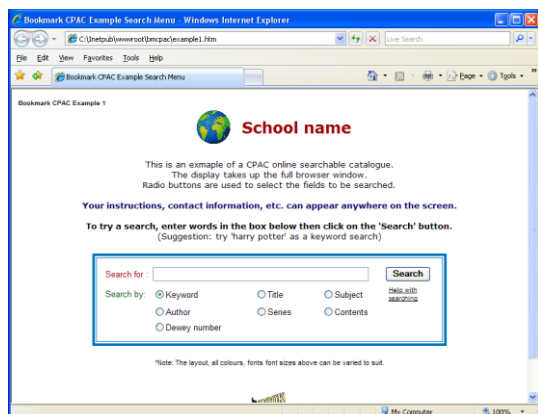Step 6 – Export your cataloguing data and covers and upload it to CPAC.

Step 7 -- Start using!

Designing a Custom Search Page

Search Page Formats

The *Search Page* is where users start.

The first thing to decide is the format of the search page you wish to use. Three general formats are available…


Full Page

This is the normal search page display. It fills the Internet browser's entire window. Results of searches are displayed on the next page. The design can vary a great deal.

Split page aka 'Frames'

This appearance has a top "search entry area" and a bottom section.

The bottom area can contain the logo, heading, instructions, etc. When a search is entered, this area displays the results.

There are two different sets of icons available. Radiobuttons or dropdown lists can be used to select fields, too.
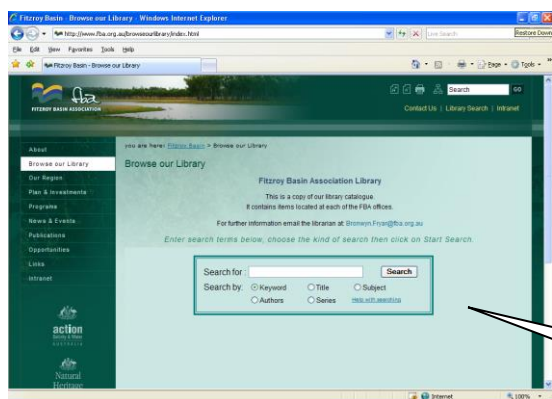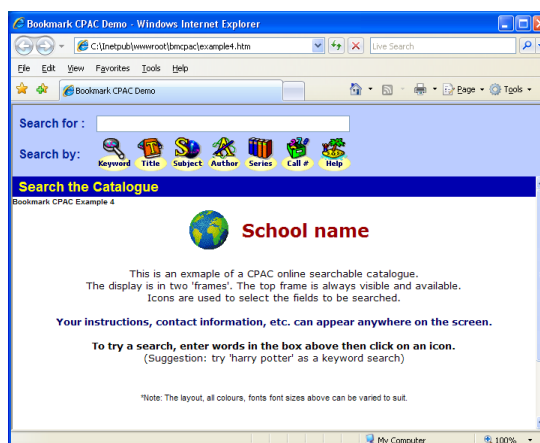

Insert Panel

On this screen, most of the webpage is produced by the user but a frame is made available for search entry. A link is added by the web designers on their page to the insert panel. This is a very advanced design and may require liason with the website designer/programmer.

This is the Insert Panel.
Instructions above

USEFUL: *Look at many of the examples to get a "feel" for possible page designs!*

