

SUMMER READER 2012 Manual

This document is a compilation of articles found at <http://Evancedsolutions.com/support>. This is not a 'true' manual in the classic sense, but rather a reflection of the online knowledge base.

Please contact support@evancedsolutions.com with any questions.

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Understanding the Summer Reader System Maintenance Page

For staff, almost all functions in Summer Reader can be run from the **System Maintenance** page. From this page you create your custom reading program, styling it and managing according to your unique tastes and needs.

Home	System Maintenance	Reports	About	Messages	Logout: Administrator Level
<p>Programs</p> <ul style="list-style-type: none"> ◦ Add Program ◦ Edit Program ◦ Import 	<p>Search All Programs</p> <p>Last Name</p> <input type="text"/>	<p>System Setup</p> <ul style="list-style-type: none"> ◦ System Settings ◦ Language\Text Setup ◦ Prize Setup ◦ Quick Search Setup ◦ Staff Home Page Setup ◦ Reviews Maintenance Setup ◦ Certificate Setup ◦ Authentication Setup 			
<p>Program Setup</p> <ul style="list-style-type: none"> ◦ Drop Lists ◦ Logging Types ◦ Registration Defaults ◦ Script Entry 	<p>First Name</p> <input type="text"/>	<p>Security Maintenance</p> <ul style="list-style-type: none"> ◦ Volunteer ◦ Basic ◦ Staff ◦ Administrator 			
<p>Links & Messages</p> <ul style="list-style-type: none"> ◦ Program Links ◦ Program Messages 	<p>Include Members <input type="checkbox"/></p> <p>Text Searching</p> <p>Begins With <input checked="" type="radio"/> Any Part <input type="radio"/></p> <p><input type="button" value="Go"/> <input type="button" value="Clear"/></p> <p><input type="button" value="Advanced Search"/></p>	<p>Email Settings</p> <ul style="list-style-type: none"> ◦ Email Setup 			
<p>Manage</p> <ul style="list-style-type: none"> ◦ Reviews\Comments ◦ Random Drawings ◦ Patron Information 				<p>Style Sheets</p> <ul style="list-style-type: none"> ◦ Export Templates ◦ Import Templates ◦ Page Editor ◦ Template Style Sheets ◦ Program-Specific Style Sheets 	
			<p>Evanced Maintenance</p> <ul style="list-style-type: none"> ◦ Defines Settings ◦ Library Info 		

PROGRAMS	Programs helps you create the actual reading tracking program you wish to implement.
Add Program	Allows you to create a new reading tracking program
Edit Program	Allows you to edit an existing reading program
Import	Import an existing program template from a .txt file
Inactive Programs	If you have any programs that are no longer in use, you can find them here.

PROGRAM SETUP	This menu allows you configure basics that can apply to all programs.
Drop Lists	Controls what options appear in various drop lists
Logging Types	Creates categories that can be used for readers to track their progress
Registration Defaults	Set the default answers that appear during registration. This is information Patrons can change. These are only defaults.
Set Program Order	Set the order in which programs appear on the patron home page
Script Entry	Use script entry for enter java script code that affects the patron-side web pages. An example of this would be Google Analytics

LINKS & MESSAGES	Each program page can be customized with links and messages.
Program Links	Set up and control the list of links displayed in each program
Program Messages	Control the messages that appear to participants in the Messages section on the patron home page.

MANAGE	Common areas that need regular staff attention.
Reviews\Comments	Controls and mediates patron reviews and interactions
Random Drawings	Conduct random drawings
Patron Information	Find and edit patron information

In the middle of the page there is a search box from which you can [quick search](#) for patrons by name, custom or advanced criteria.

SYSTEM SETUP	Set basic rules for the overall system
System Settings	Contains various customizable options for the whole system
Language\Text Setup	Controls the language of specific system messages to patrons
Prize Setup	Add prize names and descriptions
Quick Search Setup	Customize the fields that appear in the Quick Search boxes
Staff Home Page Setup	Controls the fields displayed on the Staff Home Page .
Reviews Maintenance Setup	Controls the fields displayed on the Reviews Maintenance page
Certificate Setup	Customize the certificates patrons can earn
Authentication Setup	Set up the way patrons are verified by the system

SECURITY MAINTENANCE	Set passwords for each security level
Volunteer	The lowest level of security; has access to basic functions only.
Basic	Customizable access
Staff	Customizable access
Administrator	The highest level of security; has access to all functions

EMAIL SETTINGS	Controls settings for emails sent from the system
Email Setup	Technical information and email configuration
System-Wide Email Templates	Controls the text of emails that affect the whole system

Program-Specific Email Templates	Controls the text of emails that affect only individual programs
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STYLE SHEETS	Setup the templates from which programs will be built
Export Templates	Chose an existing template to export
Import Templates	Import a template from a .txt file
Page Editor	Change the configuration of the patron home page
Template Style Sheets	Edit the CSS for the program templates
Program-Specific Style Sheets	Edit the CSS for specific program pages

Online URL: <http://kb.evanced.info/article.php?id=224>

How to Setup or Edit a Program

To setup a new Summer Reader reading program, click Add Program from the [System Maintenance](#) page.

To edit an existing Summer Reader reading program, click the setup icon () from the [Staff Home](#) page, or click Edit Program from the [System Maintenance](#) page.

If you are editing an existing program, you'll see a row of buttons along the top of the page. If you are adding a new program these don't appear.

Home	System Maintenance	Reports	About	Logoff: Administrator Level	Back
Save Export Language\Text Setup Registration Setup Logging Setup					
Delete All Program Records Or Delete All Program Records (Including Patrons)					

Save	Saves changes
Export	Exports the program to a.txt file
Language\Text Setup	Allows for the configuration of other languages
Registration Setup	Sets Registration Fields
Logging Setup	Sets up logging
Delete All Program Records	Wipes the program records for reuse
Delete All Program Records (including Patrons)	Wipes out the records including the patron information for reuse
Copy Program	Copies program information to a new program that can then be changed/edited

General Settings

General Settings	
Active <small>?</small>	Yes <input checked="" type="radio"/> No <input type="radio"/>
Program Contact Name <small>?</small>	<input type="text"/>
Program Contact <u>Email Address</u> <small>?</small>	<input type="text"/>

Active	If the program is active it remains available to patrons even if logging and registration is not currently enabled. If the program is not active it is no longer available to patrons.
Program Contact Name	Who is the person in charge of managing this program?
Program Contact	What is their email address?

Email Address	
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Text Settings

Text Settings	
Program Name ?	<input type="text"/>
Abbreviation ?	<input type="text"/>
Description ?	<input type="text"/>
Eligibility Requirement Text ?	<input type="text"/>
Instructional Text ?	<input type="text"/>

Program Name	The name Patrons see as the title of the program
Abbreviation	The abbreviation that appears on the Staff Home page
Description	Tell about the program
Eligibility Requirement Text	Tell who can register for this program
Instructional Text	Instructions for the logging process.

Patron Registration	Will there be registration for the program?
Registration Start Date	When does registration begin?
Registration End Date	When does registration close?
Registration Type	Allow for group or individual registration or both.
Login Type	Do patrons login using their name or library card number? Note that if there are duplicate library card numbers, registration must be done by name.
Authentication Type	Are patrons required to use their library card to complete registration?
Eligibility Requirement	How are eligibility requirements set? By age, grade, or some other classification. Eligibility requirements can be turned off.
Family Registration	Are families allowed to register together?
Member Program Exclusion	When a new member is added, does this program appear in the list
Quick Registration	Allows patrons to register by providing only minimal information
Staff Registration Option	Are staff members required to fill out all required registration fields? If Override is selected, staff members can register patrons with only a first and last name.
Auto User Name/Password Generation	If login is done by user name, Auto User Name and Password will create a username by combining the user's first and last names. The password will be the user name and a random three digit number.

Parental Consent	If enabled, creates a check box indicating parental consent to join the program has been given. The language can be customized.
Facebook Integration	Enables Facebook integration

Registration Settings

Registration Settings

Patron Registration [?] Yes No

Registration Start Date [?] **Registration Start Time** [?] :

Registration End Date [?] **Registration End Time** [?] :

Registration Type [?] Individuals Groups Both

Login Type [?] Library Card User Name [See Duplicates](#) The 'Library Card' option cannot be selected when there are duplicate card numbers.

Authentication Type [?] Not Used Optional Required

Eligibility Requirement [?] Age Grade Classification None

Family Registration [?] Yes No

Member Program Exclusion [?] Yes No

Quick Registration [?] Yes No

Staff Registration Option [?] Standard Override

Auto User Name/Password Generation [?] Yes No

Parental Consent [?] Yes No [Edit Language](#)

Facebook Integration [?] Yes No [Edit Language](#) [Facebook Configuration](#)

[Logging](#), [Reviews](#), and Home Page Settings

Logging Settings	
Patron Logging [?]	Yes <input checked="" type="radio"/> No <input type="radio"/>
Allow Log Date Entry [?]	Yes <input type="radio"/> No <input checked="" type="radio"/>
Log Start Date [?]	<input type="text"/> <input type="text"/> <input type="text"/>  Log Start Time [?]
Log End Date [?]	<input type="text"/> <input type="text"/> <input type="text"/>  Log End Time [?]
Reviews Settings	
Patron Reviews [?]	Off <input checked="" type="radio"/> Log Page Entry <input type="radio"/> Home Page Entry <input type="radio"/>
Home Page Settings	
Log Out Destination URL [?]	<input type="text"/>
Allow Patrons to Print Certificates [?]	Yes <input type="radio"/> No <input checked="" type="radio"/>
# of Reviews on Home Page [?]	<input type="text" value="2"/>
Reviews Displayed By [?]	Random <input checked="" type="radio"/> Most Recent <input type="radio"/>
RSS Options [?]	Program Messages <input type="checkbox"/> Program Stats <input type="checkbox"/> Reviews <input type="checkbox"/> Help
XML Events Feed [?]	<input type="text"/>

Patron Logging	Allows patrons to track their on progress when enabled.
Allow Log Date Entry	Dates can be enter manually when enabled. When set to no, the date is entered automatically
Log Start Date	On what date can logging begin?
Log End Date	On what date does logging close?
Patron Reviews	If enabled, are patron reviews tied to the log page or the home page?
Log Out Destination URL	When a patron logs out, what page are they redirected to?
Allow Patrons to Print Certificates	Certificates are 'awards' given to registrants upon completion of goals. This option allows them to print them out on their own.
# of Reviews on Home page	How many reviews show up on the patron home page at once?
Reviews Displayed By	Are reviews displayed randomly or by the most recent?
RSS Options	Gives patrons the option to put self-updating feeds into their feed reader.
XML Events Feed	Shows the Events XML feed on the home page. For use with Evanced Events

[Program](#)

Primary Log and Prize Settings:

Primary Log Type Settings	
Primary Logging Type [?]	<input type="text"/> <input type="button" value="Edit"/>
Patron Logging Restriction [?]	Yes <input type="radio"/> No <input checked="" type="radio"/>
Program Goal [?]	<input type="text" value="0"/>
Patron Goal [?]	Yes <input type="radio"/> No <input checked="" type="radio"/>
Primary Prize Settings	
Prizes [?]	Yes <input type="radio"/> No <input checked="" type="radio"/>
Secondary Log Type Settings	
Secondary Logging Type [?]	<input type="text"/> <input type="button" value="Edit"/>
Patron Logging Restriction [?]	Yes <input type="radio"/> No <input checked="" type="radio"/>
Program Goal [?]	<input type="text" value="0"/>
Patron Goal [?]	Yes <input type="radio"/> No <input checked="" type="radio"/>
Secondary Prize Settings	
Prizes [?]	Yes <input type="radio"/> No <input checked="" type="radio"/>
Other Prize Settings	
Registration Prize [?]	Yes <input type="radio"/> No <input checked="" type="radio"/>

Primary Logging Type	What is the primary measure of progress in the program (typically number of books, hours, pages, ect.)
Patron Logging Restriction	Sets limits for the quantity of units a patron can log either per day, per a set amount of time, or for the program. If Yes is checked, new menu options appear that allow you set the limits.
Program Goal	Sets the primary goal for the program
Patron Goal	If enabled, patrons have the option of supplying their own goals.
Primary Prize Settings	If prizes are enabled, a new set of options appear.

Secondary Logging Type	Set the secondary unit of measure of progress for the program.
Patron Logging Restriction	Sets limits for the quantity of units a patron can log either per day, per a set amount of time, or for the program. If Yes is checked, new menu options appear that allow you set the limits.
Program Goal	Sets the secondary program goal
Patron Goal	If enabled, allows patrons to set their own secondary goal
Prizes	If prizes AND a secondary goal are enabled, a new set of options appear
Registration Prize	Select yes to enable a prize just for registering for the program. Selecting yes allows you to configure a prize message .

Don't forget to save all information entered!

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Online URL: <http://kb.evanced.info/article.php?id=227>

Understanding Inactive Programs

When a program is finished, it can be removed from the active program list. This is an important step so as to avoid cluttering up the system with many older programs that have long since finished.

