VERSION 2.1.22

# LIBRARY OF THINGS MODULE **MANUAL**

www.assabetinteractive.com

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# INTRODUCTION

*Welcome to Assabet Interactive's Library of Things module. 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 in the browser window, and why we've provided a place for making changes to the default fonts and colors of our modules, 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, such as 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 work-flow. 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 <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.
- 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.

## GAINING ACCESS TO THE SYSTEM

*o 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.

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## 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 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.

**MANAGE ACCOUNT**

Account Information
Subscription
Users
Change Password
Logout

**MANAGE MODULES**

Calendar
Meeting & Study Rooms
Museum Passes
Library of Things
Overviews
General Settings
Assets

**GENERATE REPORTS**

Calendar
Meeting & Study Rooms
Museum Passes
Library of Things
General Reports

**CONFIGURE INTEGRATION**

Code
Advanced Options

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- *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 areas. The first provides the instructions for adding the Assabet module(s) to your website. And, depending on your level of expertise, the second area 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. This area also includes some information about various feeds and your Google Analytics account, if you have one.

- *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 (if included in your subscription); changing the general font throughout the module(s)—yes, it's labeled "Comic Sansify"; 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.

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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 Assabet 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," then "Branch Closures," and finally, "Miscellaneous Settings."*

## 1. Managing Branches

*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 public.

b. *Branch.* Select the Branch where this location is situated.

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

d. *Website.* Provide the full URL of the page on your site that includes a description of this location, using the correct protocol prefix (e.g., "http://" or "https://"). Leave blank if there is no such page.

h. *Description*. Provide a <u>brief</u> description of this location. At the present time, it is not necessary to provide this information.

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 Booking 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 them all. While you probably won't need to make choices for 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, museum pass usage, or Library of Things pick-up that an email reminder is triggered. Your options are one, two, or three days before. The choice is applied to every module. ALL

b. *PATRON-SIDE USER INTERFACE–ALL MODULES.* There are two settings within this box. Typically, the first may be ignored. The second, however, helps capture data about visits to our part(s) of your website. ALL

- *Detail/Registration Page "Pop-out" Behavior.* In each module, pop-up windows 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* This allows staff to place “global” limits on the number of objects a patron may reserve within a selected length of time, without reference to specific items.

d. *OPTIONAL/REQUIRED RESERVATION FORM FIELDS—LIBRARY OF THINGS MODULE.* This controls the appearance of email and telephone fields in the online loan request form according to three options: exclude; include, but make optional; and include and require.

e. *PATRON PASS RESERVATION LIMITS–MUSEUM PASS MODULE.* If your AI subscription does not include this module, you may ignore this setting. If it does, please refer to the Museum Pass help manual for details.

f. *PASS RESERVATION PERIOD–MUSEUM PASS MODULE.* If your AI subscription does not include this module, you may ignore this setting. If it does, please refer to the Museum Pass help manual for details.

g. *PASS RESERVATION PERIOD–MUSEUM PASS MODULE.* If your AI subscription does not include this module, you may ignore this setting. If it does, please refer to the Museum Pass help manual for details.

h. *EVENT HEAD COUNT FIELD LABELS–CALENDAR MODULE.* If your AI subscription does not include this module, you may ignore this setting. If it does, please refer to the Event Calendar help manual for details.

i. *UPCOMING EVENT FEED SETTINGS–CALENDAR MODULE.* If your AI subscription does not include this module, you may ignore this setting. If it does, please refer to the Event Calendar help manual for details.

j. *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 and “things.”

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. LIBRARY OF THINGS MODULE

*The Library of Things area contains five sections (Objects, Loans, Check-out Items, Return Items, Categories, and Emails) that allow you to add object records to your online collection of things, which contain images and a description; associate the items with any appropriate categories (which you create); define their general availability and attach buffer periods for maintenance of objects; attach downloadable documents, such as terms-of-use rules and instruction manuals; add and manage loan requests, including the check-out and return of objects; and edit and manage triggered emails.*

**THE BASICS**

***A quick look at what using the Assabet Interactive Library of Things module entails.***

**BEFORE USE**

1. Set up the basic details.
2. Add objects, categories, images, terms and conditions of usage documents, and any instruction manuals you have.
3. Associate bar code (if necessary), pick-up location, and loan instructions with each item
4. Review triggered emails and make necessary changes.

