VERSION 12.14.16A

EVENT CALENDAR WITH REGISTRATION MODULE **MANUAL**

www.assabetinteractive.com

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INTRODUCTION

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

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

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

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

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

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

I. OVERVIEW

All the areas in the Assabet Interactive Dashboard menu are important to the operation of the module(s) that you've added to your site. Some you will make use of only when you first start out; others you'll use time and time again. Once you use the system, you'll discover that everything uses the same logic and approach. In other words, when you become familiar with editing in one area, you won't need to learn an entirely different method in another.

There are certain conventions we've adopted for the Dashboard that you will find in any module. We note a few below:

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 located below "DASHBOARD."

To see the front-end presentation of the module from any page—minus all template information and library-provided content that exists as part of the specific page on your site where the module "lives"—use the "View Public Display" link at the top right under the name of your library.

To manage alpha-numeric ordering in most lists, click on the column headers.

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.

Yellow highlighting helps to quickly identify certain information, typically within lists found in the Events and Registration sections. Among others, it will highlight all occurrences of a Series or Reoccurring event when the listing is moused over. Also, when clicking on the "Access Details" link of a specific Series or Reoccurring event, that event will be highlighted on the resulting page to distinguish it from all other occurrences.

Conflicts are noted with an icon consisting of a red circle with an exclamation point, found in the "Options" column of various lists. Mousing over the icon will first produce a question mark, then a description of the conflict. The "View Details" page of any record with a conflict also provides an explanation.

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 room record, it useful to review every option as you go through the set-up, so that you don't accidentally miss the opportunity to incorporate important information.

The formatting tools for any stylable content (located in the "Description" and "Description Excerpt" fields) 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.

GAINING ACCESS TO THE SYSTEM

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

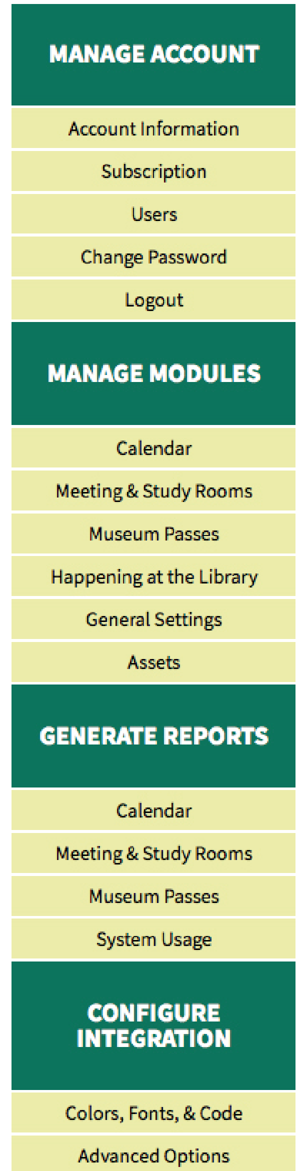
1. Log-in

The log-in page at "[your domain].assabetinteractive.com/admin/login.php" provides access to the administration section after inputting the username and password that you were issued. The red vertical bar at the right end of each field will turn green when you've typed in information that matches a user in the system.

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.

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. 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 create emails for automatically generated responses.
- *Meeting & Study Rooms.* Contains four sections (*Rooms, Registrations, Equipment,* and *Emails*) that enable you to create room records and equipment lists, add registration and waiting lists if needed, and edit or use default emails for automatically generated responses.

- *Museum Passes.* Contains four sections (*Museum Passes, Registrations,* and *Emails*) that enable you to create museum records using profiles in the system and your own content, add registration and waiting lists if needed, and edit or use default emails for automatically generated responses.
- *Happening at the Library.* For "snapshots" of all room use, with views based on individual dates and date ranges, locations, and search terms.
- *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.
- *Assets.* This is where you upload all images and any documents intended to be made available as downloads, such as pdf files. For specific instructions, please see the "ASSETS" section.

3. The "GENERATE REPORTS" section

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

4. The "CONFIGURE INTEGRATION" section

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

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

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II. THE EVENT CALENDAR MODULE

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

SETTING UP THE INSTITUTION DETAILS

If just starting out with the Event Calendar module, you will need to input or edit some information that is the backbone of the system. This is done in the Categories and Emails sections of the Calendar module, and the General Settings and Assets sections found in the top-level Manage Modules area. (Note: you may have already added much of this information if your subscription includes another Assabet Interactive module, like the Meeting & Study Room Reservation system.)

