VERSION 1.31.22

EVENT CALENDAR WITH REGISTRATION MODULE **MANUAL**

www.assabetinteractive.com

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INTRODUCTION

Welcome to Assabet Interactive's Event Calendar with Registration module for library websites. Whether you've chosen a single module or a package consisting of two or more, we know you'll be happy with our approach.

We've thought very carefully about the experience of visitors to your site and the staff that manages each module. That means we've aimed to present everything in an intuitive way, while being as explicit as we can with any instructions in the Dashboard area and this manual. And we've made it easier to use for everyone by reducing confusion through our clean and consistent design.

Speaking of design, we know that it can be a little bewildering to visitors when they are clearly taken elsewhere while "doing business" on your site. That's why your module(s) are integrated in a way that preserves your domain name and full navigation, and why we've provided a place for making changes to the default fonts and colors, so that you can more closely match your own website.

We also recognize that flexibility is necessary for any system to work smoothly. To that end, we've made the front end of our modules—where patrons interact with them on your website—always work in the same predictable manner, while providing many options in the administration area for staff to override the system's defaults or rules you've established.

You should know that we take the security of the Assabet Interactive system very seriously. Your patron's information—and your account particulars— are safe and secure; any personal information (names, email, phone, and custom fields) is encrypted before being stored in the database.

We view our modules as a continual work-in-progress. Just as your site is not static, neither are our tools. We are dedicated to making improvements and incorporating new and relevant technology as it becomes available. We want to hear from you with any ideas that would make our tools easier to use or provide additional functionality that contributes to a successful workflow. Email us with your good ideas at info@assabetinteractive.com.

I. THE BASICS

All the areas in the Assabet Interactive Dashboard menu are important to the operation of the module(s) that you've added to your site. Some you will make use of only when you first start out; others you'll use time and time again. Once you use the system, you'll discover that everything uses the same logic and approach. This section will acquaint you with the administration area—the Dashboard—and provide instructions on how to do the basic set-up of the system before setting up the pass listings for display on your website.

CONVENTIONS

There are certain conventions we've adopted for the Dashboard—found in all of our modules—that are designed to make your work easier. Some will be become obvious as you work; the ones below are important enough to share with you before you start.

- The most recent version of the module-specific Help Manual is always available at the top of every page by clicking on the "Help Manual" link.
- Also available on every page is a link—labeled "View Public Display" at the top right under the name of your library—to see the front-end presentation of the module, minus all template information and library-provided content that exists as part of the specific page on your site where the module "lives."
- To manage various alpha-numeric ordering in most lists, click or double-click on the column headers to change the display order.
- Some fields in each record require that you input the information in a particular way, such as dates and times. Strictly follow the model—in gray—that appears within the field before you start typing.
- All required fields are indicated with a vertical red bar to the right of where you input information. Once provided, the bar turns green. Though not all fields have to be filled in to set up a pass listing, it useful to review every option as you go from top to bottom, so that you don't accidentally miss the opportunity to incorporate important information.
- The formatting tools for any stylable content are made available through the use of familiar icons, including ones for inserting images and inserting links. To access a drop-down menu of the pre-established formatting associated with the look of your website, click on the "¶" icon.
- If no name is provided as the contact in a record you're creating, it will auto-fill the field with the email address listed on the Account Information page.
- In the Assabet system, if you "Cancel" something, it will still be counted in a report, and labeled as such. If you "Delete" something, it will not. However, you may "Undelete" an item before running a report if you wish to access the information associated with it.

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GAINING ACCESS TO THE SYSTEM

To access the Dashboard as a user, please obtain an ID and password from your account administrator and follow the instructions below.

1. Log-in

The log-in page at "[your domain].assabetinteractive.com/admin/login.php" provides access to the administration section using the username and password you were issued.

If you've forgotten your password, click on the "Forgot Password?" link below the log-in fields. You'll be asked to provide a user name which will generate an email sent to the address the system has on file for you to reset your password. You'll have two hours to make the change. If you're unable to respond before your time is up, you may try again.

2. User Privileges

The module has four different user-levels, with varying degrees of access. The chart below, which shows all of our modules, breaks it down.

USER LEVELS	Account Manager	Adminstrator	Editor	View/Print Only
MANAGE ACCOUNT SECTION				
Account Information	✔	✘	✘	✘
Subscription	✔	✘	✘	✘
Users	✔	✘	✘	✘
Change Password	✔	✔	✔	✔
Logout	✔	✔	✔	✔
MANAGE MODULES SECTION				
Calendar	✔	✔	✔/✘[1]	✔
Room Booking	✔	✔	✔	✔
Museum Passes	✔	✔	✔	✔
Library of Things	✔	✔	✔	✔
Overviews	✔	✔	✔	✔
General Settings	✔	✔	✘	✘
Assets	✔	✔	✔	✔
GENERATE REPORTS SECTION				
Calendar	✔	✔	✔	✔
Room Booking	✔	✔	✔	✔
Museum Passes	✔	✔	✔	✔
Library of Things	✔	✔	✔	✔
General Reports	✔	✔	✔	✔
CONFIGURE INTEGRATION SECTION				
Code	✔	✔	✘	✘
Advanced Options	✔	✔	✘	✘

Access to a module is only provided if your subscription includes it.

1. The ability to publish events and make changes to Category and Location sections in the Calendar may be restricted by the Account Manager in the "EDITOR PRIVILEGES—CALENDAR MODULE" box in the Miscellaneous Settings area of the General Settings section.

The *Account Manager* has access to all functionality within the module(s) to which a library is subscribed. The *Administrator* may access everything but areas related to the account and user credentials. The *Editor* is excluded from areas where changes might affect critical functions of the module(s).[1] The *View Only* level provides the same "access" as an Editor, though none of the functionality except printing, accomplished using controls in the browser.

THE DASHBOARD MENU

The Dashboard is the administration section for your account and any modules associated with it. Every option is made available through the menu at the left in the Dashboard area, which is present on every page. Any current news and/or tips are posted on the landing page.

1. The MANAGE ACCOUNT section

You won't be spending much time in this section. It's the place to manage the general aspects of your account, most of which are taken care of at the beginning of your relationship with Assabet Interactive, or when you renew. These are the areas in this section:

- *Account Information.* Your library's record of contact information in the system.
- *Subscription.* Contains details about the AI modules running on your site, the duration of your subscription, and the cost.
- *Users.* Where to add, edit or delete Users and modify their privileges. Those with *Account Manager* status have full access to all subscribed modules—from account details and reports to all aspects of a module—and are able to change the password of any User. An *Administrator* has access to everything but the account information and is the lowest level at which one may set up new users and terminate user privileges. An *Editor* may access only those functions that fall within a particular module.
- *Change Password.* Provides the opportunity to change only the password of the person currently logged in, no matter what his or her status.
- *Logout.* Clicking on this button will automatically exit you from the password-protected administration area and return you to the log-in page.

2. The MANAGE MODULES section

The different areas in this section allow you to manage your module(s) and information they draw upon. Depending on your subscriptions, all or some of these areas deliver the following functions:

- *Calendar.* Contains four sections (*Events, Registrations, Categories,* and *Emails*) that enable you to create events of different types, manage registration and waiting lists if needed, specify categories that patrons can use to filter calendar views, and control triggered emails.
- *Meeting & Study Rooms.* Contains five sections (*Rooms, Bookings, Categories, Equipment,* and *Emails*) that enable you to create room records and equipment lists, manage bookings, and control triggered emails.
- *Museum Passes.* Contains five sections (*Institutions & Passes, Reservations, Check-out Passes, Return Passes,* and *Emails*) that enable you to create museum records using profiles in the system and your own content, add registration and waiting lists if needed, check in and check out passes with or without a scanner, and control triggered emails.

- *Library of Things.* Contains six sections (*Objects, Loans, Check-out Items, Return Items, Categories,* and *Emails*) that enable you to create object records and establish categories; manage reservation, check-out, and return of items; add buffer periods for return and maintenance of objects; communicate with borrowers; and control triggered emails.
- *Overviews.* For "snapshots" of all room use, with views based on individual dates and date ranges, locations, and search terms provided as a list or in a visual presentation. The latter, the Location Utilization pages, may also be used to initiate an event listing or room booking after determining that there are no conflicts, if you are subscribed to one or both of those modules.
- *General Settings.* This is where you add Branches, Locations—specific spaces where events take place and rooms made available)—and Branch Closures, which all modules make use of. There are also settings here that control the email reminder trigger moment for all modules, behavior of contact information fields with the registration form, labels for head count fields for event attendance, and Upcoming Event feed settings.
- *Assets.* This is where you upload all images and any documents intended to be made available as downloads, such as pdf files. For specific instructions, please see the "ASSETS" section.

3. The "GENERATE REPORTS" section

This section enables you to generate reports derived from certain kinds of data collected and created within the module(s), as well as from the system itself.

4. The "CONFIGURE INTEGRATION" section

This section contains two sections that, depending on your level of expertise, will enable you to configure the module(s) to more closely match the look of your site. This includes:

- *Code.* The "Integration Instructions" in this area provides direction for a library's experienced IT person or webmaster to integrate the AI module(s) on an existing site. Essentially, there are two types of code that must be added to your site: a snippet that creates an iframe window that makes the module on a specific page and some javascript that must be added to the <HEAD> section of your site template.
- *Advanced Options.* The "Custom CSS" section in this area provides some CSS templates for programmers interested in making modifications to the appearance of the software on your site. These include adding colors linked to categories that sit behind event listings in the calendar; changing the general font throughout the module(s); changing colors associated with the module(s); and a way to start with the current day in event listing. If you are an experienced programmer, you may also introduce your own code to affect the public display of the module(s) using the "Add a Snippet" link.

