assabet
interactive

MEETING & STUDY ROOM BOOKING MODULE **MANUAL**

INTRODUCTION

Welcome to Assabet Interactive's Meeting Room & Study Room Booking 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, 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 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

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

1. Log-in

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

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

2. User Privileges

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

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

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

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

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

THE DASHBOARD MENU

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

1. The MANAGE ACCOUNT section

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

- *Account Information.* Your library's record of contact information in the 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. (See chart on page 5 .)

- *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

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

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:

- *Code.* The "Integration Instructions" in this area provides direction for a library's experienced IT person or webmaster to integrate the AI module(s) on an existing site. Essentially, there are two types of code that must be added to your site: a snippet that creates an iframe window that makes the module on a specific page and some javascript that must be added to the <HEAD> section of your site template.

- *Advanced Options.* The "Custom CSS" section in this area provides some CSS templates for programmers interested in making modifications to the appearance of the software on your site. These include adding colors linked to categories that sit behind event listings in the calendar (if included in your subscription); changing the general font throughout the module(s); changing colors associated with the module(s); and a way to start with the current day in event listing. If you are an experienced programmer, you may also introduce your own code to affect the public display of the module(s) using the "Add a Snippet" link.

II. GENERAL SETTINGS

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

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 "Branch/Places," 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.

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 locations within the library available to reserve to the public on days that a branch is closed.

To add a new Branch Closure, use the "Add a Branch Closure" link that appears to the right below the introduction text on this page. Click on the month within the correct year, and locate the date you want. The white circles—the default—indicate that the library or one of its branches is closed. Clicking within a circle will turn it red, indicating a closure. ***Note: If you've added any additional Branch/Places that are not library buildings for use in the Calendar—like "Off-site Locations" and "Virtual"—they will appear here as opportunities to indicate closures. Yes, it doesn't make much sense—please ignore them until we introduce some code to eliminate their presence.***

When you've finished adding the closures, hit the SAVE button to create the record.

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. Typically, Assabet Interactive will schedule a call to review and configure the settings in this section with a member of the library staff. The settings are described below, organized by box, and in the order in which they might 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 "codes.* 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 include the "UA" and "GA4" codes 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.* If your AI subscription does not include this module, this setting will not show up as a choice.

e. *MUSEUM PASS RESERVATION PERIOD–MUSEUM PASSES MODULE.* If your AI subscription does not include this module, this setting will not show up as a choice.

f. *MUSEUM PASS RESERVATIONS–REQUIRED FIELDS.* If your AI subscription does not include this module, this setting will not show up as a choice.

g. *EVENT HEAD COUNT FIELD LABELS–CALENDAR MODULE.* If your AI subscription does not include this module, this setting will not show up as a choice.

h. *UPCOMING EVENT FEED SETTINGS–CALENDAR MODULE.* If your AI subscription does not include this module, this setting will not show up as a choice.

i. *EDITOR PRIVILEGES–CALENDAR MODULE.* If your AI subscription does not include this module, this setting will not show up as a choice.

j. *PATRON ROOM BOOKING LIMITS–MEETING & STUDY ROOMS MODULE.* If you have chosen to require library card validation for room booking requests, you may indicate here a limit on how frequently a patron may reserves rooms. This is at the global level—the number of any bookable rooms per a unit of time. Limits may also be applied on a room-by-room basis.

k. *LIBRARY CARD VALIDATION CHECKS–ALL MODULES.* This is where Assabet Interactive stores the information used for evaluating library cards before sending the number to the ILS for validating against whatever criteria a library has asked Assabet to put in place. (The criteria may differ for each module.) Depending on library policies, the information placed here may vary, but Assabet will guide you through the configuration.

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 successfully use any module that collects library card numbers.

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 that act as a unique identifier 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.***

III. MEETING & STUDY ROOM RESERVATION MODULE

The Meeting & Study Rooms area contains five sections (Rooms, Bookings, Categories, Equipment, and Emails) that allow you to create room records containing images and a description, and define their general availability; attach downloadable documents, such as terms and conditions; add and manage room use requests; specify equipment to be made available in one or more rooms; and create and manage emails for automatically generated responses.

