VERSION 12.12.16A

# MEETING & STUDY ROOM RESERVATION MODULE **MANUAL**

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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."*

*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 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.*

*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 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.*

*There are many other ways we've provided you with a consistent and intuitive interface, but describing them all would require another manual. We hope you get comfortable with the system quickly.*

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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 after inputting the username and password 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 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 acccess 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.

**MANAGE ACCOUNT**

Account Information
Subscription
Users
Change Password
Logout

**MANAGE MODULES**

Calendar
Meeting & Study Rooms
Museum Passes
Happening at the Library
General Settings
Assets

**GENERATE REPORTS**

Calendar
Meeting & Study Rooms
Museum Passes
System Usage

**CONFIGURE INTEGRATION**

Colors, Fonts, & Code
Advanced Options

- *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.

## II. MEETING & STUDY ROOM RESERVATION MODULE

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

### SETTING UP BASIC DETAILS

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

#### 1. Adding branches and locations

*Done in "General Settings."* First, add all the library branches in the "Branches" area per the instructions. Next, add the location of every room in the "Locations" area for which you plan to schedule use. (Note that a location is a specific place *within* a branch, and is 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 the branch can be linked when you add them. *Please note that you must specify a location for a room here before creating a room record—the correct location will not be available to you as an option if you have not completed this step.*

#### 2. Adding images and documents

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

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

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

### 3. Adding equipment

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

To make an item available—or conversely, to remove it from circulation—use one of the "Active" radio buttons. Next, provide it with a unique name and an ID tag, if your library uses such a system for managing items. Choose all locations where this piece of equipment may be used. An image is a useful and quick way to convey information—add that next with the "Select Image" button if you have one to include. Add a description of the item with useful details for the public and save. Every location you've approved for use of this item will display as an option when a patron is filling out an online request form.

### 4. Editing automatically sent 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.

## SETTING UP AND MANAGING INDIVIDUAL ROOM RECORDS

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

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

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

### 1. Adding a room

*Accomplished in "Rooms."* To add a room, click on the link labeled "Add a Room" below the intro text on this page. This brings you to a form for creating a record that will make a specific space within the library available for reserving. Follow the instructions below.

**ROOM INFORMATION Box**

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

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

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

d. *Featured Image.* To include an image of the room with the record, click on the SELECT IMAGE button, and either choose an image from the Assets Library by clicking on it, or upload a new image by using the "Add an Asset" link just above the FILTER button and following the instructions. If there many files in the Assets Library, you may filter the results to avoid having to review them all.

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

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

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

**RESERVATION SETTINGS Box**

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

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

c. *Minimum Cleanup Time.* Based on the nature of the room and the types of events or meetings that may take place there, you may require that a certain amount of time be added to the room use time for cleanup. This ensures that a room is not made available for reserve during necessary turnover time.

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

d. *Staff Recipient(s) of Reservation Notification Emails.* Provide the email addresses of all staff who are responsible for moderating room reservation requests in this field. As an alert, any addresses included here are copied on the automatically triggered acknowledgment email that goes to each person making a reservation request. If including more than one address, separate each by a comma. ***Note that if you do not provide an email address in this field, you will not be alerted to new requests.***

**ROOM AVAILABILITY Box**

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

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

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

## MANAGING RESERVATIONS FOR ROOMS

*The Reservation section is where you'll create or modify room reservation records. It provides access to all existing room reservation records, delivering tools to approve, deny, or delete a reservation; edit or delete the record; send an email to the registrant; whether or not to make the event taking place in the room public on the calendar should you also subscribe to the AI Calendar module. The landing page for this section is a snapshot of reservations—organizable by filter—showing the name of a reservation, the location, date, and time of each reservation and when it was submitted; the status of a reservation; and a link to view and edit the record. A patron is usually the one who submits a request, but a staff member may also create a room reservation record in this section.*

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

### 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 filters that allow you to display reservations using other criteria. Each listing includes a quick look at the room name, the date submitted, and the date, time, and status of each reservation. A "View Details" link delivers the full record.