II. GENERAL SETTINGS

The General Settings section is where basic information that supports every module is entered into the system. In the A.I. system, the distinction between branches and locations is an important one. Branches are the physical buildings which serve different neighborhoods or areas of a particular library's domain, and locations are the specific places within a branch where events take place or are reserved as rooms. Even if your institution consists of only a single building, you must add it to the system as a branch.

To the extent that you can, it is important to add the information in the General Settings section before starting to use the system. Create the records in this area in the order in which the sections appear in the Dashboard menu—and in this manual—as each section builds upon the previous one: first "Branches," then "Locations," "Branch Closures," and finally, "Miscellaneous Settings."

1. Managing Branches/Places, including off-site and online

Accomplished in "Branch/Places" in the General Settings section. In the Assabet Interactive system, all library buildings are called "branches," whether or not there is more than one. The landing page of this section provides a list of all current—both active and inactive—branches in the system. The A.I. modules rely on this data to deliver important information to the public, such as where an event is taking place.

There might be events or programs that take place outside your library building(s) or are hosted online. For these, you must create a new Branch/Place entitled "Off-site Locations" or "Virtual," depending on which applies. Follow the instructions below, making sure to select the first radio button, "Yes, show each Location's address," and leaving everything that follows blank. (For instructions on how to handle *where* these outside or online events take place, please see the next section, "2. Managing Locations, including those off-site and online.")

a. *Branch/Place Name.* Indicate the name of your main library or branch, OR one or both of these "places": Off-Site Locations and Virtual.

b. *Active.* Choose whether or not you wish to make this branch publicly available.

c. *Is this the main branch of the institution?* Indicate whether or not this is the principal location of the library.

d. *Is this a library building?* This information is important in the way the software presents staff with various choices in other areas.

e. *Branch Name.* Provide a name that will be recognizable to both staff and patrons wherever it appears.

f. *Use Location Addresses.* For branches that are buildings belonging to the library, select the second radio button, "No, always show the Branch address." For the "Off-site Locations" Branch, select the first radio button, "Yes, show each Location's address." This branch requires no other information before hitting SAVE.

g. *Address Lines 1* and *2, City/State/Zip.* Provide the street address for this branch. Do not use a P.O. Box address in this field. Leave blank if this is an Off-Site or virtual location.

h. *Telephone.* Provide the general phone number that patrons call to obtain information at this branch. Leave blank if this is an Off-Site or virtual location.

i. *Website.* You need not provide the URL, since it appears nowhere at this time.

j. *Description*. You need not provide any text, since it appears nowhere at this time.

When finished, hit the SAVE button to create the record.

To *edit* a record, go to the landing page in this section, locate the branch record you wish to edit, click on the "Edit" link in the Options column, make the desired changes, and hit the SAVE button.

2. Managing Locations, including off-site and online

Accomplished in "Locations" in the General Settings section. The landing page of this section provides a list of all current—both active and inactive—locations in the branches in the system. The A.I. modules rely on this data to deliver important information to the public, such as events and room reservations, which are both associated with Locations.

To add a location, click on the "Add a Location" link that appears to the right below the introduction text on this page. On the delivered page, provide the requested information in the LOCATION INFORMATION box to create a location record.

a. *Active.* Choose whether or not you wish to make this location publicly available.

b. *Branch.* Select the branch where this location is situated. If this is an off-site or virtual location, associate it with the "Off-site Locations" branch.

c. *Location Name.* Provide a name that will be recognizable to both staff and patrons wherever it appears.

d. *Location Type.* Indicate whether this is a physical location that has an address, or a virtual one that doesn't, such as a Zoom event.

e. *Address* fields. If this is a physical location, then provide the address in these fields.

f. *Telephone.* If this is a physical location, you may provide the phone number in this field, though it's not required.

g. *Website.* You need not provide the URL, since it appears nowhere at this time.

h. *Description*. You need not provide any text, since it appears nowhere at this time.

When finished, hit the SAVE button to create the record.

To *edit* a record, go to the landing page in this section, locate the location record you wish to edit, click on the "Edit" link in the Options column, make the desired changes, and hit the SAVE button.

3. Managing Branch Closures

Accomplished in "Branch Closures" in the General Settings section. The landing page of this section provides access to all indicated branch closures in the system. The A.I. modules access the information in this section to affect certain critical functions. For example, the Calendar will automatically display all indicated closures, and the Room reservation system will not make any spaces available to reserve to the public on days that a branch is closed.

To add a branch closure, click on the "Add a Branch Closure" link that appears to the right below the introduction text on this page. On the delivered page, provide the requested information in the BRANCH CLOSURE INFORMATION box to create a branch closure record.

a. *Closure Name.* Provide a name that will be recognizable to both staff and patrons wherever it appears.

b. *Closure Date.* Provide the date for the closure by using the date picker that pops up when you click within the field. If you have sequence of days, you must enter in each date as a separate record.

c. *Branches Closed*. To place a branch in this category, click in the box to the left of the branch name. All branches in the system are available as choices.

When finished, hit the SAVE button to create the record.

To *edit* a record, go to the landing page in this section, locate the branch closure record you wish to edit, click on the "Edit" link in the Options column, make the desired changes, and hit the SAVE button.

4. Managing Miscellaneous Settings

Accomplished in "Miscellaneous Settings" in the General Settings section. This page provides access to a wide range of settings, some of which affect a single module and others that affect each of them. While you probably won't need them all, it's important to review each one. Their functions are described below, organized by box, and in the order in which they appear.

a. *EMAIL REMINDER NOTIFICATIONS–ALL MODULES.* This determines the number of days before an event, room booking, or museum pass usage that an email reminder is triggered. Your options are one, two, or three days before. Your choice is applied to every module. ALL

b. *PATRON-SIDE USER INTERFACE–ALL MODULES.* There are two settings within this box. Most libraries will not have a need to make use of these settings. ALL

- *Detail/Registration Page "Pop-out" Behavior.* In each module, there are pop-up windows that contain detail or registration forms which keep the original page visible in the background. If you want these windows to load into the iFrame into which the module is delivered on your web page—rather than appear as a new window—then change the setting from *Use the default*

"Pop-out" behavior to *Show in the same frame. (*To return to the default display of the module, a patron will need to press the "START OVER" button at the bottom of the page that indicates a successful submission or use the controls on the browser.)

- *Google Analytics "UA" code.* If you are tracking visits to your website with Google Analytics, you may collect data related to our modules by setting up a unique "property" for "https://***your-hostname***.assabetinteractive.com/" and including the UA code here. See "6. Search Engine Optimization" on the next page for more information.

c. *MUSEUM PASS LIMITS–MUSEUM PASSES MODULE.* If your AI subscription does not include this module, you may ignore this setting. (See the General Help Manual or Museum Pass Module Help Manual for instructions.)

d. *MUSEUM PASS RESERVATION PERIOD–MUSEUM PASSES MODULE.* If your AI subscription does not include this module, you may ignore this setting.

e. *MUSEUM PASS RESERVATIONS–REQUIRED FIELDS.* If your AI subscription does not include this module, you may ignore this setting.

f. *EVENT HEAD COUNT FIELD LABELS–CALENDAR MODULE.* This controls the labeling of the category fields in the head count area of the Event Calendar registration section. Review and modify the existing categories before entering any attendance numbers into the system, since changes made later will relabel any information that was collected earlier, affecting the veracity of your reports and making if difficult to compare data from one time period to another.

g. *UPCOMING EVENT FEED SETTINGS–CALENDAR MODULE.* This setting allows you to control the number of listings that appear in the Upcoming Events section on your homepage when using the feed we provided in your initial instructions. When your site is viewed on a phone, a large number of event listings could result in much unwanted scrolling. This may be controlled here by indicating the actual number of events you want to display, or by the number of days. The latter is a less precise way to determine how many events to display since it will vary according to what's actually happening at the library on any set of days. *Note that the default of the other feeds— the RSS and EXML feeds—includes the next month of events.*

h. *LIBRARY CARD VALIDATION CHECKS–ALL MODULES.* During on-boarding, an Assabet support staff member will walk you through this setting. This is where Assabet Interactive stores some information used for validating library cards—both with your ILS and in a first pass by the system.

5. Managing the Patron Block List

Accomplished in the "Patron Block List" area in the General Settings section. This area prevents abusers of their library privileges from being able to sign up for events, book rooms, and/or reserve museum passes.

The first page lists all patron blocks in effect. To create a *new* block record, use the "Add a Block" link and provide a library card number, name, and email address—to the extent that you can—then indicate a date range and the modules you wish to prevent the blocked patron from successfully using. It is only the library card number and email address that act as unique identifiers of a patron, so you will want to do a quick review of what information each module collects. *Please note that should the patron provide information other than what you've included in their record, they could still submit a form successfully, despite the block in place.*

6. Feeds

This module has a number of feeds associated with it, including RSS, eXML, and an iCal-formatted data feed, all based on upcoming events in the calendar. There is also a feed, provided with a snippet of code, that may be used to set up a display of upcoming events on the library's home page.

