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interactive

MUSEUM PASS RESERVATION MODULE **MANUAL**

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INTRODUCTION

Welcome to Assabet Interactive's Museum Pass Reservation Module for library websites. Whether you've chosen only this particular 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.

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.

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GAINING ACCESS TO THE SYSTEM

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

1. Log-in

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

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

2. User Privileges

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

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

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

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

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

THE DASHBOARD MENU

The Dashboard is the administration section for your account and any modules associated with it. Every option is made available through the menu that appears to the left in the Dashboard area and 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.

- *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 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.

This feature is not available in trial versions.

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.

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

1. Managing Branches

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

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

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

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

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

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

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

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

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

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

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

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

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

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

2. Managing Locations

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

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

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

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

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

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

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

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

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

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

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

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

3. Managing Branch Closures

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

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

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

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

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

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

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

4. Managing Miscellaneous Settings

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

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

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

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

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

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

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

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

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

f. *EVENT HEAD COUNT FIELD LABELS–CALENDAR MODULE.* If your AI subscription does not include this module, you may ignore this setting. (See the General Help Manual or Calendar Module Help Manual for instructions.)

g. *UPCOMING EVENT FEED SETTINGS–CALENDAR MODULE.* If your AI subscription does not include this module, you may ignore this setting. (See the General Help Manual or Calendar Module Help Manual for instructions.)

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

MUSEUM PASSES

EVENT CALENDAR

ALL

5. Managing the Block List

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

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

III. MUSEUM PASS RESERVATION MODULE

The Museum Passes area contains four sections (Institutions & Passes, Reservations, Check-out/Check-in and Emails) that allow you to manage the creation of museum pass listings and the reservation process. This involves mating a provided institution record with information about the benefits of a particular pass, providing your library's loan instructions, and adding exception dates to create a listing that is displayed to patrons on the front end of the website.

The box to the right is a snapshot of what you need to do before and during use of the module, starting with putting in place certain basic details which the system regularly makes use of.

SETTING UP BASIC DETAILS

If just starting out with the Museum Pass module—and you are not using or have not set up any other AI module—you will need to input or edit some information that is essentially the backbone of the module(s). This is done in the General Settings section in the top-level Manage Modules area, and in the Emails section found in the Museum Passes area. (Note: you may have already added some of this information if your subscription includes another Assabet Interactive module, like the Event Calendar with Registration.)

1. Adding branches

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 pass 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 assets 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 assets 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. Editing triggered emails

Done in "Emails." The landing page of this section provides a list of all reservation-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 to 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. In addition to the text of the email, this view includes other 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 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 list of mail-merge snippets below the fields.)

In particular, 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.

5. Establishing the trigger moment for email reminders

Done in "Miscellaneous Settings" in the General Settings section in the box labeled "EMAIL REMINDER NOTIFICATIONS–ALL MODULES." This setting allows you to specify when reminder notification emails will be sent. Choose one, two, or three days ahead of pass usage. (Note: You can enable or disable reminder emails as needed within each module's "Emails" section.)

6. Setting the reservation period for museum passes

Done in "Miscellaneous Settings" in the General Settings section in the box labeled "MUSEUM PASS RESERVATION PERIOD–MUSEUM PASSES MODULE." (See instructions in the previous section.)

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

Done in "Miscellaneous Settings" in the General Settings section in the box labeled "MUSEUM PASS RESERVATIONS–REQUIRED FIELDS." (See instructions in the previous section.)

SETTING UP AND MANAGING INSTITUTION AND PASS RECORDS

The Institutions & Passes section is where you'll create museum pass listings. The landing page for this section is a snapshot of all existing listings, showing whether or not a listing is public (available to patrons) and providing links to "View Institution Details," "Manage Subscription," "Manage Pass," and "Manage Institution Exception Dates."

*A museum pass **listing** consists of four **records**: an **Institution** record (selected from a pre-existing collection in the system) which is combined with information you provide about the benefits associated with the pass; a **Subscription** record that indicates the date-range(s) of your contract(s) with an institution; a **Pass** record created by you of how the pass is managed at your library; and an **Exception Date** record of deviations from the institution's regular schedule that you add. Note that blackout dates may also be applied to the behavior of* <u>passes</u> *at your library, either as individual dates or blocks of dates.*

Please see the previous section (SETTING UP BASIC DETAILS) for instructions on what to do before creating any listings. Some information, like that contained in the "Branches" section, must be present in the system before a listing is created.