SETTING UP BASIC DETAILS

If just starting out with the Meeting and Study Rooms module, 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 Equipment and emails section found in the Meeting & Study Rooms area. In the Assabet Interactive system, <u>all</u> libraries are called "branches," whether or not there is more than one. (Note: you may have already added much of this information if your subscription includes another Assabet Interactive module, like the Event Calendar with Registration or the 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." While it is possible to upload images during the creation of a room record, you may find it easier if they are already in the Assets Library. The Assets Library supports every AI module, so if you're subscribed to more than one, you will have access to any image that has already been uploaded. If you need to add an image to the Assets Library, click on the "Add an Asset" link below the intro text on the Assets landing page to access the Upload page.

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

All featured images should be as high-res as possible, up to 5 MBs. However, any images included in the description field should be no wider than 250 pixels. That is because the system is not able to manage the relationship between the image and text when resized because of changes in the browser window width.

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. 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. Note that this is different than museum closures, information about which you will be asked to provide later for each institution.

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. Adding room type categories

Done in "Categories" within the "Meeting & Study Rooms" section. Two categories are immediately available to define your rooms—"Meeting Rooms" and "Study Rooms," though you may add others if necessary, using the "Add a Category" link. By tagging a room with one or more categories—accomplished during the Room Record setup—patrons are able to filter the public-facing display to quickly find the type of room they're looking for. When establishing a new category or editing an existing one, you may specify the order in which a category appears to patrons. *Note that it is not necessary to place any information at this time in the Description field of the Category record.*

5. Adding equipment

Done in "Equipment" within the "Meeting & Study Rooms" section. To add equipment that can be made available for use in one or more rooms, click on the link below the intro text on the right that says "Add Equipment." Items that are a permanent part of a room might be better included in the room description, rather than as a something that can be made available to any room, so think carefully about what you'd like to include.

To make an item available—or conversely, to remove it from circulation—use one of the "Active" radio buttons. Next, provide it with a unique name and an ID tag, if your library uses such a system for managing items. Choose all locations where this piece of equipment may be used. Every location you've approved for use of this item will display as an option when a patron is filling out an online request form. *The image and description fields are reserved for future use, so you need not provide any information in them at the present time.*

6. Editing automatically sent emails

Done in "Emails" within the "Meeting & Study Rooms" section. The landing page of this section provides a list of all booking-related email messages automatically sent from the library, with their triggers, descriptions, and some settings. Because every library is different, it is important to review the wording of the default emails so any necessary changes may be made 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. In addition to the text of the email, this view includes other details that may need editing.

To make edits to the content of an email, click on the "Edit Content" link in the Options column of the chart. Note that the email uses *mail-merge* functions to draw information about the reservation from the database, like the name of the patron, room name, and your library name. 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 the mail-merge snippets below the fields that you may use to copy and paste should you accidentally delete one.)

To manage the status of an email or whether or not the staff email address within the room record is copied on individual emails sent to patrons, click on the "Edit Settings" link and indicate your preferences, using the radio buttons. Note that there is an email address field at the bottom of this page—if it hasn't been changed, it is the contact address of the library account, pulled in and used as the "Reply To" address and address to which copies are sent *only* if a staff email address has not been indicated within the room record. This is important because some patrons may communicate with the library by hitting reply.

7. Determining the behavior of contact fields in the reservation form

Accomplished in each room record. This setting allows you to manage how certain "contact" fields appear in the online reservation form that patrons use when they are submitting a request to book a room. In this module, you establish settings for each room. That enables you to make a distinction, if necessary, between meeting and study rooms.

Using the drop-down menu, library card, email, and telephone fields may be *excluded* (not appear on the form at all), *included but made optional*, or *included but made required*. Please make the email field required, since patrons who don't provide an email address won't receive the triggered emails which indicate the status of their booking, remind them when the date of their room use is coming up, and provide a link for canceling their booking if necessary.

IMPORTANT: Please notify A.I. if the library card field is required, so that a connection can be established with your ILS to validate card numbers against your desired criteria.

SETTING UP AND MANAGING INDIVIDUAL ROOM RECORDS

The Rooms section is where you'll create room records, the basis for what a patron views on the front-end of your website to understand the details of each room. The landing page for this section is a snapshot of all rooms that may be reserved, showing the following: whether a room is publicly made an option to patrons, hours available, the minimum and maximum times a room may be reserved, and links to view and edit records.