A normal search page has several parts. Many are optional and all can be redesigned.
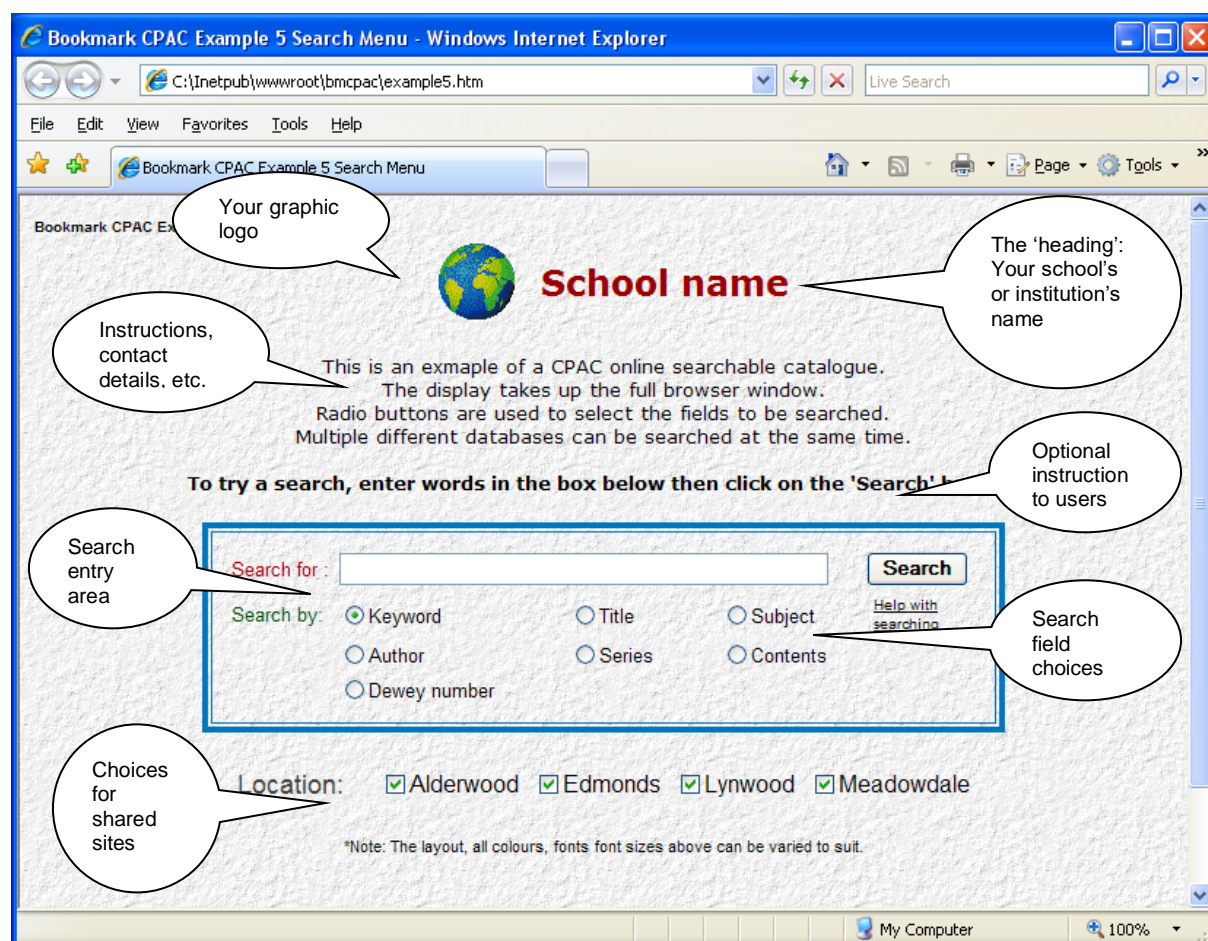
- **Background** – this is a solid colour or a graphic "wallpaper" image (the example above shows wallpaper)
- **Heading** – the name of your school, institution, library, etc. (could be replaced by a banner)
- **Logo** graphic image – school or business emblem, etc. (optional)
- **Instructions** – these are usually placed between the heading and the search area (optional)
- **Search Area** – several choices are available (see below)

Other instructions or information can also be placed anywhere.

Background colour -- Each page has a background colour. When choosing a colour other than white, provide the "colour code" – e.g. #00ffff". Try to choose a colour that allows text to be easily read. The background colour can be "carried through" to the Results and Details pages if requested. Use of "web safe" colours is very strongly recommended..