1. Adding an institution

Accomplished on the "Institutions & Passes" page by using the "Add an Institution" *link.* To add an institution, first select a state from the first drop-down menu in the "FIND AN INSTITUTION" box. Then select an institution from the second drop-down menu and hit the "CONTINUE" button. Institutions known to have accepted printable passes are noted by an asterisk. If you've already added an institution to your installation, it will be noted by the addition of "[added and active]" or "[added and inactive]," to the right of the name, depending on its status. (If the desired institution does not appear in the list of institutions already in the system, please contact support@assabetinteractive.com, and AI will create a record for you.)

You are delivered to a page that features three information boxes. The first displays institution details provided to you by the system. The other two capture information you must provide.

INSTITUTION INFORMATION Box

This box shows the institution record that Assabet Interactive has put together for you: the institution name, a concise description of what one may encounter at the institution, contact details, URLs to the institution's site, a link to directions, and a clean icon.

INSTITUTION AVAILABILITY SETTINGS Box

a. *Active.* Choose whether or not the institution will be displayed to patrons on the front of the website. This is particularly useful for seasonal passes that you

might want to be able to turn off when an institution is not open for a long amount of time.

b. *On what days of the week is this institution usually open?* Indicate the regular schedule of the institution here. Exception dates, which provide a way to indicate whether an institution is open when normally closed—or the reverse—may be added later.

c. *Patron maximum… …per unit of time.* These two fields allow you to establish how frequently a patron may reserve a pass from the institution. Note that you may also implement a global setting that limits how many passes from your total pool of passes a patron may reserve within a given time—set in the Miscellaneous Settings area of the General Settings box—as well as a limit at the pass level, should be necessary.

PASS INFORMATION Box

a. *Pass Benefits.* Provide information that will tell patrons what benefits they are entitled to with use of the pass, such as free admission or a specific discount on the admission fee. *Note that this is NOT where you need to provide details about rules governing the borrowing of the pass from your library, or where and when to pick-up and return passes.* Those are defined in the Pass section in a field entitled "Loan Instructions," where you'll work after providing information about your subscription(s). Of course, you may add the information here as well if you feel the need to introduce it to patrons earlier. ***If this is a printable pass and the institution has asked that some specific text to appear on the pass, this field is where you'll provide that, just under the actual benefits of reserving the pass from the library.***

b. *Printable Passes Accepted?* Currently the system accommodates the optional inclusion of a barcode provided by the museum, which Assabet Interactive combines with other information from the institution and reservation record. Enabling the printable pass function here is the first step in setting up this type of pass. Later, when you actually add a pass, you'll be asked to provide the bar code number if necessary. ***Note that the institution itself <u>must</u> support printable passes.***

Once you've completed the form, hit the "SAVE" button to create the record and return to the page with the list of all the institutions you've added to the system.

At this point, your listing is still incomplete. The institution will be unavailable to patrons until you've associated a pass with it. (If you've chosen to keep the record inactive for the moment, it will still be available from the list in the administration section—though grayed out—so you may edit it at any time.) To continue creating a listing, add your subscription(s) according to the directions in the next section.

2. Managing subscriptions

Accomplished on the "Institutions & Passes" page by using the "Manage Subscription" link of the selected institution listing. This is where you specify the term of your subscription with an institution. It is important for two reasons. First, it provides

the framework within which you manage exceptions. Secondly, it "feeds" a report that indicates when all your subscriptions are coming to an end.

You may have more than one subscription connected to a particular institution at the same time. An example of this is when you've already contracted for another term to go into effect immediately after your current contract ends. Having the future term in the system allows patrons to reserve into the future if you're nearing the end of the current contract.

Click on the "Add a Subscription" link to provide the appropriate information, paying close attention to the start and end-date fields. This sets up the entire date range for which the passes are available, to which you may add exception dates and associate different rules to time periods within the term of the subscription.

Your relationship with an institution may not involve what is typically characterized as a subscription with clear start and end dates. Whether or not that is the case, you must provide a time-frame during which an institution makes its passes available to you for the system to work properly. Setting the end date to a date far in the future will ensure that passes will always be available to patrons according to the limits you placed on them.

Next, you must add at least one pass for one to made available to patrons.