**DURING USE**

1. When alerted to receipt of online loan request, review to ensure that it conforms to the library's terms of use if requests are set to hold for approval.
2. Approve—or not—if necessary.

## SETTING UP BASIC DETAILS

*If you have yet to use any of our modules, you will need to input or edit some information that is the backbone of the system. This is done in the General Settings and Assets sections in the top-level Manage Modules area, and in the Emails section found in the Library of Things area. In the Assabet Interactive system, all library buildings 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, such as the Event Calendar, Room Booking system, or Museum Pass module.)*

### 1. Adding branches and locations

*Done in "General Settings."* (See instructions in the previous section.)

### 2. Adding images and documents

*Done in "Assets."* You may upload images during the creation of an object record, but you may find it easier if they are already in the Assets Library. To add an image, go to the Assets page and click on the "Add an Asset" link below the intro text to access the Upload page. ***In this module, it is recommended the images be square—the height and width the same—so that grid display on the front of your website lines up nicely—we suggest 800 x 800 pixels.***

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 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.

### 3. Managing branch closures

*Accomplished in "Branch Closures" in the General Settings section.* 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, such as preventing an object from being shown as available for pickup on days that the library 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.

### 4. Determining how frequently a patron may reserve objects

*Done in "PATRON "THING" RESERVATION LIMITS" box within the Miscellaneous Settings area of the General Settings area.* This enables you to determine how often a patron may reserve objects at the global level. Note that there is also a way to place limits on individual objects.

### 5. Establishing the behavior of contact fields in online loan request form

*Done in "OPTIONAL/REQUIRED RESERVATION FORM FIELDS" box within the Miscellaneous Settings area of the General Settings area.* This controls the appearance of email and telephone fields in the online loan request form according to three options: exclude; include, but make optional; and include and require. Though the ability to manage the library card number field is sometimes made available in other AI modules, it is automatically included and required here.

### 6. Editing automatically sent emails

*Done in "Emails."* The landing page of this section provides a list of all loan-related email messages automatically sent from the library, with their triggers. Because every library is different, it is important to review the wording of the default emails provided you so you can make any necessary changes before using the system.

To review the specific details of any email message, click on the "View Details" link in the Options column of the one you'd like to examine. This view could include details that may need editing.

To make edits, click on the "Edit this Email" link. Note that the email uses *mail-merge* functions to draw information about the reservation and object from the database into the email message. If you choose to edit any of these fields, be mindful of retaining the important mail-merge snippets. (For reference, there is a glossary of mail-merge snippets below the fields.)

***Make sure that the "Replies Sent To" address field is correctly configured to point to the staff member that has the responsibility of managing reservations for this module. This important because some patrons may communicate with the library by hitting reply.***

## SETTING UP AND MANAGING OBJECT RECORDS

*The Objects section is where you'll create object records, the basis for what a patron views on the front-end of your website. It also allows you to establish some of the rules that govern the loan of each object. The landing page for this section is a snapshot of all objects that may be reserved. Without diving into each object record, this view allows you to see if an object is active, publicly made available to patrons, and how many items are in an object's inventory, as well as providing links to view object record details and manage inventory.*

*Please see the previous section, SETTING UP BASIC DETAILS, for instructions on what to do before creating any object records. While some of what you'll be asked to provide may be added during the process of creating a new record, it might be easier if taken care of before you start. Others, like "Branches" will need to be present in the system before creating an object record, even if you only have one building.*

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

*Basically, to add a "thing" to your online collection, you will need to first "Add an Object." The finished object record acts as an umbrella that covers a single item or multiples of the object. The next step requires adding an inventory item and providing some unique details for it in the "Managing Inventory" section. If you have multiples of the same item, you may copy your first inventory item record as a basis for a new one.*

### 1. Adding an object

*Accomplished in "Objects"* To add an object, click on the link labeled "Add an Object" above the filter options on the upper right portion of this page. This brings you to a form for creating a record that will make the object available for patrons to reserve on the front end of your site. Follow the instructions below.

