



User Manual for

Summer Reader –2010

Web Based Reading Program & Interest Group Manager

MAN0104-08.1

Copyright Information

Evanced Solutions, Inc.

7830 Rockville Road Suite C

Indianapolis, Indiana 46214

Phone: 888-519-5770

Fax: 888-519-5770

E-mail 1: sales@evancedsolutions.com

E-mail 2: support@evancedsolutions.com

Web: www.evancedsolutions.com



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CHAPTER 1: INTRODUCTION

1.1 Overview

Summer Reader is a web-based product designed to help libraries manage reading programs and interest groups for all ages. With the *Summer Reader* software, libraries can manage programs, patron registration, logging and prizes. An optional, configurable option also allows patrons to register themselves in programs and manage their own logs. All of the information is stored in a MySQL database and can be managed by library staff through web-based maintenance pages and reporting tools.

1.2 Operation

Summer Reader is separated into two distinct interfaces: Staff and Patron.

- The staff interface, which is password protected, has access to program data, participant information, program and system setup and configuration.
- The patron interface is limited to sign-up, logging of participant information and reviews. Patrons do not have access to any other patron or system information with the exception of reviews that have been accepted by staff.

Important Note: For quickest and easiest access and input, staff should always work from the staff side. Using the patron side for program management and inputting information is not recommended for staff use. See Chapter 2 for more information on using the staff interface.

1.3 Installation, Backup and Technical Support

1.3.1 Installation

The installation process varies depending on whether your library is buying *Evanced* software to load on your own server or having *Evanced Solutions* host for you. If you are purchasing our software, we are happy to install the product(s) for you via remote access to your server at no additional charge. Arrangements can also be made for us to be standing by during the installation process. **Please note:** The installation process does not at any time require the server to be rebooted.

Please contact Evanced Solutions to arrange for installation assistance.

1.3.2 Backup

Regularly backing up your system is very important. The single most important folder to back up regularly (we recommend nightly) is the <drive>:\mysql\data folder. The web folder itself only requires periodic back up.

1.3.3 Technical Support

Please contact the following for assistance:

Phone	888-519-5770
E-mail	support@evancedsolutions.com
Web	Homepage: http://www.evancedsolutions.com Blog: http://evanced.blogspot.com Support Center: http://support.evanced.info

CHAPTER 2: STAFF INTERFACE

2.1 Summer Reader 2010 – New Features and Improvements

Please refer to *Appendix A* for a complete list of new features, options, and improvements to the **Summer Reader** software.

2.2 Overview

The *Summer Reader* program enables libraries to manage their reading programs and interest groups in the summer and year-round. It streamlines in-house processes such as registration, reading logs/progress logs, reviews, prizes, random drawings, statistics and reports. Patron self-service options are also available. The *Summer Reader* operational features are accessed through a series of predefined maintenance pages as described in the following sections.

2.3 Password Levels

New Feature:

To learn more about individual, configurable users and roles, please see Section 2.12.1. Otherwise, use the four pre-determined security levels to get started.

There are four levels of security:

- **Administrator** level has access to *all* program management and maintenance functions
- **Staff** level has access to *Registration and Logging, Prizes, Drawings, Reviews Maintenance, Message and Links Maintenance, Patron Maintenance and Reports.*
- **Basic** level has access to *Registration and Logging, Patron Maintenance and Reports.*
- **Volunteer** level has access to *Registration and Logging only*

Password Levels				
Manage Programs Home Page	Admin	Staff	Basic	Volunteer
Search	▲	▲	▲	▲
Programs	▲	▲	▲	▲
Program Management				
Registration	▲	▲	▲	▲
Logging	▲	▲	▲	▲
Prizes/Random Drawing	▲	▲		
Reports				
Reports	▲	▲	▲	
System Maintenance				
Program Setup Maintenance	▲			
Reviews Maintenance	▲	▲		
Message and Links Maintenance	▲	▲		
Patron Maintenance	▲	▲	▲	
Inactive Program Maintenance	▲			
Setup Maintenance	▲			
Security Maintenance	▲			
Log Out				
Log Out	▲	▲	▲	▲

Figure 2.3 A Group-Level Permissions

Note: Passwords can be changed by someone with Administrative access by going to System Maintenance/Security Maintenance.

Click the 'Remember Me' checkbox when logging in to stay logged in indefinitely or until logged out; otherwise, the session is limited to 90 minutes.

2.4 Manage Programs Home Page



Once staff are logged in to *Summer Reader*, they are taken to the *Manage Programs Home*. The *Manage Programs Home Page* is separated into two areas – the search all programs search slider and the program grid:



Program	Registrants	Quantity (P)	Quantity (S)	Reviews	Comments
Adult Page Turners	21	35 Books Read	n/a	3	n/a
Anime Club	18	10 Sign-Up	n/a	2 (1 Pending)	n/a
Paws, Claws, Scales	180	836.6 Hours	n/a	40 (6 Pending)	0
Reading Safari	6	151 Pages read	35 Minutes	n/a	n/a

Figure 2.4 A Manage Programs

Search - Search for registrants by Last Name and/or First Name. Additional search fields can be configured and included in the Search All Programs filter.

Programs – Displays total number of participants and amount of activity accomplished in each program. Select from the *Programs* box to quickly move between programs/interest groups for registration, logging, awarding prizes, etc. Clicking on an individual program name or the Manage Icon -  - navigates to the *Quick Search* function for that program. . The Setup Icon -  - automatically takes users to the setup page for a particular program.

Note: For quickest and easiest access and input, staff should always work from the staff side. Using the patron side for inputting information and general program management is not recommended for staff use.



Search Tip: The Search fields may be searched by typing in one or more of the fields. Names can be searched by typing a complete name or by typing in one or two letters.

Examples:

- Search all Robert Smiths by typing Smith (in Last Name field) and Robert (in First Name field),
- Pull up all people with last names that being with "Sm" by type "Sm" in the Last Name field

Please see Program Management for more information about registering, editing, transferring patrons, logging, prizes, and drawings.

2.5 Navigation Menu

A navigation menu is located across the top of every Summer Reader staff page. This menu includes the following submenus along with a *Back* button (when applicable) for returning to the previous page:



- **Home**
- **System Maintenance**
- **Reports**
- **About**
- **Logoff**
- **Update Available!** Appears at the Admin level when a software update is available. Click the menu choice to see a message regarding the update.

2.6 System Maintenance

2.6.1 Security Access

2.6.1.1 Administrator Access

Staff with the *administrative* password can access the following submenus from *System Maintenance* (located on the *Main Navigation Menu*):

System Maintenance

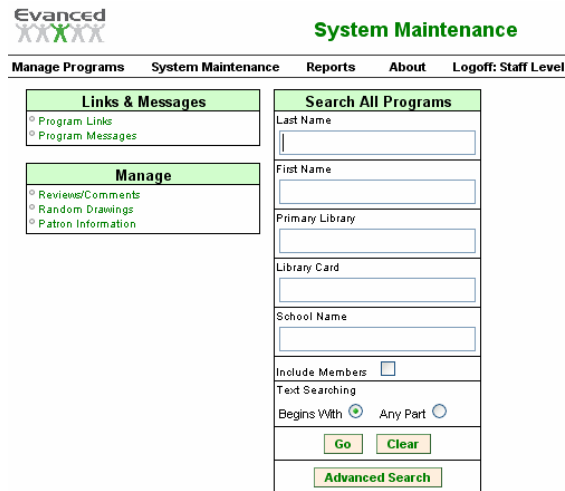
Manage Programs	System Maintenance	Reports	About	Logoff: Administrator
Programs <ul style="list-style-type: none"> Add Program Edit Program Import 	Search All Programs <p>Last Name</p> <input type="text"/> <p>First Name</p> <input type="text"/> <p>Include Members <input type="checkbox"/></p> <p>Text 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>	System Setup <ul style="list-style-type: none"> System Settings Language\Text Setup Security Setup Quick Search Setup Manage Programs Setup Reviews Maintenance Setup Certificate Setup Authentication Setup 	Email Settings <ul style="list-style-type: none"> Email Setup 	Style Sheets <ul style="list-style-type: none"> System-Wide Style Sheets Program-Specific Style Sheets
Program Setup <ul style="list-style-type: none"> Drop Lists Logging Types Registration Defaults Set Program Order Script Entry 				
Links & Messages <ul style="list-style-type: none"> Program Links Program Messages 				
Manage <ul style="list-style-type: none"> Reviews\Comments Random Drawings Patron Information 				