3. Adding passes

Accomplished on the "Institutions & Passes" page by using the "Manage Pass" *link of the selected institution listing.* There is no limit to the number of passes that you may associate with a particular institution. This is useful when distinct versions of the same pass are available. One example of this is a library that has multiple branches offering the "same" pass, but with a unique copy assigned to each location. Another example is when you'd like create what appears to patrons as a single pass, but is actually a number of passes whose date ranges back up to each other across the entire subscription term, allowing you to assign different behaviors to different times of the year.

Use the "Add a Pass" link to access the page for creating the pass record and follow the directions for providing the appropriate information in the boxes.

PASS INFORMATION Box

a. *Type of Pass.* Indicate whether the pass is a circulating (return required) or coupon (return not required) pass.

b. *Active.* Indicate whether the pass is active or not. If made active, the pass is made publicly available according to the schedule you set up later in this box after you've saved the record. Note that if no passes associated with an institution are "Active," then the listing will not be available to patrons as an option.

c. *Institution Subscription.* Select the appropriate subscription from the list.

d. *Pass Name.* Give the pass a name that is easily identifiable to staff. If adding more than one pass for an institution, make sure each has a distinct name—it will help you understand your reports.

e. *Loan Instructions.* This is an opportunity to indicate specific instructions, like pick-up and delivery information or rules that govern use of the pass at your library. Importantly, this text is what patrons agree to as the terms and conditions when checking the box at the bottom of the online reserve form. ***Note that this field is NOT for a description of the pass institution or the benefits of using the pass, both of which are already part of the listing you are in the act of creating.***

f. *Donated By.* If your Friends of the Library group or another organization has provided the funds that made the pass possible, indicate that here to for it become part of the public listing.

PASS SETTINGS Box

a. *Pass Availability Start and End Dates.* These dates indicate when the pass is available per the terms of your agreement with the pass institution. Click within each field to produce a pop-up calendar from which you can select the dates. These particular settings affect the display of the listing—if you've renewed your subscription because your old one is no longer in effect, create a new pass with the new start and end dates to make the passes available again.

You may also use the fields to create a series of passes that essentially function as one to patrons, but which behave differently during specific time periods. An example of this might be the need to change the frequency with which patrons make check out a pass from this institution for a few months. This is done by creating a series of passes with date ranges that do not overlap and which all fall within the subscription period. For the pass to be available throughout the entire subscription, all of the passes must butt up to one another.

b. *On what days is this pass available for use at the institution?* Click in the boxes to left of the weekdays to indicate when the pass is available for use. You'll think about your choices differently depending upon whether it's a circulating or coupon pass.

If this is a circulating pass, you might have more than one physical copy, each of which is available only on certain days, like the Monday/Wednesday/Friday pass and the Tuesday/Thursday/Saturday pass. Use this area to indicate the days that a particular pass is available.

If this is a coupon pass, then it echoes the regular schedule you provided on the Institution page, except in one detail—you must indicate any additional days of the week that the pass <u>could</u> be available when it is usually not. An example of that might be a Monday on a school vacation week when the institution is typically closed. When an exception date is indicated—done in the next section —passes are *only* made available when the system understands the institution as being open. ***If you do not include days that the institution is usually closed, the use of exception dates will <u>not</u> make the pass available to patrons on the front end.***

c. [*Where available.*] Under the name of the library (if there is only one branch) or the branch (if there is more than one), please indicate that this pass is available at that location and add the unique bar code number for it, if there is one. Indicate how many passes are available per unit of time—like 1 per day or 2 per week. The last field in the row, "Starting Pass Count," is for indicating the number of passes you have in hand when you start using the module. (If this is a Circulating Pass, this field will not appear.) Though not visible on this page, entering a number here allows the system to count down the number of existing passes as it is reserved. This ensures that no passes are made available if you've exhausted your supply of passes before the subscription ends. (To see the current number of coupon passes available to reserve, go to the PASSES REMAINING section in the Details View of the Pass record.)

d. *Make printable by Patron?* If you've indicated that the pass is printable on the Institution page, enable the functionality here by indicating "Yes." **Note that the institution itself <u>must</u> accept printable passes. Always confirm that you are able to generate a formatted pass that they find acceptable.**

e. *Barcode to be printed.* Enter the bar code number given to you in this field if one was provided by the institution. An exception is the Boston Children's Museum—the Assabet system relies upon data provided by them to automatically add a bar code to individual passes, so you should leave this field blank since anything you put in this field will be ignored.

f. *Patron maximum… …per unit of time.* Indicate the number of times a patron may check out this pass within a given period by selecting a number in the "Patron maximum…" field and making a choice in the "…per unit of time" field. *Note that this is different than the global setting controlling all passes, and one set at the institutional level, either or both of which may be combined to enforce a particular policy on how frequently patrons may reserve passes.*

g. *Approval.* Choose whether or not you want the system to automatically approve any pass reservations. If you choose the latter, your staff will need to review each request and manually approve it.