Please see the previous section, SETTING UP BASIC DETAILS, for instructions on what to do before creating any room records. Some of what you'll be asked to provide may be added during the process of creating a new record, but it will be easier if taken care of before you start. Others, like "Locations" need to be present in the system before creating a room record.

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

1. Adding a room

Accomplished in "Rooms." To add a room, click on the "Add a Room" link, located below the intro text on this page. This brings you to a form for creating a record that will make a specific space within the library available for booking. You will import locations already introduced in the General Settings area into the module—and add information to make them bookable—by following the instructions below.

ROOM INFORMATION Box

a. *Active or Inactive.* To make the room, with the current settings, available to the public on the front end of your site, click on "Active."

b. *Public or Private.* To designate a room as being only available for reserve by staff through the administration section, click on "Private." If the room is meant to be available to patrons through the module on the front end of your site, click on "Public." In both instances, staff make create—and modify—bookings within the administration section.

c. *Location.* Choose from the list of locations by clicking on the up and down arrow at the end of the bar for available options, and select one. (If you haven't already added the location to the system, cancel now, add it in the "Locations" area in the "General Settings" section, and start a new room record.)

d. *Room Categories.* Any categories that are available by default ("Meeting Rooms" and "Study Rooms")—or any that you've added in the Categories area of the module—are available here as choices. Rooms may be tagged with more than one if appropriate. The categories organize the display of the rooms on the public-facing side of the software and allow patrons to filter the display of rooms by type.

e. *Featured Image.* To include an image of the room 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. If there many files in the Assets Library, you may filter the results to avoid having to review them all.

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

g. *Official Room Capacity.* Provide a number that is a guide for patrons assessing the suitability of the room for its intended use. You may do that by indicating the room's legal capacity or the number of people the room holds comfortably.

h. *Room Description.* This requires text that is a general description of the room: location and any unique features of the space that would be important to someone evaluating the room before reserving it.

You may add an image into the description by placing your cursor within the text where you want the image to go, and clicking on the "Images" icon in the in the row of formatting tools at the top. (That's the one located to the left of the chain, or "link," icon that appears as a box with a mountain and sun in it.) Select "Insert Image" from the dropdown menu. When the pop-up box appears, click on the green SELECT IMAGE button. This allows you to browse the image section of the assets library. To choose an image, click on the "Select Asset" link below it, at which point you'll be returned to the pop-up box. (If you wish to change your selection at this point, use the green CHANGE SELECTION button next to your choice.) If you have not already uploaded your image choice to the Assets Library, you may do it while browsing by using the "Add an Asset" link. The second field in the pop-up box, "Description," is pre-filled with the words that were provided when the image was added to the Assets Library—you need not do anything here. The last field, "Alignment," allows you to determine whether the image will display to the left or to the right of the text in which it's embedded by using the dropdown menu. Selecting the CONFIRM button saves your choice, and you are returned to the Description field with the image in place.

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

it in the Assets Library, using the "Add an Asset" link that appears in the upper right. To complete the process, provide a word or words that will appear in your text as the link in the "Link Text" field. This will replace the file name that was automatically inserted when you chose your document.

BOOKING FORM SETTINGS Box

a. *Booking Form.* Choose which reservation template is displayed to patrons. The full registration form is designed to elicit information that will allow a library to determine the appropriateness of the request and understand clearly who is making the request. The shorter condensed reservation form is designed to be used for study rooms, in recognition of the fact that the fewer details about use are necessary.

b. *Hide "Room Setup" fields.* If you choose to display this form in order to collect information about the set-up of the room, a report may be generated of all rooms and their set-up instructions within the General Settings area to share with the appropriate staff member. Since not all libraries take responsibility for the set up their meeting rooms, you may choose to hide it.