Figure 2.6.1.1 A System Maintenance for Administrator Users

- **Programs** - Add, edit or import existing programs and view inactive programs.
- **Program Setup** – Configure the features used to setup and configure individual programs, including drop lists, logging types, registration defaults, and program order.
- **Links and Messages** – Create web links and to set system messages.
- **Manage** – Search and manage patron reviews, complete drawings, and view patron information.
- **System Setup** – Manage system settings, language/text, quick search, manage programs, reviews maintenance, certificate and authentication setups.
- **Security Maintenance** – Allows those logged in as Administrator to change Staff, Basic, and Volunteer passwords.
- **Email Settings** – System-wide email templates, program-specific style sheets, and email setup.
- **Style Sheets** – Edit or create system wide and/or program specific style sheets.

2.6.1.2 General Staff Access

Those with the general *staff* password see a different screen when they go into *System Maintenance*.



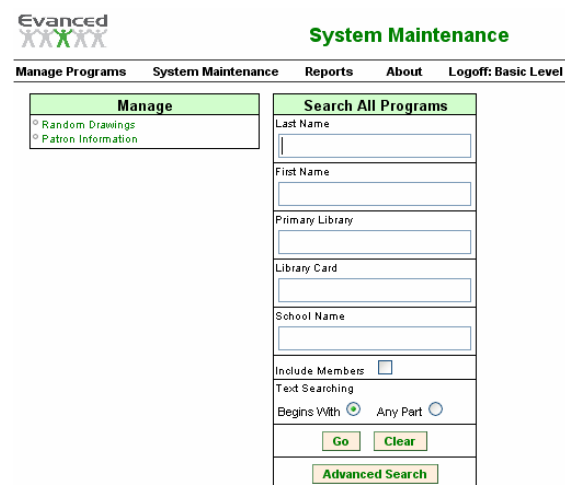
The screenshot shows the 'System Maintenance' interface for a 'Staff Level' user. The Evanced logo is at the top left. The title 'System Maintenance' is in green at the top right. A navigation bar includes 'Manage Programs', 'System Maintenance' (selected), 'Reports', 'About', and 'Logoff: Staff Level'. On the left, there are two main sections: 'Links & Messages' with links to 'Program Links' and 'Program Messages', and 'Manage' with links to 'Reviews/Comments', 'Random Drawings', and 'Patron Information'. The main content area is titled 'Search All Programs' and contains several input fields: 'Last Name', 'First Name', 'Primary Library', 'Library Card', and 'School Name'. Below these are checkboxes for 'Include Members' and 'Text Searching', and radio buttons for 'Begins With' (selected) and 'Any Part'. At the bottom are 'Go', 'Clear', and 'Advanced Search' buttons.

Figure 2.6.1.2 A System Maintenance for Staff Users

Access at this level is limited to Reviews Maintenance and Patron Maintenance.

2.6.1.3 Basic Password Level

Those with the *basic* staff password see a *System Maintenance* screen that looks like the one below. They only have access to searching and *Patron Maintenance*.

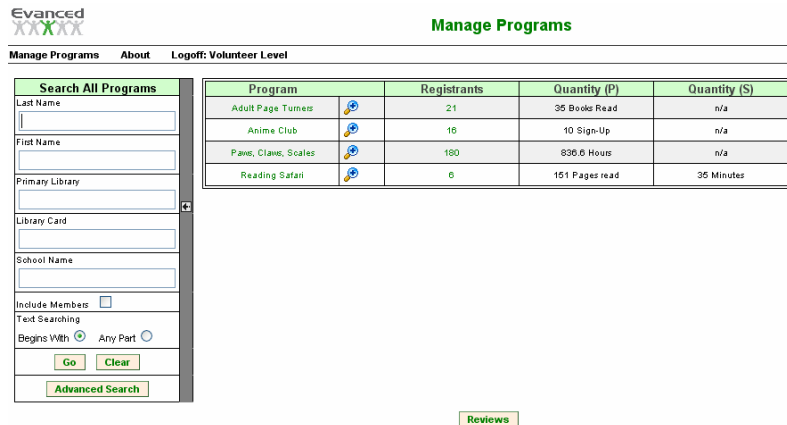


The screenshot shows the 'System Maintenance' interface for a 'Basic Level' user. The Evanced logo is at the top left. The title 'System Maintenance' is in green at the top right. A navigation bar includes 'Manage Programs', 'System Maintenance' (selected), 'Reports', 'About', and 'Logoff: Basic Level'. On the left, there is a 'Manage' section with links to 'Random Drawings' and 'Patron Information'. The main content area is titled 'Search All Programs' and contains the same search fields as the Staff Level screen: 'Last Name', 'First Name', 'Primary Library', 'Library Card', and 'School Name'. Below these are checkboxes for 'Include Members' and 'Text Searching', and radio buttons for 'Begins With' (selected) and 'Any Part'. At the bottom are 'Go', 'Clear', and 'Advanced Search' buttons.

Figure 2.6.1.3 A System Maintenance for Basic Users

2.6.1.4 Volunteer Password Level

Those with the *volunteer* password do not have any access to *System Maintenance*. They only have access to limited functionality on the *Manage Program Home Page*.



Manage Programs

Manage Programs About Logout: Volunteer Level

Program	Registrants	Quantity (P)	Quantity (S)
Adult Page Turners	21	35 Books Read	n/a
Anime Club	16	10 Sign-Up	n/a
Pans, Claws, Scales	180	836.8 Hours	n/a
Reading Safari	6	151 Pages read	35 Minutes

Search All Programs

Last Name

First Name

Primary Library

Library Card

School Name

Include Members ☐

Text Searching

Begins With ☒ Any Part ☐

Go Clear

Advanced Search

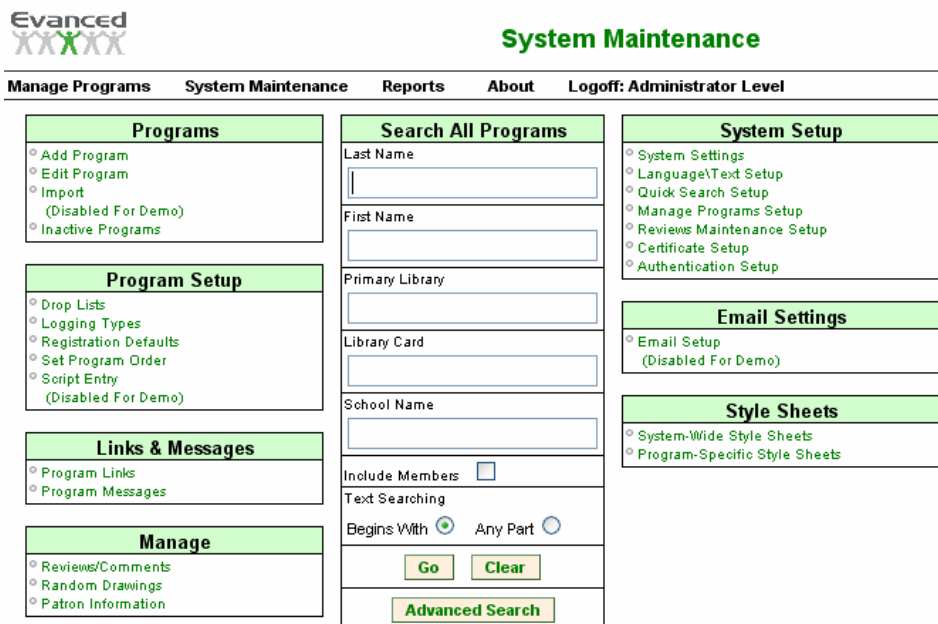
Reviews

Figure 2.6.1.4 A Manage Programs for Volunteer Users

2.7 Programs

Under *System Maintenance/Programs*, staff with the *Administrative* password may do the following:

- Add program
- Edit program setup of an *active* program
- Import program
- View and modify *inactive* programs



System Maintenance

Manage Programs System Maintenance Reports About Logout: Administrator Level

Programs

- Add Program
- Edit Program
- Import (Disabled For Demo)
- Inactive Programs

Program Setup

- Drop Lists
- Logging Types
- Registration Defaults
- Set Program Order
- Script Entry (Disabled For Demo)

Links & Messages

- Program Links
- Program Messages

Manage

- Reviews/Comments
- Random Drawings
- Patron Information

Search All Programs

Last Name

First Name

Primary Library

Library Card

School Name

Include Members ☐

Text Searching

Begins With ☒ Any Part ☐

Go Clear

Advanced Search

System Setup

- System Settings
- Language/Text Setup
- Quick Search Setup
- Manage Programs Setup
- Reviews Maintenance Setup
- Certificate Setup
- Authentication Setup

Email Settings

- Email Setup (Disabled For Demo)

Style Sheets

- System-Wide Style Sheets
- Program-Specific Style Sheets

Figure 2.7 A System Maintenance for Administrator Users

2.7.1 Add New Program

2.7.1.1 Managing a Program's Appearance on the Patron Home Page

Whether a program appears on the Patron's Home Page is determined by several settings:

- *Active* must be set to *Yes*.
- *Patron Registration* or *Patron Logging* or *Patron Reviews* (when set to *Home Page Entry*) must be enabled. When none of these options are enabled, the system displays the *Show Program on Home Page* field.
- Enable *Show Program on Home Page* to display a program on the Patron Home Page regardless of the Patron Registration, Patron Logging and Patron Reviews settings.

2.7.1.2 Add a Program Procedure

Under *Program Maintenance*, click *Add New Program* to enter a new reading or interest group program. The system displays *Step 1 of 4 – Add Program*. Staff is directed through each step of the three step process, which includes adding the program, adding language(s), setting up registration, setting up logging.

Note: As noted in the following sections, some settings in 'Program Setup' cannot be modified once one or more patrons have registered for a program.

Step 1 of 4

Step 1 of 4 - Add Program

[Manage Programs](#) [System Maintenance](#) [Reports](#) [About](#) [Logout: Administrator Level](#) [Back](#)

[Save](#)

General Settings

Active ☐ Yes ☒ No ☐

Text Settings

Program Name
 Abbreviation
 Description
 Eligibility Requirement Text
 Instructional Text

Registration Settings

Patron Registration ☐ Yes ☒ No ☐
 Registration Start Date : : : :
 Registration End Date : : : :
 Registration Type ☒ Individuals ☐ Groups ☐ Both ☐
 Login Type ☒ Library Card ☐ User Name ☐ [See Duplicates](#) cannot be selected for this setting because duplicates have been found.
 Authentication Type ☒ Not Used ☐ Optional ☐ Required ☐
 Eligibility Requirement ☐ Age ☐ Grade ☐ Classification ☒ None ☐
 Family Registration ☐ 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 Settings

Patron Logging ☐ Yes ☒ No ☐
 Allow Log Date Entry ☐ Yes ☒ No ☐
 Log Start Date : : : :
 Log End Date : : : :

Reviews Settings

Patron Reviews ☐ Off ☒ Log Page Entry ☐ Home Page Entry ☐

Home Page Settings

Log Out Destination URL
 Allow Patrons to Print Certificates ☐ Yes ☒ No ☐
 # of Reviews on Home Page 2
 Reviews Displayed By ☒ Random ☐ Most Recent ☐
 RSS Options ☐ Program Messages ☐ Program Stats ☐ Reviews ☐ [Help](#)
 XML Events Feed

Primary Log Type Settings

Primary Logging Type [Edit](#)
 Patron Logging Restriction ☐ Yes ☒ No ☐
 Program Goal 0
 Patron Goal ☐ Yes ☒ No ☐

Primary Prize Settings

Prizes ☐ Yes ☒ No ☐

Secondary Log Type Settings

Secondary Logging Type [Edit](#)
 Patron Logging Restriction ☐ Yes ☒ No ☐
 Program Goal 0
 Patron Goal ☐ Yes ☒ No ☐

Secondary Prize Settings

Prizes ☐ Yes ☒ No ☐

Other Prize Settings

Registration Prize ☐ Yes ☒ No ☐

[Save](#)

Figure 2.7.1.2 A Adding a Program (Step 1 of 4).

The fields for Step 1 of *Adding a Program* are as follows:

Note: Some fields are hidden or displayed based on configuration. This figure displays the default setup page.

- **Active** - This field whether a program active or inactive. Inactive programs are archived so they are accessible by Administrative staff only. Setting this field to *No* also disables *patron access to the program* regardless of other configured settings. Setting this field to *Yes* makes the program accessible to patrons during the defined registration and logging periods.
- **Program Contact Name** - The program's contact name associated with the program's contact email address.
- **Program Contact Email Address** - The program's contact email address is used in lieu of the From Address in the Email Setup and the contact email address in System Settings when set.
- **Program Name** - Enter the unique program name here.
- **Abbreviation** - Enter the shortened name of the *Program Name*. The abbreviation is used to reference the program when entered; otherwise, the *Program Name* is used. The abbreviated name helps control screen sizing problems experienced with longer program names. Example: "Kids Summer Reading Book Bugs" might be shortened to "Book Bugs" or "Kids Summer Reading".
- **Description** - Enter the *Description* of the program. This is free-form text field. HTML links may also be inserted here.
- **Eligibility Requirement Text** - This is a text field that gives libraries a place to enter instructions related to a program's eligibility requirements.
- **Instructional Text** - This is an open text box that configures the description or instructions displayed at the top of the *Patron Log Entry* page. For example, 'Please list ONE BOOK AT A TIME. Format like this: Author Last Name; Book Title.'
- **Patron Registration** - Patron Registration determines whether patron's can register themselves online for the program or must contact the library to register.
- **Registration Start Date and End Date** - Enter the first and last date registration is allowed. This can be selected by choosing a date from the drop lists or by clicking on the calendar icon and selecting a date. These dates are not required entries if *Patron Registration* is disabled.
- **Registration Start Time and End Time (Optional)** - If *Patron Registration* is enabled, enter the time of day patron registration begins and ends.
- **Registration Type** - The 'Individual' option allows only individuals to register for the program. The 'Group' option allows only groups to register for the program. The 'Both' option allows both individuals and groups to register for the program.
- **Login Type** - This option determines whether a *User Name* or *Library Card Number* is required for registration and subsequently used by the patron to log in to their home page..
- **Eligibility Requirement** - These fields vary depending on the Eligibility Requirement option selected.

- **Family Registration** – This function allows family registration for the program - one user registers and manages multiple family members' accounts.
- **Maximum Family Members** - Appears when family registration option is turned on and is the maximum number of family members that can be added by the “parent” family member.
- **Quick Registration** - The 'Yes' option allows registration for the program with minimal amount of information (first and last name). If the patron registers using this option they cannot log into the program and log their progress until their login information is filled out by staff. The 'No' option does not allow patrons to register using the 'Quick Registration' option
- **Staff Registration Option** - The 'Standard' option requires staff to enter all required registration fields. The 'Override' option does not require staff to enter all required registration fields (only first and last name is required with this option).
- **Auto User Name/Password Generation** - This setting is only applicable when the 'Login Type' is set to 'User Name'. Set to 'Yes' to enable automatic user name and password generation for STAFF registrations. This does not apply to patron registrations. Set to 'No' to allow staff to specify the user name and password for registration. Using auto-generation, the user name is the first name combined with the last name and the password is the auto-generated user name and a random 3-digit number.
- **Parental Consent** - When set to *Yes* this option creates a checkbox on the *Patron Registration* page along with a configurable message. Click on the accompanying *Edit* button to configure the *Parental Consent* message.
- **Facebook Integration** – Set to 'Yes' to display a Yes/No question on the registration page that allows Facebook users to opt to post content to their Facebook page. Set to 'No' to disable this feature. For detailed description of Facebook features see Appendix A.
- **Patron Logging** – Click *Yes* to allow patrons to log their progress. Click *No* to not allow patrons to the log their progress.