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

CIRCULATING PASS RETURN INFORMATION Box

This information is what determines the overdue status of a checked-out pass when reviewing pass reservations.

a. *Circulating passes must be returned by…* Provide a time by which a circulating pass must be returned on the "due date."

b. *…on the …after date of pass use.* Select how many days after the date of pass use is the day that the pass must be returned to the library.

Once you've completed the form, hitting the "SAVE" button will create the record and return you to the page with the list of every pass you've added to the institution.

If you are not creating more passes, then you must add information about dates that are exceptions to the normal schedule of an institution, if there are any.

Copying a Pass

Locate the museum you want to work with in the list on the "Institutions and Passes" page, and click "Manage Pass" to access every pass associated with the institution. Find the pass you want to copy and click on the "View Details" in the Options column. Clicking in the "Copy this Pass" link, located at the top, will copy all the existing pass details into a new pass form where you can tweak the details as appropriate for the new pass, including which "Institution Subscription" the pass is associated with. **Note that the blackout dates associated with the original pass are not copied over to the new pass.**

Next, you must tell the system when there are exceptions to the institution's schedule.

4. Managing institution exception dates

*Accomplished on the "Institutions & Passes" page by using the "*Manage Institution Exception Dates" *link of the selected institution listing.* Any existing exception dates connected to the institution will be indicated here. Note that any added dates that are now in the past will not appear in the default display, though they may be retrieved using the "View" filter. Blackout dates related to a pass are handled in the pass section. (See "5. Managing pass blackout dates" later in this section.)

To add deviations of the regular schedule of when this institution is open and closed, click on the "Add an Exception Date" link. This new page is organized by year, month and day, with popular holidays indicated so that they may be found quickly. The days of each month are accessed or hidden by clicking on the dark red bars that indicate months. The normal schedule you indicated in section #1 is shown as empty circles. Your additions reflect an institution's behavior that is distinct from the norm—both when open and when closed.

For example, if a museum is usually scheduled to be open on a Monday, but is closed on a particular date because of a holiday, you will need to make it an exception date to show that it is not open. This will prevent the pass from being offered for use on a day when the museum is closed. Exception dates may also represent days when an institution is open when it is normally closed. This is also where you should indicate when passes are not honored by the institution anytime the normal schedule would suggest otherwise. **Note that you do NOT need to (and should not) mark every day of the year in this section—it is for exceptions only.**

To add exception dates to the record, locate the day(s) within the desired year(s) and month(s). To indicate a date that is *closed,* click once within the circle associated with the desired date. The circle will turn red to show that your selection has been correctly interpreted by the system. To indicate that a date is *open* or accepting passes—contrary to the regular schedule—click twice within a date's empty circle, and it will turn green to show the new status. An empty (white) circle is the default and indicates that there is no change to the regular schedule.

5. Managing pass blackout dates

Accomplished on the "Institutions & Passes" page by using the "Manage Pass" link of the selected institution listing. Every pass associated with the institution will be listed on this page. Clicking on the "Manage Blackout Dates" link will take you to a page that shows all current and future dates already added to the system. There you will find links to add either single blackout dates ("Add a Blackout Date") or a block of blackout dates ("Add a Blackout Date Range").

If you choose to add single dates, there is no limit to the number of non-contiguous dates you may add. Simply click within the circles that correspond to pass unavailability dates to turn them red. Hit "SAVE" when you're done.

If you want to black out an entire range of dates—say, January 3, 2018 to March 17, 2018—it is easily accomplished by providing a name (so it's easy to recognize) and date-range on the page accessed by the "Add a Blackout Date Range" link.

6. Limiting frequency of pass usage by a patron at specific pass level

Accomplished in the Institutions & Passes section. Click on the "Manage Pass" link of the listing on the Institutions & Passes main page. Then, click on the "Edit" link of the pass you want to manage.

Find the Patron Settings box. In the "Patron maximum…" field and the "…per unit of time" fields, indicate the number of times a patron may check out the pass within a given period by providing a number and selecting a unit of time, hitting "SAVE" when done.