The default view is a period of thirty days, but you may modify that in the "PASS RESERVATION PERIOD–MUSEUM PASSES MODULE" box in the Miscellaneous Settings area of the General Settings section. There, you may change the number of days that it draws upon, or specify the number of events instead.

The iCal feed can be used to facilitate external subscriptions to the calendar of events which are automatically updated as changes are made, such as a town calendar that needs to include library events, a third-party event aggregation service like Burbio, or a patron wanting to include all children's events in their personal calendar.

7. Search Engine Optimization

A Google Analytics "UA" code may be added to your version of our system for tracking activity in the modules. This is done in the "PATRON-SIDE USER INTERFACE–ALL MODULES" box in the Miscellaneous Settings area of the General Settings section after obtaining the UA code from your Google Analytics account. ***Note: When configuring Google Analytics it is highly recommended to track activity via a unique "Property" for "https://waltwhitman.assabetinteractive.com/".***

In addition, when entered into your Google Analytics account, the following links can aid search engine indexing of your content:

https://waltwhitman.assabetinteractive.com/calendar/robots.txt

https://waltwhitman.assabetinteractive.com/calendar/sitemap.xml

III. THE EVENT CALENDAR MODULE

The Event Calendar contains four sections (Events, Registrations, Categories, and Emails) that allow you to create events of different types; add and manage registration and waiting lists if needed; specify categories that patrons can use to filter calendar views; and create and manage emails for automatically generated responses. To reveal the sections, click on the bar that says "Calendar."

SETTING UP BASIC DETAILS

If just starting out with the Event Calendar module, you will need to input or edit some information that is the backbone of the system. This is done in the Categories and Emails sections of the Calendar module, and the General Settings and Assets sections found in the top-level Manage Modules area. In the Assabet Interactive system, all libraries are called "branches," whether or not there is more than one. (Note: you may have already added much of this information if your subscription includes another Assabet Interactive module, like the Meeting & Study Room Reservation system.)

1. Adding branches and locations

Done in "General Settings." Follow the instructions provided in the previous section (pp. 9-10). *Though it is possible to add a branch or location during an event record set-up, it is recommended you do this before you begin.*

2. Adding event categories

Accomplished in "Categories." To add a category used to filter lists in the administration section and the display of defined collections of calendar events in specific locations on the public side of the site, use the link below the intro text entitled "Add a Category" and follow the set of instructions. The "Category Name" should be as short as possible, like "Adult" and "Children," for example.

3. Adding images and documents

Done in "Assets." While it is possible to upload images during the creation of a room record, you may find it easier if they are already in the Assets Library. The Assets Library supports every AI module, so if you're subscribed to more than one, you will have access to any image that has already been uploaded. If you need to add an image to the Assets Library, click on the "Add an Asset" link below the intro text on the Assets landing page to access the Upload page.

In the first box, labeled UPLOAD FILE, click on the "Choose File" button to locate the file you wish to upload on your computer. Select the file and hit the "Choose" button. Next, fill in the requested information in the ASSET INFORMATION box. The more information you can provide, the easier it will be for search engines to find you, and for you to find specific files within the library. In particular, the "Alt Value" is important because it provides a description for

THE BASICS

A quick look at what using the Assabet Interactive Event Calendar module entails.

BEFORE USE

1. **Set up the basic details about branches, locations, and branch closures.**
2. **Review miscellaneous settings and make any necessary adjustments to default configuration**
3. **Review—and change if necessary—head count categories**
4. **Review triggered emails and make necessary changes.**

DURING USE

1. **Create an event, with registration details if necessary**
2. **If registration is required, approve—or not—when notified of requests**
3. **Track attendence and room use**

visitors who are unable to see images in their browser, especially the visually impaired or those using screen readers. Don't forget to select "Active" if you wish to make the image available for use.

When completed, hit the SAVE button below. *Note that the file will not become part of the library until you've hit this button.*

4. Managing branch closures

Accomplished in "Branch Closures" in the General Settings area. Please follow the instructions provided in the previous section (p. 10).

5. Managing Miscellaneous Settings

Accomplished in "Miscellaneous Settings" in the General Settings area. Please follow the instructions provided in the previous section (p. 11).

6. Editing automatically sent emails

Done in "Emails." Please follow the instructions provided in the "MANAGING EMAILS TO REGISTRANTS" section (pp. 32-35).

SETTING UP AND MANAGING INDIVIDUAL EVENTS

The Events section provides access to all event records—even those which have already taken place—and the tools needed to manage them. This is where you'll create new event records and make decisions about the type of event and add registration if needed.

Please see the previous section, SETTING UP BASIC DETAILS, for instructions on what to do before creating any events. Some of what you'll be asked to provide may be added within the process of creating a new record, but it will be easier if taken care of before you start.

Also, you should have on hand everything you require to add a new event before starting—you'll be unable to save the record until all the necessary fields contain information, even if you try to save the event record as a draft. This approach will minimize the chance that you'll have to start over.

*Please note that if you've created an event that is in conflict with any existing data in the system, you will be alerted to the problem after you've saved the record and gone to the Events page with its list of Current & Future Events. A problem is indicated by a red circle with "**!**" inside, appearing at the right in the Options column in the list. Clicking on this will take you to the event record, which displays a banner describing the nature of the conflict at the top and links which provide access to potential solutions below.*

1. Adding an event

Accomplished in "Events." To add an event, click on the "Add an Event" link and select an event type from one of the three options presented on this page. The first type is self-explanatory, but please note the distinctions between "Series" and "Reoccurring Events" in the descriptions that follow, as they will guide you in your choice.

> Single. A one-off event with no repetition. Registration and wait-listing are options if needed.
>
> Series. A collection of related events that happen in a sequence and viewed as a whole. *Registration and wait-listing, if needed, are available only for the entire series of events.*
>
> Reoccurring Events**.** A collection of identical or related stand-alone events that share some details. (An example of this would be a number of events connected to a theme such as the anniversary of the institution, each instance of which is independent from the others.) In this case, participating in a particular event is not dependent on having attended earlier events. *Registration and wait-listing, if needed, are available only for each event.*

Once you've selected the type of event, hit the CONTINUE button, and you'll be taken to a page that collects the details of your listing.

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Essentially, there are five different boxes that collect the details essential to an event record: Event Information, Event Categorization, Event Repetition, Registration/Wait List Settings, and Confidential Notes. (The exception is for a Single Event, which, for obvious reasons, does not require information about Event Repetition.) Here are instructions for providing the correct information, box by box.

EVENT INFORMATION Box

a. *Event Title.* Give your event a title that will appear in the public calendar.

b. *Visibility.* Select whether you want to publish this now, or save only as a draft. Saving the event as a draft "reserves" the location you've indicated, making it unavailable to anyone else, even though the event has yet to be made public.

c. *Start Date* and *End Date.* Clicking within either field will cause a calendar picker to pop up, enabling you to choose a date. Since most events take place on a single day, you'll see that the "End Date" field is automatically filled in with same date as what was selected for the "Start Date." If you wish to change the "End Date," handle it as you did the "Start Date."

d. *All Day Event?* If this is an all-day event, choose "Yes." If not, choose "No." Entries made in the "Publicized Start Time" and "Publicized End Time" fields are ignored if you choose "Yes."

e. *Publicized Start Time* and *Publicized End Time.* Clicking within either field will cause a time picker to pop up, allowing you to choose a specific time from a list of choices in 15-minute increments. These are times that are publicly displayed in the calendar.

f. *Preparation Time and Cleanup Time.* Clicking on the "Select..." bar will produce a dropdown menu of options from which to choose. Be aware that any time you add here is in *addition* to the publicized time, so make sure the room is available for the entire length of time.

g. *Locations.* Click on one of the displayed options to associate it with this event. If the location you want has not yet been added to the system, you may add it now, using the "add a new location" link that appears in the sentence below the title of this section. A separate window or tab will appear, providing access to the LOCATION INFORMATION box in the General Settings area where you can add locations not yet in the system. Once you've made your addition, hitting the SAVE button will return you to the event record in progress, with the location now available as an option. It is now also available for all future events. (If you decide not to add a new location at this time, you may return to the event record by hitting the CANCEL button at the bottom of the box.)

h. *Featured Image.* The system is designed to use a unique image that is displayed in the public pop-up window which delivers an event's details. It doesn't matter what the size of the original image is because the system will automatically reduce it to the needed predetermined width. That said, images should *always* be larger than the size at which they appear—if they are smaller, then they will display poorly because of bitmapping. Clicking on the SELECT IMAGE button will allow you to choose from the Assets Library or upload a new image. Once you've indicated your choice by clicking on one of the images in the Library, you're taken back to event record.

i. *Description.* This field allows you to provide a description of the event and add formatting, including links. Clicking on the "¶" icon in the row above the content area will provide access to a set of predetermined formats. Links to a downloadable document may be added by highlighting the word you wish to make a link, clicking on the chain icon in the header choices, and browsing the Assets Library for the document. (Though images may also be added in this space using the mountain and sun icon to the left of the chain, it is discouraged unless absolutely necessary—limited space and an additional graphic have the potential to compete with the featured image, often making it more difficult to deliver your information quickly and clearly.)

j. *Description Excerpt.* This field allows you to create a summary of the event that will appear in the public DATE-ORDERED LISTINGS view. If you do not provide any text in this field, the system will use the first paragraph of the description you provided in the "Description" field.

h. *Event Pricing.* If there is an admission fee connected to the event, provide the cost and details about how to pay in the "Event Pricing" area. At this time, there is no payment method for registrations that require a fee on the Assabet Interactive system.