Inactive programs may also be programs that you are in the process of creating but are not yet ready to be made public.

To make a program inactive, go to the [Program Setup page](#) and click 'No' next to the choice **Active**. Save the program.

To access an **Inactive Program**, choose Inactive Programs from the [System Maintenance](#) menu.

Click in the program you wish to edit. You'll be returned to the [Program Setup page](#).

Online URL: <http://kb.evanced.info/article.php?id=232>

Understanding Logging

"Logging" is the process by which patrons record what they've read.

[Adding a new Logging Type is easy](#). These are created on the **Logging Types Menu**, which can be accessed from the [System Maintenance](#) page. Just choose a name. Here are some examples of ways to measure reading:

- Books
- Pages
- Hours
- Blocks of time (20 minutes a sitting)
- Chapters

Once you've added a Logging Type into your system, you need to add it to your reading program. When [adding a new program](#), you'll be asked to choose a **Primary Logging Type**.

You can create any kinds of **Logging Type** you wish. Just make sure the concept is clear enough that patrons can easily understand it.

You can also assign a **Secondary Logging Type** for the program. For example, if the primary type is "Books" (meaning the number of books read), perhaps "Pages" could be a good secondary logging type.

You'll need to decide whether you want to allow Patrons to log their own reading. If you do, they'll be able to sign in on the Patron View Page and enter their own reading statistics. The log becomes the record that tracks each patron's participation in the program.

When adding a program, you can customize how much information readers need to supply for their log. They can be given the opportunity to [review books](#) and rate books. Again, the decision to combine these actions with Logging is optional, [and can be set when adding a new program](#).

To enter a log for a Patron:

- Search for the patron record from the [Staff Home Page](#).
- Click the Log Icon 
- Enter the information

To edit a log for a Patron:

- Search for the [patron record](#) from the [Staff Home Page](#).
- Click the Log Icon 
- Any existing logs will appear at the bottom of the screen. Click the edit icon  to edit the log
- Online URL: <http://kb.evanced.info/article.php?id=231>

How to Install Google Analytics and Other Scripts

Summer Reader has an easy way to install third party javascripts into your site.

One of the most popular is [Google Analytics](#), a tool for tracking web traffic.

Once you've signed up for Analytics and have been given the script for your site, you can install it from the Script Entry option on the [System Maintenance page](#). You will need to be logged in as an administrator in order to access the Script Entry feature.

Global Script entry will be applied to the patron home page for all programs.

If you want to install a script for a particular program only, chose that program.

The interface is simple. Just copy the script supplied by the third party source and paste it into the box. Then click save.

For instructions on how to maximize use of the third party tool, consult with that company.

Online URL: <http://kb.evanced.info/article.php?id=233>

Understanding Reviews and Comments

Summer Reader can give patrons the opportunity to review the books they read and interact with the reviews of other patrons. This can be a fun way for patrons to exchange views and opinions about books.

This article will help walk you through the process of enabling and managing the review and commenting process.

The first step is to enable reviews in the program. [Edit the program in question](#). You can edit a program either from the [Staff Home Page](#) or from the [System Maintenance](#) page.

Head to the section called **Reviews Settings**.

Patron Reviews	You can choose to have Reviews show up as on the patron log page or to be entered independently on the patron home page. Enabling reviews reveals the rest of this menu.
Separate Entry For Reviews	If you do enable reviews as part of the log page, you can choose to combine them with the log or have them entered separately. This option only appears if you check Log Page Entry above.
Patron's Access to Their Reviews	Decide if patrons are allowed to view or edit their own reviews.
Reading List	Allows patrons to create and print a reading list. This option is only applicable when a book's title, author, or ISBN is collected with a review.
Mediated Reviews	Because reviews are public, mediated reviews requires a staff member to approve what a patron writes before it is made public.
Anonymous Reviews	If home page reviews are selected, this setting allows users to input reviews without logging in first.
Rate Reviews	Allows patrons to rate one-another's reviews. The language of the message explaining the process is editable.

Review Comments	This setting allows patrons to comment on one-another's reviews
Mediated Comments	This allows a staff member to review comments before they are posted to patron's pages
Email Offensive Comments To	Set an email address where offensive comments can be sent to for tracking.
Anonymous Comments	Allows patrons to comment on reviews without logging in.

Once reviews and comments have been configured, you'll need to track them. On the [Staff Home Page](#) you can see a tally of all comments and reviews, as well as how many are pending.

If you click on the pending review, you can read them all and choose to accept, deny, delete, or edit them. You can search reviews as well by name, email address, or library of the patron. You can also search by book title, author, review, genre, ISBN, rating or date.

Also from the Staff Home Page, you will see a notice of any offensive comments. If you click View, you can choose to delete or edit them.

You can also access reviews and comments from the [System Maintenance page](#). Select Reviews\Comments under the Manage tab. You can manage Private, Pending, Denied and Accepted Reviews and Comments.

To configure the viewable columns on the Reviews Maintenance page, go to the [Reviews Maintenance Setup page](#).

Online URL: <http://kb.evanced.info/article.php?id=228>

Summer Reader - Random Drawings

Random Drawing is an option to award prizes based on specified criteria defined at the library. The library has the option to process a Random Drawing either for all active programs or program specific. You can access the **Random Drawing** page from the [Staff Home page](#). To access a drawing for a specific program, click on the program name, then click the drawing button.

At the top of the Random Drawing Page, there are buttons:

Help	Opens help information
Test	Tests to make sure settings are valid
Draw Names	Executes the drawing
View Drawings	Shows past drawings results
Template (Drop down menu)	Loads previously saved Templates
Save Template	Saves current entries as a template for future drawings.

Field	Filter
General Filters	
Drawing Name	<input type="text"/>
Number of Winners	<input type="text"/>
Include Previous Winner(s)	<input type="checkbox"/>

Drawing Name	Title the drawing
Number of Winners	How many patrons are getting prizes
Include Previous Winner(s) (check box)	Are previous winners eligible for this drawing?

<u>Registration Filters</u>	
Registration Type	Individuals <input type="radio"/> Groups <input type="radio"/> Both <input checked="" type="radio"/>
Gender	<input type="text"/>
Age	From <input type="text"/> To <input type="text"/>
Grade	From <input type="text"/> To <input type="text"/>
Patron Classification	<input type="text"/> Or <input type="text"/>
School Name	<input type="text"/> Or <input type="text"/>
Primary Library	<input type="text"/> Or <input type="text"/>
Custom Registration Entry 2	<input type="text"/>
Custom Registration Entry 3	<input type="text"/>

Registration Type	Draw from groups, individuals, or both
Gender	Run male or female specific drawings
Age	Run the drawing based on an age range
Grade	Run grade specific drawings
Patron Classification	Run the drawing based on preset patron classifications
School Name	Run by school name
Primary Library	Run by Primary Library
Custom Field	Custom fields can be set for other registration criteria

Primary Logging Type Filters

Quantity	Minimum <input type="text"/> Maximum <input type="text"/>
Log Date Range	<input checked="" type="radio"/> All Dates <input type="radio"/> Selected Dates Oct ▼ 20 ▼ 2011 ▼ To Oct ▼ 20 ▼ 2011 ▼
Weighting Option	<input checked="" type="radio"/> One chance per person <input type="radio"/> One chance for every <input type="text"/>

Quantity	Set minimums and maximums for inclusion in the drawing
Log Date Range	Award prizes based on certain logging dates
Weighting Option	Give additional entry strength for those with more primary log units . In other words, the more one reads, the more likely they are to win.

Review Filters

And <input checked="" type="radio"/> Or <input type="radio"/>	
Reviews	Minimum <input type="text"/> Maximum <input type="text"/>
Review Date Range	<input checked="" type="radio"/> All Dates <input type="radio"/> Selected Dates Oct ▼ 20 ▼ 2011 ▼ To Oct ▼ 20 ▼ 2011 ▼
Weighting Option	<input checked="" type="radio"/> One chance per person <input type="radio"/> One chance for every <input type="text"/> Review(s)

And/Or	"And" includes review settings with the log settings. "Or" factors in reviews settings separately.
Reviews	Set a minimum and maximum number of reviews necessary for the filter
Review Date Range	Filter the drawing by date range
Weighting	Give additional entry strength to those with more reviews. In other words, the more reviews

Option	one posts, the better their chance to win.
---------------	--

Once the filters have been set, run the drawing.

The results will appear on the next screen.



awards the prize to the patron.



cancels the result of the drawing.

Once a prize has been awarded, you can manage it from the Prize Management page.

Online URL: <http://kb.evanced.info/article.php?id=150>

Understanding System Settings

System Settings control many of the general rules for Summer Reader. You can access this page from the [System Maintenance page](#).

General Settings	
Library Name ?	<input type="text"/>
Home Page ?	<input type="text"/>
Library Contact Email Address ?	<input type="text"/>
Allow <u>Prize</u> Cancellation ?	Yes <input type="radio"/> No <input checked="" type="radio"/>
List Mouse-Overs ?	Yes <input checked="" type="radio"/> No <input type="radio"/>
Program Activity Days ?	<input type="text" value="0"/>
Data Records/Page ?	<input type="text" value="10"/>
Report Records/Page ?	<input type="text" value="20"/>

GENERAL SETTINGS	Basic settings for the program.
Library Name	Name the Library
Home Page	Enter the URL of the library home page
Library Contact Email Address	Enter the contact email address for the library.
Allow Prize Cancellation	Allow staff to cancel prizes
List Mouse-Overs	Some areas in staff-side maintenance display mouse-over information in the list results such as Program Management, Reviews Management and Patron Registration .
Program Activity Days	How many days of activity should appear on the program management page. 0 will display all summary information.
Data Records/Page	How many records show up per page on the staff side
Report Records/Page	When running reports, how many records appear on each page.

Home Page Settings

Home Page Setup [?] Tabs (Default) Drop-Down List Links Tab Type [?] Rounded Square Tabs/Row [?] Prize Scrolling on Home Page [?] Yes No Prize Scroll Speed [?] [Enter a number between 1 and 10]

HOME PAGE SETTINGS	Sets settings for the patron home page
Home Page Setup	How are the multiple programs listed? Via tabs, Drop-Down List, or HTML Links?
Tab Type	Rounded or Squared tabs (purely aesthetic)
Tabs/Row	How many tabs appear in each tab row?
Prize Scrolling on Home page	Does the prize message on the home page scroll or is it static? Valid only when prizes are enabled.
Prize Scroll Speed	How fast does the message scroll? (on a scale of 1-10...10 is fastest)

Regional Settings

Current Time Is: 10/19/2011 10:43:03 AM

Region [?] ▼Date Format [?] ▼Time Zone [?] ▼Observe Daylight Savings Time [?] Yes No Daylight Savings Start Month [?] ▼Daylight Savings Start Week [?] ▼Daylight Savings Start Day [?] ▼Daylight Savings Stop Month [?] ▼Daylight Savings Stop Week [?] ▼Daylight Savings Stop Day [?] ▼

REGIONAL SETTINGS	Controls date and time settings for the system
Region	Set your language and country
Date Format	Day, month, year, or month, day, year format
Time Zone	Set your time zone

Observe Daylight Savings Time	Choose and configure Daylight Savings Time settings (if yes is selected, more options appear).
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Registration Settings

International Field Entry ? Yes No

Library Card Length ? [0 - Variable Length]

Password Length ? Minimum Maximum

Patron Recall Limit ? [0 - Recall button disabled on patron side]

Program-Specific Custom Registration Entries ? Yes No

Start Birth Year ?

REGISTRATION ENTRIES	Set rules to govern patron registration
International Field Entry	Allows for non-standard phone number and zip code entry
Library Card Length	Set the number of characters in the library card length
Password Length	Set Password length limits
Patron Recall Limit	Limit the number of times in one visit a patron can recall his or her registration information. Applies only to patron-side registration.
Program-Specific Custom Registration Entries	Allows for the creation of up to six custom registration questions per program.
Start Birth Year	Set the first birth year for the drop down list.

Reviews Settings

Default Catalog URL Title ? [For Patron Reviews]

Default Catalog URL ? [For Patron Reviews]

Default Book Jacket URL ? [For Patron Reviews]

Populate Catalog URLs Automatically ? Yes No

Go To Next Review/Comment After Disposition ? Yes No

Review Paging ? Yes No

Reviews/Page ? [Enter a number between 5 and 100]

Links/Page ? [Enter a number between 5 and 25]

Save Private Reviews ? Yes No

Private/Public Question Default ? Private Public

REVIEWS SETTINGS	Controls the settings that govern patron book reviews
Default Catalog URL Title	Set a default book title for the Catalog URL line on patron reviews
Default Catalog URL	Set a default URL for the Catalog URL line on patron reviews
Default Book Jacket URL	Set a default URL for the book jacket line on patron URLs.

Populate Catalog URLs Automatically	If yes, the catalog URL is automatically supplied based on the ISBN number entered by the patron. If no, patrons can enter their own catalog URL if they wish.
Go to Next Review/Comment After Disposition	When mediating reviews and comments, the subsequent one is automatically brought up once one is dealt with.
Review Paging	Sets a limit to the number of reviews and links per page. If yes, more options appear
Save Private Reviews	Saves reviews that patrons mark as private
Private/Public Question Default	Controls the default selection if reviews are enabled as part of logging . All reviews from the home page are public.