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

d. *Custom Booking fields.* This allows you to add as many extra fields as you need to gather more information than the original form collects. To add an extra field, simply type within the filed and it will appear as a heading above the field in the form. To add additional fields, use the "+ Add Another Field" link. ***Any fields you've added appear on the second page of the online registration process and are automatically required.***

BOOKING SETTINGS Box

a. *Minimum Booking Length.* Choose the smallest amount of time for which a room may be reserved by clicking on the right end of the bar and making a choice from the list that appears.

b. *Maximum Booking Length.* Choose the maximum amount of time for which a room may be reserved by clicking on the right end of the bar and making a choice from the list that appears.

c. *Minimum Cleanup Time Required.* Based on the nature of the room and the types of events or meetings that may take place there, you may require that a certain

amount of time be added to the room use time for cleanup. This ensures that a room is not made available for reserve during necessary turnover time.

d. *Bookings not allowed beyond "X" weeks from current date* and *Bookings not allowed prior to "X" days from current date.* The first field controls how far out from today you allow reservations to be made online—for example, two months after the current date. If you do not allow a booking to be made the same day of the room use, you may put in a number in the second field which is the number of days before which a booking request may be made. If this does not apply to this particular room, put a zero.

e. *Patron maximum…per unit of time.* These fields enable you enforce a limit on the number of times a patron may book this particular room per whatever unit of time you select. If you want to control that at the global level—that is, establishing a limit on all rooms—go to the Miscellaneous Settings page in the General Settings area and provide information in the PATRON ROOM BOOKING LIMITS–MEETING & STUDY ROOMS MODULE box. ***Note that this setting works only if you collect library card numbers in this module.***

f. *Approval.* Choose whether or not reservation requests will be automatically approved, or whether approval is contingent upon a review by library staff.

g. *Staff Recipient(s) of Reservation Notification Emails.* Provide the email addresses of all staff who are responsible for moderating room reservation requests in this field. Any addresses included here act as the "Reply To" address triggered emails to patrons. It is also the address to which copies of triggered emails to patrons are sent if indicated in the email settings. If including more than one address, separate each by a comma. ***Note that if you do not provide an email address in this field, it will auto-fill with the email address in the Account Information record in the Manage Account area or one that you've provided in the Edit Settings area of the Email section of the module.***

ROOM AVAILABILITY Box

This section allows you to indicate the availability of the room by blocks of time within each day of the week and assumes a weekly cycle of normal open hours. These are general settings, so any branch closures introduced into the system in the General Settings area will automatically make a room unavailable, overriding the choices made here.

2. 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 room choices 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 AI Room Bookings module within a page that uses the site's template, which includes full navigation and other content placed there by staff.

MANAGING BOOKINGS FOR ROOMS

The "Booking" section is where you'll create or modify room booking records. It provides access to all existing room booking records, delivering tools to approve, deny, or delete a booking; edit or delete the record; send an email to the room booker; whether or not to generate an event from the room booking to post on the calendar should you also subscribe to the AI Calendar module. The landing page for this section is a snapshot of bookings—organizable by filter—showing the name of a booking, the location, date, and time of each booking and when it was submitted; the status of a booking; 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 room booking record in this section.

If you've created a meeting room booking that is in conflict with any existing data in the system, you will be alerted to the problem <u>after</u> saving when you're returned to the booking record. A banner describing the nature of the conflict appears at the top—links like "Edit this Booking" provide access to potential solutions. When viewing a list of existing bookings, any existing conflicts are indicated by a red circle with "!" inside, appearing at the right in the Options column in the list. Clicking on this will take you to the booking record, where you're provided with the options described above. (More often than not, you will first encounter a booking on a list, since most will be made online by patrons using the system.)

1. Viewing bookings

Accomplished in the "Bookings" section. The main page delivers a list of all current and future room bookings—made by both patrons and library staff—with filters that allow you to display bookings using other criteria. Each listing includes a quick look at the room name, the date submitted, and the date, time, and status of each booking. A "View Details" link delivers the full record.

2. Adding a staff-side booking

Accomplished in "Bookings." In some situations, you will need to make a booking from within the administration section, either for a patron unable to initiate the process on your website or for a room earmarked for library use only. To do this, click on the link labeled "Add a Booking." This brings you to a form for creating a room booking.

Please note that if you are adding a reservation for a room set to "Auto approve all reservations," you will still need to change the status from "Pending" to "Approved," accomplished on the booking record page that appears after you hit the SAVE button. In addition, please review the "Description" before publishing to your AI Event Calendar (if subscribed to that module) to ensure that the language is appropriate for public display.