1. Adding branches and locations

Done in "General Settings." Though you may add branches and locations (specific sites within a branch) at any time, you will find it more convenient to add as much of this information as possible to the system before creating any events. This provides instant access to it while developing an event record.

First, add all library branches in the "Branches" area per the instructions. Next, add the location of every room in "Locations" for which you plan to schedule use. (Note that a location is a specific place *within* a branch, not the same as a branch.) Even if you have only a single branch, you must create a record for it so that any locations within a branch may be linked when you add them. *Though it is possible to add a branch or location during an event record set-up, it is recommended you do this before you begin.*

2. Adding a category

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

3. Adding images and documents

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

In the first box, labeled UPLOAD FILE, click on the "Choose File" button to locate the file you wish to upload on your computer. Select the file and hit the "Choose" button. Next, fill in the requested information in the ASSET INFORMATION box. The more information you can provide, the easier it will be for search engines to find you, and for you to find specific files within the library. In particular, the "Alt Value" is important because it provides a description for visitors who are unable to see images in their browser, especially the visually impaired or those using screen readers. Don't forget to select "Active" if you wish to make the image available for use.

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

4. Editing automatically sent emails

Done in "Emails." The landing page of this section provides a list of all registration-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 is important because some patrons may communicate with the library by hitting reply.

SETTING UP AND MANAGING INDIVIDUAL EVENTS

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

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

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

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

1. Adding an event

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

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

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

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

EVENT INFORMATION Box

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

b. *Visibility.* Select whether you want to publish this—making it public on the calendar on your website or simply conserving it as a draft—once you hit the SAVE button at the end of the event record creation.

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

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

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

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

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

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

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

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

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

EVENT CATEGORIZATION Box

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

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

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EVENT REPETITION Box

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

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

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

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

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

   i. Create a reoccurring event.
   ii. Indicate an initial start time of 4:00 PM and an end time of 4:15 PM
   iii. Set the number of occurrences to 5
   iv. Set the repetition rate to "Hourly", and enter 15 minutes.
   v. Save the event, and edit occurrences #4 and #5 to move their times out by 15 minutes
   vi. To secure the room in that small gap between Occurrences 3 and 4, set the preparation time on occurrence #4 to 15 minutes.

REGISTRATION/WAIT LIST SETTINGS Box

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

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

a. *Registration Required.* If your event does not require registration, select "No" and hit the SAVE button at the bottom if you're finished. If you choose "Yes," then respond to the requests for information which follow to set the registration settings. ***Note that though you'll be able to add registration after saving the record, you won't be able to apply the new settings to all occurrences in a Series or Reoccurring event at once—it will need to be handled one at a time.***

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

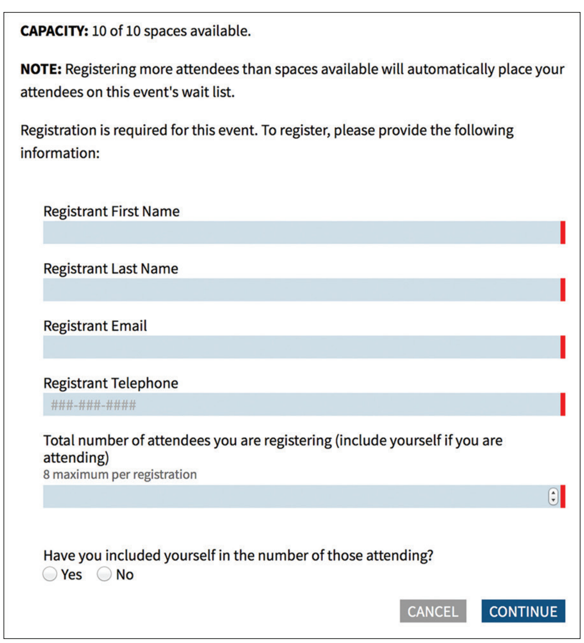
c. *Time Registration Opens* and *Time Registration Closes.* Provide times for the opening and closing of the registration period with the pop-up time picker that pops up when you place your cursor within the fields.