Security Settings: for a complete discussion of security settings, please read this article.

Mobile Maximum Length	Set to limit the number of characters on long text fields on mobile pages.
Enable Novelist Select	Enables the Novelist service to be selected.

How to Edit Patron Information

To find a patron record, use the [Quick Search](#) box. You can find it on the [Staff Home page](#), the [System Maintenance page](#), or from the **Patron Information** link.

When you've located the record click on the  icon to edit the **Patron Information**.

If you access the record from the Staff Home Page, you can edit the basic registration information for the patron and change passwords.

If you've accessed the record from the **Patron Information** link, you have more options.

You can **merge** multiple patron records into one.

You can **list** all patrons who are not currently registered for a program.

You can **delete** all unregistered patrons from the system.

By clicking the  icon, you can access a more complete page of information about the patron than just what required for a given program. Fields included are: Parent information, birth date, address, phone number, email and library card information.

Program specific information will appear at the bottom of the page.

Online URL: <http://kb.evanced.info/article.php?id=234>

How to Manage Language and Text Setup

Summer reader allows you change the language of the system. Languages can be configured to include real-world languages such as Spanish or French, or to set up wording specific to groups or demographics (teen-speak, simple explanations for kids, programs designed for moms or seniors).

Access the Language\Text Setup page from the [System Maintenance Menu](#).

To **add** a new language, click Add New.

To **edit** a language template, click the  icon.

The Language\Text Setup Screen contains the following fields:

Language ID	Each language template is assigned a preset ID number.
Copy	For new Templates, this copies settings from an existing language template
Name	The name of the language template
Description	A description of the language template (for readers under 13, for teens, ect)
Region	The region and language information. Fixed after initial entry.
Normal (tab)	Sets the language for the normal version of the site
Mobile (tab)	Sets the language for the mobile version of the site
Button Text	What appears on the buttons throughout the site
Field Labels	What titles are given to various entry fields
Messages	Configures the wording of various alerts and notifications patrons encounter while using the system (You won a prize!, Registration Successful!, ect.)
Page Text	Controls what the page actually says in various locations.
Page Titles	Controls what various pages are titled.
Test	Test the settings to be sure they are functional.
Save	Saves all changes and applies them to the defaults

Once you've configured languages you can apply them to a program.

In the [Program Setup screen](#), click **Language\Text Setup**.

There you can assign language Templates to the program. Each program can have multiple languages assigned to it.

If multiple languages are available, patrons can select them from the patron home page.

How to Setup Patron Certificates

Certificates are fun and inexpensive ways to reward patrons for completing goals and programs.

Summer Reader allows you to give patrons the option to print off their own certificates when they meet certain program goals.

To create a new certificate, create an HTML document using custom tags. An example of a sample certificate is below:

CERTIFICATE OF COMPLETION

This certificate demonstrates that ^FIRSTNAME^ ^LASTNAME^ has completed
the ^PROGRAMNAME^ program.

^FIRSTNAME^ read ^LOGQUANTITY^ ^LOGGINGTYPE^.

^LASTREVIEW^

Congratulations!

As you can see, the tags between ^ ^ marks import information from the system.

Now upload your certificate to the website.

If you are a hosted site, [email Evanced Support](#) and they'll load the certificate on the server for you and give you the URL path. If you are hosted on your own server, ask your IT department how to store the file on line

Go to Certificate Setup on the [System Maintenance](#) page.

Enter a name for the certificate. Participation or Completion are popular choices.

Then enter a URL where the certificate is stored.

Then from the [Program Setup Page](#), find the Home Page Settings.

Allow Patrons to Print Certificates ? Yes No

Patron Certificate ? Completion ▼

Certificate Eligibility ? Prize Eligible Min Log Qty Anytime

To enable patron printing of certificates, select Allow Patrons to Print Certificates: Yes.

Then select the certificate you named from the drop down list that appears.

Set the criteria by which the patron receives the certificate:

Prize Eligible	Patron can print certificate when they win a prize
Min Log Qty	Set a minimum log number at which they qualify
Anytime	They can print any time (great for participation certificates)

Patrons will then be notified on the home page once they qualify for a certificate. To configure that message, choose the [Language/Text Setup menu](#).

For information on running Certificate Reports, [read this article](#).

To notify patrons by email about certificates they have qualified for, [read this article](#).

Posted - Fri, Oct 21, 2011 at 9:35 AM. This article has been viewed 323 times.

Online URL: <http://kb.evanced.info/article.php?id=238>

Summer Reader - Authentication

Summer Reader: Authentication

Authentication is the means by which the Summer Reading application connects to your ILS system and confirms that a patron record exists for the library card number used. The 2 methods supported by Summer Reader are "III (Patron API)" and "SIP2".

Applies to version 8 and newer of the Summer Reader software
You must be logged in as administrator to see the links described below

Configuring Summer Reader to use authentication is a matter of configuring the connection and opening the path to the ILS server. Similar to what would be done when adding a self-checkout station. Configuring the connection is done through the Summer Reader software from the 'Authentication Setup' link on the main maintenance page. Opening the path to the ILS server can consist of many devices and configurations.

Opening the path to the ILS system

You will probably need to enlist the help of your IT staff and/or ILS company to open the path from the Summer Reader application and the ILS system. Because the equipment used can be considerably different for each application we cannot cover the actual configuration changes needed. Instead, here is a list of the most common devices and what should be done.

- Firewall - The Firewall in front of the ILS server will need an exception added to allow the Summer Reader application through. The IP used will be the IP of the server Summer Reader sits on (newest Evanced hosted server is 216.239.248.18) and the port is usually determined by the ILS system. There are some standard ports used (like 4500 for Patron API) but the ILS system should be checked for this value.
- Router/Port Forwarding - A router or other device that handles port forwarding will need a new rule that forwards requests from the Summer Reader site to the ILS server. These rules can usually be added with an originating IP (again the newest Evanced hosted server is 216.239.248.18) and port (specified by the ILS system). If the server housing the ILS system is directly accessible then this step is unnecessary.

- ILS Configuration - In most cases the ILS system needs to have a rule added that is similar to the port forwarding rule to allow the connection from the Summer Reader server. This is usually done in the ILS configuration and is very specific to the system you have. Some ILS vendors require an additional license to enable this connection.

Authentication Setup

The 'Authentication Setup' link on the main maintenance page is how you configure the Summer Reader application to authenticate with your ILS system. You will need to log in as an administrator to see this link.

Clicking on the 'Authentication Setup' link will bring up the configuration page. The major components of this page are; the authentication configuration, a 'Field Setup' button, a 'Patron Type Setup' button and a 'Test' button. There is also a 'Save' button and a 'Save and Test' button that can be used for convenience.

Authentication Configuration

The following list is from the authentication setup screen.

- Authentication - This item is used to enable or disable authentication.
- Edit Patron Authentication Info - Select 'Yes' to allow patron authentication information to be edited on registration page. Click 'No' to not allow patron authentication to be edited on registration page. This only affects the patron information that is maintained in the Summer Reader application. The connection Summer Reader uses is a read-only connection and cannot affect the data in the ILS system.
- Authentication Type - Select the type of authentication used by the ILS system. Currently only SIP2 and III (Patron API).
- Authentication Path - IP or URL address of the ILS authentication server. The syntax (including backslashes) for this field is important. Be sure to review the examples.
 - Example SIP path - 192.168.1.201:7304/ or subdom.domain.org:7304/
 - Example III path - 192.168.1.201:4500/PATRONAPI/
- Overdue Fee Level - Set the overdue fee level for not allowing program registration. Enter a dollar amount between 1 and 1000. Enter 0 to ignore overdue fees.
- Residency Checking - Enable/Disable residency checking. If enabled then only residents determined by library card prefix(es) entered in Patron Type Setup are allowed to register for the program. Use Residency Check Prefix Characters to set the number of prefix characters to compare from the card number entered by patron to card number prefix(es) entered in Patron Type Setup. See 'Residency Checking' below for more details.

- Residency Check Prefix Characters (visible only if 'Residency Checking' is enabled)- Set the number of prefix characters to compare from the card number entered by patron to card number prefix(es) entered in Patron Type Setup. Enter a number between 2 and 25. Enter 0 or 1 to disable this feature.
- Patron Hold Checking - Enable/disable patron hold checks. Enable this setting to not allow registration when there is 1 or more holds on the patron card. Disable this setting to ignore all holds on the patron card and allow all patrons to register for a program.
- Patron-Side Last Name/Pin Entry - Set patron-side pin/last name entry option. This setting only applies to authentication requested from the patron-side of the application. ILS sip server settings ultimately controls what is required.
- Staff-Side Last Name/Pin Entry - Set staff-side pin/last name entry option. This setting only applies to authentication requested from the staff-side of the application. ILS sip server settings ultimately controls what is required.
- Patron-Side Library Card Field Type - Set patron-side library card field type option to either password (entered text is not visible) or text. This setting only applies to authentication requested from the patron-side of the application.
- Staff-Side Library Card Field Type - Set staff-side library card field type option to either password (entered text is not visible) or text. This setting only applies to authentication requested from the staff-side of the application.

Residency Checking

If 'Residency Checking' is enabled then the system must be told how to determine if a patron is a resident. There are 2 methods possible; using the "P TYPE[p47]" value from the patron information record (usually used with III Patron API) and using the first few numbers of the patron barcode (usually used with SIP2).

To use the "P TYPE[p47]" value with a III Patron API system you will need to enable 'Residency Checking' and configure the 'Residency Check Prefix Characters' to 0 or 1. Then you will need to configure the values by clicking on the 'Patron Type Setup' button. On this screen you will enter all of the values that represent a resident and non-resident that are used in the "P TYPE[p47]" field in the ILS system. Summer Reader will then pull the "P TYPE[p47]" value and compare it to this list to determine who is a resident.

To use the first few digits of the barcode value you will need to enable 'Residency Checking' and configure the 'Residency Check Prefix Characters' to the numbers to compare against. If you set this value to 5 then the first 5

characters will be compared. Then you will need to configure the values by clicking on the 'Patron Type Setup' button. On this screen you will enter all of the values that represent a resident and non-resident that are made up of the first few digits of the patron barcode. Summer Reader will then pull the barcode value and compare it to this list to determine who is a resident.

Testing and Troubleshooting

The 'Test' or 'Save and Test' buttons will allow you to not only test the connection but also will display some of the message level text to help you determine the cause of any problems you may be having. When you run a test it will ask you to enter the barcode and last name or just the barcode (depending on your configuration) for a patron. A screen will then display the results of this test. The test result screen consists of 3 areas; the 'Communication Result', the 'Error Result' and the 'Data Result'.

- **Communication Result** - This area will typically give you the connection string (the URL used to grab the patron information) and the returned values. The returned values can be quite long depending on the amount of information that is stored for each patron in your ILS system.
- **Error Result** - The error result will be blank if the connection was successful and the patron would be allowed to register. If there is a problem communicating or the patron information indicates that there is a reason to not allow them to register, then it will display the information it can gather about the error. If 'Residency Checking' is enabled then a non-resident will generate an error and it will be displayed here.
- **Data Result** - The data result area displays information the Summer Reader application was able to gather from the response to the request for patron information. This is where their name and address will appear.