Background wallpaper – This is an option! It is not required. Wallpaper is a graphic pattern design, like a floor tile. It is optional and can be used instead of a background colour. There are nine wallpapers already available (see below) or you can email to us an image that you would like to use. (Please do not send it as part of a Word document!) Wallpaper can be carried through to the Results and Details pages.

| 1 | 2 | 3 | 4 |

| 5 | 6 | 7 | 9 |
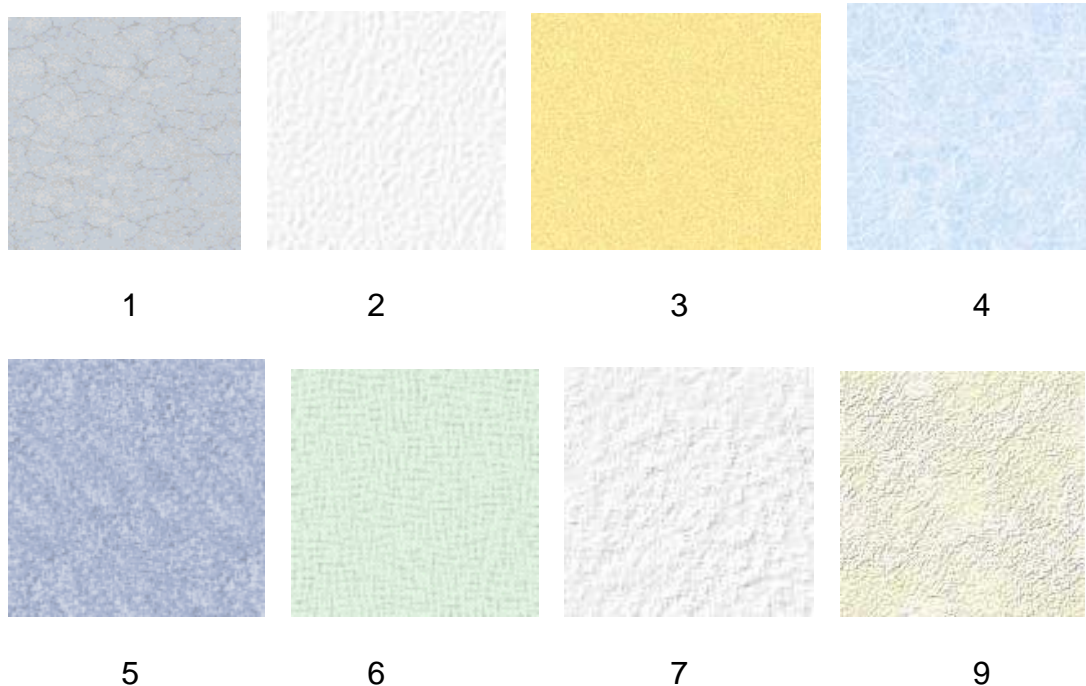
You can also provide your own background image.

Heading – This is the name of your library, school, institution site or whatever you want to appear at the top. It usually has a larger font. The font can be a design, size and colour that you specify. Alternately, a graphic banner can be used that appears across the top of the page. (see below for an example). Headings usually are between 16 and 20 points in size. See below for more information about fonts.

Logo – This is the graphic image that appears on your page. It is often to the left of the heading. It can be replaced by a banner across the top, side, etc., or it can be omitted entirely.

Instructions – These are optional and can appear beneath the heading or elsewhere. They may be omitted or contain information, instructions, email contacts, etc. Instructions can be a different font, size and colour if you wish, even combinations.

Search Entry Area

The most important part of the first page is where the search is entered. This is called the "**search entry area**".

Simple Search

A **simple search** consist of a <u>textbox</u> in which words are typed and a **Search** pushbutton, which can be a button or a graphic image (such as a 'Go') button. This is similar to a Google search.

Simple searches are always the keyword variety, which checks titles, series, authors, subjects, isbn, notes and contents all at the same time. Users do not have the option of selecting a field.

Adding Fields

Search entry areas can allow users to select the field to be searched. Field selection can be made by:

- **Radiobuttons**, one each for Keyword, Title, Subject, Author, Series and Contents. Not all of these need to be displayed, only the ones that you wish users to be able to search. Radiobuttons usually appear beneath the textbox but they can appear above.