7. Limiting frequency of pass usage by a patron at the institution level

Accomplished on the "Miscellaneous Settings" page in the "General Settings" section. To indicate the number of times a patron may check out any pass connected to a specific institution offered by the library within a given period, provide a number and select a unit of time in the fields within the INSTITUTION AVAILABILITY SETTINGS box, hitting "SAVE" at the bottom of the page when done.

8. Limiting frequency of pass usage by a patron at global level

Accomplished on the "Miscellaneous Settings" page in the "General Settings" section. To indicate the number of times a patron may check out any pass offered by the library within a given period, provide a number and select a unit of time in the fields within the MUSEUM PASS LIMITS box, hitting "SAVE" at the bottom of the page when done.

### 9. Establishing pass behaviors for selected date-ranges within a subscription

There are two ways to manage this, each described below.

The Multiple Pass Versions Approach

Accomplished on the "Institutions & Passes" page by using the "Manage Pass" link of the selected institution listing and clicking on the "Add a Pass" link. The best way to understand this is to imagine that every addition (pass)—with its unique

behavior—is actually a component of a single pass when those passes each cover a distinct period within the subscription time. Here's an example:
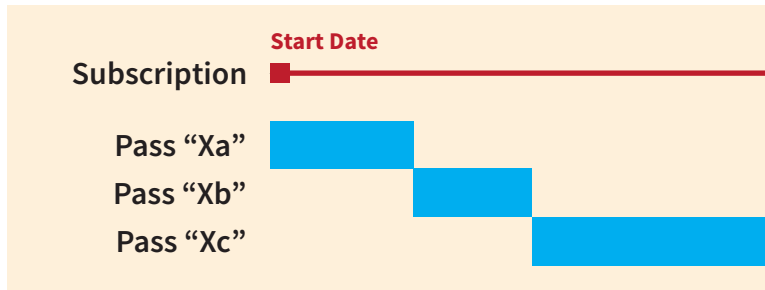

Let's assume that Pass "Xa" has an end date of January 31, Pass "Xa" has a start date of February 1 and end date of February 28, and Pass "Xc" has a start date of March 1. Over the course of those three months, when one ends and disappears, another is made available for the same institution.

The important things to keep an eye on are these:

- Make sure the start and end dates of each pass are aligned over the course of the subscription so they can retire and arrive smoothly on the patron side of the system. **Note that if any overlap, they will be seen as separate passes and offered as different options at the same time.**

- Don't forget to adjust the behavior of the pass. After all, there's no point in going through this exercise if there is no change.

The Blackout Date Range Approach

Accomplished on the "Institutions & Passes" page by using the "Manage Pass" *link of the selected institution listing.* This approach shares the same assumptions as the first, but handles the issue a little differently. Here, a pass is added for the full length of the description. Then, for each variation, a blackout date range is introduced for which we create a pass that takes its place when both date ranges line up.
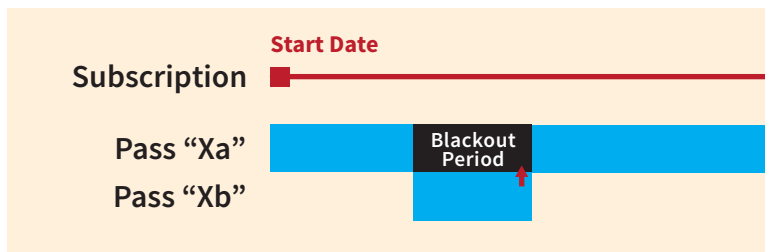
To accomplish this, locate the pass you wish to manage and click on the "Manage Blackout Dates" link, taking you to a page where you can access the "Add a Blackout Date Range" link to introduce your blackout period.

Then, create a new pass with availability limits that share the time-frame of the blackout period. Because the second pass is associated with the same institution,

the duplicate pass will "step up and stand in" for the original pass during this period, with no noticeable differences to patrons making a reservation.

When setting up the new pass, make its name reflects something important about the difference (such as "Summer Vacation Pass"), so that you can recognize it easily. Also, make sure that the blackout period dates and the Pass Availability Start and End Date fields are exactly the same, or the pass may behave differently than you intended on certain days. Also, don't forget to change the behavior of the new pass. If you need help setting up the new pass, see "4. Adding Passes" in this section. Hit "SAVE" when you've provided all the requested information.