Note: The logging type cannot be changed once a program has been created and a log entry made.

- **Log Start Date and Log End Date** – This refers to the time period during which patrons may log their progress. Enter the first and last date logging is allowed. Enter a date and time by making a selection from the drop down list or by clicking on the calendar icon and selecting a date. These dates are not required entries if *Patron Logging* is disabled.
- **Log Start Time and Log End Time (Optional)** - If *Patron Logging* is enabled, enter the time of day that logging starts and ends.
- **Show Program on Home Page** - This field only appears when the *Patron Registration*, *Patron Logging* and *Patron Reviews* options are disabled. *Show Program on Home Page* determines whether the program appears on the patron home page. When displayed, the patron can view the program and reviews, but cannot register or log progress.
 - *Yes* – program appears on the Patron Home Page.
 - *No* – program does not appear on the Patron Home Page and is available from the Staff side only.
- **Patron Reviews:** Patron Reviews determines whether patrons are allowed to submit reviews into the program.

- Click *Off*, to disable patron reviews
- Click *Log Page Entry* to add a review section to the progress log on the Patron's Program Home Page.
- Click *Home Page Entry* to create a button that allows review submissions on the Patron's Program Home Page.
- **Separate Entry for Reviews** - Select 'Yes' to make reviews a separate entry on the log entry page or select 'No' to mix both logging and review fields together on the log entry page.
- **Patron's Access to Their Reviews** – Select 'None' to not allow patrons access to their own reviews. Select 'View' to allow patrons to view their own reviews. Select 'Edit' to allow patrons to edit their own reviews and resubmit for approval.
- **Reading List** - Select 'Yes' to allow patrons (that are logged in) 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. Select 'No' to not allow patrons to create and print a reading list
- **Mediated Reviews** - Select 'Yes' to mediate reviews or select 'No' to allow unmediated reviews.
- **Anonymous Reviews** - Select 'Yes' to allow anonymous (user does not need to be logged in) reviews or select 'No' to not allow anonymous reviews. Anonymous reviews are mediated and cannot be unmediated regardless of the 'Mediated Reviews' setting.
- **Rate Reviews** - Select 'Yes' to allow users to rate reviews or select 'No' to not allow users to rate reviews.
- **Review Comments** - Select 'Yes' to allow comments on reviews or select 'No' to not allow comments on reviews.
- **Log Out Destination URL** - This setting if set navigates the patron to the specified URL when the patron clicks the 'Log Out' button on the home page. If left blank then the patron is directed back to the home page.
- **# of Reviews on Home Page** - Set this to the number of reviews to be displayed in the reviews area on the patron home page.
- **Reviews Displayed By** - Select 'Random' to display reviews randomly or select 'Most Recent' to display reviews by date submitted.
- **RSS Options** - The 'RSS Options' give patrons the option to put RSS feeds into their feed reader.
 - **Program Messages** displays up-to-date program-related messages.
 - **Program Stats** feed displays key information about the program and the patron's participation. The information to be displayed can be configured in the language configuration (the 'ProgramStatsText_RSSFeed' setting located in the 'Page Text' area).
 - **Reviews** feed is a feed of program reviews. This feed is configured with the url and passing various parameters which determine the reviews returned in the feed. Click on the 'Help' button to see a parameter list.
- **XML Events Feed (Only if using the Evanced–Event Calendar)** - Enter the URL to the events XML page (eventsxml.asp) located in the root path of the Events installation to display upcoming events on the patron home page. See Appendix E in the Events manual for specific instructions on structuring the URL to return the events required.
 - **Example URL:** <http://demo.evanced.info/lib/eventsxml.asp?dm=xml&nd=30>

- **Logging Fields** - Libraries may use up to 2 logging types to track patron progress toward program goals. Fields are labeled *Primary Logging Type* and *Secondary Logging Type*, respectively. The information below applies to both logging types.

- **[Primary or Secondary] Logging Type** - Select from the drop list the type of progress the program will track (i.e., number of books, chapters, weeks, etc.). Click on the corresponding *Edit* button to configure the list.

Note: This field cannot be modified once one or more patrons have log entries for the program. The *Edit* button will no longer appear.

- **Patron Logging Restriction –**

- Yes restricts patrons to the settings configured in:
 - *Quantity Increment* creates a drop down list whose minimum value is the value entered in this field and whose maximum value is determined by the *Maximum Quantity\Entry* field.
 - *Maximum Quantity\Entry* represents the largest quantity a patron may record in one log entry. The amount entered here will be the highest number in the *Quantity* drop down list on the patron's log for the program if the *Quantity Increment* is non-zero.
 - *Maximum Log Entries\Day* restricts the number of log entries a patron may enter each day.
 - *Maximum Quantity\Program* restricts the total quantity a patron may record for the entire program.

For example:

- Primary Logging Type = Books
- Quantity Increment = 2
- Maximum Quantity\Entry = 6
- Maximum Log Entries\Day = 1
- Maximum Quantity\Program = 10

Under this configuration, a patron can make 1 log entry per day. That log entry must contain 2, 4 or 6 books. The patron is restricted to logging no more than 10 books total for the program. Under this configuration, the *Quantity Increment* drop list includes the following values: 2, 4 and 6.

- No disables logging restrictions. Patron's are still able to make log entries, but are not restricted in how or how often they log their progress.
- **Program Goal –** When enabled, this field displays the program's goal. Enter a quantity that represents the program's goal. For example, if logging by books and the program's goal is 3 books, enter 3.

Note: '0' disables this feature.

- **Patron Goal –** This option determines whether a patron may set a personal goal.

- Yes allows patrons to set a personal goal within the range set in the *Min* and *Max* fields. The *Min* and *Max* fields are only displayed when *Patron Goal* is set to Yes.
 - *Min* reflects the lowest goal a patron may set. When set to 0, there is no restriction on the goal minimum.

- *Max* reflects the highest goal a patron may set. These numbers restrict the patron's goal entry to this range. When set to 0, there is no restriction on the goal maximum.

Note: If this option is set to 'Yes' then an entry is required during patron registration.

- No prevents patrons from setting a personal goal for the program.
- **Prizes** – This option determines whether prizes are awarded for reaching the program's goals.
 - Yes enables the prize fields below:
 - Prize Type: All examples in this section use *Books* as the logging type.
 - *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. Fields include:
 - ✓ *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 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 time frame 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* field(s) 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* field(s). If the *Prize Timeframe* is set to *Per Week* another option called *Week Starts On* appears. This setting controls when each week begins for the purposes of calculating prize eligibility.

Example:

- 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
- *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.
 - ✓ *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 and 5 books or more.
 - ✓ *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*.
 - ✓ *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.

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
- *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. When using *Daily Goals*:
 - ✓ *Intervals* = The number of times a patron must meet the set goal.
 - ✓ *Daily Goal Minimum* is used to restrict a 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.