BOOKING INFORMATION Box

a. *Room.* To choose a room, select a location from the drop down menu. If your location is not in the list, cancel this record now, and add it in the "Locations" area in the "General Settings" section. When done, start a new record.

b. *Booking Title.* Provide a name for the room use that will help you identify it easily in a list of reservations.

c. *Start Date* and *End Date.* Clicking within the field will cause a calendar to pop up, enabling you to choose a "Start Date." Since most events take place on a single day, you'll see that the "End Date" field is automatically filled in with same date you just selected. If room use takes place consecutively over many days, use the pop-up calendar to select a new "End Date."

d. *Room Access Start Time* and *Room Access End Time.* Add "Room Access Start Time" and "Room Access End Time" by clicking within the field which produces a pop-up tool that allows you to pick a time. ***This is the total time for which the room is booked, and includes set-up and clean-up time.***

e. *Publicized Start Time* and *Publicized End Time.* Clicking within the appropriate field will produce a pop-up tool that allows you to pick a time. This is what is publicly displayed in the calendar as the time of the meeting or event, if selected for display and your library has a subscription to the AI Event Calendar. ***It does not include set-up and clean-up time.***

f. *Show in Event Calendar.* Your choice here determines whether your event or meeting in a room booked at the library will be publicly displayed on the calendar. ***Your library must have a subscription to the AI Event Calendar to take advantage of this feature.***

g. *Calendar Event Title.* If you've indicated that your event or meeting in a room booked at the library will be publicly displayed on the calendar, the listing will use the title from this field. ***Your library must have a subscription to the AI Event Calendar to take advantage of this feature.***

h. *Featured Image.* If you've indicated that your event or meeting in a room booked at the library will be publicly displayed on the calendar, the image associated with the listing will use the image indicated here. ***Your library must have a subscription to the AI Event Calendar to take advantage of this feature.***

i. *Booking Description.* When information is provided by a patron attempting to make an online booking, this field provides room usage details which help demonstrate to staff that the request falls within library guidelines. If a staff member is setting up the reservation, presumably there is no need to capture any information for evaluation, and so a more public-friendly description may be provided instead. Either way, ***please review this text before publishing to make sure that the language is appropriate if you've indicated that the event or meeting will be displayed on the AI Calendar.***

j. *Expected Attendance.* Provide an estimate of the number of people who will using this room.

REQUESTED SETUP & EQUIPMENT Box

a. *Desired Setup.* Based on the room summary and what's available, provide a description of how the room should be prepared.

b. *Equipment Bookings.* Select any equipment made available to this room. If already reserved by another for use in a different room, it will show up as a conflict once the record has been saved.

BOOKER INFORMATION Box

a. *First and Last Name.* Enter the name of the person requesting the room.

b. *Email.* Provide the email address of the patron.

c. *Telephone.* Provide the phone number of the patron.

d. *External/Internal Booking.* If you want to categorize the source of the booking for your reports, select whether it's external or internal using the radio buttons.

e. *Organization.* If the room booking is for an organization, please indicate here.

c. *Address fields.* Provide the address of the organization or contact if necessary in the fields provided.

CUSTOM FIELD RESPONSES Box

If there are any custom field associated with the room, they will appear here as required fields.

CONFIDENTIAL NOTES Box

a. *Booking Notes.* Provide any information that will help the library manage this booking. This could include the reason why a booking may have been denied, so that it's easily available to any staff members who needs it. This information is not visible to the general public.

b. *Location Setup Directions.* The instructions you provide here are delivered in a report for those in charge of arranging the room before a meeting takes place.

3. Copying a booking

Accomplished in the "Bookings" section. Click on "View Details" in the desired listing. On the record page, clicking on a link entitled "Copy this Booking" will exactly duplicate the booking. Change the date to reflect the new booking, and any other necessary modifications before saving.

4. Editing a booking

Accomplished in the "Bookings" section. Click on "View Details" on the desired listing. Once in the booking record, click "Edit this Booking" to make changes.

5. Indicating whether a booking is "internal" or "external" for reports

Accomplished in the "Bookings" section. Click on "View Details" on the desired listing. Once in the booking record, click "Edit this Event" and scroll down to the BOOKER INFORMATION box. In the middle of the box is an area labeled "External/Internal Booking" where you will make a selection by clicking on the appropriate radio button.