EVENT CATEGORIZATION Box

Click on all categories that apply to the new event. This will allow patrons to more easily search your calendar and help control where specific categories appear on your site. For example, if you apply the "toddler" category to an event, it might appear in two places on the public side of the site—on a page that lists children's activities, and on the general calendar page where a filter can be applied to the default display to show only events connected to "Toddler."

If the category you want has not yet been added to the system, you may add it now, using the link provided under the title of this section. A separate window or tab will appear, providing access to the Categories area in the Calendar section where you can accomplish this. Once you've added a name and provided a description, hitting the SAVE button will return you to the event record in progress where you can now apply the new category. (If you decide not to add a new category, you may return to the event record by hitting the CANCEL button at the bottom of the box.)

EVENT REPETITION Box

This box will appear only if you've selected "Series" or "Reoccurring" as the Event Type. ***If your event type is "Single," then skip this section and proceed to the Registration/Wait List settings instructions that follow.***

a. *Number of Occurrences.* Indicate the number of times the event will take place—the first event, plus all "copies" of the event.

Note that, once you've created a "Series" event—an event with multiple occurrences, but with only a single registration—you are unable to add additional instances. If you anticipate needing to add more occurrences in the future, you indicate more than you need here, keeping the extra ones as "drafts" until you need them.

b. *Occurrence Rate.* Choose *one* of the five options provided to generate all occurrences of this event as separate records. Select a unit of time (minute, day, week, month, or year) by clicking on the desired radio button and indicate the frequency in the field(s) to the right.

Note that in the monthly and yearly options, not all fields must contain information. Both areas contain more than one approach, providing a little more control over setting the pattern than the others.

To set up an event with *multiple adjacent occurrences,* follow the instructions in the model below, changing the details to reflect your particular event. In the example, there are 5 instances of 15-minute occurrences beginning at 4:00 PM, but with a gap after the third which prevents a registration from being made at that time.

i. Create a reoccurring event.

ii. Indicate an initial start time of 4:00 PM and an end time of 4:15 PM

iii. Set the number of occurrences to 5

iv. Set the repetition rate to "Hourly", and enter 15 minutes.

v. Save the event, and edit occurrences #4 and #5 to move their times out by 15 minutes

vi. To secure the room in that small gap between Occurrences 3 and 4, set the preparation time on occurrence #4 to 15 minutes.

REGISTRATION/WAIT LIST SETTINGS Box

In the AI system, a distinction is made between Registrants (those signing up and providing contact information) and Attendees (those attending the event). In most cases, they are one and the same. Making this distinction, however, helps staff correctly gauge space and material needs.

If you choose to include registration, default emails are provided which are automatically sent to registrants at certain points in the process, up until the event takes place. For example, when a registration is approved or a person wait-listed, an email is triggered and sent to the registrant to inform them of their change in status. Review these before setting up your first event with registration to ensure that the text reflects *the reality of your institution. (For more information about triggered emails, see the MANAGING EMAILS TO REGISTRANTS section.)*

a. *Registration Required* and *Registration Requirement Text.* These two items work in tandem and allow you to manage three different scenarios: registration required; registration not required; and registration required, but managed by a third party. If one of the first two options, then click the appropriate radio button and provide the text you'd like to display (or not, as the case may be) in the field to the right.

If the third possibility—registration for an event required and managed elsewhere—click the "No" radio button and enter "Register Required" (or something to that effect) in the field on the right. This effectively prevents the system from providing the form patrons expect to finish the registration process while still indicating on the calendar that some kind of registration is required. Then, put registration instructions within the event description, so that patrons know how to sign up.

Note that, though you'll be able to add registration after you've saved the record without having done so in the original set-up, you won't be able to apply the new settings to <u>every</u> occurrence in a REOCCURRING event all at once—it will need to be handled on an occurrence-by-occurrence basis.

b. *Date Registration Opens* and *Date Registration Closes.* Provide dates for the opening and closing of the registration period with the pop-up date picker that pops up when you place your cursor within the fields.

c. *Time Registration Opens* and *Time Registration Closes.* Provide times for the opening and closing of the registration period with the pop-up time picker that pops up when you place your cursor within the fields.

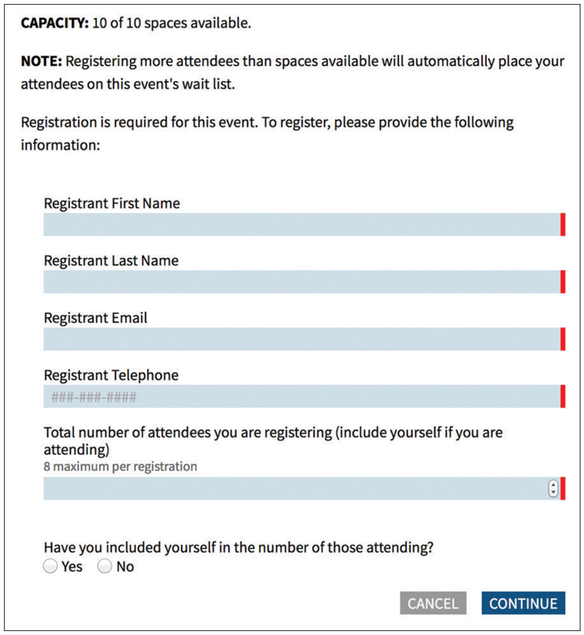
d. *Maximum Total of Attendees.* Though not required unless maintaining a waiting list, this field allows you to limit the number of attendees.

e. *Minimum Total of Attendees per Registration.* Also not required, though defining a minimum number of attendees per registration can help you collect accurate information needed for certain kinds of events.

f. *Maximum Total of Attendees per Registration.* Also not required, though defining a minimum number of attendees per registration can help you collect accurate information needed for certain kinds of events.

g. *Registration Form Options.* Three slightly different form templates, described on the next page, are available. To select one, click on the button to the left of your choice.

1. <u>Registrant/Attendees</u>. This is the default. If you do nothing, this is the form that the system uses, collecting registrant and attendee information, and asking how many attendees and whether registrant is one of those attendees. (See form on the following page.)



CAPACITY: 10 of 10 spaces available.

NOTE: Registering more attendees than spaces available will automatically place your attendees on this event's wait list.

Registration is required for this event. To register, please provide the following information:

Registrant First Name

Registrant Last Name

Registrant Email

Registrant Telephone

###-###-####

Total number of attendees you are registering (include yourself if you are attending)

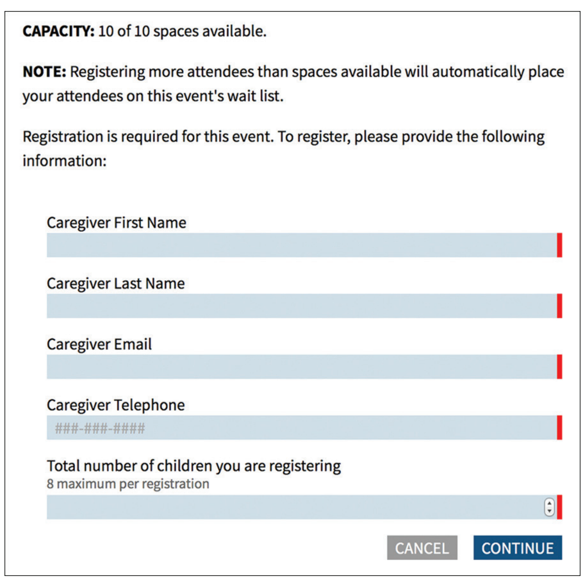
8 maximum per registration

Have you included yourself in the number of those attending?

Yes No

CANCEL CONTINUE

2. <u>Caregiver/Child(ren), Caregiver excluded</u>. Collects caregiver, child information, and count of children. Caregiver not counted as attendee.



CAPACITY: 10 of 10 spaces available.

NOTE: Registering more attendees than spaces available will automatically place your attendees on this event's wait list.