- **Dropdown list**. This is a simple line which, when clicked, presents a list of the fields. One can be the default which always appears first. The droplist can appear to the left or beneath the textbox. Again, the fields can be limited.
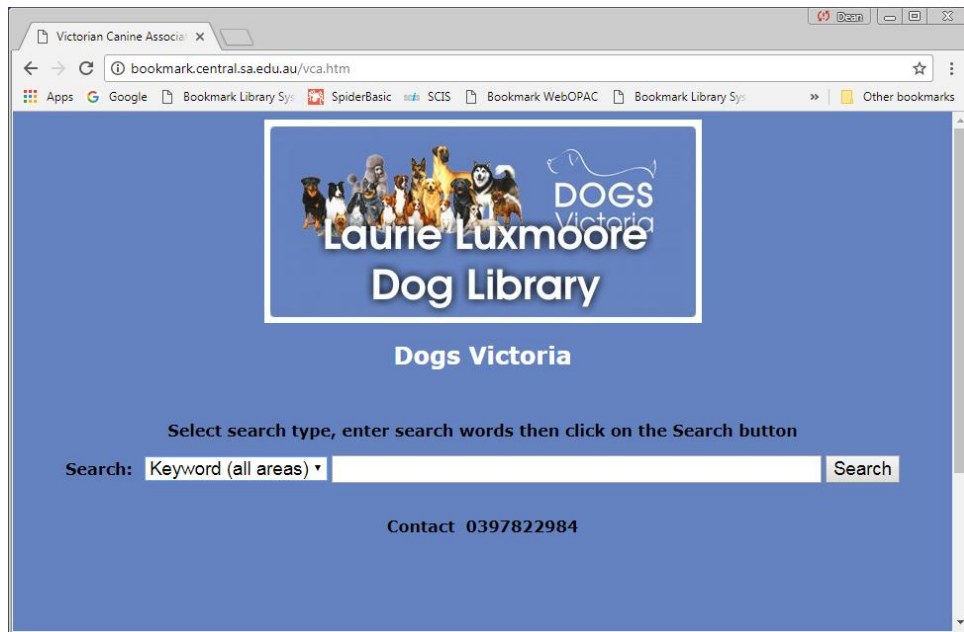
- **Icons**. Icons can appear beneath or next to the text entry box. Clicking on an icon activates a search. The "Search" pushbutton is not needed.

Fonts

All text is shown in a **font**.

Fonts have a *style, colour* and *size*.

Only a limited range of web safe fonts are available!

Arial, Tahoma, Verdana, Times, Courier and Comic Sans

Do not use any other font !

(For more information, Google "web safe fonts".)

Font sizes are available in 'points'. 8pt is small, 10pt is normal, 12pt is slightly larger, and 14pt and bigger are used for headings. 20 is very large. Note: web sizes are usually one size larger than the sizes in Word.
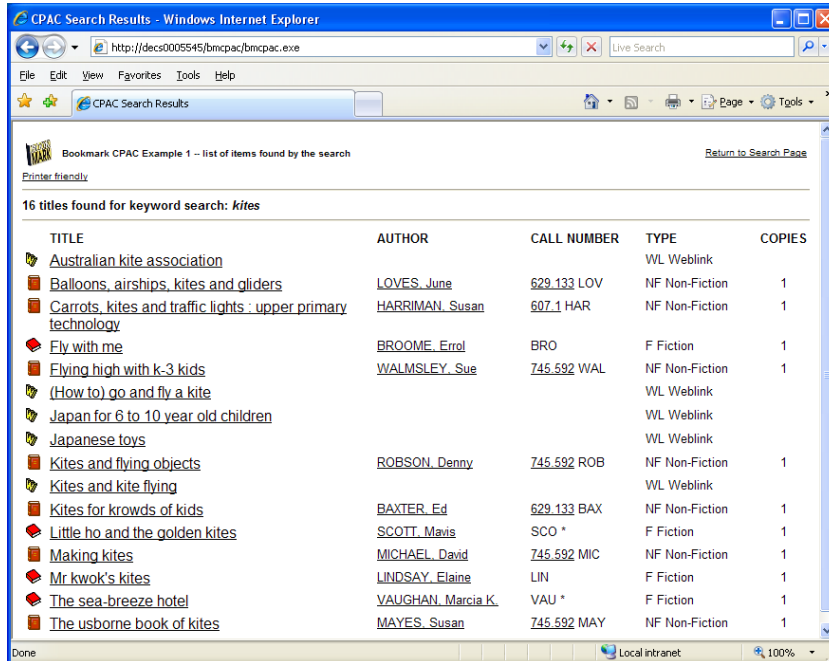
When submitting your page design to the Bookmark team, the font(s) to be used and their colours and sizes must be specified.