#### OBJECT INFORMATION Box

a. *Object Title.* Give the object a title, using the singular, even if you have more than one of this item in your inventory.

b. *Active or Inactive.* To make the object available, either to the public on the front end of your site or to staff in the administration section, click on "Active."

c. *Public or Private.* To designate an object as being only available for reserve by staff through the administration section, click on "Private." If the object is meant to be available to patrons through the module on the front end of your site, click on "Public." In both instances, staff may create—and modify—loan requests and records within the administration section.

d. *Featured Image.* To include an image of the object with the record, click on the SELECT IMAGE button, and either choose an image from the Assets Library by clicking on the "Select Asset" below it, or upload a new image by using the "Add an Asset" link just above the FILTER button and following the instructions. To find the correct file in the Assets Library, you may filter the results to avoid having to review them all. ***We suggest that your image be 800 x 800 px.***

e. *Terms & Conditions Document.* This works the same way as the image: click on the SELECT DOCUMENT button and choose a pdf or Word document from the Assets Library, or upload a new one.

f. *Object Manual Document.* If you have a pdf of an object's instruction manual, the system can make it available to patrons in the Details drop-down on the front end. This could give potential borrowers the information they need to determine whether or not the item will actually accomplish what they hope it will. Just as with the terms and conditions document, you add this with the SELECT DOCUMENT button, choosing the pdf from the Assets Library.

g. *Object Categories.* This area allows you to associate an object with a category. Check all categories that are applicable to make it easy for patrons to find what they're looking for. Categories may be added in the Categories area of the Library of Things module, or on the fly here if not already in the system using the "add a new category" link.

h. *Object Description.* This area is for a description of the object, delivered in the Details drop-down on the front end of the software. Include as many specifics as possible to help patrons judge the suitability of the item as a loan choice. Note that formatting options allow you to add images and links—to both documents you've uploaded to the Assets area and web pages—to the text.

**LOAN SETTINGS Box**

a. *Object Available by the Day or Hour.* Specify the increment of time by which the loan is measured. Typically items to be taken from the library are indicated in days, while items for use within the library, hours.

b. *Minimum and Maximum Loan Lengths.* You may indicate a set loan length by putting in the same number in both of these fields. For example, if you want to allow someone to borrow an object for six days, after which the item is overdue, then you would put a "6" in both the Minimum and Maximum Loan Length fields.

Since some objects could be needed for specific days only, you may decide to allow patrons to choose the loan length within a range that you establish. For example, you might decide that the minimum useful loan length is two days, but recognize that someone may need it longer and so cap the range at eight. For that, you would put a "2" in the Minimum Loan Length field and an "8" in the Maximum. In this case, the item would be overdue after the number of days the patron selected for their loan length, whether it was 2, 3, 4, 5, 6, 7, or 8.

c. *Included "Buffer" period.* This allows you to add an amount of time to the end of the loan period for any maintenance that the object might require before being made again available to patrons, such as recharging. It is measured in the unit of time selected in the "Available by the…" section above.

d. *Loans not allowed beyond "X" weeks from current date.* This number indicates the number of weeks from the current day in which dates for borrowing are made visible to patrons on the front end. ***Note that this is on a per-object basis, so you can vary this period if there's a good reason to do so.***

e. *Loans not allowed prior to "X" days from current date.* This allows you to prevent a patron from reserving and picking up an object on the same day, or any number of days before the pick-up date. If that limit is unimportant, enter a "0" here.

f. *Patron maximum… …per unit of time.* These two fields allow you to limit the frequency with which a patron may reserve and check-out this particular object. ***Note that you may also indicate a global limit for reserving "things" in this module in the Miscellaneous Settings section in the General Settings area.***

g. *Approval.* Indicate whether or not you want the system to automatically approve any loan requests. If you choose "Hold for manual approval," your staff will need to review each request and manually approve it.

h. *Staff Recipient(s) of Loan Notification Emails.* For staff to be copied on all triggered emails to patrons using this module—incoming loan requests, patron-generated cancellations, etc.—this field must contain at least one email address. Separate addresses by comma if adding more than one. ***Note that if you do not provide at least one address here, the system will automatically use the email address on file for the account contact.***

### OBJECT AVAILABILITY Box

In this box, you must indicate when an item may be in the possession of a borrower.

If the loan period is measured in days, indicate that the object is available <u>every</u> day of the week. The library closures you indicated in the General Settings, or any blackout dates you've associated with the object in this module, will prevent an item from being picked up or returned on those dates. ***(If you don't, patrons will be unable to choose loan periods that bridge library closures.)***

If the loan period is established in terms of hours, fields appear that allow you to indicate the hours an item is available on each day of the week. This is ideal for objects for use at the library, whether by patrons in a Makerspace or staff. The general availability is noted in the details box in the patron view.