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

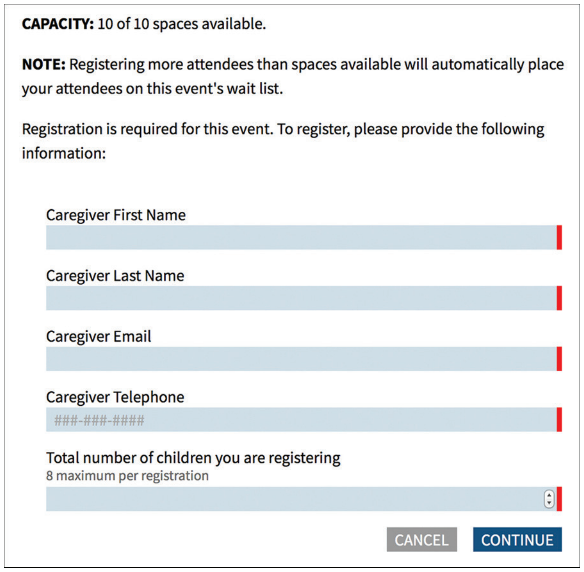
e. *Minimum Total of Attendees.* Also not required, though defining a minimum number of attendees per registration can help you collect accurate information needed for certain kinds of events.

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

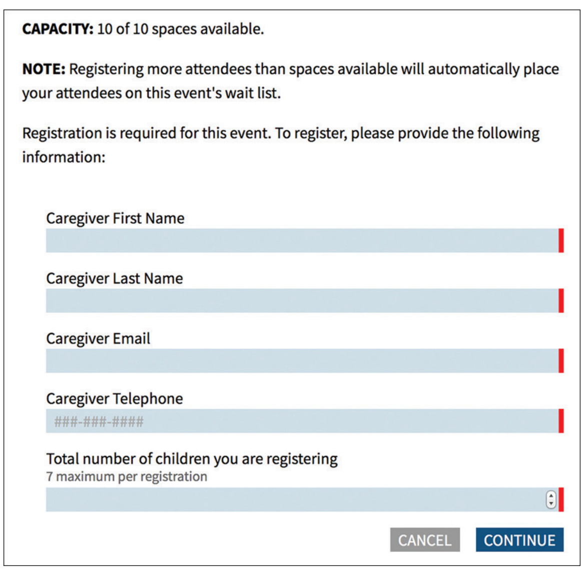
1. <u>Registrant/Attendees</u>. This is the default. If you do nothing, this is the form that the system uses, collecting registrant and attendee information, and asking how many attendees and whether registrant is one of those attendees.



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



3. Caregiver/Child(ren), Caregiver included. Collects caregiver, child information, and count of children. Caregiver counted as attendee.



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

h. *Staff Recipient(s) of Registration Notification Emails.* For staff to receive alerts about incoming registrations, this field must contain at least one email address. Separate addresses by comma if adding more than one.

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

j. *Custom Registration Fields.* You may custom fields to the registration form to collect information important if necessary. To add one, click within the field visible in this section and type in the name of the label you wish to associate with the field when displaying to a site visitor. The "+ Add Another Field" link enables you to add as many fields as you need.

CONFIDENTIAL NOTES Box

This is a field for preserving any notes or comments you would like to associate with the event listing, but that you don't want to publicly display. This may prove useful for capturing details that may help the library manage the event. You are not required to put anything in this box.

. . . .

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

2. Copying an event

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

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

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

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

3. Editing an event

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

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

4. Deleting an event

Accomplished in "Events." Select an event from the list and click on the "Delete" link at the right end of the listing. Though it will no longer display, the event is not removed from the system, so the reporting function can include it where necessary. ***Note that once you've deleted an event, you now have the option to "Undelete" if you have a need to do so.***

5. Adding an image to an event record

Accomplished in the "Events" section within an event record. All images are stored in the Assets Library. These may be added to an event in one of two ways.

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

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

To add an image to the Description field, place your cursor within the text where you want the image to go, and click on the "Images" icon in the formatting bar above. (That's the one located to the left of the chain, or "link," icon that looks appears as a box with a mountain and sun in it.)

Choose between "Select image" or "Upload." Clicking on the former produces the "Select Asset" box. Click on the green "SELECT IMAGE" button in the first field, and select an image in the Assets Library pop-up window by clicking on it. Returned to the "Select Asset" box, now add a description and choose an alignment from the list of choices. Use of the CONFIRM button saves your choice, and you are returned to the Description field with the image in place.

To use an image which is not yet in the Assets Library, select "Upload Image" after clicking on the Images icon. This produces the "Upload Image" box. Click on the "Choose File" button in the first field to browse your computer. Locate and choose the file, which returns you to the ""Upload Image" box. Add a description and choose an alignment. Use of the CONFIRM button saves your choice, and you are returned to the Description field with the image in place.