Important Notes

- Send separate graphic files as attachments to the email. *Sometimes it is not possible to removed graphics from a Word document.*

- Indicate *where* on the page the graphic is to be located. Top, left, bottom… where?

- Microsoft Word can be used to design a mockup of the search page. The exact page produced may not be exactly the same but similar. *All images must be emailed as separate files and not just in the Word document.*

- Do not submit designs made with Publisher or as a PDF as they cannot be extracted accurately.

Title List Page

The result of a search is always a list of titles. These can be displayed either as *columns*
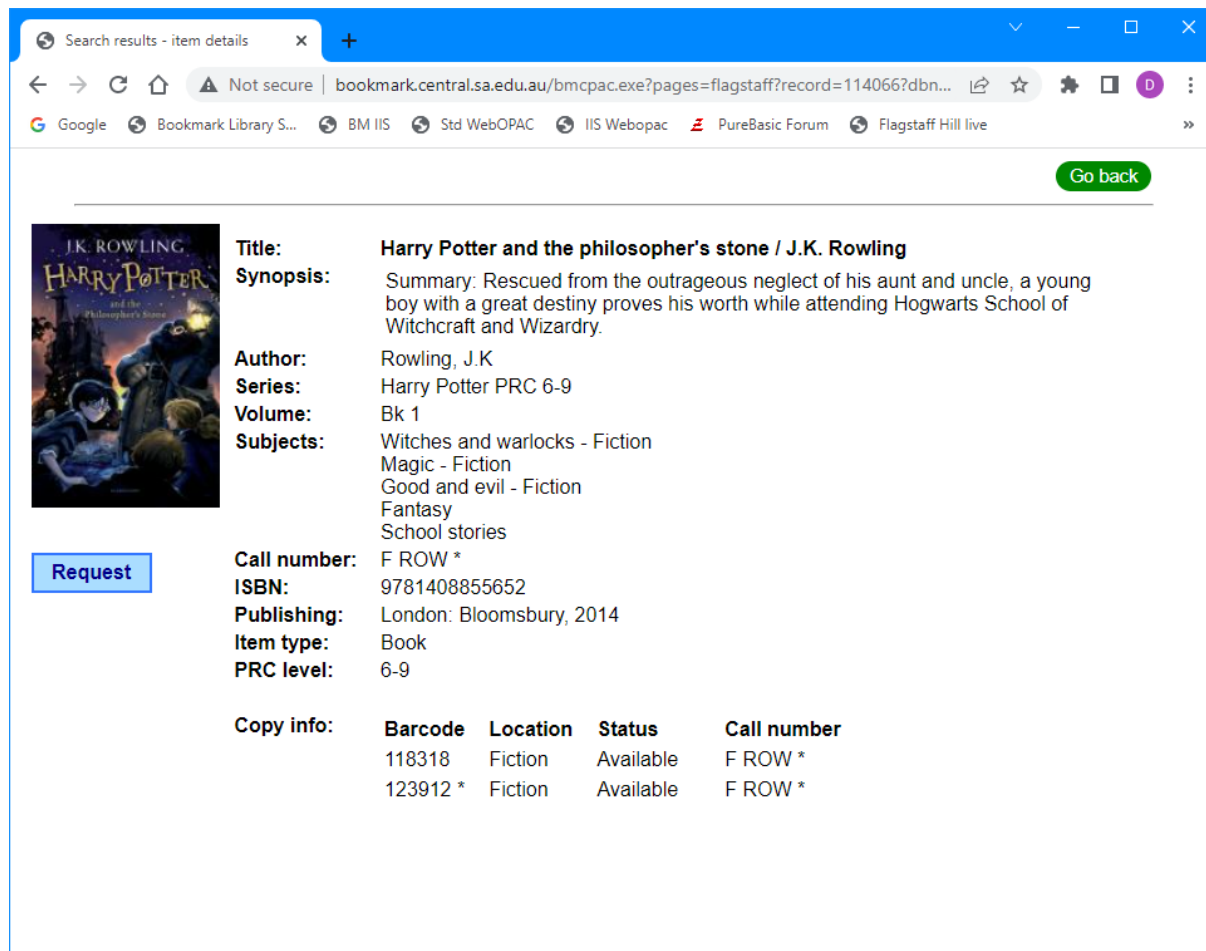

or *rows.*

Or Tiles…

All three formats can include book cover images.