## 2. Adding inventory items

*Accomplished on the Manage Inventory page connected to each Object.* Go to the Objects page, find the desired object listing, and click on the "Manage Inventory" link in the Options column to the right. After you've added an object to the collection using the "Add an Object" link, you will need to "Add an Inventory Item" using the link at the upper right. That brings you to the following box:

**ITEM INFORMATION Box**

a. *Item Name.* Provide a descriptive name here. This is particularly important if you have multiples of the object with slightly different characteristics.

b. *Housed At.* Click on the bar and select the location where the item is stored.

c. *Available For Pickup At.* If your library has only a single building, make sure that the "Housed At" and "Available For Pickup At" options are the same. If your library has multiple branches, you may let a patron decide where to pick up an item by checking the box of every location where that is possible.

d. *Active.* Making the item active makes it available to patrons and staff to reserve; making it inactive removes it from the display on the front end of your website.

e. *Item Bar Code.* Put the bar code of the item in this field. If there is none connected to this item, you may leave this field blank.

f. *Loan Instructions.* Provide all of the information a patron needs to successfully pick up and return the item according to your policies.

g. *Donated By.* If a group other than the library has provided the funds to make this available, you may put their name here to recognize their generosity.

When you are finished, hit the "SAVE" button at the bottom.

### 3. Enabling patrons to choose a pick-up location

*Accomplished in the Edit View of an Inventory Record.* To deliver pick-up location choices for patrons on the online loan request form, indicate where the item is housed and where the item may be picked up in the ITEM INFORMATION BOX. The patron's selection is stored with the loan information, so staff can determine whether an item needs to be transferred to a different location.

### 4. Adding multiples to the inventory of an existing object record

*Accomplished on the Manage Inventory page connected to each Object.* To reach this page, go to the Objects page, find the desired object listing, and click on the "Manage Inventory" link in the Options column to the right. If you have already added at least one item to the inventory, you may add more using the following method: click on the "View Details" link in the Options column to the right of the object listing. Once there, use the "Copy this Item" link at the top to create an additional object record. Change any details that might be unique to the new record, such as the bar code, what branch the item is associated with, and the loan instructions.

Another approach is using the "Add an Inventory Item" link at the top of the Manage Inventory page, like when you added the first item to the inventory. However, you will probably find the previously described approach easier—since no fields are pre-populated with information in this method, you will need to fill in every field in the new record.

### 5. Managing item blackout dates

*Accomplished on the Manage Inventory page connected to each Object.* To reach this page, go to the Objects page, find the desired object listing, and click on the "Manage Inventory" link in the Options column to the right. In the Options column to the right of every object listing on the new page, the "Manage Item Blackout Dates" link allows you to remove the object's availability from the front end should you need to. Reasons for doing that might include regularly scheduled maintenance. Blackout dates may be indicated as individual days or date ranges.

### 6. Viewing the public view of module from within the Dashboard

*Available within the Dashboard on every page in this section.* Use the link entitled "View Public Display"—located in the upper right hand-corner of every page in this section, just below the name of your library—to display the view of your Library of Things collection that patrons see when they visit your website. Note that this view only includes material generated by the AI module—visitors to the actual website will see the module within the context of a page that uses the site's template, and which includes full navigation and any content placed there by staff.

### 7. Adding object Categories

*Accomplished on the Categories page.* This page displays a list of all the existing categories in your Library of Things module which organize the display of your collection for patrons. The use of categories also makes the collection filterable, so that patrons may limit their view of objects to only those of interest. To add to the list, click on the "Add a Category" link at the upper right. That brings you to the following box:

**CATEGORY INFORMATION Box**

a. *Category Name.* Provide a descriptive name here. This is particularly important since patrons will use it to help find what they are looking for. (Note that objects may appear in more than one category if necessary.)

b. *Description.* Though you may add a description of the category here for possible future use, it currently is not visible to patrons.

c. *Active.* Making the category active makes it available to staff to tag objects and patrons to filter views of the collection. Making a category inactive *only* removes it from the list of filters available to patrons on the front end. If any objects were tagged with a category before it was made inactive, the category is still visible in the object display—with those items correctly included—on the front end.