Online URL: <http://kb.evanced.info/article.php?id=148>

Summer Reader Default Security Roles

Summer Reader Default Security Roles Defined

Admin

Description	Access	Read	Add	Edit	Delete
Authentication Info		X		X	
Authentication Setup		X		X	
Bulk Approval for Reviews	X				
Certificate Setup		X	X	X	X
Certificates Report	X				
Change Password	X				
Custom Report		X	X	X	X
Delete Program Records	X				
Delete Program Records (Including Patrons)	X				
Delete Unregistered Patrons	X				
Drop Lists		X	X	X	X
Duplicate Cards Report	X				
Email Access	X				
Email Setup		X		X	
Import	X				
Inactive Programs		X	X	X	X
Individuals Registration Report	X				
Language Setup		X		X	
Log Totals Report	X				
Logging Types		X	X	X	X
Manage Reviews		X	X	X	X
Other Prize Notifications	X				
Patron Information		X		X	X
Patron Merge	X				

Prize Notifications	X				
Prize Setup		X	X	X	X
Program Links		X	X	X	X
Program Logs		X	X	X	X
Program Messages		X	X	X	X
Program Order		X		X	
Program Prizes		X	X	X	X
Program Registration		X	X	X	X
Program Reviews		X	X	X	X
Program Setup		X	X	X	X
Program Totals Report	X				
Program Transfer	X				
Program-Specific Email Templates		X	X	X	
Program-Specific Style Sheets		X		X	
Quick Search Setup		X		X	
Random Drawing Prizes		X	X		X
Random Drawings		X	X		X
Random Drawings Report	X				
Registration Defaults		X		X	
Registration Totals Report	X				
Reset Password	X				
Review Maintenance Setup		X		X	
Review Total Report	X				
Role Security Setup		X	X	X	X
Staff Home Page	X				
System Settings		X		X	
System-Wide Email Templates		X	X	X	X
System-Wide Style Sheets		X	X	X	X
User Security Setup		X	X	X	X

Staff

Description	Access	Read	Add	Edit	Delete
Authentication Info		X		X	
Authentication Setup				X	
Bulk Approval for Reviews	X				
Certificate Setup					
Certificates Report	X				
Change Password	X				
Custom Report		X	X	X	X
Delete Program Records					
Delete Program Records (Including Patrons)					
Delete Unregistered Patrons					
Drop Lists					
Duplicate Cards Report	X				
Email Access	X				
Email Setup				X	
Import					
Inactive Programs					
Individuals Registration Report	X				
Language Setup					
Log Totals Report	X				
Logging Types					
Manage Reviews		X	X	X	X
Other Prize Notifications	X				
Patron Information		X		X	X
Patron Merge					
Prize Notifications	X				
Prize Setup					
Program Links		X	X	X	X
Program Logs		X	X	X	X
Program Messages		X	X	X	X
Program Order					

Program Prizes		X	X	X	X
Program Registration		X	X	X	X
Program Reviews		X	X	X	X
Program Setup					
Program Totals Report	X				
Program Transfer	X				
Program-Specific Email Templates					
Program-Specific Style Sheets					
Quick Search Setup					
Random Drawing Prizes		X	X		X
Random Drawings		X	X		X
Random Drawings Report	X				
Registration Defaults					
Registration Totals Report	X				
Reset Password	X				
Review Maintenance Setup					
Review Total Report	X				
Role Security Setup		X			
Staff Home Page	X				
System Settings		X			
System-Wide Email Templates					
System-Wide Style Sheets					
User Security Setup		X			

Basic

Description	Access	Read	Add	Edit	Delete
Authentication Info		X		X	
Authentication Setup					
Bulk Approval for Reviews					
Certificate Setup		X			

Certificates Report	X				
Change Password	X				
Custom Report		X	X	X	X
Delete Program Records					
Delete Program Records (Including Patrons)					
Delete Unregistered Patrons					
Drop Lists					
Duplicate Cards Report	X				
Email Access	X				
Email Setup					
Import					
Inactive Programs					
Individuals Registration Report	X				
Language Setup					
Log Totals Report	X				
Logging Types					
Manage Reviews					
Other Prize Notifications	X				
Patron Information		X		X	
Patron Merge					
Prize Notifications	X				
Prize Setup		X			
Program Links					
Program Logs		X	X	X	X
Program Messages					
Program Order					
Program Prizes		X	X	X	X
Program Registration		X	X	X	X
Program Reviews		X	X	X	X
Program Setup					
Program Totals Report	X				

Program Transfer	X				
Program-Specific Email Templates					
Program-Specific Style Sheets		X		X	
Quick Search Setup					
Random Drawing Prizes		X	X		
Random Drawings		X	X		
Random Drawings Report	X				
Registration Defaults					
Registration Totals Report	X				
Reset Password	X				
Review Maintenance Setup					
Review Total Report	X				
Role Security Setup					
Staff Home Page	X				
System Settings					
System-Wide Email Templates					
System-Wide Style Sheets					
User Security Setup					

Volunteer

Description	Access	Read	Add	Edit	Delete
Authentication Info		X		X	
Authentication Setup					
Bulk Approval for Reviews					
Certificate Setup					
Certificates Report					
Change Password	X				
Custom Report					
Delete Program Records					
Delete Program Records (Including Patrons)					

Delete Unregistered Patrons					
Drop Lists					
Duplicate Cards Report					
Email Access	X				
Email Setup					
Import					
Inactive Programs					
Individuals Registration Report					
Language Setup					
Log Totals Report					
Logging Types					
Manage Reviews					
Other Prize Notifications					
Patron Information					
Patron Merge					
Prize Notifications					
Prize Setup					
Program Links					
Program Logs					
Program Messages					
Program Order					
Program Prizes					
Program Registration					
Program Reviews					
Program Setup					
Program Totals Report					
Program Transfer					
Program-Specific Email Templates					
Program-Specific Style Sheets					
Quick Search Setup					
Random Drawing Prizes					

Random Drawings					
Random Drawings Report					
Registration Defaults					
Registration Totals Report					
Reset Password					
Review Maintenance Setup					
Review Total Report					
Role Security Setup					
Staff Home Page					
System Settings					
System-Wide Email Templates					
System-Wide Style Sheets					
User Security Setup					

Default Patron Role

Description	Access	Read	Add	Edit	Delete
Authentication Info		X		X	
Change Password	X				
Log Info		X			
Other Prize Notifications (Home Page)	X				
Other Prize Notifications (Log Page)	X				
Prize Notifications (Home Page)	X				
Prize Notification (Log Page)	X				
Random Drawing Notifications (Home Page)	X				
Random Drawing Notifications (Log Page)	X				
Registration Info		X		X	
Review Info		X		X	X

Online URL: <http://kb.evanced.info/article.php?id=153>

How to Set up Email in Summer Reader

Summer Reader allows you to setup email functionality to increase your communication with patrons. To setup email, access Email Setup from the [System Maintenance](#) page. Please note that many of these settings are technical. Have your library IT person set up the page whenever possible.

Email System Enable	Enable <input type="radio"/>	Disable <input checked="" type="radio"/>	
<u>Confirmation</u> Email Enable	Enable <input type="radio"/>	Disable <input type="radio"/>	
Login Info Email Enable	Enable <input type="radio"/>	Disable <input type="radio"/>	
From Name	<input type="text"/>		
From <u>Email Address</u>	<input type="text"/>		
Enable Automatic CC in <u>Emails</u>	Enable <input checked="" type="radio"/>	Disable <input type="radio"/>	(Automatically CCs emails to patrons with 'From Address')
SMTP Address (URL or IP)	<input type="text"/>		(Required for Windows servers)
SMTP Port	<input type="text"/>	(Usually 25 or 587)	
Use SSL Connection	Enable <input type="radio"/>	Disable <input checked="" type="radio"/>	
Authentication Type	No Authentication <input checked="" type="radio"/>	Basic Authentication <input type="radio"/>	NTLM <input type="radio"/>
User Name	<input type="text"/>		
Password	<input type="text"/>		
<input type="button" value="Save"/>			

Email System Enable	Turn on emailing in Summer Reader
Confirmation Email Enable	Enables the system to send registration confirmations
Login Info Email Enable	Allows patrons to receive email notifications of their user name and password if forgotten.
From Name	When the system sends emails, what will the sender's name be?
From Email Address	When the system sends emails, what will the sender's email address be?
Enable Automatic CC in Emails	If you select yes, the 'from' email address will automatically receive a copy of all sent emails.
SMTP Address (URL or IP)	The SMTP address. For more on email configuration, see this article . If you don't know how to find the SMTP server for your email, contact your IT department. Many of these settings are private to your library.
SMTP Port	The SMTP port. See above. Often 25 or 587
Use SSL Connection	SSL means Secure Socket Layer. This enables or disables an encrypted link between a

	web server and a browser.
Authentication Type	If the SMTP server requires authentication for sending email then select the either Basic Authentication or NTLM.
User Name	This is used for server authentication.
Password	This is used for server authentication.

[If you are using Gmail](#), read this article.

Online URL: <http://kb.evanced.info/article.php?id=240>

Understanding the Patron Home Page

The **Patron Home Page** is the page patrons see first when coming to Summer Reader.

Every aspect of the page is customizable.

The primary ways to customize the **Patron Home Page** are through [Program Setup](#) and through [Style Sheets](#).

The following items are optional on the **Patron Home Page**:

Tabs	Tab between Summer Reading Programs. Can also be displayed as a drop down.
Events	An RSS feed of upcoming library events
Important Messages	Messages from the library to the patrons
Prize and Certificate Messages	Messages alerting patrons of prizes
Reviews	Display reviews from the patron or from other Patrons
Cool Links	Interesting links from around the web or from your library home page
Log In	Allows the Patron to login to the program
Register	Allows the Patron to register for the program
Headers	Use great themes and images either from a pre-existing template or create your own
Language Customization	Create different languages for the patrons to choose from

Online URL: <http://kb.evanced.info/article.php?id=315>

Understanding Email Templates

Summer Reader gives you the ability to create custom email messages for your patrons. These can be set on a **System-Wide** or **Program-Specific** level. You can access these template menus from the [System Maintenance](#) page.

Remember, that in order to send email you have to [first configure email settings](#).

To create email templates, first decide if you want to create one that applies to all programs in your system or just to one specific program. Chose the appropriate menu.

Begin by choosing a name for the template.

Then fill in the subject and body of the email. If you use ^^ tags, be sure to use the tag codes from the list on the right hand side of the page. Using these codes between ^^ marks, enables the system to send a custom email. For example, entering this into the templates field:

Dear ^LIBRARY CONTACT^,

^LIBRARY^ is pleased to announce that you've won a prize for your participation in ^PROGRAM NAME^.

would appear like this in the email that goes out to patrons:

Dear John Smith,

Smithville Public Library is pleased to announce that you've won a price for your participation in Summer Kind of Fun.

The custom tags pull from information in the system and populate it uniquely for each patron and program.

Be sure to save all entries.

To edit an existing template, locate that template from the list of templates below. Click the  icon.

To send emails using the **Email Template**, go to Custom Reports. You can find this on the Reports page.

1. Select Custom Reports. Refer to the Custom Report article if necessary.
2. Select the Program Status and Program Name you want to email from
3. Select Enable Email (Yes)
4. Apply the filters you wish to employ to get the patrons you want to find.
5. Click Run Report
6. In the report, locate the **Email button** in the middle of the header.
7. At the top of the **Send Email Screen** that pops up, select a **Template** to apply.
8. Make any changes you wish and attach any files required. Click send.

How To Setup Registration Questions

In Summer Reader, you can customize the [Registration](#) Setup for any program. You can access the Program Registration Setup page from the [Add Program or the Edit Program Pages](#). Some aspects of registration are controlled by the [Program Setup page](#), and others are controlled by the Program Registration page.

This page contains a variety of fields and gives you options related to them.

Enabled	Turns the field on
Required	Patron must supply information in order to complete registration
List	Displays the field as list on the registration page.
Search	Allows the field to be used in the Advanced Search area.
Change Order	Moves the order in which the field appears on the page.

These fields control what information patrons have to provide during registration as well as how to display that information. Note that you can create custom questions as well.

Online URL: <http://kb.evanced.info/article.php?id=293>

How to Find a Registrant

There are many ways to find a registrant in Summer Reader.

From the [Summer Reader Staff Home](#) page, use the **search box** to locate the registrant by name, email, or primary library. You can also perform an [Advanced Search](#) which reveals more criteria you can use to search.

SEARCH ✕

<p>Group Name <input style="width: 90%;" type="text"/></p> <p>Last Name <input style="width: 90%;" type="text"/></p> <p>Gender <input style="width: 80%;" type="text"/></p> <p>Age <input style="width: 20px;" type="text"/> yr <input style="width: 20px;" type="text"/> mo To <input style="width: 20px;" type="text"/> yr <input style="width: 20px;" type="text"/> mo</p> <p>Grade <input style="width: 90%;" type="text"/></p> <p>City <input style="width: 90%;" type="text"/></p> <p>Email <input style="width: 90%;" type="text"/></p> <p>Library Card <input style="width: 90%;" type="text"/></p>	<p>First Name <input style="width: 90%;" type="text"/></p> <p>User Name <input style="width: 90%;" type="text"/></p> <p>Birth Date <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/></p> <p>Street Address 1 <input style="width: 90%;" type="text"/></p> <p>Patron Classification <input style="width: 90%;" type="text"/></p> <p>Phone Number <input style="width: 60%;" type="text"/></p> <p>School Name <input style="width: 90%;" type="text"/></p> <p>Destination <input style="width: 90%;" type="text"/></p>
--	--

You can also click on the list of registrants from the menu to the left.

From the [System Maintenance](#) page, you can click on **Patron Information**.

When you've located the patron you are looking for, you can perform a variety of tasks.