For 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.
- *Manual* allows staff to control a patron's log progress manually using checkboxes that appear on the *Prize Management* page. The number of checkboxes that appear is determined by the *Levels* field. For example, if *Levels* = 3, then 3 check boxes appear in the Prize Management page that staff may use to mark patron progress.
- Buttons: Setting Prizes to Yes activates the following buttons:
 - *Prize Message* allows you to configure a message that appears on the patron home page notifying the patron that they have earned.
 - *Prize Quantity* allows library staff to configure prize quantities for each level only if one or more prize levels requires a prize quantity greater than 1. A good example for using *Prize Quantity* is when the library gives away raffle tickets for each prize level. If 5 tickets are given for each prize level then the prize quantity should be set to 5 for each prize level.
- **Multi-Logging Log Option** - The system displays this field only when the Secondary Logging Type is selected. It allows staff to set which logging options patrons may use.
 - *Patron Logs 1 Logging Type* allows patrons to select a logging type during registration and restricts them to the selected logging type for the duration of the program.
 - *Patron Logs Either Logging Type* keeps both logging types available during the program and allows patrons to choose between logging options when they enter their progress.
- **Multi-Logging Prize Options** – The system displays multi-logging prize options only when the Secondary Logging Type is configured and is enabled when *Prizes* is set to *Yes*. It is visible but disabled when *Patron Logs 1 Logging Type* is selected. Multi-Logging Prize Option allows staff to determine how prize eligibility is determined.
 - *Either Prize Setup Determines Eligibility* allows patrons to become eligible for a prize when they meet either the Primary or Secondary prize eligibility criteria. This is the default setting, which remains active any time *Patron Logs 1 Logging Type* is selected. When this option is selected, the *Combined Prize Levels* field becomes available. Set this to a value between the minimum and maximum prize levels of the two prize settings to limit prize eligibility to the number entered.
 - *Both Prize Setups Determine Prize Eligibility* requires patrons to satisfy both the Primary and Secondary prize criteria to be eligible for a prize.
- **Other Prize Settings Options** – The system displays other prize settings options based on selected prize settings.
 - *Registration Prize* allows patrons to become eligible for a prize when they register for a program. When this option is selected, the *Number of Prizes* field becomes available. Set this to the number of prizes to award after registration.

- *Primary Program Goal Prize* allows patrons to become eligible for a prize when they complete a certain percentage of the program goal (based on Primary Logging Type). When this option is selected, the Goal% and # of Prizes fields become available. Set Goal% to the percentage needed in order to be eligible for this prize. Set # of Prizes to the number of prizes to award after reaching this completion percentage of the program goal.
- *Primary Patron Goal Prize* allows patrons to become eligible for a prize when they complete a certain percentage of their patron goal (based on Primary Logging Type). When this option is selected, the Goal% and # of Prizes fields become available. Set Goal% to the percentage needed in order to be eligible for this prize. Set # of Prizes to the number of prizes to award after reaching this completion percentage of the patron goal.
- *Secondary Program Goal Prize* allows patrons to become eligible for a prize when they complete a certain percentage of the program goal (based on Secondary Logging Type). When this option is selected, the Goal% and # of Prizes fields become available. Set Goal% to the percentage needed in order to be eligible for this prize. Set # of Prizes to the number of prizes to award after reaching this completion percentage of the program goal.
- *Secondary Patron Goal Prize* allows patrons to become eligible for a prize when they complete a certain percentage of their patron goal (based on Secondary Logging Type). When this option is selected, the Goal% and # of Prizes fields become available. Set Goal% to the percentage needed in order to be eligible for this prize. Set # of Prizes to the number of prizes to award after reaching this completion percentage of the patron goal.

2.7.1.3 Language\Text Setup

Once Step 1 is complete, a second page appears entitled *Language\Text Setup*. This is *Step 2* in adding a program. This configuration determines what language(s) the selected Summer Reader can be displayed in. Click on the *Default* radio selection to make a specific language the default language for the program. A language can only be removed if it is not the default.

Step 2 of 4

Step 2 of 4 - Program Language\Text Setup

Manage Programs	System Maintenance	Reports	About	Logoff: Administrator Level
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Assigned Languages

Language	Default	Remove
English	<input checked="" type="radio"/>	<input type="checkbox"/>
Español	<input type="radio"/>	<input type="checkbox"/>
Français	<input type="radio"/>	<input type="checkbox"/>
Adult Page Turners	<input type="radio"/>	<input type="checkbox"/>

[Remove](#)

Unassigned Languages

Language	Add
Anime Club	<input type="checkbox"/>
Creature Feature	<input type="checkbox"/>
Kids Read 2007	<input type="checkbox"/>
Paws, Claws, Scales	<input type="checkbox"/>
SRP 2007	<input type="checkbox"/>


[Add](#)

[Continue](#)

Figure 2.7.1.3 A Adding A Program (Step 2 of 4)

2.7.1.4 Registration Setup

Once Step 2 is complete, a third page appears entitled *Registration Setup*. This is *Step 3* in adding a program. This configuration determines how the information is displayed on the *Patron Registration* page. The *Patron Registration* page is used by both staff and patrons to register patrons for programs.



Step 3 of 4 - Program Registration Setup

Manage Programs System Maintenance Reports About Logoff: Administrator Level
Back

Save

Order	Field	Enabled	Required	List	Search	Change Order
<div style="display: flex; justify-content: space-around;"> Individual Group </div>						
1	First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
2	Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
3	User Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
4	Password	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
5	Middle Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
6	Parent/Guardian First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
7	Parent/Guardian Middle Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
8	Parent/Guardian Last Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
9	Gender	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
10	Birth Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
11	Age	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
Age Min <input type="text"/> yr <input type="text"/> mo Age Max <input type="text"/> yr <input type="text"/> mo Disable Age Month <input type="checkbox"/> Allow Selection of Any Age <input type="checkbox"/>						
12	Grade	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
Grade Min <input type="text"/> Grade Max <input type="text"/> Allow Selection of Any Grade <input type="checkbox"/>						
13	Patron Classification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
<input type="text"/> Edit Allow Selection of Any Classification <input type="checkbox"/>						
14	Street Address 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
15	Street Address 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
16	City	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	↑ ↓
17	State	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	↑ ↓
18	Country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
19	Zip Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
20	Phone Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
21	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
22	School District	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	↑ ↓
23	School Name Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
Subgroup Enabled <input type="checkbox"/>						
24	Teacher Edit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
25	Primary Library	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
26	Library Card	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
27	Custom Registration Entry 1 Edit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
28	Custom Registration Entry 2 Edit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	↑ ↓
29	Custom Registration Entry 3 Edit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
30	Custom Registration Entry 4 Edit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
31	Custom Registration Entry 5 Edit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
32	Custom Registration Entry 6 Edit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑ ↓
33	Facebook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	↑

Save

Figure 2.7.1.4 A Adding A Program (Step 3 of 4)

- **Change Display Order** - Click the *Up* or *Down* arrow in the *Change Order* column to reorder the registration fields.
- **Registration Fields** represent the information the patron will be asked to provide on the program's registration form. Fields include:
 - Participant First Name
 - Participant Last Name
 - User Name
 - Password
 - Participant Middle Name
 - Parent/Guardian First Name
 - Parent/Guardian Middle Name
 - Parent/Guardian Last Name
 - Gender
 - Birth Date
 - Age: Subfields include *Age Min*, *Age Max*, *Disable Age Month* and *Allow Selection of Any Age* checkbox.
 - Grade: Subfields include *Grade Min*, *Grade Max*, and *Allow Selection Any Grade* checkbox.
 - Patron Classification
 - Street Address 1
 - Street Address 2
 - City
 - State
 - Country
 - Zip Code
 - Phone Number
 - E-mail
 - School District
 - School Name
 - Teacher
 - Primarily Library of Use
 - Library Card Number
 - Custom Registration Entry Fields Nos. 1 – 6.

Note: See Appendix C.1 for more information on configuring custom registration entries

- **Enabled** determines whether the corresponding field appears on the Patron Registration form. Check the box to enable the corresponding field. Deselect the field to hide the field.
- **Required** determines whether the patron must complete the associated field to register for the program. When *Required* is deselected, the field is optional.
- **List Enabled** determines how the corresponding field accepts information – either through a selection from a drop down list or a text field entry. When List Enabled is selected (i.e., checked), the patron makes a selected from a configured drop down list. When deselected, the patron enters information into an open text field. Drop down lists must be configured through *Program Setup - Drop Lists*. Drop lists may apply to the following fields: *Grade*, *Patron Classification*, *City*, *State*, *Country*, *Zip Code*, *School District*, *School Name*, and *Primary Library of Use*.