10. Making reservation form contact fields optional or required

Please see "e. MUSEUM PASS RESERVATIONS–REQUIRED FIELDS" on page 11.

11. Making an existing pass "patron-printable" when a museum accepts it

If a museum in your version of our system accepts printable coupon passes, you'll need to "convert" those passes before patrons may print them. Here are the steps:

1. Ensure that the Email Address field is set to "Include and require" in the online reservation form. If it isn't, patrons might not receive the emails that will allow them to print the pass. This is located in the Miscellaneous Settings are of the General Setting section.

2. If you've previously made any edits to the text in the module's triggered emails, the necessary link won't appear in the body of the email. You'll need to go into the Edit view of each relevant email to paste in a [PrintablePassLink] snippet above the existing [InstitutionName] snippet. (Note that this snippet is part of the glossary at the bottom of the page.) Add this to emails with the following triggers: "Reservation Auto Approve,""Reservation Auto Approved,""Promoted to Approved,""Reservation Reminder."

3. Edit the Institution record ("View Institution Details" link) by indicating—at the bottom of the page—that printable passes are accepted.

4. Edit the Pass page ("Manage Pass" link) in two places in the PASS SETTINGS box—first, enabling the functionality by clicking on the "Yes" button in response to "Make printable by Patron?" and, second, providing a bar code number if provided by the museum. **Note that, if this is a printable pass from the Boston Children's Museum or Zoo New England, then you should leave this field blank since the system will ignore any information you put there.**

A staff member may also print out approved printable passes from the administration section by going to Details area of a reservation and using the "Print Pass" link.

MANAGING RESERVATIONS FOR MUSEUM PASSES

The Reservation section is where you'll create or modify museum pass reservation records. It provides access to all existing museum pass reservation records, delivering tools to approve, deny, edit or delete a reservation record; enables sending an email to a person making a reservation; and indicates the status of a pass, including whether it's overdue—and, by how long if so.

The landing page for this section is a snapshot of current and future reservations —organizable by filter—showing important information and paths to view and edit record details. A patron is usually the one who submits a request, but a staff member may also create a museum pass reservation record in this section.

1. Viewing reservations

Accomplished in the "Reservations" section. The main page delivers a list of all current and future room reservations—made by both patrons and library staff— with views and filters that allow you to locate reservations using various criteria, including ones in the past. Each listing includes a quick look at the patron name, institution, specific pass name, branch (if your library has more than one location), reservation date, date submitted, and the date, time, and status of each reservation. A "View Details" link delivers the full record, including a Reservation Activity Log which captures every action related to a reservation.

If you wish to locate a specific reservation, you may do that in the Check-out/ Return area by library card number, pass bar code number, or name, or any combination of the three. See the MANAGING THE CHECK-OUT AND RETURN OF PASSES section.

2. Adding a reservation from within the Dashboard

Accomplished in "Reservations." In some situations, you might want to make a reservation from within the administration section, like when a patron is unable to initiate the process on your website. To do this, click on the link labeled "Add a Reservation" and follow the directions for providing the appropriate information in the boxes. **Please note that if you are adding a reservation for a museum pass set to "Auto approve all reservations," you will still need to change the status from "Pending" to "Approved," after submission, accomplished on the reservation record page that appears after you hit the SAVE button.**

RESERVATION INFORMATION Box

a. *Date of Use.* Select a date on which the institution is open. If there are no remaining passes available for the date you've chosen, it will be flagged as a conflict only after you've submitted the form. Reviewing the reserved passes list on the main page in this section beforehand will allow you to identify any potential conflicts.

b. *Museum Pass.* To choose a pass, make a selection from the drop down menu. When there are many options associated with an institution, displayed details about where and when a pass is available will help you choose the correct one.

REGISTRANT INFORMATION Box

a. *Library Card Number.* Provide the library card number of the patron making the reservation in the indicated field. This is to validate that the person who is making the request is from the approved group you defined during the set-up process with AI, such as the holder of a card issued by your library or library consortium. 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.

Clicking on the red button to the right that says "RETRIEVE PATRON INFO" will initiate validation with your ILS and auto-fill some of the fields that follow if you are not bypassing validation. Note that each ILS determines what they make available, so it could be that our system is unable to retrieve information for every contact field in this section. If a card is "refused"—that is, the validation process determines that it does not meet all the required criteria for checking out a pass—you may check the box labeled "Bypass ILS validation" to enable checkout if you decide to make an exception.

b. *First Name* and *Last Name.* Provide the first and last name of the patron making the reservation in the indicated fields.

c. *Email.* Provide the email address of the patron making the reservation in the indicated field. (Not a required field.)

d. *Telephone.* Provide the telephone number of the patron making the reservation in the indicated field. (Not a required field.)