Registration is required for this event. To register, please provide the following information:

Caregiver First Name

Caregiver Last Name

Caregiver Email

Caregiver Telephone

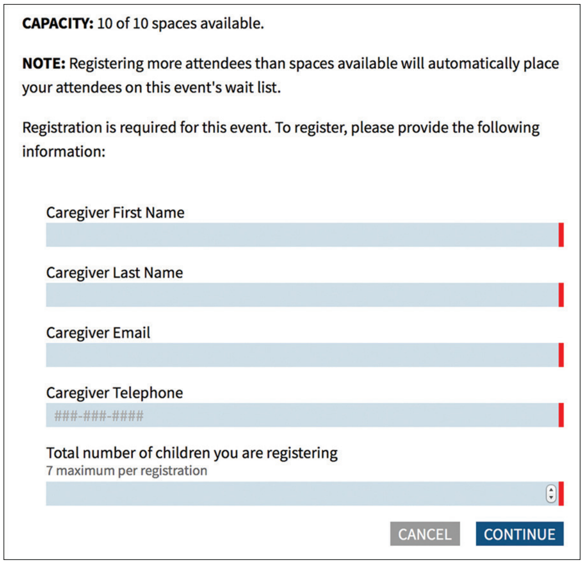
###-###-####

Total number of children you are registering

8 maximum per registration

CANCEL CONTINUE

3. <u>Caregiver/Child(ren), Caregiver included</u>. Collects caregiver, child information, and count of children. Caregiver counted as attendee. (See form on the following page.)



h. *Contact Information fields.* The system can collect contact information through the use of three fields: Library Card, Email, and Telephone. In this module, you have the same options for each—you can "Exclude" (not display), "Include, but optional" (display, but not make required); and "Include and require." Because of the triggered emails that deliver important information throughout the booking process, it is suggested that you make the email field required. ***If you decide to make the library card field required, please communicate with Assabet, so the a connection can be made to your ILS in order to validate against any desired criteria.***

i. *Approval.* Select automatic or hold for manual approval of registrations. If you choose automatic approval, any registration made by a patron will add all names contained within the request to the list of attendees, unless the number exceeds a set maximum number. (See d.) ***Note that if staff—not a patron—adds a registrant, they will need to change the status from "Pending" to "Approved" after saving.*** If you opt for manual review, then you will need to review and change the registration status (Approve, Deny, or Wait List) in the Registration section of the Event Calendar module.

j. *Staff Recipient(s) of Registration Notification Emails.* This address becomes the Reply-To address on triggered emails and where copies of those emails—if indicated in the Email section—are sent. This field must contain at least one email address. Separate addresses by comma if adding more than one.

k. *Allow a Wait List.* If you choose to have a waiting list, then you will be required to provide a number in the Maximum Total Attendees field of people attending the event. (See d.) Activating a waiting list will automatically capture, in order, anyone who attempts to register after the cut-off date and time. This creates opportunities for those not originally on the attendee list if any confirmed attendees alert the library that they're unable to attend in a timely manner.

l. *Custom Registration Fields.* You may introduce additional fields to the registration form to collect more information if necessary. To add one, click within the field visible in this section and type in the name of the label you wish to associate with the field when displaying to a site visitor. The "+ Add Another Field" link enables you to continue to add more fields as you need them. ***Any fields you've added appear on the second page of the online registration process.***

CONFIDENTIAL NOTES Box

This area provides fields for preserving any information you would like to associate with the event listing, but which you don't want to publicly display. The *Event Notes* field is useful for capturing details that may help the library manage the event. The *Location Setup Directions* field is the basis of a report for those in charge of arranging the room before an event. You are not required to put anything in either box.

When you've finished providing all the information requested, hit the SAVE button at the bottom of the page to finish the event set-up. To view the saved record, find it in the list on the main Events page, and click on the "Access Details" link.

2. Copying an event

Accomplished in "Events." When you choose to copy an event, it uses the settings and content of the event being copied to set up an additional record. Before saving as a new event record, be sure to review the content in all fields, so you don't mistakenly create an instance of the event that is in conflict with the original.

To copy, select an event from the list on the main Events page and click on the "Access Details" link at the right end of the listing. (You can use the filtering options located above the list to quickly locate the event you wish to edit.) Your event falls into one of two categories—either a Single event or a Series/Reoccurring event. Follow the indicated instructions that follow for your type of event.

Single. Once in the record, click on the "Copy this Event" link to create a new record with all the original information and settings, then make any necessary changes. The new listing will not be created until you hit the SAVE button at the bottom.

Series or Reoccurring Events. Once in the record, click on the "Copy this Series (or Reoccurring) Event" link to create a new record and make any necessary changes, paying close attention to the Event Repetition box. The new listing(s) will not be created until you hit the "SAVE" button at the bottom.

3. Editing an event

Accomplished in "Events." Select an event from the list and click on the "Access Details" link at the right end of the listing. To access the event record and make changes, click on the “Edit” link located at the top of the page for a single event, and to the right of an individual event if a Series or Reoccurring type. Hitting the SAVE button at the bottom will commit any changes you made.

If you’d like to make changes to the registration settings associated with an event or set of events, or want to add registration to an event without it that’s already been created, changes should be made in the “Event Registration Settings” area of the event. A link to this area can always be found on the page to which you are delivered when using the “Access Details” link. In the case of a Single event, the “Edit” link is at the bottom of the page. For Series and Reoccurring events, locate the occurrence you wish to modify. Immediately below it—just as with all other occurrences—there is a box labeled “Occurrence ‘x’ Registration Settings” where the “Edit” link can be found. Make the necessary changes, then hit the SAVE button at the bottom to commit your modifications. For more information, please see the next section in this manual, MANAGING REGISTRATION.

4. Canceling an event

Accomplished in “Events.” Canceling an event leaves an event listing on the calendar, but adds the prefix “CANCELED” before the title, removes the sign-up form from the event listing if there is registration, and prevents the reminder email from being triggered.

To cancel an event, select an event record from the list on the “Events” page and click on the “View Details” link at the right end of the listing. From here, the approach you take may differ depending on the event.

- If this is a single event, use the “Cancel this Event” link on this view of the event record.

- If this is an event that is part of a series and you want to cancel them all, click on the “Cancel All Occurrences” link at the top of event “Details” page.

- If you want cancel only a single instance of a series event, click on the “View Details” link of the specific occurrence and use the “Cancel this Event” link on that page.

Canceled events are not removed from the system, though they are shown grayed out in every list to indicate their canceled status. “Uncanceling” an event will remove the “CANCELED” prefix from the event listing on the calendar and restore both the registration and reminder email functionality that was removed when you originally canceled the event.

5. Deleting an event

Accomplished in “Events.” Select an event from the list and click on the “Delete” link at the right end of the listing. The event is not removed from the system, but it does prevent the event from displaying on the calendar. If you want the information associated with the event record to be included in a report, you will have to "Undelete" the event record beforehand.

6. Adding an image to an event record

Accomplished in the "Event Information" box in an event record. All images are stored in the Assets Library. These may be added to an event in one of two ways.

1. *Featured image.* This is the preferred way for including an image in an event listing. When designated as "Featured," the image is automatically resized to predetermined widths for various presentations of the event listing. To set one, go to the "Featured Image" area of the EVENT INFORMATION box and click on the SELECT IMAGE button. This connects you to the Assets Library to browse all uploaded images. Clicking on an image selects it and returns you to the event record. If you have not yet uploaded an image, click on the "Add an Asset" link located just above the FILTER button in the Assets Library and follow the instructions. If you need to include an image other than the Featured Image, see #2 below.

2. *Embedded in a content area.* If you need to place another image in the listing, you may do it in the "Description" area located below the "Featured Image" area. This is not usually recommended, because the addition of another element often makes your listing harder to read.

To add an image to the Description field, place your cursor within the text where you want the image to go, and click on the "Images" icon in the in the row of formatting tools at the top. (That's the one located to the left of the chain, or "link," icon that appears as a box with a mountain and sun in it.) Select the only choice available in the dropdown menu: "Insert Image." When the pop-up box appears, click on the green SELECT IMAGE button. This allows you to browse the image section of the assets library. To choose an image, click on the "Select Asset" link below it, at which point you'll be returned to the pop-up box. (If you wish to change your selection at this point, use the green CHANGE SELECTION button next to your choice.) If you have not already uploaded your image choice to the Assets Library, you may do it while browsing by using the "Add an Asset" link that appears in the upper right-hand corner below the instructions.

The second field in the pop-up box, "Description," is pre-filled with the words that were provided when the image was added to the Assets Library—you need not do anything here. The last field, "Alignment," allows you to determine whether the image will display to the left or to the right of the text in which it's embedded by using the dropdown menu.

Selecting the CONFIRM button saves your choice, and you are returned to the Description field with the image in place.

7. Adding a document for download to an event record

Accomplished in the "Event Information" box in an event record. Links enabling patrons to download documents from an event listing may only be added within the set-up fields labeled "Description" and "Event Pricing."

Place your cursor within the text where you would like the link to appear. Then click on the document icon in the row of formatting tools at the top of the field—between the image and the chain icons—and select the only choice available in the dropdown menu: "Insert Document." Click on the link and when the pop-up box appears, click on the SELECT DOCUMENT button. This allows you to browse the document section of the assets library. To choose a document, click on the "Select Asset" link below it, at which point you'll be returned to the pop-up box. (To change your selection, use the green CHANGE SELECTION button.) If you have not yet uploaded the document, you may do it in the Assets Library, using the "Add an Asset" link that appears in the upper right.

To complete the process, provide a word or words that will appear in your text as the link in the "Link Text" field. This will replace the file name that was automatically inserted when you chose your document.

8. Adding a link to a page in an event record

Accomplished in the "Event Information" box in an event record. This feature is only available within the set-up fields labeled "Description" and "Event Pricing." Place your cursor within the text where you would like the link to appear. Click on the link icon—the chain, to the right of the document icon in the row of formatting tools at the top of this field—and select the "Insert Link" in the dropdown menu, producing a pop-up box. In the URL field, please place the full address of the web page you are linking to, using the correct prefix (i.e., "http://" or "https://"). Place the word or words that you want to act as the link in the "Link Text" field and CONFIRM your choices.