[Home](#) [System Maintenance](#) [Reports](#) [About](#) [Messages](#) Logoff: Administrator Level

<div style="background-color: #e0ffe0; padding: 2px; border: 1px solid #ccc;">Search This Program</div> <p style="margin: 0;">Last Name <input style="width: 90%;" type="text"/></p> <p style="margin: 0;">First Name <input style="width: 90%;" type="text"/></p> <p style="margin: 0;">Text Searching Begins With <input checked="" type="radio"/> Any Part <input type="radio"/></p> <p style="margin: 0; text-align: center;"> <input type="button" value="Go"/> <input type="button" value="Clear"/> </p> <p style="margin: 0; text-align: center; background-color: #e0ffe0; padding: 2px; border: 1px solid #ccc;">Advanced Search</p>	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #e0ffe0;"> <th style="width: 10%; text-align: center;">Manage</th> <th style="width: 15%;">First Name</th> <th style="width: 15%;">Last Name</th> <th style="width: 10%;">Quantity (Books)</th> <th style="width: 10%;">Prizes Received</th> <th style="width: 10%;">Prize Eligibility</th> <th style="width: 10%;">Delete</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"> </td> <td style="text-align: center;">Tim</td> <td style="text-align: center;">Timmerson</td> <td style="text-align: center;">1</td> <td style="text-align: center;">0</td> <td style="text-align: center;">1</td> <td style="text-align: center;"> <input type="button" value="Delete"/> </td> </tr> <tr style="background-color: #e0ffe0;"> <td colspan="7" style="text-align: center;"> Sort By Last Name <input type="text"/> Asc <input type="text"/> </td> </tr> <tr> <td colspan="7" style="text-align: center; font-size: small;">Page 1 of 1 (1 Records)</td> </tr> <tr style="margin-top: 10px;"> <td colspan="7" style="text-align: center;"> <input type="button" value="Register Patron"/> <input type="button" value="Reviews/Comments"/> <input type="button" value="Random Drawing"/> <input type="button" value="Delete"/> </td> </tr> </tbody> </table>	Manage	First Name	Last Name	Quantity (Books)	Prizes Received	Prize Eligibility	Delete		Tim	Timmerson	1	0	1	<input type="button" value="Delete"/>	Sort By Last Name <input type="text"/> Asc <input type="text"/>							Page 1 of 1 (1 Records)							<input type="button" value="Register Patron"/> <input type="button" value="Reviews/Comments"/> <input type="button" value="Random Drawing"/> <input type="button" value="Delete"/>						
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<input type="button" value="Register Patron"/> <input type="button" value="Reviews/Comments"/> <input type="button" value="Random Drawing"/> <input type="button" value="Delete"/>																																				

	Patron	Edit the registrant information.
	Log	Make a log entry for the registrant
	Review	Submit a review for a registrant
	Prize	Award prizes won by the registrant

<input type="checkbox"/>	Delete	Deletes the registrant. Check the box, then hit delete below.
<input type="checkbox"/>	Sort By	Sorts the list of registrants by name, prizes, or books read

At the bottom of the page, you can choose between four buttons:

Register Patron	Register a new patron for a program
Reviews/Comments	Manage reviews and Comments
Random Drawing	Conduct a prize give away to a random registrant
Delete	Delete all registrants who have been checked in the list above

Online URL: <http://kb.evanced.info/article.php?id=226>

How to Add Logging and Reviews Fields

In Summer Reader, you can customize the [logging](#) and [reviews fields](#) for any program. You can access the **Program Logging Setup page** from the [Add Program or the Edit Program Pages](#). Some aspects of registration are controlled by the [Program Setup page](#), and others are controlled by the **Program Logging Setup** page.

For each of the applicable fields, you can choose to check the following boxes:

LOG ENTRY

Enabled	Allows patrons to fill out the field
Required	Requires Patrons to fill out the field
Log Summary	Includes the field in the log summary
Mobile	Includes the field in the log summary of the mobile version

REVIEW ENTRY

Enabled	Allows patrons to fill out the field
Required	Requires Patrons to fill out the field
Public	Makes the information public
Mobile	Includes the field in the mobile version
Search	Check the checkbox to allow the data entered to be searched upon on the 'View All Reviews' page.

List creates a drop down list that populates the field.

Text allows the patron to enter text into the field

Change order alters the order in which the fields are displayed.

Note that you can also create custom fields in this screen in addition to the defaults.

Online URL: <http://kb.evanced.info/article.php?id=295>

Creating XML-RSS Feeds

Summer Reader uses XML feeds only! This chapter covers the process for Evanced Events software integration only.

Creating XML/RSS feeds: This is an example of the path to the XML feed file:

<http://demo.evanced.info/events/lib/eventsxml.asp>

"eventsxml.asp" is the standard name of that file.

To show events that will take place in a specific branch, on the thirtieth day from today, we do this:

<http://demo.evanced.info/events/lib/eventsxml.asp?lib=1&do=30>

where "lib=1" stands for the library, "do=30" stands for date offset.

And if you want it in RSS mode rather than XML, do this:

<http://demo.evanced.info/events/lib/eventsxml.asp?lib=1&do=30&dm=rss2>

where "dm" stands for Data Mode.

Look at how the following library incorporated RSS feeds:

[Johnson County Library](#)

The switches (everything after "?") tell the system what to display and how to display it. The table below provides a reference for deciphering the switches.

lib =	This is used to control the events for a given library/branch or events for all branches [Default is 0]. Use the library number (lib=x) or "ALL" (lib=ALL) to specify the library's events that are to be displayed. Note that ALL needs to be in all capital letters. [Path to event calendar]/eventsxml.asp?lib=1
IncludeDateHtml = 1	This works in HTML mode only and returns a date, so you can plug this into the widget for multi-day stuff.
loc =	This allows you to put in a location and display all events occurring at locations with that phrase in the name. If you do not specify branch, this will return all locations with a name that matches what you enter. [Path to event calendar]/eventsxml.asp?loc=meeting room A&lib=1
do =	This is the date offset used to return events held X number of days away from today's date [Default is 0; today's date] [Path to event calendar]/eventsxml.asp?lib=all&do=1 This URL will bring the events of tomorrow.
alltime =	This is used to display all event times, even events that have already occurred earlier in the day. Use alltime=1 to override the default setting.

	[Path to event calendar]/eventsxml.asp?lib=1&alltime=1
nd =	Shows the events for the next XX number of days. [Default is 1]. [Path to event calendar]/eventsxml.asp?lib=all&nd=7 This URL shows events for the next 7 days starting TODAY.
startdate= &enddate=	Those are used to specify a date range to pull events from. Date should be in this format: MM/DD/YYYY. [Path event calendar]/eventsxml.asp?lib=all&startdate=03/07/2010&enddate=03/20/2010
et =	This is used to limit the output to only certain event types. The default is to show all event types. You can specify multiple event types by separating them with a comma and a plus sign (et=Adult+Program,+Book+Discussion). Event types need to be alphabetically in order to work. [Path event calendar]/eventsxml.asp?lib=all&nd=14&et=Adult+Programs
fe =	Refers to Featured Events. Use fe=1 to show only featured events.
ag =	This is used to limit the output to only events for certain age groups. Similar to "et" above, you can specify multiple age groups by separating them with a comma and a plus sign (ag=children,+adult).
kw =	This is used to limit output to only events which contain a given keyword in their title, description, other information, or instructor fields. The default is to show all events. [Path event calendar]/eventsxml.asp?lib=all&nd=30&kw=knitting
primarygroup =	Determines whether only the primary event type and age group are searched (primarygroup=1), or search secondary/tertiary event types and age groups for each event as well [Default].
dm =	This is used to output using a different XML format. Valid values are "xml" to use the XML format described above, "exml" provides detailed information beyond typical XML mode, "rss2" to output a RSS 2.0 feed, "atom1" to output an ATOM 1.0 feed, and "ical" for iCalendar formatted output for use in other calendar programs like Google calendar. And "html" for HTML page output. [Default value is "xml"]. [Path to event calendar]/eventsxml.asp?lib=all&nd=7&dm=rss2
roominfo =	1 = shows room reservations information in the rss feed
ongoing =	0 = [Default] Doesn't show ongoing events 1 = shows ongoing events 2 = shows only ongoing events
pub =	Ongoing events will be listed first, if any.

	<p>0 = [Default] Only shows events published to the public. 1 = shows both published & unpublished</p> <p>2 = shows only unpublished</p>
private =	<p>0 = [Default] Only shows public events. 1 = shows both public & private events. 2 = shows only private events.</p> <p>A private event is an event that is either created on a private branch or has a private event type.</p>
feedtitle =	<p>Title that shows at the top of the feed. Used with RSS only. [Default] Upcoming library events.</p> <p>Advanced Encoding Switches (World Language Compatability)</p>
noencode =	<p>1 = This prevents the system encoding extended characters into their equivalent hex values. This setting works with ISO-8859-1 type of encoding.</p> <p>Testing with UTF-8 type of encoding generated XML errors.</p>
encodetype =	<p>This allows for setting the encoding type in the XML header:</p>
return =	<p>This sets the return path that will be used by the "Back" button on the event detail page. This parameter should be the last in line and needs all "&" characters encoded in hex (%26). This is especially useful when setting up an RSS Feed Reader. To setup an iGoogle RSS feed to display only 'Adult Programs' events from lib=2 but to return to lib=All with all event types when they hit the "Back" button use:</p> <p>[Path event calendar]/eventsxml.asp?lib=2&nd=5&et=Adult+Programs&return=[Path event calendar]/eventcalendar.asp?et=ALL%26Lib=ALL</p>
limit=xxx	<p>This is used when you need to pre-set the number (xxx) of events returned by the feed. Example:</p> <p>[Path event calendar]/eventsxml.asp?nd=5&et=Adult+Programs&Lib=ALL&limit=10</p>
rsslink=	<p>This is used to set the link associated with the RSS feed title. This feature is only applicable using RSS and only in some browsers. Example:</p> <p>[Path event calendar]/eventsxml.asp?dm=rss2&rsslink=http://google.com</p>

Note: There are common switches between these and [Calendar view switches](#), such as: ag, et, and kw.

Online URL: <http://kb.evanced.info/article.php?id=77>

Summer Reader Defining Primary Secondary Prize Setup

Linear

Linear allows prizes to be awarded at intervals determined by the number entered in the Interval field. The support fields that define the linear award intervals changes depending on the selection made in the Prize Timeframe Field.

The screenshot shows the 'Prize Configuration' form. At the top, there are radio buttons for 'Prizes' (Yes and No) and a 'Prize Configuration' button. Below that, 'Prize Type' is set to 'Linear'. The 'Interval' field contains the number '5' and is labeled 'Hours'. The 'Prize Levels' field contains the number '5'. At the bottom, 'Prize Timeframe' is set to 'Per Week'.

Example of Possible Setup:

- Logging Type = Books
- Interval = 3 (the patron earns a prize for every 3 books read)
- Prize levels/Week = 2 (the patron may earn a maximum of 2 prizes per week)
- Prize Levels/Program = 6 (the patron may earn a maximum of 6 prizes during the program)
- Prize Timeframe = Per Week (prizes are earned on a weekly basis)

Result = The patron may earn up to 2 prizes per week and no more than 6 prizes during the entire program regardless of the quantity logged

Defining Fields:

The screenshot shows the 'Prize Timeframe' field with radio buttons for 'Per Week', 'Per Month', and 'Entire Program'. Below it, the 'Week Starts On' field is set to 'Monday'.

Field Description	Field Location (Click to enlarge image)
<p>Interval appears regardless of the Prize Timeframe selected and represents how often, by logging type, the patron is eligible for a prize. If Interval = 0, the patron is eligible for 1 prize regardless of the quantity of logging types logged. For example, if the Logging Type = Books, enter 3 to award a prize for every 3 books logged up to the maximum entered into the Prize Levels field. If the patron reads 10 books, they become eligible for 3 prizes. If set to 0, the</p>	<p>The screenshot shows the 'Interval' field with the value '3' and the label 'Hours'.</p>

patron is eligible for 1 prize regardless of the number of books read.

The **Prize Levels** field is dependent upon the Prize Timeframe and represents the maximum number of prizes a patron can claim during the timeframe selected. When the Prize TimeFrame is set to Per Week or Per Month, the Prize Level field is split into 2 fields - Prize Levels[the Prize TimeFrame] and Prize Levels/Program. When Prize Timeframe is set to Entire Program, the Prize Levels is the only required entry.

Prize TimeFrame works with the Prize Level fields and represents the time period - Per Week, Per Month or the Entire Program - during which a patron may earn the maximum number of prizes set in the Prize Levels fields. If the Prize Timeframe is set to Per Week another options called Week Starts On appears. This setting controls when each week begins for the purposes of calculating prize eligibility.

Non-Linear

Non-Linear allows the entry of multiple prize intervals, separated by commas, into the Intervals field. The support fields that define non-linear award intervals change depending on the selection made in the Prize Timeframe field.

Example:

- Logging Type = Books
- Intervals = 1,3,5, - (the patron is eligible for a prize when they have read 1 book, 3 books, and 5 books or more)
- Prize Levels/Program = 6 (the patron may earn a maximum of 6 prizes during the program)
- Prize TimeFrame = Per Week (prizes are earned on a weekly basis)

Result = The patron may earn up to 3 prizes per week and no more than 6 prizes during the entire program regardless of the quantity logged

Defining Fields:

>/images/thumb/6/6b/Interval2.jpg/300px-Interval2.jpg" />

Field Description	Field Location (Click to enlarge picture)
<p>Intervals represent the benchmarks for earning a prize. Once a patron logs progress up to the intervals entered, they become eligible for a prize. For example, the Intervals field = 1,3,5. The patron is eligible for a prize after having read up to 1 book, 3 books, 5 books, or more</p>	
<p>Prize Levels/Program only appears when the Prize Timeframe field is set to Per Week or Per Month and represents the maximum number of prizes a patron can claim during the entire program. This field does not appear when the Prize Timeframe is set to Entire Program.</p>	
<p>Prize Timeframe represents the time period - Per Week. Per Month or the Entire Program - during which a patron may earn the maximum number of prizes set in the Prize Levels field.</p>	

Daily Goals

Daily Goals is similar to Non-Linear in the way it is configured. Daily Goals allows a patron becomes eligible for a prize when they meet the daily goal a set number of times.