### 2. Adding a reservation

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

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

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**RESERVATION INFORMATION Box**

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

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

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

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

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

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

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

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

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

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

**SETUP & EQUIPMENT Box**

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

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

**REGISTRANT INFORMATION Box**

a. *Organization.* If the room reservation is for an organization, please indicate here.

b. *Name.* Provide the name of the contact for the reservation.

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

d. *Telephone.* Provide the phone number of the contact.

e. *Email.* Provide the email address of the contact.

**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 changes.

### 4. Moving a reservation from one status to another

*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.

### 5. Publishing a reservation as an "Event" on the AI Calendar

*Accomplished in the "Reservations" section.* To publish to your AI calendar, click on "View Details" on the desired listing. Once within the reservation record, choose the "Yes" radio button under "Show in the Event Calendar?," located in the RESERVATION INFORMATION box. ***Your library must have a subscription to the Assabet Interactive Event Calendar module to take advantage of this feature.***

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## MANAGING AVAILABLE EQUIPMENT LIST

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

### 1. Adding equipment to the system

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

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

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

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

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

e. *Featured Image.* To include an image of the equipment with its description, click on the SELECT IMAGE button, and either choose an image from the Assets Library by clicking on it, or upload a new image by using the "Add an Asset" link just above the FILTER button and following the instructions. If there many files in the Assets Library, you may filter the results to avoid having to review them all.

f. *Equipment Description.* Provide details that will enable patrons to evaluate whether their needs will be met if they choose to reserve this piece of equipment.

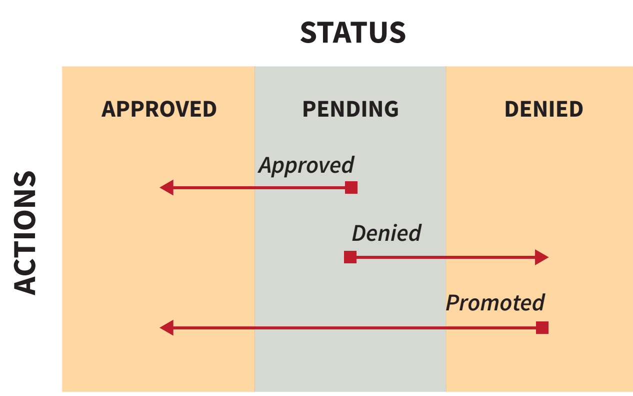
## MANAGING EMAILS SENT TO THOSE RESERVING A ROOM

*The Emails area in the Meeting & Study Rooms module allows administrators to view and modify emails that are automatically sent to registrants at various predetermined points in the 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 suggested that you review the default email details to ensure that they accurately reflect the library's intentions.*

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

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

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




### 1. Editing a triggered email

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

When you start using the system, you may choose to use the existing text in the emails or edit them to better reflect the reality of your institution. To replace or add text of your own, select "Edit" at the right end of the line of the email in the list you wish to make changes to. Note that there are many places where "mail-merge" names within editor's brackets pull in data from the registration record. Since the "mail merge" names are descriptive, it shouldn't be difficult to identify and preserve these so that each email sent retains the automatic personalization. (If you've accidentally erased one that you want to retain, or if you'd like to add one, there is a list of all available "mail-merge" fields at the bottom of the page for reference.)

### 2. Sending an automatically 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)*

In addition, there is an email sent to the address(es) indicated in the room listing set-up whenever a registration arrives in the system that requires an action on the part of the staff.

### 3. Sending a custom email

*Accomplished in the "Reservations" section, in an event record.* The main page in this section provides a list of all reserved rooms. Select the "View Details" link to the right of the specific reservation you'd like to manage. In the record, select "Email Registrant" and a blank email with the registrant's email address will pop up, allowing you to provide a subject line and message text. When ready to send, hit the SEND button.

# IV. 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.