6. Adding a document for download to an event record

Accomplished in the "Event Information" section in an event record. Only within the fields labeled "Description" and "Event Pricing" can one add a document such as a pdf file for download. In the location you've chosen, highlight the word(s) that will provide the link to your document. Then click on the link icon—the chain, to the right of the images icon—and choose "Insert link" from the drop-down menu. Use the "Browse" button next to the URL field to find and select the document in the Assets Library. If you wish the document to open up in a new tab or window, make the appropriate selection in the "Target" field.

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

Accomplished in the "Event Information" section in an event record. This feature is only available within the fields labeled "Description" and "Event Pricing." Highlight the word or words you want to be the link and click on the link icon—the chain, to the right of the images icon. Provide the desired URL, a title, and a target. In most cases, you will want a new window to pop up to ensure that visitors don't lose what they were looking at when they hit the link. Make your selection in the "Target" field.

8. Posting to social media

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

9. Viewing public presentation of calendar

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

MANAGING REGISTRATION

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

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

1. Viewing registrations

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

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

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

2. Adding registrants

Accomplished on the "View Registrants" page of a selected event in the "Registrations" section. Clicking on the "Add Registrants" link in the upper right-hand corner of the page delivers two boxes to input a name, email address, and telephone number (REGISTRANT INFORMATION box) and attendee information (ADD AS AN ATTENDEE? box). Any unique fields that were added during the registration set-up to collect information unique to the event will be available in the second box. When finished, click on the SAVE button, or the SAVE & ADD ANOTHER if you wish to add another attendee. ***Note that, if registration has been set to auto-approve in the event record, the addition of a registrant by staff still requires approval after saving.***

3. Moving registrants from one status to another

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

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

4. Viewing information related to a unique registration

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

5. Managing attendance and capturing numbers for reports

Accomplished in the "Registrations" section by selecting the "View Registrants" link of a specific event, then "Manage Attendance." This page delivers a list of all registered event attendants, with contact information and data from any custom forms that were added to the registration. To the left of each name is a box which, when clicked on, will indicate attendance at the event. The resulting "checked" box is the evidence that you have been successful. If the online page is unavailable at the event location, you may print it out to take attendance manually. ***Note that if you do use a piece of paper to check people in, and attendance numbers are a vital part of one of your report(s), then you will need to transfer the captured information to the system when you again have access to the "Manage Attendance" page.***

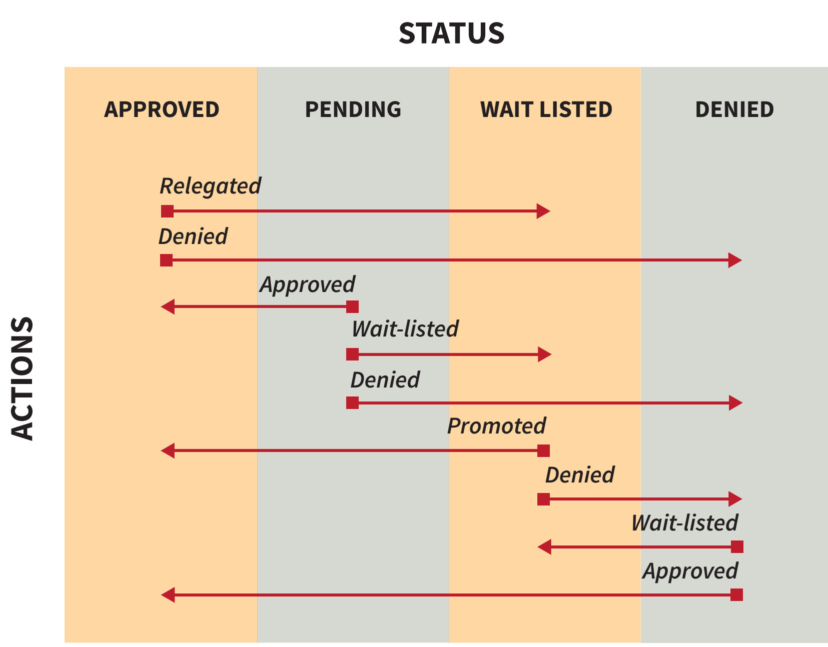
MANAGING EMAILS TO REGISTRANTS

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

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

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

Changes in Status that Trigger Automatic Email Responses



1. Sending an automatically triggered email

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

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

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

2. Editing a triggered email

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

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

3. Sending a custom email

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

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

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

assabet interactive

III. ASSETS

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

1. Adding an asset to the Library

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

In the first box, labeled UPLOAD FILE, click on the "Choose File" button to locate the file you wish to upload on your computer. Select the file and hit the "Choose" button.

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. 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.