9. Posting to social media

Accomplished in the "View Details" section of an event record. AI users may post a saved event to the following social media platforms: Facebook, Twitter, Tumbler and Pinterest. Icons representing these four are located on the right, just above the event record on an event's "View Details" page. To post an event, click on the icon of the platform to reveal a pop-window that previews the automatically generated post. When ready, submit it using the obvious button for the platform you've chosen. If you haven't already, you will be required to log-in with the correct credentials to access the library's account of the social media you've chosen.

10. Adding or editing event-specific text to triggered emails

This is useful for adding unique information about an event to the body of a triggered email. If used for delivering information like Zoom and Facebook links and passwords for virtual events and programs, taking advantage of this method will eliminate having to create and send a mass-email before the event takes place. *Note that if the last or only triggered email delivering this text is scheduled before the end of your registration period, there might be some attendees that don't receive it.*

The text is solicited during the set-up of an event, but a specific mail-merge field—[RegistrantEmailContent]—must appear in the body of any triggered email you wish the text to appear in. If the mail-merge code is not already in the body of the email you want the text associated with, open it in the Edit View, add it where you'd like it to appear, and save. *Note that every email configured to merge an additional paragraph will do that for any event for which you have provided text.*

Adding the event-specific text is done during the set-up or editing of an event. Provide the text you'd like to include in the field entitled *Content for Triggered Emails,* which appears at the end of the REGISTRATION/WAIT LIST SETTINGS box. If you leave this field blank, nothing will be added to the email you've configured to "grab" the text that appears here.

If you've already set up an event record, you may still add or edit event-specific text. Start by clicking on the "Access Details" link of the event you'd like to change on the Events page. Once there, locate the "Registration Settings" of the event (or, if a series, for an occurrence of the event) and click on "Edit." The *Content for Triggered Emails* field, which contains the text you want to edit, is located at the bottom of the REGISTRATION/WAIT LIST SETTINGS box.

11. Using the calendar to manage curbside pickup

Accomplished during event record set-up. First, create a Reoccurring series event with a title like "Curbside Pickup" and a unique registration of "1" for each instance, using the "By the Minute" repetition rate. In the "Maximum Attendees Per Registration" field in the event set-up, indicate "1." (This automatically indicates to the system that the registrant is the intended attendee, and so eliminates the fields which ask for the number of attendees and whether registrant is one of those attendees on the registration form.) Select the first form option,"Registrant/Attendees (default)," and confirm that the next section—"Assume Registrant is Attendee"—displays the "Yes" radio button as having been selected.

To keep track of no-shows, you may add a head count after a scheduled pick-up has passed by adding a "1" or "0" to indicate whether or not a patron showed up. The "Head count" column on the "Past Events" view of the Event Calendar Registration page will display the number you've indicated for each event, so it will be easy to identify patrons with whom you need to follow up without having to go into each event record.

12. Viewing the public presentation of the calendar

Accomplished on every page in the Calendar module. Use the link in the upper right hand corner entitled "View Public Display" to display the view of the calendar that patrons see when they visit your website. Note that this only includes material generated by the AI module—visitors to the actual website will see the module, the template with full navigation, and content added by library staff to any page which displays the calendar.

13. Printing the public presentation of the calendar

Accomplished on every page in the Calendar module. Using the directions above, open the Public Display version of the calendar. Use the print function of your browser to open a print configuration window, then, depending on the choices you are provided, select landscape (instead of portrait orientation), indicate that the size of the calendar should fit to width or provide a percentage that will work, eliminate the headers and footers, and allow the background and images to print. Because Chrome provides a view of your choices before printing, it may be easier to manage this process with this browser than others.

MANAGING REGISTRATION

The Registration section provides access to the records of all events that require registration. It also allows an administrator to move registrants from one status to another, such as from "Pending Approval" to "Attendance Approved." Note that actual registration settings are not added or modified here, but rather in a specific event record in the Events section.

A registration will be rejected if the number of attendees indicated in the request is greater than the number of spaces for the event that remain available, unless a waiting list has been set up. The patron attempting to register will be notified of the status of their request at that moment by a triggered email.

1. Viewing registrations

Accomplished in the "Registrations" section. The main page provides a list of all events with a registration process, including a quick look at how many attendees are approved and what the limit is for each event. The usual filters for finding a particular event in order to view the details are available. This section provides access to the information that has been entered by patrons and the tools for managing it. You may even enter a new registrant if you wish.

In the Assabet Interactive system, the person registering is considered a "registrant," though not necessarily an "attendee." During the registration process, patrons are asked how many are in the party, and if he or she would like to be added as an attendee. If the number in the party is indicated by the registrant as greater than one, then the appropriate number of fields are generated to capture the name of each attendee so they can be added to the list as unique individuals.

To access registration information, choose an event and select "View Registrations." This page delivers a snapshot of all current registrants, organized by "Approved," "Pending Review," "Wait Listed," or "Denied," and enables you to change a registrant's status and manage emails. If you wish to email those in a particular category (i.e., pending or approved) or all event registrants, use the "Mass-Email Registrants" link in the upper right-hand corner. You will provided with an opportunity to indicate which groups are to be included in the email. (Note that if no one has yet to register, there will be no email addresses in the system for the event and no groups will be visible.)

2. Adding registrants

Accomplished on the "View Registrants" page of a selected event in the "Registrations" section. Clicking on the "Add Registrants" link in the upper right-hand corner of the page delivers two boxes to input a name, email address, and telephone number (REGISTRANT INFORMATION box) and attendee information (ADD AS AN ATTENDEE? box). Any unique fields that were added during the registration set-up to collect information unique to the event will be available in the second box. When finished, click on the SAVE button, or the SAVE & ADD

ANOTHER if you wish to add another attendee. ***Note that, if registration has been set to auto-approve in the event record, the addition of a registrant by staff still requires approval after saving.***

3. Adding anonymous registrants attached to a known attendee

Accomplished on the "View Registrants" page of a selected event in the "Registrations" section. Though patrons are unable to register for an event anonymously, library staff may add a number of nameless attendees in the administration section. These attendees may only be added if they are associated with a registrant record that contains a name and contact information. This is useful for situations where the library allows an institution like a senior citizens' home to reserve a block of spaces when they don't yet know the exact names of attendees.

To add anonymous attendees, follow the directions in the previous instruction ("Adding registrants"), provide a number in the "ADD ANONYMOUS ATTENDEES" box, and hit the SAVE button. To finish, the new record must be approved, as you are reminded with the colored box that appears at the top of the record page you are taken to. This is done by clicking on the Approve Registration link in the second row below the box which then returns you to the Registrant list page.

4. Moving registrants from one status to another

Accomplished in the "Registrations" section by selecting the "View Registrants" link of the specific event you wish to manage. This page that displays the four possible categories in the registration process, with registrant names listed under an appropriate group name: Approved, Pending Review, Wait Listed, or Denied.

At the right end of each line, every choice to change status available is displayed by a link to accomplish the task. Not all categories may apply to the event—for example, if no waiting list has been added to the registration record, then the option to move someone into that group will not appear. Note that any moves you make will trigger an automatic email informing the patron of his or her change in status. (See the next section, "Managing Emails to Registrants," for more details.)

5. Viewing information related to a unique registration

Accomplished in the "Registrations" section by selecting the "View Registrants" link of a specific event, then "View Details" of the Registrant you wish to view. This page provides every piece of information related to the registration contained in the system, including a log of what emails were sent and when, and any status changes made by staff, indicated by who and when.

6. Managing attendance

Accomplished in the "Registrations" section by selecting the "View Registrants" link of a specific event, then "View Attendee List." This page delivers a list of all registered event attendants, with contact information and data from any custom forms that were added to the registration. If the online page is unavailable at the event location, you may print it out to take attendance manually. ***Note that if you do use a piece of paper to check people in, and attendance numbers are a vital part of one of your report(s), then you will need to transfer the captured information to the system when you again have access to the "Manage Attendance" page.*** If you wish to export a list of attendees—together with the associated information that appears on this page— click on the "Export to CSV link." This will create a file that may be opened by spreadsheet applications.

7. Adding attendance numbers for reports

To add a head count to events with registration, go to the "Registrations" page in the Calendar module and click on "View Registrants" of the event you'd like to manage. Click on the link for the "View Attendee List" page, then on "Set Head Count" once there. Enter the number of attendees in each of the categories—using "0" if none—and the system will automatically generate a total. If you don't wish to categorize the attendees of an event, you need only place a number in the "Total Number of Attendees" field. If the registration is for a series and you wish to generate an attendance number for each instance, there are two ways to accomplish this. One way is to input numbers for the first occurrence, then apply the same numbers to the rest by using the "Copy these Counts to all Occurrences" button. Alternatively, you can just input numbers that reflect the actual attendance on each particular date.

To add a head count for those events that do not require registration, go the "Events" page and click on the "Access Details" link next to the event you wish manages. At the bottom of the page, under "Event Registration Settings," click on the "View Attendee List" link to access the page where you can set the head count using the link. From this point on, the instructions are the same as for those events with registration described in the previous paragraph.

Note that the head count categories can be changed in the "EVENT HEAD COUNT FIELD LABELS" Box in "Miscellaneous Settings" in the General Settings section of the MANAGE MODULES area. Any labels changed after you've begun to input head count numbers will re-categorize attendance from earlier events.