Note: Lists can be modified by staff with Administrator rights under System Maintenance – Program Setup - Drop Lists.

- **Search Enabled** determines whether the corresponding field is displayed on the *Advanced Search* page as searchable field. Select Search Enabled to enable the field as a search parameter. Deselect the field to remove the field from the *Advanced Search* page. By default fields are deselected.
- **Sub-Group Enabled** - If the *Sub-Group Enabled* box is checked, this means the corresponding *Registration Field* is grouped by items in the group list. Click on the *Modify Group List* button to add/edit the group list.

Note: This option is only available if 'List Enabled' is checked and currently is only available for the 'School Name' field. Select the 'Use Default Group List' option to use the group list created in 'Drop Lists'. Select the 'Use Program-Specific Group List' option to create a group list specific to the program.


Some fields are not configurable (i.e., *Participant Last Name*) because the system requires them in their default state. Some settings may be disabled based on the configuration of the system.

Once the registration details are configured, click the *Save* button to exit *Program Registration* and move onto *Logging Setup*.

2.7.1.5 Logging Setup

Once *Step 3* is complete, the fourth and final screen appears entitled *Logging Setup*. This is *Step 4* in adding a program. These options are specifically related to how log information is collected for the program.

Step 4 of 4



Step 4 of 4 - Program Logging Setup

Manage Programs
System Maintenance
Reports
About
Logoff: Administrator Level
Back

Order	Field	Log Entry			Review Entry				List	Text	Change Order
		Enabled	Required	Log Summary	Enabled	Required	Public	Search			
1	Quantity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
2	Comments/Review	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
3	Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
4	Author	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
5	Genre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
6	ISBN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
7	Rating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
8	Custom Log Entry 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
9	Custom Log Entry 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
10	Custom Log Entry 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
11	Custom Log Entry 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
12	Custom Log Entry 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
13	Custom Log Entry 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	Logged By			<input checked="" type="checkbox"/>							
	Log Date/Time			<input checked="" type="checkbox"/>							




Figure 2.7.1.5 A Adding a Program (Step 4 of 4)

- **Change Order** - Click on the *Up* or *Down* arrow located in the *Change Display Order* column to modify the order in which the fields are displayed.
- **Logging Field** – This column includes the various logging fields to be configured for each program. Options include the following:
 - Quantity
 - Review
 - Title
 - Author
 - Genre
 - ISBN
 - Rating
 - Custom Log Entries 1-6
 - Logged By
 - Log Date/Time

Note: See Appendix C.2 for more information on configuring custom log entries.

The following options are available for each of the aforementioned fields:

- **Enabled** - If the Enabled box is checked for a field, this means the corresponding Logging Field is enabled and visible on the Patron Logging page. Disable a field by leaving the Enabled box unchecked.
- **Required** - If the Required box is checked, this means the corresponding Logging Field is required. If the Required box is not checked, the field is optional.
- **List Enabled** - For the Title, Author, and Genre fields, there is an option to create drop lists for the patrons to choose from. These drop lists should consist of the most commonly entered titles, authors, and genres. Not only is this quick and easy for patrons, but it also provides consistency and prevents typos. For the Rating field, there is also an option to create a drop list. By default this option is unchecked. When enabled, the *Rating* field displays 5 radio buttons for rating a title on a scale of 1 to 5.

If the *List Enabled* box is checked, the corresponding *Logging Field* on the patron's logging page displays a drop down list. If the *List Enabled* box is not checked, the field uses a text entry field.

To create the *List Enabled* drop lists, click on the field's corresponding *Edit* button, type in a list item, and click *Save* button. Continue entering list items, being sure to Save after each entry. The list appears in a table at the bottom of the page. It is labeled '*MODIFY items in the list*'. To edit an entry once it has been saved, double click on the field or click on the corresponding *Edit* button, make changes, and click the *Save* button again. To delete an item, click the *Delete* check box corresponding to the field and then click the *Delete* button at the bottom of the page.

Note: Click the *Edit* button to quickly add to the list options. 'Text Enabled' may also be checked in conjunction with 'List Enabled' to allow participants to type in additional titles, authors, and genres.

- **Text Enabled** - This option enables a text field for patrons to enter Title, Author, and/or Genre information in their log. This option may be selected on its own or in conjunction with List Enabled as described above.

- **Show Field on Log Summary** - Selecting this option means that the field appears on the patron's reading log page in the log table.

Once finished with the *Logging Setup* page, click the *Save* button. This returns navigation to the *Program Setup*. From here, click the *Save* button again to finalize and go to the *Program Selection* page.

Program Setup can be edited at any time by going to *System Maintenance/Programs/Edit Programs*. See the next section for more details.

2.7.2 Edit Programs

An active program can be edited at any time by going to *System Maintenance → Programs → Edit Program*. Click on the appropriate program from the list. The *Program Setup* page for the selected program is displayed.

2.7.2.1 Editing Language\Text, Registration, and Logging Setup

From here, staff may edit the general program information or click on the *Language Setup\Text* button, *Registration Setup* button, or *Logging Setup* button (located at the top of the page) to modify the language, registration, or logging setup. The program's *ProgramID* is also displayed (this field is read-only and is used to reference programs when using the *ReaderXML* page or widgets). In addition, click the *Get Registration Link* button to copy a direct link to the program's registration page onto the library's home page. Be sure to click the *Save* button after all changes have been made.

2.7.2.2 Prize Messages

The Prize Message function allows you to create a prize notification message that appears on the patron home page when they have won a prize. Prize messages only appear when the program Prize setting is set to Yes. If using Advanced Security, the *Prize Notifications* checkbox must be checked for the patron role assigned to the program in order for prize messages to appear on the patron home page. If Advanced Security is not used, the *Patron Prize Notifications* setting in the System Settings must be enabled in order for prize messages to appear on the patron home page.

To create a Prize Message compose your message in the text field. The field supports the following tags:

- `^ContactLibrary^` displays a link that allows the patron to email the library
- `^PrizeString^` tag displays the number of prize(s) that the patron is eligible for and the associated program(s).
- `^CUSTOMSTART^` enclosed with the `^CUSTOMEND^` tag: Uses these tags instead of the `^PrizeString^` tag. Between `^CUSTOMSTART^` and `^CUSTOMEND^`, use the `^EligiblePrizes^` tag to display the number of prizes and/or the `^ProgramName^` tag to display the program name. For example:

Congratulations! You have won ^CUSTOMSTART^ ^EligiblePrizes^ tickets for the ^ProgramName^ program.^CUSTOMEND^ Please contact the ^ContactLibrary^ to claim your prize.

Additional tags are available for creating tiered messages based on the patron's prize eligibility level. This is only applicable if a program has two or more prize levels. Use the on-screen help to set up tiered prize messages.

When complete, click *Save*. The system will save the file and return to the System Maintenance page. It is important that you save your message before clicking the *Preview* button. If you do not save first, the preview window will be blank. However, your message will not be lost. Simply close the preview window to return to the Prize Maintenance page and then click *Save*.

To preview your message, go back into Prize Message and click the *Preview* button. The system opens a prize preview window. Enter the prize level number of the message you wish to see and click the *Preview* button. The system will display the associate prize message beneath the Prize Level field. Once complete, click the *Close* button to close the Preview window and return to the Prize Message Maintenance page. Click either *Save* or *Back* to return to the System Maintenance page.