CONFIDENTIAL NOTES Box

a. *Reservation Notes.* Provide any information that will help the library manage this reservation. This information is not available to the general public.

3. Editing a reservation

Accomplished in the "Reservations" section. To edit a reservation, click on "View Details" on the desired listing. Once on the reservation record, click "Edit this Event" to make the desired changes.

4. Moving a reservation from one status to another, including "Deleting"

Accomplished in the "Reservations" section. To approve or deny a requested reservation, click on "View Details" on the desired listing. Once on the reservation record, click "Approve Reservation" or "Deny Reservation" to make changes. If you need to communicate with the person requesting the room, you may use the "Email Registrant" link at the top of this page to generate an email.

Note that staff can "Delete" a booking from this page, which makes it unavailable to any reports you run. You may "Undelete" an item before running a report if you wish to access the information associated with it.

5. Overriding an ILS card rejection

Accomplished in the "Reservations" section when adding a reservation. If you know that a library card will be rejected by the validation process, but want to enable checkout in this particular case, click the "Bypass Assabet Interactive and ILS validation" box just below the "Library Card Number" field.

6. Making a pass available again when returned before use

Accomplished in the "Reservations" section. If a patron discovers that he or she is unable to use a pass and returns it to the library so another patron may make use of it, you must delete the listing to make it again available on the front end—unless it is returned after the indicated use date. This enables the system to retain the data for reporting. *Note that checking it in will NOT make the pass newly available, since the system sees the pass use as fulfilled.*

7. When library closures affect timing of pass pickup by a patron

The system assesses library closures that might affect the successful pickup of museum passes, displaying alerts during the reservation process to warn patrons.

If there is a closure on the day of use, the alert says, "The library is closed on the selected date of pass use. Before placing a reservation, make sure there will be enough time to pick up the pass." If on the day prior to use, it reads, "The library is closed on the day prior to the selected date of pass use. Before placing a reservation, make sure there will be enough time to pick up the pass." (Depending on the number of branches in your system, the initial text of these warnings might vary to indicate whether it is every branch or a single one that is closed.) This information is also included in any triggered emails connected to the reservation.

MANAGING THE CHECK-OUT AND RETURN OF PASSES

The Check-out and Return sections in the Museum Passes module allows administrators to quickly locate an existing reservation and check out or check in a pass. This section provides almost the same tools for locating and managing pass reservations as those found on the main page in the Reservations section, except that the criteria for searches rely upon different kinds of information—in this case, unique numbers associated with passes and library cards that may be captured by a bar code scanner if attached to your computer.

1. Checking out a pass

Accomplished in the "Check-out" 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 RESERVATION" 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 is usually the most efficient way to locate a reservation. After scanning, the system will find and display all reservations connected to that specific card. It will then auto-tab the cursor into the Pass Bar code field, which can optionally be used to narrow the matches further if desired.

To check out the pass, click on "Check-out" in the Options column of the reservation listing. The system will then cycle through the checkout work flow, marking the pass as checked out, and sending the patron a confirmation notification email. After that process, it will return to the checkout page, automatically searching for additional reservations associated with the previously inputted library card.

2. Checking in a pass

Accomplished in the "Return Passes" section. First locate an existing reservation by supplying the information requested in one or more of the fields—pass bar code, patron name, or library card number—in the "FIND A RESERVATION" box.

Once found in the system by this method, the pass 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, then all of them will be displayed under the heading "Matching Reservations." Is this is the case, choose the correct record and select "Return" in the Options column of the listing to tell the system that the pass has been returned to the library.

As with pass 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 THOSE RESERVING A PASS

The Emails area in the Museum Pass module allows administrators to view and modify emails that are automatically sent to registrants at various predetermined points in the reservation process up until the event. Unless you wish to change the text of the default emails which pull in information related to your library, the reservation, and the specific registration—or you wish to make an email inactive—you need not do anything in this section. However, before using the system, it is strongly suggested that you review the default email details to ensure that they accurately reflect the library's intentions.