The screenshot shows the 'Primary Prize Settings' configuration page. At the top, there are radio buttons for 'Prizes' (Yes, No) and a 'Prize Configuration' button. Below this, the 'Prize Type' section has radio buttons for 'Linear', 'Non-Linear', 'Daily Goals' (which is selected), and 'Manual'. The 'Intervals' field is a text input containing '3,6,10' with a 'Days' label. At the bottom, there are two input fields: 'Daily Goal Minimum' with the value '10' and 'Daily Goal Maximum' with the value '50', both with 'Books' labels.

Example:

- Logging Type = Pages
- Interval (in Days)= 3,6,10
- Daily Goal Minimum = 10
- Daily Goal Maximum = 50

- Result = To earn a prize, the patron must read between 10 and 50 pages each day for 3 days, 6 days, and 10 days. If the patron reaches their daily goal, they are eligible for a prize at day 3, day 6 and day 10.

Defining Fields:

Field Description	Field Location
Intervals represents the number of times a patron must meet the set goal	
Daily Goal Minimum is used to restrict to patron's daily goal entry and reflects the low end of the goal range	
Daily Goal Maximum is also used to restrict a patron's daily goal entry and reflects the upper end of the goal range	

Manual

Manual allows staff to control a patron's log progress manually using check boxes that appear on the Prize Management page. The number of check boxes that appear is determined by the Levels field.

The screenshot shows the 'Primary Prize Settings' form. It has a title bar 'Primary Prize Settings'. Below it, there are several sections:

- Prizes:** 'Yes' (checked) and 'No' (unchecked) radio buttons.
- Prize Type:** 'Linear' (checked), 'Non-Linear' (unchecked), 'Daily Goals' (unchecked), and 'Manual' (checked) radio buttons.
- Levels:** A dropdown menu showing the value '3'.

Example:

- Levels = 3
- Check boxes = 3
- Result = 3 Check boxes will appear for staff to use to mark patron progress

Online URL: <http://kb.evanced.info/article.php?id=154>

Catalog & Book Jacket URL

This article walks through how the Default Catalog URL Title, Default Catalog URL, and Default Book Jacket URL are set up.

If you are planning on setting up the catalog and book jacket URLs for your Summer Reader, you will first want to go to the [System Settings page](#) on the maintenance side. Once there, find the three fields as seen in the picture below:

The image shows a screenshot of a web form with three rows of input fields. Each row consists of a text input box, a small green 'Edit' button, and a label '[For Patron Reviews]'. The labels for the rows are 'Default Catalog URL Title', 'Default Catalog URL', and 'Default Book Jacket URL'.

In the **Default Catalog URL Title**, enter in the title you want the catalog to be. This can be anything you'd like such as the libraries name or any other custom name you'd prefer.

In the **Default Catalog URL**, enter in the link to the catalog's page. If you would like to make it so each review about a book will go to that book in your catalog, you will have to set it up using tags. For example, if you were to put in tags to search for books, you can use any of the three tags (Author, Title, ISBN). The first thing you will want to do is click on edit on the right side of the Default Catalog URL field. Once that opens up, paste the link for a searched book in the text area. Link for a searched book refers to the link you will get when you type in a book and search for it on your catalog. You may get a link similar to this if you search by ISBN number

http://yourlibrary.com/ipac20/ipac.jsp?menu=home&aspect=basic_search&index=123456789EX&term=123456789&x=9&y

When you paste the link into the box, you want to find the locations where the ISBN is showing. In the example provided, the ISBN searched (123456789) is shown. This happens in `&index=123456789` and `&term=123456789`. To add the tags, highlight the ISBN number (123456789) and delete it. Next, double click on the ISBN tag on the right hand side of the screen. It would now read `&index=^ISBN^` and `&term=^ISBN^`. Now when a patron logs, it will take the ISBN number and place it in the tag. If a patron clicks to view it in your catalog then, it will use the search link you provided with the ISBN number for the book and pull up the appropriate book. This is most efficient using an ISBN number since it is the most consistent among librarians, however, title and author will work to. The downside to using title and author is that the fields must be typed in by the patron exactly as it would display in the catalog when searched. If it is not exact, it will show as a failed search. For ISBN to work, you must enable it (requiring it is not necessary, it just won't show up if they don't enter in the ISBN) in the logging setup page. If you are editing this after some failed attempts, it will not update the already logged and reviewed books. It will only show new entries that are entered after the edit has taken place.

In the **Default Book Jacket URL**, this will display the cover of the book on the review page for patrons to see. To do this, enter in the link to a book jacket on your catalog's page. If you would like to make it so each review about a book will go to that book in your catalog, you will have to set it up using tags. For example, if you were to put in tags to bring up each book's book jacket, you can use any of the three tags (Author, Title, ISBN). The first thing you will want to do is click on edit on the right side of the Default Book Jacket URL. Once that opens up, paste the link for a book jacket (this can be done by clicking on the picture of a book cover in your catalog and copying the link of the window displaying the cover) in the text area. You may get a link similar to this if you

search by ISBN number

(<http://www.catalog.com/index.aspx?type=xw12&isbn=123456789/SC.GIF&client=arrop&upc=&oclc=>).

When you paste the link into the box, you want to find the locations where the ISBN is showing. In the example provided, the ISBN searched (123456789) is shown. This happens in &isbn=123456789. To add the tags, highlight the ISBN number (123456789) and delete it. Next, double click on the ISBN tag on the right hand side of the screen. It would now read &isbn=^ISBN^/SC.GIF. Now when a patron logs, it will take the ISBN number and place it in the tag. If a patron clicks to view the book jacket, it will use the link you provided with the ISBN number for the book and pull up the appropriate book cover. This is most efficient using an ISBN number since it is the most consistent among librarians, however, title and author will work too. The downside to using title and author is that the fields must be typed in by the patron exactly as it would display in the catalog when searched. If it is not exact, it will show as a failed search. For ISBN to work, you must enable it (requiring it is not necessary, it just won't show up if they don't enter in the ISBN) in the logging setup page. If you are editing this after some failed attempts, it will not update the already logged and reviewed books. It will only show new entries that are entered after the edit has taken place.

If you would like to learn how to replace existing Catalog URLs and Book Jackets, visit [Editing Catalog and Book Jacket URLs for past reviews](#) for a walkthrough on how to go back and have all reviews show up with the new links.

Online URL: <http://kb.evanced.info/article.php?id=300>

Configuring Email with Evanced Products

Email has become a very powerful tool in the world of web-based software applications. Most web-based software is highly dependent on email and your Evanced Solutions software is no exception. From Event Registration and Room Request Approval Notifications to Summer Reading Random Drawing Notifications, our software relies heavily on email and getting that email delivered. So when it fails, what do you do?

Below are some suggestions and explanations about using email with the Evanced Solutions software that we hope will help ensure that your email is always delivered.

Email Configuration

There are several ways to configure how your Evanced Solutions software will deliver email. All of our software uses the same basic concepts so this information applies to all Evanced Solutions applications that use email.

Your Evanced Solutions software uses SMTP to send email. This can be an SMTP (or Mail) server on the local web server, or an external SMTP server. When you sign-up for home internet service, your ISP (Internet Service Provider) will usually provide you with login information to their SMTP server for your email account. This is usually a dedicated email server running something like Exchange or Zimbra. This is an external SMTP server. But at your library you could be using an external email server or one that is "in-house" and is controlled by your IT staff. Here is a list of the possible mail server configurations for your Evanced Solutions software.

Localhost - Using the local web server's default SMTP server.

If your Evanced Solutions software is hosted on Evanced servers then this option is not a good option. Not because it doesn't work. It does. But because the server is owned by Evanced it has the Evanced name (as in "evanced.info"). The local SMTP server must have an identity and it inherits the name of the server. So any email leaving the server must come from "evanced.info". In order for it to pass through spam filters (not ours but other email servers) it must have a sending name (the server) that matches the sending address. In this case the only way it would pass through the filters is if it had a return address that belonged to "evanced.info". This would eliminate the possibility of using your library name in the return email address. So to ensure mail would get through all of the spam filters, the return address would have to be an "evanced.info" address.

If your Evanced Solutions software is installed on your server then this option may be fine. Since the server is controlled/owned by the library, you can configure the default SMTP server to have a name that is appropriate for sending your email. So if the server name is "server1.mylibrary.com" and your email addresses are "myname@mylibrary.com" then email using this method will usually get through just fine. Since the server domain matches the email domain the spam filters will allow it through.

Your Library SMTP Server - Using your library's in-house SMTP server.

Your SMTP server already has the appropriate name for your email addresses. So the spam filters will not block email that comes from your server with your mail address on it. There are some issues with this method that can cause an IT group to resist it. This method requires that the server be configured to relay email. This means it allows another server to send mail through it. In most cases this is considered a bad practice because you normally

do not want any server sending mail through your server. So typically this option is locked down. And most security recommendations suggest that you leave this locked down. In a general sense this is a good idea. Primarily because, in the past people would leave relaying open to all IPs. This meant that anyone could send email through your server. Obviously a spam problem. However, there is a way to configure your server to allow relaying from just a single IP address. This means that your server is not open to relaying, it is just open to relaying from one particular server. This eliminates the possibility of a spammer getting into your server this way. In addition, the account would need to also require logging in to send email.

If your Evanced Solutions software is hosted on our servers, you will need to configure relaying from our server's IP address. Since our IP is fixed, and our system would have the log in information in it, only our server would ever be able to send mail through your server. This is a common method used with many types of web-based software.

If your Evanced Solutions software is installed on your server then you will simply need to allow relaying from this server.

External SMTP Server - Using a service from an ISP or something like Gmail.

Any external email provider can do this if they allow SMTP connections. There are many free email providers but so far Gmail is the only free one we are aware of that does this. Not only is Gmail configured similar to the "Your Library SMTP Server" option above, but it also allows for business accounts that can have your domain in the email address. So it is possible to have a Gmail account that is "myname@mylibrary.com".

At the time of this writing Google offered Non-profits with less than 3000 users free access to Google Apps. You can get more information and apply for your free account here:

<http://www.google.com/apps/intl/en/nonprofit/index.html>

NOTE: The standard free Gmail account has a limit on the number of emails that can be sent in one day. As of the time of this writing the limit was 500 per day.

Troubleshooting

Testing email functionality can be a very tedious task so we have provided you with some tools to help ensure you can see the results of the email function. Here are some suggestions.

1. Enter a "From:" email address that you have access to. If you enter a fake email address or one that your cannot retrieve email for, then you will be unable to see bounce-backs and other failures.
2. Use the "View Notify Log" or "View Email Log" button to open the email log screen and evaluate the sending procedure. If there are problems connecting to the SMTP server this log will list the problem and give some details on the error.
3. Be a little patient :-). Although it may seem like email is always instantaneous, there are times when it isn't. An email will be sent from the Evanced Solutions software when the action occurs but delays on the SMTP server can exist and an email can be cued up for delivery a few minutes later. Unless there are severe problems with the SMTP server, it will usually be delivered within 5 minutes of being received.

Error Messages

The transport failed to connect to the server.

This error usually happens when there is a problem with the email server configuration. Things to check are:

- SMTP Address
- SMTP Port
- Use SSL Connection setting
- Authentication Type - Should always be "Basic" for an external SMTP server
- Username
- Password

If you are using an "in-house" server, you should also check:

- Does this email account exist?
- Can this email account log in from outside of your network?
- Is relaying enabled for this specific account/IP address?
- Is the firewall open for the selected port for the originating IP address?

The server response was: 550 Cannot relay.

If your Evanced Solutions software is hosted on our servers, you will need to configure relaying from our server's IP address, which is this: **216.239.248.18**.

If your Evanced Solutions software is installed on your server then you will simply need to allow relaying from this server.

The message could not be sent to the SMTP server. The transport error code was 0x800ccc14. The server response was not available

This error is usually caused by the SMTP server not allowing relaying from the application server or a firewall block.

If your Evanced Solutions software is hosted on our servers, you will need to configure relaying from our server's IP address, which is this: **216.239.248.18**.

If your Evanced Solutions software is installed on your server then you will simply need to allow relaying from this server.

At least one of the From or Sender fields is required, and neither was found.

This error is generated when some of the configuration fields have not been completed yet. Be sure to enter an address for the "From" Email Address in system settings.

The server rejected one or more recipient addresses. The server response was: 501 5.5.4 Invalid Address

This message is usually generated when an email address is entered incorrectly.

The message could not be sent to the SMTP server. The transport error code was 0x800ccc0b. The server response was not available

This error is usually caused by the SMTP server not allowing relaying from the application server or a firewall block.

If your Evanced Solutions software is hosted on our servers, you will need to configure relaying from our server's IP address, which is this: **216.239.248.18**.