2.7.2.3 Deleting Programs and Program Information

There is an option to delete a program and/or program-related information which is available only to a user logged in at the *Administrator* level. If there are no registrants in the program, simply click on the *Delete* button located at the top or bottom of the page to delete the program. If there are one or more registrants, all program-related information (registration records, logging records, random drawings, etc...) for the registrants must be deleted before deleting the program. A *Delete All Program Records* button appears at the bottom of the page when there are one or more registrants. Click on this button to delete all the registrants' program-related information. After doing so the *Delete* button is available for deleting the program. There is a system setting available called *Bulk Deletion of Patron Records*. When this setting is enabled (set to *Yes*) and there are one or more registrants, a button appears at the bottom of the page labeled *Delete All Program Records (Including Patrons)*. Click on this button to delete all of the registrants' program-related information as well as the patron registration records. Doing so, removes the patron completely from the database as long as they are not registered for other programs.

2.7.2.4 Exporting a Program

The *Export* button allows you to export your program/style sheet template to a file that can be imported into another library's Summer Reader system. This feature allows libraries in a consortium to share programs/style sheet templates.

To export a program, go to *System Maintenance → Edit Program* and select the desired program. Click *Export* to display the export window. Select either "Program", "Style Sheet Template" (this option is only available if the program has styles associated with it) or both. Click *Export*. The system displays the following message "You are about to export the program. Use the dialog box option to open or save the file." Click *Ok* to proceed or *Cancel* to abort the process. The system will open a window asking to open or save the file. The resulting file should be saved to a file in.txt format. If you choose to open the file without saving, the system opens the file in .txt format in Notepad. The file can then be e-mailed or otherwise shared. The file's recipient imports the code by copying and pasting the contents of the file into *System Maintenance → Programs → Import*. Click the *Import* button to import the program and or style sheet template. The recipient may then edit the program by going to *System Maintenance → Programs → Edit Program*. The program title will appear in the program list. If a program of the same title already exists in the recipient's program list, the system will add the second title without overwriting the existing program. To access the style sheet template, go to *System Maintenance → Style Sheets → System-Wide Style Sheets*. The template is assigned a unique name and begins with "ImportStyle" followed by a number. If there were no other style sheets imported then the system would name the first style sheet "ImportStyle1". Additional imported style sheets would be assigned with an incrementing number.

2.7.2.5 Copying a Program

The *Copy Program* button allows you to copy a program's setup configuration, but does not copy any existing registrations from the original program by default. To copy program registrants check the *Include Patrons* checkbox. To copy a program, go to *System Maintenance → Programs → Edit Program* and

select the desired program. Click the *Copy Program* button to display a naming field and the *Include Patrons* checkbox. Enter the name of the new program and click *Save Copy*. The system confirms the program has been copied and returns to the Programs list. Click on the program's title to edit.

2.7.2.6 Importing a Program and/or Style Sheet Template

The *Import Program* function allows libraries in a consortium to share programs/style sheet templates. In order to import a program/style sheet template, the library which has the original program/style sheet template must export the information to a .txt file and send it to the recipient library.

To import a program/style sheet template, open the .txt file. Select and copy the contents of the file. Then, go to *System Maintenance → Programs → Import* and paste the contents into the Import text window. When complete, click the *Import* button to save the program/style sheet template. Edit the program by going to *System Maintenance → Programs → Edit Program*. The program title will appear in the program list. Click the *Close* button at any time to cancel the import process. To access the style sheet template, go to *System Maintenance → Style Sheets → System-Wide Style Sheets*. The template is assigned a unique name and begins with "ImportStyle" followed by a number. If there were no other style sheets imported then the system would name the first style sheet "ImportStyle1". Additional imported style sheets would be assigned with an incrementing number.

2.7.2.7 Inactive Programs

2.7.2.7.1 Making a Program Inactive

When a program is no longer active (i.e. taking place), it can be made *inactive* (i.e., saved for future reference and use). To make a program inactive, go to *System Maintenance → Programs → Edit Program* and change the *Active* field to *No*. Click the *Save* button to save the change.

2.7.2.7.2 Viewing an Inactive Program

Note: This option only appears when there are inactive programs in the database. To view inactive programs at any time, go to *System Maintenance → Programs → Inactive Programs*. From this page, all inactive programs are listed. Click on the appropriate program to see *Program Setup* information.

2.7.2.7.3 Reactivating an Inactive Program

A program can be made active again by clicking *Yes* to the right of the *Active* setting on the *Program Setup* page. Click the *Save* button to save the changes.

2.8 Program Setup

To locate Program Setup, select *System Maintenance* → *Program Setup*. Program Setup consists of the configuring drop lists, logging types, registration defaults and the order in which programs are displayed.

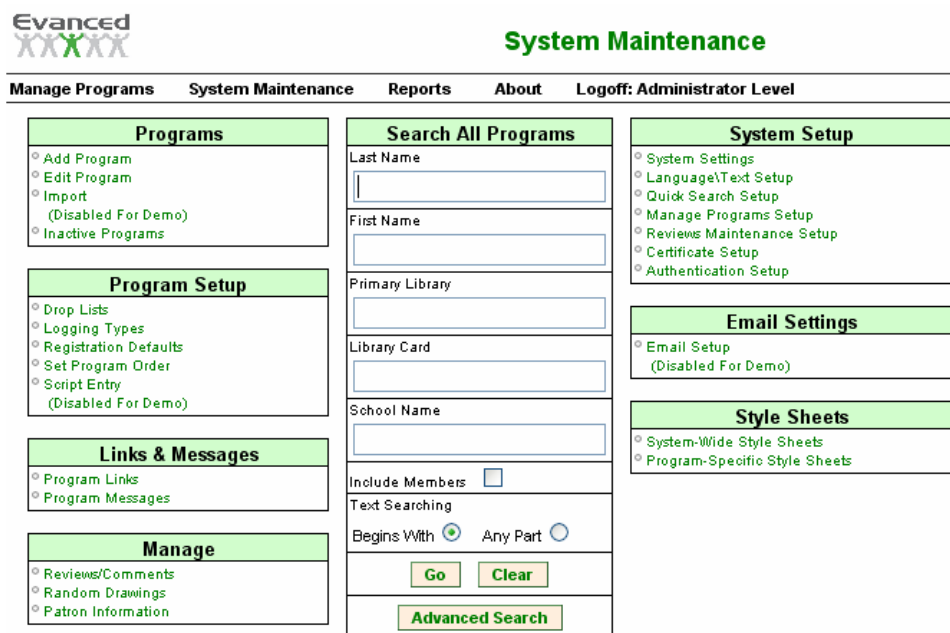


Figure 2.8 A System Maintenance for Administrator Users

2.8.1 Drop Lists

Drop Lists allows staff to create pre-configured lists that appear on the Patron Registration Page. The configured list becomes a drop list menu rather than a text box. Configuring these items ensures data integrity for the Reporting function of the system. See Section 2.8.3 – Registration Defaults for information about selecting a list item as the default response on the Patron Registration Page (i.e., the State field on the Registration Page displays your home state by default).

2.8.1.1 List Descriptions

The system allows you to configure the following lists:


- **City** refers to the patron's resident city.
- **Country** refers to the patron's home country.
- **Grade** refers to the patron's academic grade. The system default provides a list that begins runs Preschool through Adult. Staff can modify this list as desired, but must retain at least one item in the list. To disable this feature, delete all but one list entry and rename the remaining entry 'NA'.
- **Patron Classification** refers to the patron's classification as defined by the library (i.e., adult, teen, senior citizen, youth, etc.). There are no default entries in this list.

- **Primary Library** refers to the library that the patron frequents the most. There are no default entries in this list.
- **School District** refers to the patron's school district or township. There are no default entries in this list.
- **School Name** refers to the name of the school the patron attends. The system uses this list as the default list for all new programs. Staff can customize a school name list specific to a program when adding the program. This occurs in Step 3 of 4 – Registration Setup – of the Add New Program process. The new customized list is only available to the program for which is created.