When you are finished, hit the "SAVE" button at the bottom.

## MANAGING LOANS OF "THINGS"

*The "Loans" section is where you'll modify or create object loan records. It provides access to all existing object loan records, delivering tools to approve, deny, or delete a record; check out an object; send an email to the borrower; and to append any notes, unseen by patrons, related to a specific loan. The landing page for this section is a snapshot of loan records—organizable by various filters—showing the name of a borrower, object, the location the object is associated with, the start and end date of loan (and hours, if appropriate), and date and time a request was submitted; the status of a loan; and a link to view and edit the record. A patron is usually the one who submits a request, but a staff member may also create a loan record in this section.*

*If a staff member has created a loan record that is in conflict with any existing rules or data within the system, you will be alerted to the problem after saving. (It is impossible for a patron to create a conflict because of the way the front end is configured.) In this particular module, the only conflicts that might arise are associated with the limits you've placed on how frequently a patron may reserve objects.*

### 1. Viewing loans

*Accomplished in the "Loans" section.* The main page delivers a list of all current and future loans—made by both patrons and library staff—with filters that allow you to organize the display of the information using specific criteria. Each listing includes certain details; a "View Details" link to the right delivers the full loan record.

### 2. Adding a loan from within the Dashboard

*Accomplished in the "Loans" section.* In some situations, you will need to create a loan record from within the administration section, either for a patron who is unable to manage the process on your website or for objects designated for staff use only (those marked "Private" and not displayed on the front end). To do this, click on the link labeled "Add a Loan." This brings you to a form for creating a loan record. ***Please note that if you are adding a loan record which is set to "Auto approve all reservations," you will still need to change the status from "Pending" to "Approved," easily accomplished on the loan record page that appears after you hit the SAVE button within the green box that appears.***

**LOAN INFORMATION Box**

a. *Start and End Dates.* Select the dates for which the object is to be checked out according to the posted Loan Length. If the Loan Length is defined in terms of hours instead of days, provide the Start and End Times in the fields which appear below.

b. *Object.* Select an item to borrow by clicking on bar and scrolling down to the desired object.

**BORROWER INFORMATION Box**

a. *Library Card Number.* Provide a library card number in the first field, then press the "RETRIEVE PATRON INFO" button to populate the other fields in this box. Some ILSs may prevent the system from grabbing the email address, so you will need to enter it if that is the case and it's a required field. If you wish to ignore any of the card validation criteria in effect when creating a loan record, then check the "Bypass Assabet Interactive and ILS validation" box.

b. *First and Last Name.* If using the "RETRIEVE PATRON INFO" button failed to populate this field, enter the email address of the borrower here.

c. *Email.* If using the "RETRIEVE PATRON INFO" button failed to populate this field, enter the email address of the borrower here. (Not all ILSs will provide us with that information.)

**CONFIDENTIAL NOTES Box**

a. *Loan Notes.* Provide any information that will help the library manage this loan. This information is not visible to the general public.

### 3. Editing a loan record

*Accomplished in the "Loans" section.* Locate the desired loan record in the list, and click on the "View Details" link in the Options column at the right. Once there, click on the "Edit this Loan" link at the upper right. This brings you to the same view of a loan record as described above. Please see "2. Adding a loan from within the administration" for more information.

### 4. Moving a loan from one status to another, including "Canceling" and "Deleting"

*Accomplished in the "Loans" section.* Locate the desired loan record in the list, and click on the "View Details" link in the Options column at the right. Once there, you may approve, deny, cancel, or delete a loan record, depending on the current status of the loan. You may also communicate with the patron reserving the object by clicking on the "Email Borrower" link at the top of this page.

***Note that staff can "Cancel" or "Delete" a booking from this page. These have different meanings in the Assabet system. If you "Cancel" a loan, it will still be counted in a report. If you "Delete" a loan, it will not. In both cases, the availability of the object is returned to the patron view of the module. You may "Undelete" a booking before running a report if you wish to access the information associated with it.***

assabet interactive

## MANAGING THE CHECK-OUT AND RETURN OF OBJECTS

*The Check-out and Return sections in the Library of Things module allows administrators to quickly locate an existing reservation and check-out or check-in a "thing." Loan records may be found by capturing a library card number or object bar code—easily done with a scanner—or by typing in a name.*

### 1. Checking out an object

*Accomplished in the "Check-out Items" section.* First locate an existing reservation by supplying the information requested in one or more of the fields—library card number, patron name, or pass bar code—in the "FIND A LOAN" box. If you use a bar code scanner to input data for some of these fields, you must click within the field you wish to fill first.