If your Evanced Solutions software is installed on your server then you will simply need to allow relaying from this server.

The server rejected the sender address. The server response was: 421 4.7.0 Try again later, closing connection.

This message is usually generated when the SMTP service has a limit on the number of emails per day. Contact the SMTP service provider about increasing the amount of emails you can send.

Email is delivered locally (to addresses with the same domain) but not externally.

This error is usually caused by the SMTP server not allowing relaying from the application server.

If your Evanced Solutions software is hosted on our servers, you will need to configure relaying from our server's IP address, which is this: **216.239.248.18**.

If your Evanced Solutions software is installed on your server then you will simply need to allow relaying from this server.

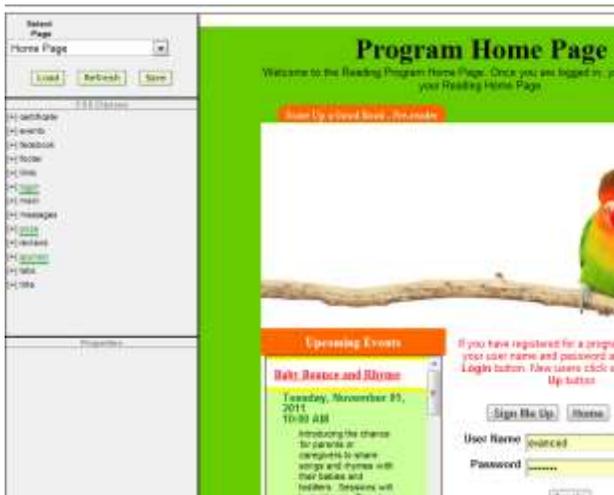
Online URL: <http://kb.evanced.info/article.php?id=72>

An Introduction to CSS in Summer Reader

Summer Reader gives you the ability to create custom websites to draw your patrons in. Using the **Page Editor** tool (available on the [System Maintenance](#) page), you can give your program the exact look you want. These pages use [CSS \(Cascading Style Sheets\)](#) to apply formatting to your web page.

First, select a program from the menu.

Next, you'll be taken to a page where you can select what page, and what part of the page, you want to edit. You'll see a preview window on the right and a menu on the left.



First, select the page you wish to edit.

For editing information for that page, click on the list below

Home Page
Registration Page
Logging Page
Patron Reviews Page
View Reviews Page
Signup Confirmation Page
Email Login Information Page
Program Selection Page
Add Comment Page
RSS Selection Page (not used)
Reading List Page
Landing Page

[Submit Review Page](#)

[Change Password Page](#)

Each page linked to above will contain instructions for how to edit the page using CSS code.

Online URL: <http://kb.evanced.info/article.php?id=256>

Understanding Template Style Sheets

You can load, edit, save, and export template style sheets in Summer Reader. You can access the **Template Style Sheets** from the [System Maintenance menu](#).

Template Style Sheets control the look of every page in Summer Reader. Using CSS code, you can customize those pages to the needs of your library. If you are unfamiliar with CSS, please [refer to this excellent resource](#).

Program Specific Style Sheets work the same way as **Template Style Sheets**, but apply only to existing programs.

To begin, pick an existing style sheet or add a new one.

Then choose the page you want to style

If you are adding a new template, be sure to enter a name for it.

You can then enter CSS code in the sections below. You can also choose from the following button options:

Help	Displays help information
Save	Saves the template changes
Delete	Deletes the template
Load	See explanation below*
Export	Exports your template in a .txt file
Preview	Previews the changes you've made

***Loading a template works as follows:**

1. Be sure to have entered a name for the template.
2. Choose the source of the template. **Factory** means the default template Evanced provides. **Program** copies templates from existing programs. **Templates** copies templates that either Evanced provides or that [you've uploaded](#).
3. Choose to load either all pages or just a selected page template.

Online URL: <http://kb.evanced.info/article.php?id=291>

Tiered Prize Messages Setup for Prizes Won for Each Level

This article shows how to setup a [prize message](#); to show on the logged-in patron home page and let them know about the prize they won for completing each level of reading in Summer Reader. Staff members have access to complete this setup.

1. From your Summer Reader [staff home page](#) (after logging in), click on the little wrench icon next to the program in question.
2. Scroll down to primary prize settings area on the program setup page.
3. Click **Prize Configuration** button from there.
4. Find the sentence that reads "Click here to add prize level messages", then click it.
5. Enter your prize level messages one at a time saving each time. Notice the tags you can use on the right hand side.
6. You can now get rid of the default message, if you wish, that shows in the Prize message field to the top of the Prize Configuration page/Prize Message tab. Just make sure to keep the tag that reads ^HighestPrizeLevelMessage^. This will instruct the system to use defined prize level messages instead. Save again.

Online URL: <http://kb.evanced.info/article.php?id=229>

How do I add text to the landing page?

Q: I'm trying to add text onto my landing page (i.e. saying we don't start until June) and was wondering where I go for that on the editing side? I can tell that the program-specific style sheets are mainly CSS coding and inputting HTML code does not work (or I'm putting it in the wrong spot). Is there some place I can change/add this or is there another type of coding I want to use for this?

A: "Language\Text Setup" is used to add or edit text that appears on the patron pages. From "System Maintenance" it is in the "System Setup" group.

Select a language that is used by your program (English is default) and do a browser text search for the word "Landing". You will find three occurrences.

Code:

```
SubtitleText_LandingPage = ""  
SubtitleTextPatron_LandingPage = ""  
PageHeader_LandingPage = "Program Home Page"
```

These are language variables and you can edit the text between the double quotes. This can include text and simple HTML code.

IMPORTANT NOTE: Do not add double quotes inside the text. The only double quotes should be on the outside of the text. To add a double quote in your text use """.

Online URL: <http://kb.evanced.info/article.php?id=194>

How do I Add a New Header in Summer Reader?

Q: How do I add a new header in Summer Reader?

A:

If you are just trying to change the default image that is on your Summer Reader homepage, then do the following:

- 1- Log in as an admin
- 2- Go to [System Maintenance](#).
- 3- Click [Page Editor](#) in the Style Sheet section.
- 4- Select the program in question. It will open to a preview of the home page.
- 5- Expand the [Sponsor section by clicking on the plus sign](#).
- 6- Hit Sponsor Image, then in the background image field, replace the image link (should look something like this: https://sr.evanced.info/ev/Winter_banner1.jpg) with your own image's web address instead. Then hit Save button.

Note : If you do not have a web server to host your image on and obtain a link, [you can use Flickr](#):

Online URL: <http://kb.evanced.info/article.php?id=320>

How To Summer Reader-Setup Widgets 2011

Setting up Widgets on your Summer Reader website

WARNING: Widgets are an advanced programming method and will require extensive knowledge of HTML, CSS and JavaScript. Evanced Solutions' Support will offer support for functional aspects but not implementation.

Defining Summer Reader Widgets

The Summer Reader 2011 widgets will allow you to take basic Summer Reader functions and integrate them into your current website. For example you will be able to allow patrons to login to their program right from your home page or teen page. You will be able to post reviews of books your kids have done anywhere within your website. You can do this and more with a few cuts and pastes. So let's get started.

What Files Do You Need?

To make the widgets work, you will need four files that we supply. They are located in the root folder of your Summer Reader program. Example URL: <http://yourserver/evanced/sr/readerwidget.html>. They can be read and saved locally with your browser. If you are using IE then you will be prompted to download the file. If you are using Firefox, the files are pulled into the browser window and have to be copied and pasted. You can also download the latest files from our demo site:

- http://sr.evanced.info/2011_widgets/readerwidget.html
- http://sr.evanced.info/2011_widgets/readerwidget.css
- http://sr.evanced.info/2011_widgets/readwidget.js
- http://sr.evanced.info/2011_widgets/srproxy.htm

The files `readerwidget.css`, `readerwidget.js` and `srproxy.htm` need to be placed in the same folder as your library's HTML files.

A little info about each of the files:

File 1: `readerwidget.html` (This is a sample page that contains the code that you will copy and paste within your website to activate the widgets.)

File 1: `readerwidget.css` (This is where the style sheet settings for the widgets are located.) Please remember that you will be able to customize your widgets using the `readerwidget.css` style sheet file.

File 3: `readwidget.js` (This is the code that the widgets need in order to function.)

File 4: `srproxy.htm` (This file is only required if you are integrating with Facebook or Novelist Select. You must

use "View Source" and copy and paste contents of the file into a text editor and save as "srproxy.htm" on your site.) So we need to figure out what to do with all the code in the .HTML file.

1. We need to define our variables so lets just copy (from readerwidget.html) and paste them before the <HTML> tag on our page (see graphic below).

```

<script language=javascript>
//global variables
var ServerPath = "http://demo.evanced.info/sr/"; //set to summer re
var ReturnPage = "http://yourserver/readerwidget.html"; //set to location
var ProgramID = 1; //set this Program
var RegisteredProgramID = 0; //this is set by th
var NewWindow = "Y"; //set to 'Y' to op
var PageLangID = 1; //set this to the l
var FBAppPath = "http://cloud.evanced.info/evancedsr/"; //if app path (do
var FBBackgroundColor = "white"; //set this to cont

//*****
//Use these settings to set the position of the popup windows (some of these may NOT be applicable depending on yo
//To center the popup, set the _Top and _Left variables to "0" (the center setting is only supported by IE)
//To let the browser determine height and width, set the _Height and _Width variables to "0"
var AddMember_Top = "50px";
var AddMember_Left = "50px";
var AddMember_Height = "500px";
var AddMember_Width = "825px";

var Certificate_Top = "50px";
var Certificate_Left = "50px";
var Certificate_Height = "500px";
var Certificate_Width = "825px";

var PatronLog_Top = "50px";
var PatronLog_Left = "50px";
var PatronLog_Height = "500px";
var PatronLog_Width = "825px";

var ManageMember_Top = "50px";
var ManageMember_Left = "50px";
var ManageMember_Height = "500px";
var ManageMember_Width = "825px";

var MyInfo_Top = "50px";
var MyInfo_Left = "50px";
var MyInfo_Height = "500px";
var MyInfo_Width = "825px";

var MyReviews_Top = "50px";
var MyReviews_Left = "50px";
var MyReviews_Height = "500px";
var MyReviews_Width = "825px";

var ReadingList_Top = "50px";
var ReadingList_Left = "50px";
var ReadingList_Height = "500px";
var ReadingList_Width = "825px";

var RSS_Top = "50px";
var RSS_Left = "50px";
var RSS_Height = "500px";
var RSS_Width = "825px";

var SignUp_Top = "50px";
var SignUp_Left = "50px";
var SignUp_Height = "500px";
var SignUp_Width = "825px";

var SubmitReview_Top = "50px";
var SubmitReview_Left = "50px";
var SubmitReview_Height = "500px";
var SubmitReview_Width = "825px";

var ViewReviews_Top = "50px";
var ViewReviews_Left = "50px";
var ViewReviews_Height = "500px";
var ViewReviews_Width = "825px";
//*****
var arrScriptBlocks = new Array(4);
arrScriptBlocks[0] = ServerPath + "readerwidget.asp?command=checksession&programid=" + ProgramID;
arrScriptBlocks[1] = ServerPath + "readerwidget.asp?command=language&programid=" + ProgramID;
arrScriptBlocks[2] = ServerPath + "readerwidget.asp?widget=links&divid=divLinks&programid=" + ProgramID;
arrScriptBlocks[3] = ServerPath + "readerwidget.asp?widget=messages&divid=divMessages&programid=" + ProgramID;
arrScriptBlocks[4] = ServerPath + "readerwidget.asp?widget=reviews&divid=divReviews&programid=" + ProgramID + "&random=Y";
</script>
<script type="text/javascript" src="readwidget.js"></script>

<html>
<head>

```

Copy the highlighted text

Set the ServerPath within this section of code. This tells the code where to get the data from (the path to your Summer Reader installation). It should look something like this '<http://yourserver/evanced/sr/>'. Set the

ReturnPage to the fully qualified URL of your library's HTML page. Set the ProgramID to point to the specific program you will be using.

NOTE: The ProgramID can be found by logging into Summer Reader. Click 'System Maintenance' then click 'Edit Program' and select your specific program. At the top is the Program ID.

The default PageLangID may also need to be changed. This is the default language used by the widgets. To determine the PageLangID to use, go to 'System Maintenance' then click 'Edit Program' and click on the 'Language Setup' button. Make note of your program's default language. Now, go back to 'System Maintenance' and click on 'Language Setup' and then click on your program's default language. The Language ID is located at the top of the page. Set the PageLangID to this value.