Email is used to communicate with your patrons in one of two ways: through emails triggered by events; the other with unique messages created by the library to send to a particular patron. Note that each triggered email contains a link to cancel a reservation if the pass has not yet been picked up.

The chart below details what prompts the triggered email messages.

Changes in Status that Trigger Automatic Email Responses
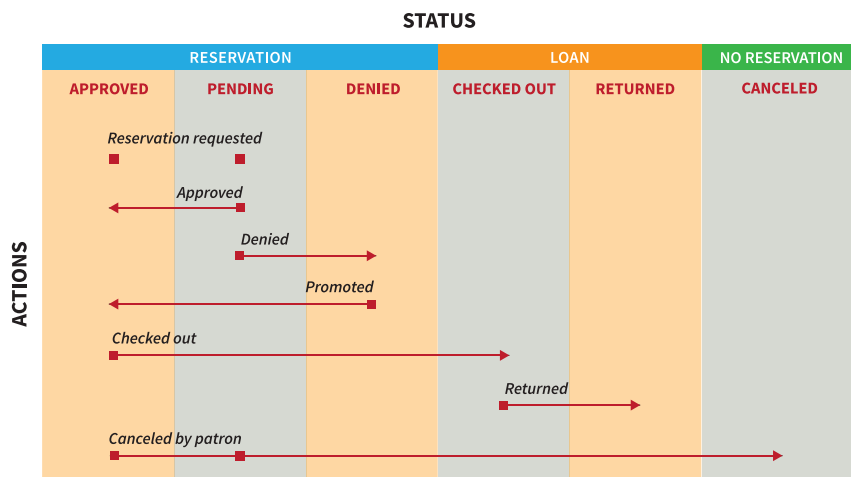
1. Configuring a triggered email

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

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

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

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

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

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

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

- **Pass checked out** *(automatically triggered by system when pass goes on loan)*

- **Pass returned** *(automatically triggered by system when pass is checked back in)*

- **Reservation canceled** *(automatically triggered by system when a patron clicks on the cancel link in an email they received about the reservation)*

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 Reservation 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 Museum Pass module. This main page 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.)

Note that "[ReservationCancellationLink]" is what a patron requires to cancel a reservation, so make sure that it remains as part of the new version of the email.

3. Sending a custom email

Accomplished in the "Reservations" section, in an event record. The main page in this section provides access to a list of all reservations. You may change the "View" or use the filters to help you locate a reservation.

Once you've located the reservation of whom you want to email, click on the "View Details" link at the end of the listing. In the record, select "Email Registrant" and a blank email with the registrant's email address in place 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 museum pass reservation 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 use your selected pass on the day that you reserved it, letting the library know will enable someone else to use this pass. To cancel this reservation, please use this link:
>
> [ReservationCancellationLink]

Once this paragraph is in place in every one of your active emails, patrons will have the opportunity to cancel their pass reservation 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 all images and documents intended to be made available as downloads, such as pdf files or Word documents. This section provides access to every asset that has been uploaded to the system, supporting every module you've subscribed to. Filtering, based on the type of asset (image or document), and information in the record placed in the search field, can help you quickly find a file in the library.

1. Adding an asset to the system

Done on the "home" page of the Assets section. You may only upload the following formats: jpg, jpeg, gif, png, pdf, doc/docx or xls/xlsx. To access the upload page, use the "Add an Asset" link below the intro text on the right.

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, in particular, the visually impaired or those using screen readers. Don't forget to select "Active" if you wish to make the image available for use. When completed, hit the SAVE button below. Note that the file will not become part of the library until you've hit this button.

2. Viewing an asset record

Accessed on the "home" page of the Assets section. To access the record, click on "View Details" below the image. An asset record contains some information that will help you manage the site, such as where and how an asset is being used. Links are provided so that you can see the context in which it's been used, particularly helpful if you're trying to determine whether or not to delete an asset. **Note than an asset indicated as being in use may not be deleted.**

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.

IV. REPORTS

The Museum Pass module reports provide information about the frequency of pass use, subscription time periods, and enhancements made to the system. The reports may be printed or exported as a csv file which can be opened in a spreadsheet application. Note that these reports are not all accessed in the same place.

1. Generating a report on pass use.

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

2. Generating a report on pass subscriptions.

Done on the "Subscription Expiration" page of the Museum Pass area in the GENERATE REPORTS section. The report collects information about the start and end dates of all current subscriptions and provides the number of remaining days within your agreements. Past subscriptions may also be retrieved.

3. 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.