6. Moving a booking from one status to another, including "Canceling" and "Deleting"

Accomplished in the "Bookings" section. To approve or deny a requested booking, click on "View Details" in the desired listing. Once in the booking record, click on the appropriate link to make changes. To communicate with the patron booking the room, click on the "Email Booker" 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 booking, it will still be counted in a report. If you "Delete" a booking, it will not. However, you may "Undelete" a booking before running a report if you wish to access the information associated with it.*

7. Using the module to manage curbside pickup of library materials

Accomplished in the "Locations" area in the "General Settings" section and the "Rooms" area in the "Meeting & Study Rooms" section. Add a location with a name like "Curbside Pickup" to the system in the General Settings area. Then add the new location as you normally would in this module, setting the minimum- and maximum-use time to be the same, say 15 minutes. (If your pickup times are more frequent than every 15 minutes—the smallest increment of time available to bookers—then you might establish another room, with a similar, but different, name.) When you create the "room" record, you'll be able to provide instructions for the patron in the Room Description field. *We suggest you use the Assabet Event Calendar for curbside pickup scheduling if you have a subscription to it.*

8. Directly publishing <u>or</u> converting to an event to publish on Calendar?

Accomplished in the "Bookings" section. There are two different ways to post to the AI Event Calendar if you are subscribed to that module. The first is to open the approved booking using the "View Details" link and clicking on the "Edit this Booking," located in the upper right hand corner of the page. Check the "Yes" radio button and change any details you'd like to post before hitting "SAVE."

The second is by opening the booking record through the "View Details" link and clicking on the "Convert to Event" link, also located in the upper right hand corner of the page. This causes a new page to open in the Calendar section as an editable event. Make any necessary changes, including indicating its visibility status, and hit "SAVE."

The first method ensures that the booking remains categorized within the system as a booking. In the second method, the booking is still visible in the list of room bookings, but the main record is now in the calendar and the only place you may make modifications. The main advantage to the latter is that you are able to provide registration to patrons and capture a head count if needed. Note that on the Location Utilization page, events that have been converted from a booking will be displayed in blue, instead of the light green that indicates a booking.

MAKING EQUIPMENT AVAILABLE WITHIN ROOMS

The Equipment area in the Meeting & Study Rooms module allows administrators to add various pieces of equipment and assign their availability to one or more rooms in the system.

1. Adding equipment to the system

Accomplished in the "Equipment" section. To add a piece of equipment that the library will make available in certain rooms, click on "Add Equipment" on the landing page in this area and fill in the required fields.

a. *Active or Inactive.* To make equipment available to the public on the front end of your site, click on "Active."

b. *Equipment Name.* Label the equipment with a recognizable name.

c. *ID Tag.* If your institution has a tagging system for keeping track of library property, enter the name and/or number here.

d. *Locations.* Choose all locations at which this piece of equipment is available when not already checked out.

e. *Featured Image.* This field is reserved for future use—you need not provide an image at the present time.

f. *Equipment Description.* This field is reserved for future use—you need not provide any information in this field at the present time.

MANAGING EMAILS SENT TO THOSE BOOKING A ROOM

The Emails area in the Meeting & Study Rooms module allows administrators to view and modify emails that are automatically sent to registrants at various predetermined points in the booking process up until room usage. Unless you wish to change the text of the default emails which pull in information related to your library or the booking, or you wish to 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 room bookers:

1. *When a booking is configured to approve or hold for manual approval any request made through the system, an appropriate email is automatically sent to the booker after they've submitted their information.*

2. *When a change is manually made to a booking 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 an event taking place, an email reminder is automatically sent two days beforehand.*