NOTE: In order to use the UTF character set for compliance with alternative languages, the following META tag must be set.

```
<html>
  <head>
    <meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
    <title>
      Summer Reading
    </title>
  </head>
  <body>
    <link rel="stylesheet" type="text/css" href="readerwidget.css">
```

arrScriptBlocks

The arrScriptBlocks variables tell the page where to get the information from and then where to put it within your HTML page. arrScriptBlocks[0] and arrScriptBlocks[1] should not be altered or removed – these call housekeeping routines that are required. The other arrScriptBlocks variables can be removed if not being used. For example, to remove the "links" script block, the code would look like this:

```
var arrScriptBlocks = new Array(3); //Use this array to load the scrip
arrScriptBlocks[0] = ServerPath + "readerwidget.asp?command=checksession&programid=" + ProgramID;
arrScriptBlocks[1] = ServerPath + "readerwidget.asp?command=language&programid=" + ProgramID;
arrScriptBlocks[2] = ServerPath + "readerwidget.asp?widget=messages&divid=divMessages&programid=" + ProgramID;
arrScriptBlocks[3] = ServerPath + "readerwidget.asp?widget=reviews&divid=divReviews&programid=" + ProgramID + "&random=Y&limit=3";
```

The array declaration was changed from 4 to 3 and the arrScriptBlocks variables following the "links" script block variable were renumbered.

The "reviews" script block in this section controls the behavior of the reviews displayed on your HTML page. It contains two additional configuration URL parameters – random and limit. These can be set differently to change the behavior of the reviews displayed on your HTML page. If you set random=N then only the latest

reviews determined by the date that they were submitted are pulled in rather than in a random fashion. If you set limit=10 then 10 reviews will be pulled in rather than the default of 3.

2. The following variables must be included in your html page.

```
<body>
  <link rel="stylesheet" type="text/css" href="readerwidget.css">
  <input id="PatronID" type="hidden" value="">
  <input id="ParentPatronID" type="hidden" value="">
  <input id="ServerHashSeed" type="hidden" value="">
  <input id="LoginStatus" type="hidden" value="">
  <input id="FamilyRegistration" type="hidden" value="">
  <input id="PrintCert" type="hidden" value="">
  <input id="ReviewSetting" type="hidden" value="">
  <input id="AnonymousReviewsSetting" type="hidden" value="">
  <input id="FBEnabled" type="hidden" value="">
  <input id="FBStatus" type="hidden" value="">
  <input id="FBMessageType" type="hidden" value="">
  <input id="FBProgramID" type="hidden" value="">
  <input id="FBMessageID" type="hidden" value="">

  <div id="MainSection" name="MainSection" width=100% align=center>
```

3. The highlighted HTML below must be included if your program is set up for 2 or more languages. This widget provides a drop-down list of your program languages for the patron to select from.

```
<div id="divLanguageSelection" style="display:none;">
  <span id="GeneralLabel_Language" class="smalltext">Language</span>
  <select id="selLangID" onchange="refreshContent(this.value);">
  </select>
</div>
//div
```

4. The highlighted HTML below is the links widget. This widget pulls in your program's links.

```
<td id="LinksSection">
  <div style="width:300px;float:left;">
    <div id="LinkSectionTitle_HomePage">
      Links
    </div>
    <div id="divLinks" class="links"></div>
  </div>
```

5. The highlighted HTML below is the prize message widget. This pulls in the program's prize message when a patron is eligible for a prize. This assumes that the settings are set appropriately to show the prize message.

```
<div style="width:450px;float:left;">
  <div id="divPrizeMessage" class="prize"></div>
```

6. The highlighted HTML below is the certificate message widget. This pulls in the program's certificate message

the arrScriptBlocks array when making this change:

```
var arrScriptBlocks = new Array(5); //
arrScriptBlocks[0] = ServerPath + "readerwidget.asp?command=checksessionsprogramid=" + ProgramID;
arrScriptBlocks[1] = ServerPath + "readerwidget.asp?command=language&programid=" + ProgramID;
arrScriptBlocks[2] = ServerPath + "readerwidget.asp?widget=links&divid=divLinks&programid=" + Prog
arrScriptBlocks[3] = ServerPath + "readerwidget.asp?widget=messages&divid=divMessages&programid="
arrScriptBlocks[4] = ServerPath + "readerwidget.asp?widget=reviews&divid=divReviews&programid=" +
arrScriptBlocks[5] = ServerPath + "readerwidget.asp?widget=links&divid=divLinks2&programid=22";
```

Why aren't my widgets showing any information?

This can be for several reasons:

- Check that you have entered the correct ProgramID in variable definition at the top.
- Make sure all the paths are correct.
- Make sure you copied the code within the <HTML></HTML> tags.
- Make sure you are using the latest release of the readwidget.js file. If you are getting javascript errors, try updating your readwidget.js file by downloading the most recent file from here:

http://sr.evanced.info/2011_widgets/readwidget.js

- Check that your program has information available to be displayed.

Why can't I make my widget the same color as my website background?

You are able to do this within the readerwidget.css file. Please note that you must have a general knowledge of style sheets in order to use. (Review the style sheets section in the user manual for more info)

Posted - Wed, Sep 28, 2011 at 1:53 PM. This article has been viewed 123 times.

Online URL: <http://kb.evanced.info/article.php?id=126>

How to export and import a program's style sheet in Summer Reader

This article is intended for Summer Reader system administrators, who wish to import the look and feel of a program in their system into a template style sheet.

- 1 - Go to the [setup page of the program](#) in question (wrench icon next that program from the staff home page).
- 2- Use the export button on that page; selecting the [style sheet](#) check box, then export button. This will generate a text file.
- 3- Select [import](#) from System Maintenance in the Programs section.
- 4- Copy the entire content of the exported text file, then paste it in the provided box. Hit Import button.

You will be notified when it is complete. The name of the style sheet will also be provided. To see it, access [Template Style Sheets](#) from System Maintenance>Style Sheets.

Online URL: <http://kb.evanced.info/article.php?id=294>

How To Summer Reader-Include a link to SR on my website

The link to your Summer Reading program can be included on your website by simply linking to the patron-side of your program.

The default patron-side link for your SR program is:

YOUR DOMAIN/evanced/sr/homepage.asp

example: <http://statewidelibrary.org/evanced/sr/homepage.asp>

If your system is installed on your server, the domain path and folders can be different.

If you are hosted on one of the Evanced servers your link will follow this format:

STATE.evanced.info/LIBRARY PATH/sr/homepage.asp

example: <https://tx.evanced.info/texasstatelibrary/sr/homepage.asp>

Online URL: <http://kb.evanced.info/article.php?id=120>

Can one Summer Reading Program Support Multiple Goals?

Q: My library's summer reading program is going online for the first time ever. I have been designated as the person who sets up the Evanced Summer Reader. My question is: is it possible to have separate goals for separate age groups?

For instance, preschoolers must read "x" amount of pages while 3rd graders must read "y" amount. I cannot figure out how to set this up.

A: It is possible to have both a "patron" goal and a "program" goal in the same program. However, there is only one of each in a single program.

What many libraries do is setup up multiple programs with an age restriction on each. So for example, you could have a kids program (ages 0-6), a youth program (ages 7-12), a teen program (ages 13-17) and an adult program (ages 18-up). You can have as many programs as you like.

To help make this easier to setup, there is a "copy" function in the program setup. So you can configure one program with the basic settings for your programs then copy it several times and change only the portions that are different (like patron goal).

A side-affect of setting up many programs is that it may cause some confusion with all the tabs. So to help eliminate this problem go to 'Program Settings' and change the display mode from "Tabs" to either "Links" or "Droplist". Now create a link for each specific program on your library's web page using the program ID found in the program configuration (for example, <http://xx.evanced.info/library/sr/homepage.asp?programID=4>). This way you can direct each age group to a specific program and they will only see the tab for their program.

Online URL: <http://kb.evanced.info/article.php?id=195>

Database Maintenance

You don't have any programs currently running and you want to delete all data from all programs and all the patrons

- Be sure that all reports have been saved off that are needed from last year's programs.
- Confirm that the "Bulk Deletion of Patron Records" setting in System Settings is set to "Yes". (NOTE: For Advanced Security users this step is not required.)
- Go into setup for each of your programs.
 - For active programs select Edit Program and then select the program.
 - For inactive programs select Inactive Programs and then select the program.
- Click on the "Delete All Program Records (Including Patrons)" button to remove all patrons from the program and to delete the patron from the db.
 - Do this for each of your programs.
 - Once you remove all patrons from the program you have the option to delete the program as well (the "Delete" button).

In most cases, this will remove 99% of the patron records if you do this for all of your programs. There are times when a patron has been deleted from a program but has not been deleted from the db so they are not attached to a program. These patrons will still be in the db. Go to 'System Maintenance-->Patron Information' and click on the "Delete All Unregistered Patrons" button. This will remove the rest unregistered of the patrons from the db. Click on the "Go" button to perform a blank search to make sure all records have been deleted.

In this scenario all patrons will register as new sign ups.

You have 1 or more programs currently running but you want to delete all data from all other programs and all those programs' patrons

- Be sure that all reports have been saved off that are needed from last year's programs.
- Confirm that the "Bulk Deletion of Patron Records" setting in System Settings is set to "Yes". (NOTE: For Advanced Security users this step is not required.)
- Go into setup for each of your programs. (Only programs for which patrons should be removed.) **DO NOT PERFORM THIS STEP FOR THE PROGRAMS THAT ARE CURRENTLY RUNNING!**
 - For active programs select Edit Program and then select the program.
 - For inactive programs select Inactive Programs and then select the program.
- Click on the "Delete All Program Records (Including Patrons)" button to remove all patrons from the program and delete the patron from the db. NOTE: If a patron is signed up for another program they will not be deleted.
 - Do this for each of your programs where you want the patrons deleted.
 - Once you remove all patrons from the program you have the option to delete the program as well

(the "Delete" button).

In most cases, this will remove 99% of the patron records that you want removed if you do this for the programs for which patrons are to be removed. There are times when a patron has been deleted from a program but has not been deleted from the db so they are not attached to a program. These patrons will still be in the db. Go to 'System Maintenance-->Patron Information' and click on the "Delete All Unregistered Patrons" button. This will remove the rest of the unregistered patrons from the db. Click on the "List All Unregistered Patrons" button to perform a search to make sure there are not any unregistered patrons left. There will still be patrons in the db for the programs where you did not delete the patron record.

In this scenario all patrons will register as new sign ups unless they happen to be registered in one of the programs that is currently running. If they are in a program currently running and want to sign up for another program they would need to use the "Signed Up Before" button on the registration page. To ensure that this feature is available go to System Settings and set the 'Signed Up Before' Feature to Yes. If this option is not made available then only staff will be able to register them unless they register as a new individual with a different library card or user name.

You want to keep the patron information in the db and re-use one or more of your programs

There are two ways to accomplish this:

- Remove the program data from the program and keep all the registered patrons in the program.
 - Be sure that all reports have been saved off that are needed from last year's programs.
 - Confirm that the "Bulk Deletion of Patron Records" setting in System Settings is set to "Yes". (NOTE: For Advanced Security users this step is not required.)
 - Go into program setup and click on the "Delete All Program Records".
 - In this scenario since the patrons were only removed from the program and not the db, patrons in the program do not have to sign up for the program and can simply log in as they did previously.
 - Patrons new to Summer Reader register as new sign ups.
- Make a copy of the program (including patrons).
 - Since you are keeping the original program intact, you will still have reporting available to you for the program.
 - Go into the program's setup and click on the "Copy Program" button, enter a name for the program in the text box. Be sure to check the "Include Patrons" check-box (this ensures that the patron's registration record is copied over with the program) and click on the "Save Copy" button.
 - In this scenario, patrons in the program do not have to sign for the program and can simply log in as they did previously as well.
 - Patrons new to Summer Reader register as new sign ups.

If you plan on using this scenario then it is a good idea to enable Email via Email Setup. Be sure to enable the "Login Info Email Enable" • and make the "Email" • field a required field in the program's registration setup as well. This will allow users to use the "Forgot Your Login Info" • button so they can receive an email from the application with their login information " rather than calling the library for this information or the user could

choose to register with a new user name or library card.

You want to keep the patron information in the db and create a new program for this year

- Since the patrons in last year's program are still in the db, those patrons will need to use the "Signed Up Before" button on the registration page. To ensure that this feature is available go to System Settings and set the 'Signed Up Before' Feature to Yes. If this option is not made available then only staff will be able to register them unless they register as a new individual with a different library card or user name.
- Patrons new to Summer Reader register as new sign ups.

Online URL: <http://kb.evanced.info/article.php?id=149>

Where Can I find new Templates and how do I install them?

Go to <http://evancedsolutions.com/templates2012>

How to import Summer Reader Templates

1. Click on “Download Template”. This will open a page full of text.
2. Press Ctrl-A to highlight all of the text, and press Ctrl-C to copy all of the text.
3. Log into your library’s Staff/Administrative **Summer Reader** webpage.
4. Go to System Maintenance.
5. Look in the “Programs” box (upper left hand corner) and choose “Import”.
6. Press Ctrl-V to paste the text into the box.
7. Press the “Import” button at the bottom of the page. Pay attention to the name it is saved as, the new style sheet will appear in the list of available style sheets with this name and can be renamed now.
8. Return to System Maintenance, select the “Program-Specific Style Sheets” and select the program you want to apply this style sheet to.
9. Click “Load”, Select “Template” from “Styles Source” and find the name of the template you just imported under “Select Template”.
10. Make Sure “All Pages” is selected, and click “Load”.