A patron's library card number is usually the most efficient way to locate a loan. After scanning, the system will find and display all loan records connected to that specific card.

To check out the object, choose a loan listing and click on "Check-out" link in the Options column at the right. A box will appear asking you to verify that you want to check out the item. Clicking "OK" will mark the item as checked out in the system and send the patron a triggered email confirming that the object has been checked out. After completing that process, you will be returned to the Check-out page, which will display any additional reservations associated with the previously inputted library card.

### 2. Checking an object back into the system

*Accomplished in the "Return Items" section.* First locate an existing loan record by supplying the information requested in one or more of the fields—item bar code, patron name, or library card number—in the "FIND AN OBJECT CURRENTLY CHECKED OUT" box.

If the loan record is found in the system using the bar code method, the object will automatically be checked back in without you having to do anything else.

*There is one exception to this—if for whatever reason the system finds more than one record associated with your search, then all of them will be displayed under the heading "Matching Objects." If this is the case, choose the correct record and select "Return" in the Options column of the listing to tell the system that the item has been returned to the library.*

As with an item check-out, you may use a bar code scanner to input data for some of these fields if you have one attached to your computer. Before scanning or entering in any data, make sure to click within the field you wish to populate with information.

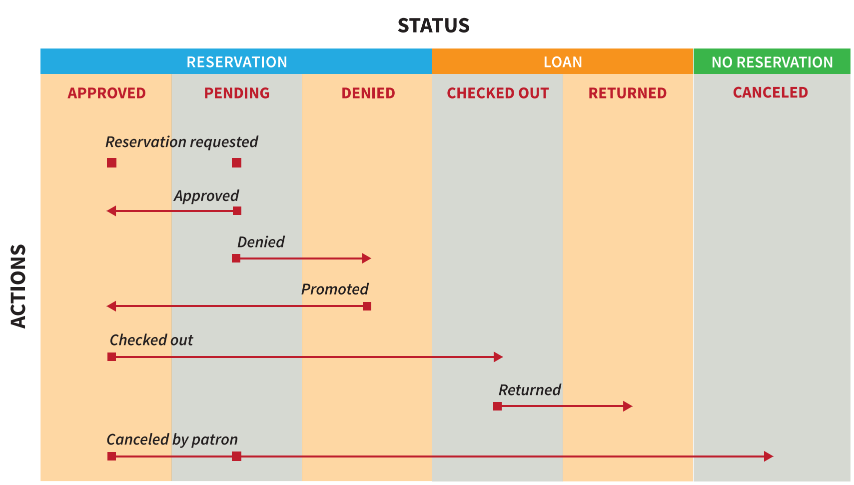
## MANAGING EMAILS SENT TO BORROWERS

*The Emails area in the Library of Things module allows administrators to view and modify emails that are automatically sent to registrants at various pre-determined points in the life of the loan. Unless you wish to change the text of the default emails which pull in information related to your library or the loan, or make an email inactive, you need not do anything in this section. However, before using the system, it is suggested that you review the default email details to ensure that they accurately reflect the library's intentions.*

*There are basically four different situations where emails are sent to borrowers:*

1. *When a loan is configured to approve or hold for manual approval any loan request made through the system, an appropriate email is automatically sent to the borrower after they've submitted their information.*
2. *When a change is manually made to a loan record that results in a new status, an appropriate email is automatically sent. (Note that the actions named in the graphic use the same words as those in the administration section to describe the email triggers, so it's easy to correlate the two.)*
3. *When getting close to the date of the object pick-up from the library, an email reminder is automatically sent beforehand.*
4. *When an administrator wants to send a custom message to someone who has reserved—or is in the process of reserving—an object, regardless of a change in status, a unique email may be created and sent to the person.*

***Changes in Status that Trigger Automatic Email Responses***




### 1. Configuring an automatically triggered email

You need do nothing to have email messages sent to object borrowers at important moments. They are triggered by both automatic and manual events, such as when an administrator changes the status of the loan from one to another. The emails include the following:

- **Loan Auto Approved** *(automatically triggered by a patron's request)*
- **Pending Approval** *(automatically triggered by a patron's request)*
- **Loan Approved** *(automatically triggered by a manual change of the loan status to Approved)*
- **Loan Denied** *(automatically triggered by a manual change of the loan status to Denied)*
- **Promoted to Approved** *(automatically triggered by a manual change of the loan status from Denied to Approved)*
- **Loan Reminder** *(automatically triggered by system two days before)*
- **Object Checked Out** *(automatically triggered by the check-out of an item by a patron)*
- **Object Returned** *(automatically triggered by the return of an item by a patron)*
- **Loan Canceled** *(automatically triggered when a patron cancels the loan using the link that appears in every triggered email but this one.)*

To deactivate an email, click the "No" button under the "Active" heading on the "EMAIL SETTINGS" page. This change does not delete the email from the system, so you may reactivate it at a future date simply by clicking on the "Yes" button here.

To prevent an email from being copied to the library staff, click the "No" button under the "CC to Staff" heading on the "EMAIL SETTINGS" page. You may restore the copying of the email to staff by clicking on the "Yes" button here.

By default, staff are copied on each triggered email, except for the reminder email. All copied emails are sent to any addresses indicated in the room set-up field labeled "Staff Recipient(s) of Loan Notification Emails" or the "Replies Sent To" field on the "EMAIL SETTINGS" page of each email. If neither field contains an email address, the system will automatically use the email address that is part of the account record.

## 2. Editing a triggered email

*Accomplished in the "Emails" section in the Library of Things module.* The main page in this section delivers a list, plus descriptions of all emails and their trigger points.

When you start using the system, you may choose to use the existing text in the emails or edit them to better reflect the reality of your institution. To replace or add text of your own, select "Edit" at the right end of the line of the email listing you wish to make changes to. Note that there are many places where "mail-merge" words within editor's brackets pull in data from the loan and object records. 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 want to retain, or if you'd like to add one, there is a glossary of all available "mail-merge" fields at the bottom of the page for reference that you can copy and paste.

### 3. Sending a custom email

*Accomplished in the "Loans" section.* Locate the desired loan record in the list, and click on the "View Details" link in the Options column at the right. Once there, click on the "Email Borrower" link, and a blank email with the borrower' email address will pop up, allowing you to provide a subject line and message text.

When ready to send, hit 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 loan 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 in the bottom half of the email body. If it is there, you need not do anything.

If you *have* made changes—or the paragraph is simply not there—you'll need to add the following paragraph underneath the email sign-off: "[InstitutionName] Staff" in the Edit view.

> NEED TO CANCEL?
>
> If you are unable to use your selected object during the period that you requested it, letting the library know will enable someone else to use this object. To cancel this loan, please use this link:
>
> [LoanCancellationLink]

Once this paragraph is in place in every one of your active emails, patrons will have the opportunity to cancel their object loan 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. ASSETS

*Assets are defined as the images you use in the module, such as pictures of objects for loan, and any 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, and supports every module you've subscribed to. Filtering, based on keywords and the type of asset (image or document), 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.

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, such as 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.

***Note that the recommended size of image files of the "things" on display in your online collection is 800 x 800 px.***

### 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 the description). Links are provided so that you can understand the context in which it's been used. Click on the "View Details" link in the Options column of a listing in the Usage section to access the full record where it's being utilized.

### 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.

# V. REPORTS

*The Library of Things module report provides information about how often objects have been reserved and loaned. Another report available in this module allows you to output information about changes and enhancements made to the system. Reports may be printed, or exported as a CSV file that can be opened in a spreadsheet application.*

### 1. Generating a report on object usage

*Done on the "Object Usage" page of the Library of Things area in the GENERATE REPORTS section.* Indicate a date range in the Start and End Date fields. To confine the report to a specific object in the system use the "Narrow by Type of Object" drop down menu, or leave as is to collect information on every item in your Library of Things collection. If your library has more than one building that offers objects for loan, you may also narrow the report by "Branch." Click on the "Create Report" button when you've established the parameters of the report.

The report organizes data in a number of different ways: one, according to the status of a loan; another by object type; the last by individual object, good for comparing the usage of items for which you have multiples in the inventory of an object.

### 2. 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.***