Title list pages have a *background colour* or *wallpaper graphic* and a font colour. The fonts used and their sizes are pre-defined and cannot be changed. Normally it is the same as the search entry page.

Special headings, graphics, links, etc., can be added to the Results page.

Item Details Page

Click on a title on the Results page to see details about the item. Cataloguing details area always displayed.

The **Status** chart at the bottom is optional. It shows each copy of a title at the time the data was exported.

You can specify a background colour (white is default) or a wallpaper graphic, a font and font colour (black is default) and you can have a logo, heading and/or banner added to the top of the page.

The *book cover graphic* is optional. It is only displayed if a picture has been uploaded.

Every copy of the title is listed. You can choose the arrangement of columns shown.
- Barcode, Location and Status
- Barcode, Location, Status and Call Number
- Barcode, Location only
- Barcode, Site, Location Status and Call Number
- Barcode, Location, Sublocation, Status and Call Number

The Requests function can also be included.

Linking the Search Page to your Website

If you have a library website, you may wish to add a link to the search page.

The Bookmark team is unable to do the actual linking. Your site's webpage designer does this.

Applying for a Custom CPAC page

Important: Produce a "mock up" of the design of the search entry page in Word. This helps us put the custom pages together. Do not use Excel or Publisher.

Once decisions have been made about the page designs, download an application form document, fill it out, and send it to education.bookmark@sa.gov.au.

The form can be found at http://bookmark.central.sa.edu.au in the CPAC section.

Requests

Users can make a Request for items they find.

The requests are saved to a file that can then be emailed. It is then up to the librarian to decide what to do with each request.
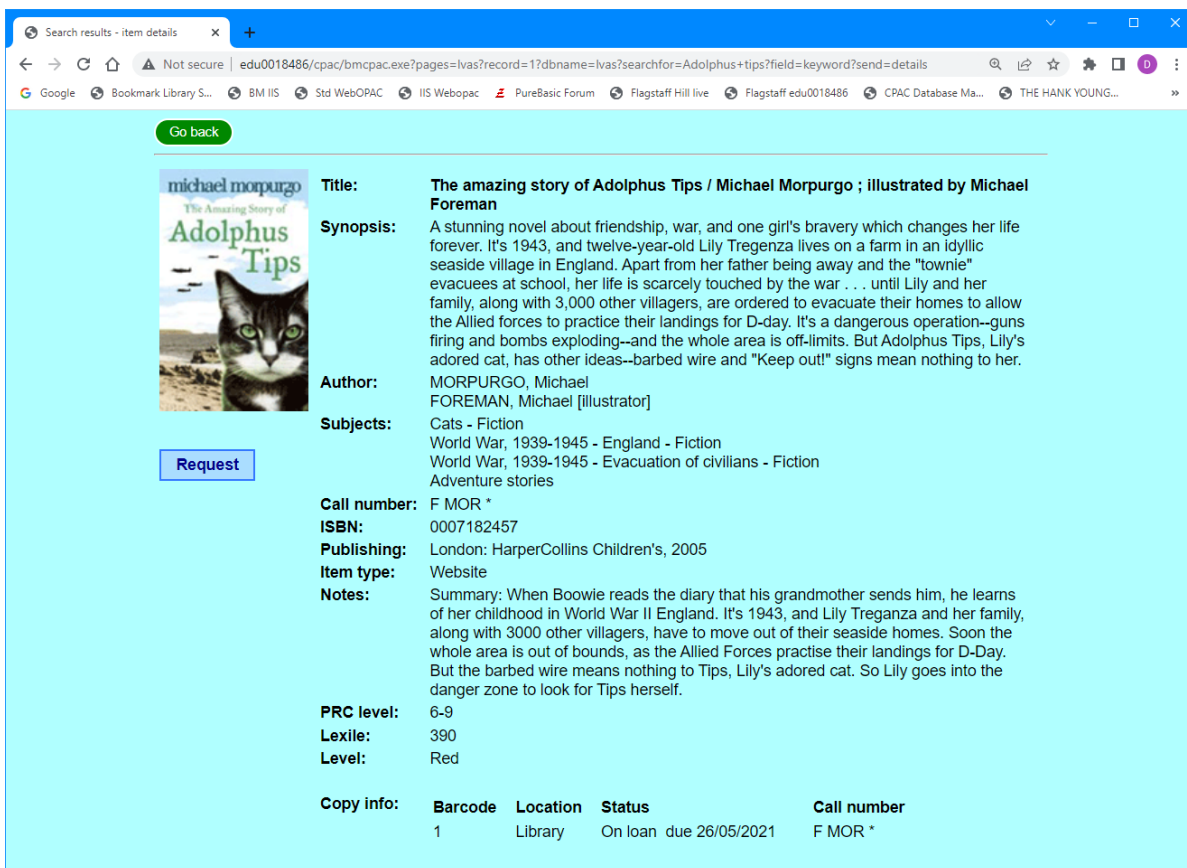
Bookmark does not automatically make reservations.