8. Adding attendance numbers to an event with no registration

Sometimes you'll want to collect attendee numbers for your reports, even though registration for the event was not required. To add this information go to the Events page in the Calendar module, use the filters to locate the event you want to add a head count to, then click on the "Access Details" link. Once on that page, scroll down to the registration settings area. There is a link in the Options column at the right to "Manage Attendance," which will take you to a page that enables you to access the "Set Head Count" link. Once there, add the numbers just as you would have had there been registration attached the event.

9. Managing cancellations (attendance and wait lists)

A patron's attendance at an event may be canceled in one of two ways—either by a staff member in the administration section or by a patron through the system.

The first is accomplished by going to the "View Registrants" page of the event and using the "Delete" link under the Options column. The latter is done by a patron using the cancellation link that appears in triggered emails.

In either case, the space(s) vacated by a registrant are not automatically filled by the system moving name(s) from the wait list, even if there are patrons in this category. A staff member must purposefully change the status of patrons in the wait list to fill the vacancy created by the cancellation.

Staff are made aware of a patron-initiated cancellation by the copy of the cancellation confirmation email to the notification email address provided in the event record during set-up of the listing. Note that while a space may have opened up by a cancellation, a patron who attempts to register for the event won't get "lucky" and fill the space if the wait list has names in it—they are automatically sent to the end of the line.

10. Deleting a registration

Accomplished in the "Registrations" section by selecting the "View Registrants" link of a specific event. Any registration may be deleted by using the "Delete" link found in the Option column at the left of every name. The registration is not actually removed from the system, but it does prevent any information associated with it from being included in a report. If you want the registration to be part of a report, you will have to "Undelete" the event record beforehand.

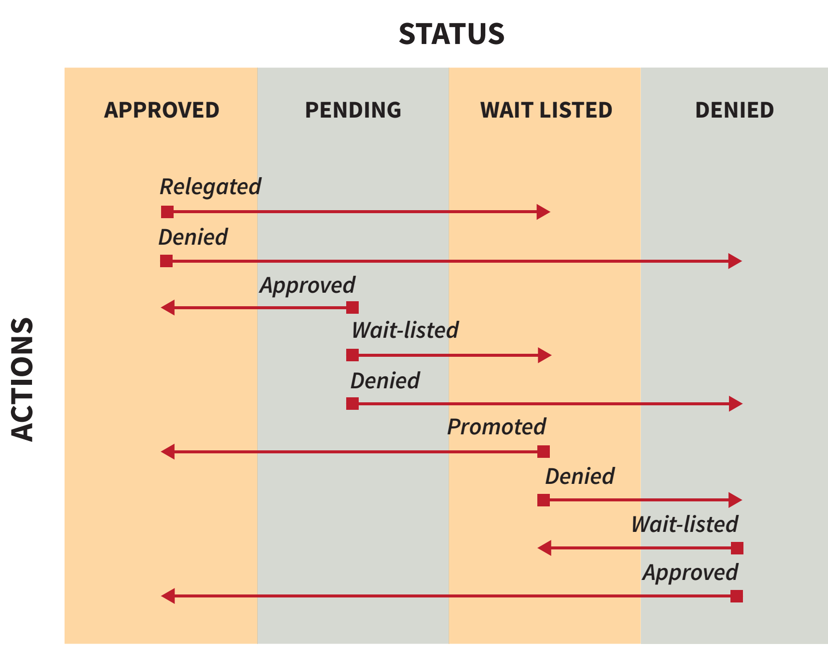
MANAGING EMAILS TO REGISTRANTS

The Emails section allows administrators to view and modify emails that are automatically sent to registrants at various predetermined points in the registration process up until the event. Unless you wish to change the text of the default emails which pull in information related to your library, event, and a specific registration, or to make an email inactive, you need not do anything in this section.

There are basically four different situations where emails are sent to registrants:

1. *When an event listing is configured to approve, waitlist, or hold for manual approval any registration request made through the system, an appropriate email is automatically sent to the registrant after they've submitted their request.*
2. *When a change is manually made to a registration record that results in a new status, an appropriate email is automatically sent. (Note that the actions named in the graphic use the same labels as those in the administration section to describe the email triggers.)*
3. *When getting close to an event taking place, an email reminder is automatically sent two days beforehand.*
4. *When an administrator wants to send a custom message to a registrant, or to registrants based on their group status, a unique email may be created and sent at a time decided by you.*

Changes in Status that Trigger Automatic Email Responses



1. Sending an automatically triggered email

You need do nothing to have email messages automatically sent to registrants at system-scheduled moments with details about an event and their status. These emails are triggered at important points and changes in status. They include the following:

- **Attendance auto-approved** *(automatically triggered by a patron's reservation request when auto-approve setting is set to "Yes")*
- **Wait-list auto-approved** *(automatically triggered by a patron's reservation request when attendee list is full, but when "Waitlist Available" is set to "Yes")*
- **Pending approval** *(automatically triggered by a patron's reservation request if not set to auto-approve)*
- **Attendance approved** *(automatically triggered by manual change of reservation status to attending)*
- **Wait-list approved** *(automatically triggered by a manual change of reservation status to approved for wait list)*
- **Attendance denied** *(automatically triggered by a manual change of reservation status to denied)*
- **Promoted to attendance** *(automatically triggered by a manual change of reservation status from wait list to attending)*
- **Relegated to waiting list** *(automatically triggered by a manual change of reservation status from approved to wait list)*
- **Event reminder** *(automatically triggered by system two days before event)*

Staff is alerted by email when a registration arrives into the system that requires an action. (All such emails are sent to any addresses indicated in the event set-up field labeled "Staff Recipient(s) of Registration Notification Emails.") Please see the next section for instructions if you wish to deactivate an automatically-triggered email.

2. Editing a triggered email

Accomplished in the "Emails" section within an event record. When you start using the system, you may need to edit the emails provided with the system to better reflect the reality of your institution. To replace or add text, select "Edit" in the "Options" column of the specific email in the list you wish to modify. Note that there are some "mail merge" names (located within editor's brackets) that pull in data from the registration record. Since the "mail merge" names are descriptive, it shouldn't be difficult to identify and preserve these so that each email sent retains the automatic personalization. (If you've accidentally erased one that you wanted to retain, or you'd like to add new one, a list of all available "mail merge" fields is available at the bottom of the page for reference.) ***Note that***

you must leave the text after the email sign-off in place if you want to provide the opportunity for patrons to cancel their event registration. (See #4 below for more information.)

To deactivate an email, click the "No" button under the "Active" heading in the "EMAIL CONTENTS" box. This change does not delete the email from the system. You may reactivate it at a future date simply by clicking on the "Yes" button under the same "Active" heading in the "EMAIL CONTENTS" box.

3. Sending a custom email

Accomplished in the "Registration" section, in an event record. The main page in this section delivers a list of all events with registration. Selecting the "View Registrations" link to the right of the event delivers a page that provides lists of all registrants, organized by status.

To send an email to all registrants, or one or more status groups, click on the link in the upper right-hand corner labeled "Mass-Email Registrants." At the top of the box labeled "EMAIL REGISTRANTS," indicate to which groups the email is to be sent, fill in the fields, and click on the "Send" button. *Note that the only choices for segmenting your email by group are the categories (i.e.,. pending) that already contain registrants.*

To send an email to an individual, click on the "Email" link to the right of their name. When the form appears, fill in the fields, and click on the "Send" button.

4. Ensuring that the "Cancel" link in triggered emails is functional

Accomplished in the "Emails" section, in Edit mode of a particular email. A patron may cancel their registration through a link provided in every message sent during the "pre-engagement" process if the text in every email is properly configured.

If you have yet to make any edits to the text in an email, you'll see the paragraph that delivers this at the end. If that is the case, you need not do anything.

If you *have* made changes before we added this functionality—or the paragraph is simply not there—you'll need to add the following paragraph underneath the email sign-off (The [InstitutionName] Staff) in the Edit view.

> NEED TO CANCEL?
>
> If your group is unable to attend the event you've registered for, letting the library know could enable someone else to attend instead. To cancel this registration, please use this link:
>
> [RegistrationCancellationLink]

Once this paragraph is in place in every one of your active emails, patrons will have the opportunity to cancel their registration every time they receive a triggered email from the library in a process not unlike removing one's name from an annoying email list.

5. Adding a graphic to a triggered email

Accomplished in the "Emails" section, in Edit mode of a particular email. You may want to add the library's logo or another graphic to the text of an email. In that case, you will need to insert some code that references a graphic in your Assets Library. It will look something like this:

```
<img src="https://s3.amazonaws.com/ai-assets/waltwhitman/
wwl_logo_sm_111_lg.jpg" alt="Assabet Interactive" width="140"
height="81" />
```

The text in red is the prefix in your portal's address. (The example above comes from our demo site—"https://waltwhitman.assabetinteractive.com/admin/".) The text in blue is the file name of the graphic in your assets library. The alt information, in green here, is for those using screen readers to let them know what it is that they're unable to see. And finally, the width and height should be the exact dimensions of the graphic—if the proportions are wrong, your graphic will not display properly.

IV. OVERVIEWS: WHAT'S HAPPENING AT THE LIBRARY & LOCATION UTILIZATION

This section delivers snapshots of what's going on at the library from two points of view. The first is organized by what; *the second, by* when *and* where.