4. *When an administrator wants to send a custom message to someone who has booked—or is in the process of booking—a room, 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
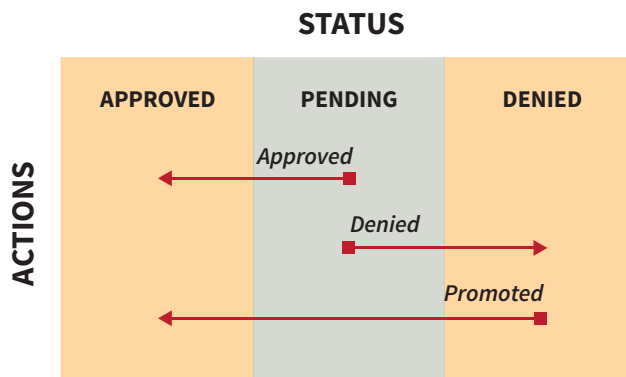
1. Configuring an automatically triggered email

You need do nothing to have email messages sent to room bookers at important moments. They are triggered by both automatic and manual events, such as when an administrator moves a booker from one status to another. The emails include the following:

- **Reservation Auto Approved** *(automatically triggered by a patron's booking request)*

- **Pending approval** *(automatically triggered by a patron's booking request)*

- **Reservation approved** *(automatically triggered by a manual change of booking status to approved)*

- **Reservation denied** *(automatically triggered by a manual change of booking status to denied)*

- **Promoted to approved** *(automatically triggered by a manual change of booking status from denied to approved)*

- **Reservation reminder** *(automatically triggered by system two days before)*

- **Booking Canceled** *(automatically triggered when a patron cancels their booking)*

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 Booking 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 Rooms 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 in the list you wish to make changes to. Note that there are many places where "mail-merge" names within editor's brackets pull in data from the registration record. Since the "mail merge" names are descriptive, it shouldn't be difficult to identify and preserve these so that each email sent retains the automatic personalization. (If you've accidentally erased one that you want to retain, or if you'd like to add one, there is a list 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 "Bookings" section, in a booking record. The main page in this section provides a list of all booked rooms. Select the "View Details" link to the right of the specific reservation you'd like to manage. In the record, select "Email Booker" and a blank email with the registrant's 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 booking through a link provided in every message sent during the "pre-engagement" process if the text in every email is properly configured.

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

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

NEED TO CANCEL?

If you are unable to make use of your selected room on the day that you booked it, letting the library know will enable someone else to use the space. To cancel this booking, please use this link:

[BookingCancellationLink]

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

5. Adding a graphic to a triggered email

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

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

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

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

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

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.

V. ASSETS

Assets are defined as images and all 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 on your computer. Select the file and hit the "Choose" button. Make sure that the name of the file follows best practice—no spaces or special characters—or you might have problems with certain browsers.

Next, fill in the fields 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. If you create a title that is particularly descriptive, you can copy and paste it into each of the three fields in this box.

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.

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. Deleting an asset

Accessed on the "home" page of the Assets section using the View Details link. An asset may only be deleted if it is not being used. (Use is indicated at the bottom of this page.) The "Delete This Image" link at the top will be red if immediately deletable.

VI. REPORTS

The Room Booking module reports provide information about the frequency of location use, location set-up instructions and enhancements made to the system. The reports may be printed, exported as a csv file which can be opened in a spreadsheet application, or exported as a pdf file through your browser. Note that these reports are not all accessed in the same place.

1. Generating a report on location use from room bookings.

Done on the "Room Usage" page of the Meeting & Study Rooms area in the GENERATE REPORTS section. This report looks at booking status and location use. Indicate a date range in the Start and End Date fields. You may narrow the scope by room and category, and include bookings that were converted to events for display on the Assabet calendar (if your subscription includes this module.) Click on the "Create Report" button when you're ready.

2. Generating a report on location usage by category from room bookings.

Done on the "Room Usage by Category" page of the Meeting & Study Rooms area in the GENERATE REPORTS section. This report looks at room use by category and status, including—if indicated—whether or not a booking is external or internal. (To specify, open the booking in the Edit View and indicate your choice.) Though the results are different than the first room use report, the settings are the same. Follow the instruction provided above.

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

Done on the "Location Set-up" page of the General Reports area in the GENERATE REPORTS section. The report collects room set-up instructions for all events for which they have been collected within the time period that you enter, including any requested equipment. If your subscription includes the AI Event Calendar module, instructions included in the Location Set-Up Directions field in the CONFIDENTIAL NOTES of the event record are also part of the report and can be shared with the person(s) at your library in charge of getting rooms ready for use.

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

4. Generating a report 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.