Bookmark is not able to automatically email the requests directly to library staff.

Adding the Request Function

The Request function can be selected when creating a Basic CPAC site the first time. Simply tick the appropriate checkbox on the Create CPAC Site page.

If you have a Custom CPAC site, Request can be easily added.

Making a Request

The user enters enough information to identify themselves. This can be their full barcode, their borrower number or name. Entering a class may be helpful, too.

As CPAC does not contain any borrower data, it is unable to validate an entry. The information entered is simply saved to the request file "as is". It is up to library staff to identify the person.

Viewing Requests

Library staff can view the Requests file in two ways:

1. Online

2. In Bookmark

Online Viewing Requests

Go to https://bookmark.central.sa.edu.au/upload.htm

Or

Open Bookmark
Click on Cataloguing
Click on CPAC
Click on Open Upload Page

Enter your username in the bottom 4th frame and click on View requests.

Viewing Requests Within Bookmark

On the CPAC menu in Cataloguing, click on the Requests button. The View Requests menu appears if any requests are contained in the Requests File.
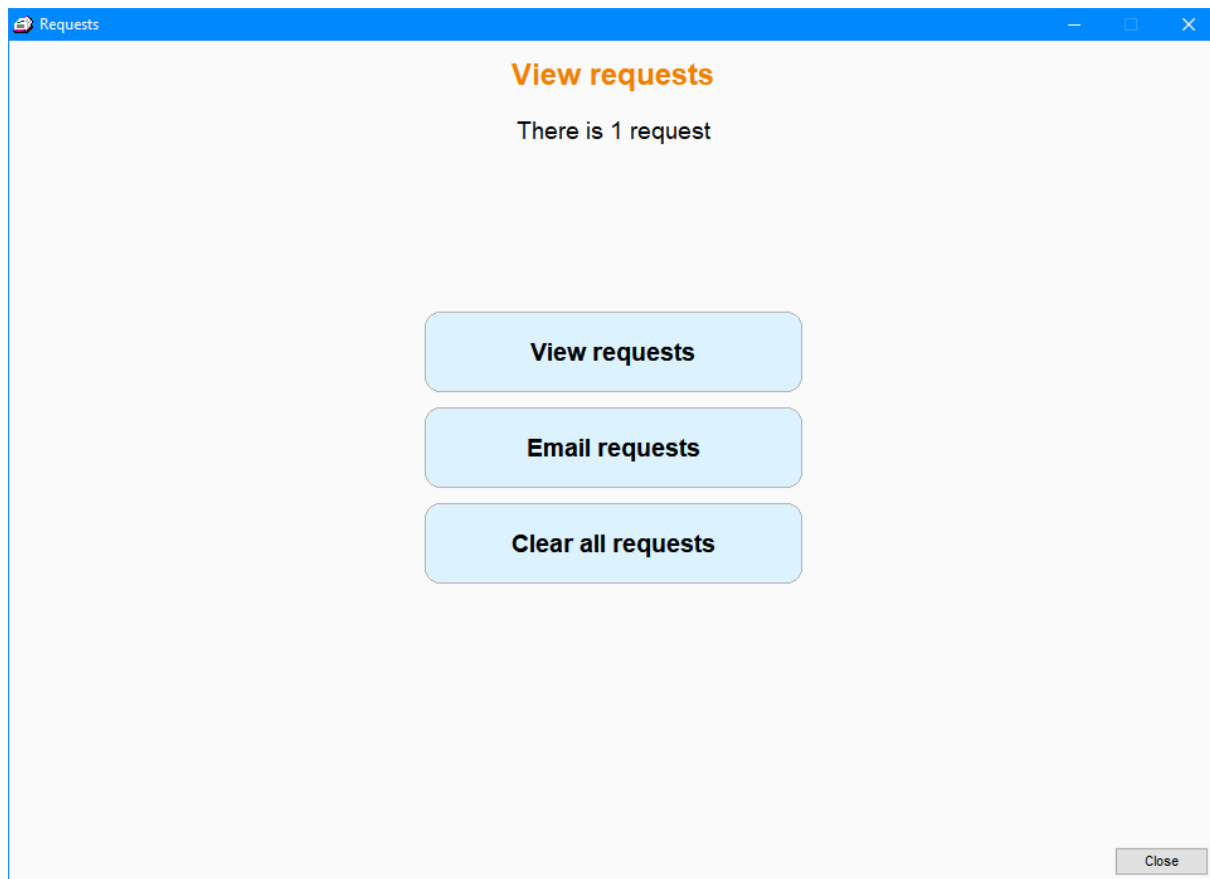
View Requests lists the requests in a standard reports window. They can be printed or saved.