The Happening at the Library page allows staff to generate printable lists of all events and room reservations within a given time-frame. Filters can narrow results by search terms and location.

The other two, Location Utilization–By Week and Location Utilization–By Day, provides visual views of when locations within the institution are being used and when they're not. In addition, the creation of events and room booking records may be initiated here after determining that there are no conflicts.

1. Generating a list of events taking place at the library over a specified date-range

Accomplished on the "Happening at the Library" page in the OVERVIEWS section. Lists may be automatically generated by any one of a number of pre-established time frames: "Today", "Tomorrow", "This Week", "Next Week", and "This Month." Clicking on any of these links will deliver a list of results defined by your choice.

If the desired time period is not reflected in any of those ranges, you may enter information in the Start Date and End Date fields to create a different one. In addition, you can choose a location entered in the system and/or use a search term to further segment your results. Any of these approaches requires clicking on the FILTER button to apply the filters.

The results are organized by the date and time of when each event takes place. In some cases, clicking on a column header will affect the alpha-numeric order of the event listings.

Each listing contains the following information: Event Title, Access Start, Publicized Hours, Access End, Location, Event Type, Status, and Options, the last of which will display the conflict icon if appropriate. If a Single event, the "Access Details" link in the Options column allows you to view the event record. Once there, you can edit, copy, or delete the event by using one of the provided links. A Series or Reoccurring event functions in the same manner, except that is requires another step to access the tools for editing, copying, or deleting—after clicking on the "Access Details" link in the Options column, click on the "View Details" link of the highlighted occurrence on that page.

2. Printing or making a PDF of a What's Happening list

Accomplished on the "Happening at the Library" page in the OVERVIEWS section. To print your list, use the "Print Event List" link located above the pre-established time frame options. With this feature, you can take advantage of your computer's option to "print" as a pdf, making distribution of the list easy by email.

3. Understanding location usage with a visual “datebook” view

Accomplished in “Location Utilization-By Week” and *“Location Utilization-By Day” in the OVERVIEWS section.* These pages deliver views of all location usage, from both the Event Calendar and the Room Booking modules (depending on your specific subscriptions)—for the current week or day—the default—or other weeks and days if you wish. Information is provided about whether a time block represents an event, a booking, or a booking converted to an event, in addition to whether the record is a draft (not yet published) or a pending booking (being reviewed for approval), and if there are conflicts. (See the “Key” for reference.) Filters can help sort the information according to locations and categories. The grid may be printed out, or turned into a pdf file by taking advantage of your computer’s option to “print” as a pdf.

4. Initiating the creation of an event record or room booking from a Location Utilization page

Accomplished on either of the “Location Utilization” pages *in the OVERVIEWS section.* While this page delivers a view of all instances of location usage, it just as importantly conveys if a locations is available, indicated when no block representing a “room claim” is displayed within a particular time period in the location of your choice. You may initiate the creation of an event or room booking directly from this page once you’ve determined that a location has not been scheduled for the time you want.

To start, click in the grid with your mouse when you’d like your location usage to start, dragging the block that appears to the point at which you’d like your event or booking to end. After releasing, a pop-up box will appear with the date, fields pre-populated with the start and end times you selected, and a drop-down menu enabling you to specify whether you’re creating a particular type of calendar event, or—if you subscribe to the Assabet Room Booking module—a staff-side room booking. The time fields are editable, so if you need to make any modifications before continuing, you may. When you’re finished indicating your choices, hit the “Configure” button, and you’ll be taken to the appropriate module to finish setting up the new record.

V. ASSETS

Assets are defined as all images and documents intended to be made available as downloads, such as pdf files or Word documents. This section provides access to every asset that has been uploaded to the system, supporting every module you've subscribed to. Filtering, based on the type of asset (image or document), and information in the record placed in the search field, can help you quickly find a file in the library.

1. Adding an asset to the Library

Done on the "home" page of the Assets section. Use the "Add an Asset" link below the intro text on the right to access the Upload page.

In the first box, labeled UPLOAD FILE, click on the "Choose File" button to locate the file you wish to upload on your computer. Select the file and hit the "Choose" button. *Accepted formats are gif, jpeg, and png files for images, and Word, Excel, and Acrobat (PDFs) for documents.*

Next, fill in the requested information in the ASSET INFORMATION box. The more information you can provide, the easier it will be for search engines to find you, and for you to find specific files within the library. The "Alt Value" is important because it provides a description for visitors who are unable to see images in their browser, in particular, the visually impaired or those using screen readers. Don't forget to select "Active" if you wish to make the image available for use. When completed, hit the SAVE button below. Note that the file will not become part of the library until you've hit this button.

We suggest that "Featured Images" be as high-res as possible, without going over five MBs. An image appearing in the description should be no wider that 250 pixels, because the relationship of the image to text in the same space is harder to control.

2. Viewing an asset record

Accessed on the "home" page of the Assets section. An asset record contains some information that will help you manage the site, such as usage details like *where* (a specific event listing, for example) and *how* (Featured Image or embedded in description). Links are provided so that you can understand the context in which it's been used. To access the record, click on "View Details" below the image.

3. Editing an asset record

Accessed on the "home" page of the Assets section or from the record page. While the term "Edit" might suggest you'll be able to change attributes of the image or document itself, it applies only to the information you provided when you uploaded the file. To edit the record, click on the "Edit" link below the image or document in the library "home page" list. If you are already within the record, click the “Edit this Asset Record” link at the top right of the page, and make your modifications.

4. Sharing a document located in the Assets Library using email

Accessed on the Details View of a document that has been uploaded to the Assets Library. To share a document with someone through email, first locate the “DOCUMENT URL” field on the Details View of the document in your Assets Library. Copying and pasting the URL into the body of the email will create a link that allows the receiver of the email to download the document. *Note that images are unable to be shared in this manner.*

VI. REPORTS

Calendar module reports include event attendance, location use, and location set-up information. All reports may be printed or exported as a csv file which can be opened in a spreadsheet application. Note that these reports are not all accessed in the same place.

1. Generating a report on the attendance at a specific event.

Done on the "Attendance" page of the Calendar area in the GENERATE REPORTS section. This report has more settings than most in order to provide as much control as possible over the information you wish to compile. In addition to specifying a date range, there are ways to include and exclude certain events, including the ability to narrow the data by branch, category, and event title keywords. We suggest you take the time to review these setting each time you generate a report, so that you understand the significance of the numbers you're looking at. Make your choices in the REPORT SETTINGS Box, then click on the "CREATE REPORT" button at the bottom of the form when done to assemble the information.

REPORT SETTINGS Box

a. *Start Date* and *End Date.* Provide the date range for the report.

b. *Narrow by Branch.* Reports can be confined to any branches in the system. If you have more than one branch, no change is necessary to capture information from all of them.

c. *Narrow by Category.* Reports can be confined to categories. The default is "all," but the drop down menu makes available any event category that you've entered into the system.

d. *Narrow by Event Title Keywords.* This field allows you to generate a report based on a particular event or series by providing its name.

e. *Include Events that* did not *require registration.* Since a head count may indicated for events without registration, the system default is "Yes." If attendance tracking is not maintained for events without registration, or you don change the setting to "No."

f. *Include Events with no Head Count set.* The default is "No," the assumption being that a Head Count which is blank—seen as zero—could misrepresent the aggregated attendance. Change to "Yes" if you wish to include those events without a head count number.

g. *Include Room Bookings converted to Events.* Room bookings that originate in the Meeting & Study Room module may be converted into events that can be published to the calendar. Sometimes these are meetings that the library has no control over; other times, meetings which the library actively manages and for which it collects attendance. To include these converted room bookings, you need do nothing—the default is "Yes." However, if you wish to exclude these, change the setting to "No."

2. Generating a report on frequency of location use.

Done on the "Location Usage" page of the Calendar area in the GENERATE REPORTS section. Indicate a date range in the Start and End Date fields. To confine the report to a specific location in the system use the "Narrow by Location" drop down menu, or leave as is to collect information on all. Then click on the "Create Report" button when you're ready.

3. Generating a report on location set-up instructions.

Done on the "Location Set-up" page of the General Reports area in the GENERATE REPORTS section. The report collects room set-up instructions for all events for which they have been collected within the time period that you enter.

If your subscription includes the AI Room Booking module, instructions for booked rooms are part of the report and can be shared with the person(s) at your library in charge of getting rooms ready for use. All equipment requests are included.

Note that any instructions provided by a room reserver collected in the optional "How would you like the room arranged?" field of the online reservation form must be copied into the Location Set–up Directions field in the CONFIDENTIAL NOTES box of the booking record to be included in the report.

4. Generating a report of the Confidential Notes of event records.

Done on the "Confidential Notes" page of the General Reports area in the GENERATE REPORTS section. The report collects the information in the Confidential Notes field for all events within the time period that you enter.

5. Generating a report on improvements made to the system.

Done on the "Enhancements & Fixes" page of the General Reports area in the GENERATE REPORTS section. The report allows you to retrieve the news items posted on the DASHBOARD home page when improvements and fixes have been made within the date range you specify.

Note that enhancements are sometimes made without being announced with an email to libraries. However, this information is always posted to the DASHBOARD home page, so this report is a good way to explore changes that Assabet has made to the system.