VERSION 1.31.22

GENERAL **MANUAL**

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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.

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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. In other words, when you become familiar with editing in one area, you won't need to learn an entirely different method in another.

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 <u>required</u> 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.

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 after inputting the username and password that you were issued.

If you've forgotten your password, click on the "Forgot Password?" link below the log-in fields. Provide a user name and an email will be sent to the address 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

Every module has four different user-levels, with varying degrees of access.

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.

MANAGE ACCOUNT
- Account Information
- Subscription
- Users
- Change Password
- Logout

MANAGE MODULES
- Calendar
- Meeting & Study Rooms
- Museum Passes
- Overviews
- General Settings
- Assets

GENERATE REPORTS
- Calendar
- Meeting & Study Rooms
- Museum Passes
- General Reports

CONFIGURE INTEGRATION
- Colors, Fonts, & Code
- Advanced Options

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 Assabet Interactive (AI) 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. If you wish to return to the Dashboard, you'll need to re-enter your login information.

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 weekly visual presentation. The latter, the Location Utilization page, 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:

- *Colors, Fonts & Code.* This area provides tools for a library's experienced IT person or webmaster to implement the AI module(s) on an existing site.
- *Advanced Options.* Provides access to css for programmers interested in making sophisticated modifications to the appearance of the software on a site.

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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," and finally, "Branch Closures."

1. Managing Branches/Places

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

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.

c. *PATRON "THING" RESERVATION LIMITS–LIBRARY OF THINGS MODULE.* If your AI subscription does not include this module, this setting will not show up as a choice.

d. *MUSEUM PASS LIMITS–MUSEUM PASSES MODULE.* The frequency of patron check-out of museum passes may be controlled at three levels: the global level, by institution, and by pass. The information you provide here controls this at the global level, limiting the number of passes overall, but without restriction by institution and specific pass.

e. *MUSEUM PASS RESERVATION PERIOD–MUSEUM PASSES MODULE.* This box enables you to manage the parameters of the period during which reservations may be made by patrons. To establish the length of the period, indicate how many weeks from today's date in the *Reservations not allowed beyond "X" weeks from current date* field. You may also prevent patrons from reserving a pass near the date of usage, if important, by supplying a number in the *Reservations not allowed prior to "X" days from current date* field.

f. *MUSEUM PASS RESERVATIONS–REQUIRED FIELDS.* This controls the behavior of the email and telephone fields in the reservation form according to three options: exclude; include, but make optional; and include and require. The library card number field does not appear here because it is automatically required in this module. *Note that the behavior of these three fields are managed at a much more local level in the other modules—on a per-event basis in the calendar, and on a per-room basis in the Rooms modules.*

g. *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.

h. *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.*

i. *LIBRARY CARD VALIDATION CHECKS–ALL MODULES.* You may ignore this setting. This is where Assabet Interactive stores some of the 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.*

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III. 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 lists of all events and room reservations within a given time-frame. Filters can narrow results by search terms and location.

The other, the Location Utilization page, provides a weekly view of when locations within the institution are being used and when they're not. In addition, events and room booking records may be initiated here after determining that there are no conflicts in terms of time and location.

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

Accomplished in "Happening at the Library." 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 or booking takes place. In some cases, clicking on a column header will affect the alpha-numeric order of the 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 or booking record. Once there, you can edit, copy, or delete the record 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 in "Happening at the Library." 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 by-the-week view

Accomplished in "Location Utilization–By Week" in the OVERVIEWS section. This page delivers a view of all location usage, from both the Event Calendar and the Room Booking modules (depending on your specific subscriptions)—for the current week (the default)—or other weeks 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 an event 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.
An excellent place to look for opportunities to schedule a room booking and avoid a conflict, you may initiate a staff-side room booking by clicking and dragging with your mouse over the specific hours on the day that you want.

4. Understanding location usage with a visual by-the-day view

Accomplished in "Location Utilization-By Day" in the OVERVIEWS section. Instead of the columns indicating different days, as in the weekly view, each represents a unique room which delivers a view of all sequential room use, using information from both the Event Calendar and the Room Booking modules, depending on your specific subscriptions. Here you may initiate a staff-side room booking by clicking and dragging with your mouse over the specific hours within a specific room.

5. Initiating an event or room booking from Location Utilization pages

Accomplished on either of the "Location Utilization" pages *in the OVERVIEWS section.* While these pages deliver views of all instances of location usage, it just as importantly conveys what locations are available. You may initiate the creation of an event record or room booking directly from either 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 room booking or a particular type of calendar event. 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.

Note that the functions in this feature depend upon which modules are included in your subscription.

IV. 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 add. 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.

Your library will grow over time, so we suggest you create a system for easily identifying categories that you might want to use more than once—that way you can easily find them using the Search function. Because the Search only looks at the titles, a good approach might be the use of prefixes as part of the name you've given the asset.

Don't forget to select "Active" if you wish to make the image available for use. When completed, hit the SAVE button below.

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 in the Assets Library by 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 shared in this manner.*