Email Requests creates a PDF of the requests list which can be emailed to the librarian (as entered in Controls > General Controls > Email tab).

Clear All Requests erases everything from the online requests file. This action can also be performed using the online View Requests page (see above).

Emailing the Requests List

Due to restrictions imposed on the CPAC webserver's network, it is not possible for CPAC to email each request to library staff as they are made.

It is possible, however, to email the requests list file once it has been downloaded.

This can be done manually or semi-automatically.

First, the Bookmark email system must be set up and operational. See the Overdues manual or the Emailing Overdue Notices fact sheet for information on how to do this. Emailing the requests lists can only be done if the email function is working. Note: sending emails may be blocked by network security.

The list can be manually emailed by going to the CPAC menu and clicking on Requests. Then click on Email Requests.

An automatic alert can be set up. The alert produces a popup notification in the morning when Bookmark is first opened.
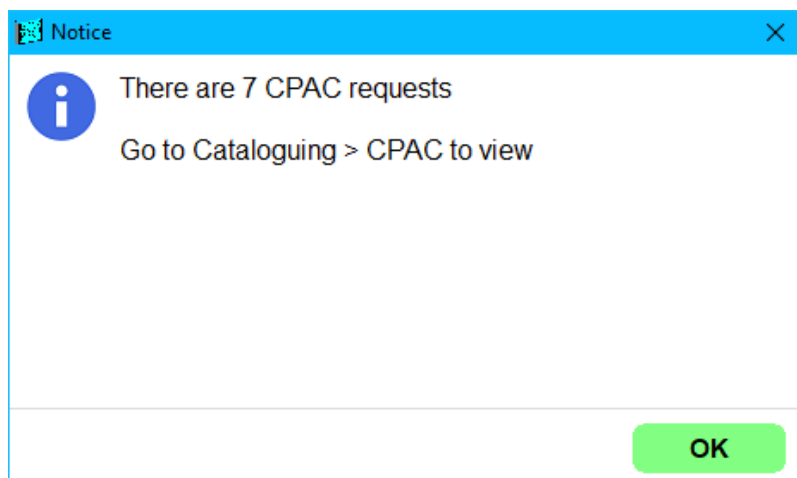
To activate the requests alert function, go to Controls then General Controls. Click on the Start of Day tab. Tick the checkbox to activate this function.

The Requests List can also be popped up at any time on the main menu by holding down the ALT key and pressing R at the same time.

Appendix – Automatic data upload

See the Fact Sheet Automatic CPAC Upload for instructions on how to set up scheduled uploading. The direct upload method must be available for this to work.