Consolidating or Grouping Large School Lists

Large libraries with a significant number of schools can consolidate their school list into groups using the Modify Subgroup List option. To use the Modify Subgroup List option:

- Enter the names of all schools into the School Name (Grouping) List Maintenance page.
- Click the *Modify Subgroup List* button located at the bottom of the page. The system displays the School Name (Grouping) List Maintenance page.
- Enter the school subgroup/category names using the "ADD a new group to the list". Subgroup Name refers to the groups into which the schools will be categorized. Each category listed in the Subgroup List is associated with *Edit Item* and *Edit List* icons.
 - Edit Item* loads the 'School Name' (Grouping) List Maintenance page, which allows you to revise the name of the selected subgroup.
 - Edit List* loads the '[Subgroup Name]' Subgroup List Maintenance page, which allows you to add and remove schools from the selected subgroup list.
- Click *Edit List* to load the '[Subgroup Name]' Subgroup List Maintenance page. You may close the '[Subgroup Name]' Subgroup List Maintenance page at any time by clicking the *Close* button at the bottom of the page.



'Baird Middle School' Subgroup List Maintenance

'Baird Middle School' List Items

List Item	Remove
Broadneck Senior High	<input type="checkbox"/>
Jacobsville Elementary	<input type="checkbox"/>
Turner	<input type="checkbox"/>

Remove

Unassigned Items

List Item	Add
Annapolis Elementary	<input type="checkbox"/>
Avon Senior High School	<input type="checkbox"/>
Chesapeake Senior High	<input type="checkbox"/>
Homeschool	<input type="checkbox"/>
Out-of-County School	<input type="checkbox"/>
Park Elementary	<input type="checkbox"/>
Preschool	<input type="checkbox"/>
Tick Tock	<input type="checkbox"/>
Wegner	<input type="checkbox"/>

Add

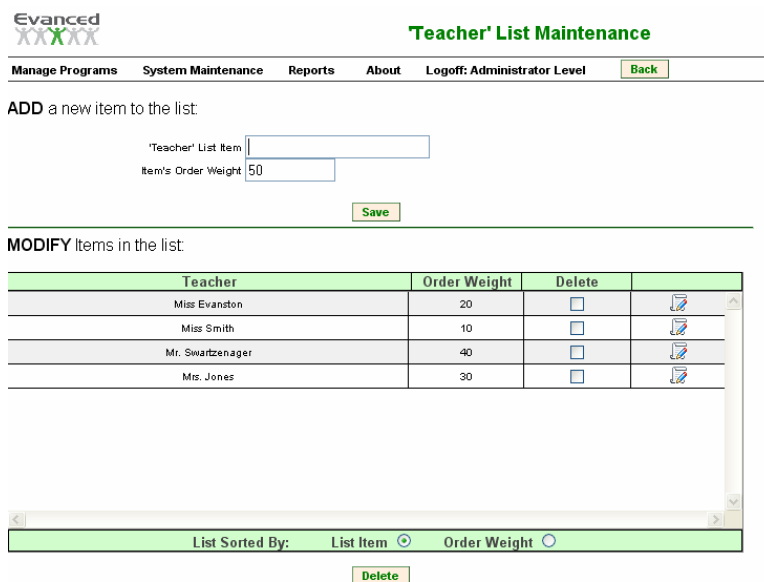
Close

Figure 2.8.1.1 A School Subgroup List Maintenance

- A. **Add** a School to a Group List: Schools that have not been assigned to the subgroup are listed in the Unassigned Items list on the right side of the page. Select schools by clicking on their associated checkboxes and click *Add*. The system moves the selected school names from the Unassigned Items list to the [Group Name] List Items.
 - B. **Remove** a School from a Group List: Select schools for removal from the '[Group Name]' List Items list by clicking on the associated checkbox, then click the *Remove* button. The system will ask you to confirm that you want the selected items removed from the list. Click *Ok* and the system moves the selected schools back to the Unassigned Items list.
- **State** refers to the state in which the patron resides. A default list is provided by the system (all 50 states and the District of Columbia along with the Canadian provinces).
 - **Teacher** allows staff to create a list of teachers (i.e., those employed by the school district).
 - **Zip** refers to the patron's zip code.

2.8.1.1.1 Modifying a List

Click on the desired list name to access the list's Maintenance page, pictured below.



Teacher' List Maintenance

Manage Programs System Maintenance Reports About Logoff: Administrator Level [Back](#)





ADD a new item to the list:

'Teacher' List Item:

Item's Order Weight:

[Save](#)

MODIFY Items in the list:

Teacher	Order Weight	Delete	
Miss Evanston	20	<input type="checkbox"/>	
Miss Smith	10	<input type="checkbox"/>	
Mr. Swartzenager	40	<input type="checkbox"/>	
Mrs. Jones	30	<input type="checkbox"/>	

List Sorted By: ☒ List Item ☐ Order Weight

[Delete](#)

Figure 2.8.1.1.1 B Teacher List Maintenance

View or modify a list item by clicking on the associated *Edit* button or double-clicking on the list item name.

Delete an existing entry by clicking the associated *Delete* checkbox and clicking the *Delete* button at the bottom of the page.

2.8.1.1.2 Sorting Lists

Drop lists can be sorted alphabetically by item name or by assigned weight. To sort list items, locate the List Sorted By: field at the bottom of the list and click on the desired radio button:

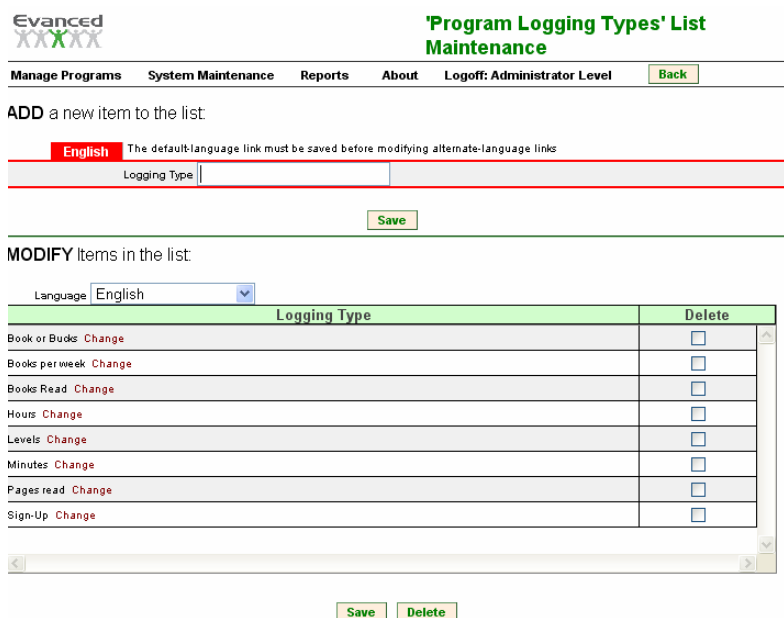
- *List Item* to sort by the list alphabetically
- *Order Weight* to sort the list by assigned value.

Order weights occur in increments of 10. By default, the system assigns a new item a value that is equal to the highest order weight value in the item list plus 10. In the example above, the highest value in the existing list is 50 (Mrs. O'Connor). The system will automatically assign the next list item a value of $50 + 10 = 60$.

Staff may overwrite the suggested Item Order Weight with an alternate value to place the new item in the desired location within the list. To place the new item in the list, assign it a value that is 5 points more or less than the existing item. For example, to enter a teacher name between Miss Evanston and Mr. Dunleavey in the example above, assign the new item a value of 25. When saved, the system places the new name between Miss Evanston and Mr. Dunleavey and reassigns order weight values so that the list appears in the desired order and all order weights appear in increments of 10.

2.8.2 Logging Types

This option is used to add, modify, and delete the *Logging Types* list. The logging types list is displayed in a program's setup and the subsequent selection is used as the metric for a patron's log. Examples may include *Books*, *Chapters*, *Hours*, *Levels*, *Minutes*, *Pages*, etc.



Evanced **'Program Logging Types' List Maintenance**

Manage Programs System Maintenance Reports About Logoff: Administrator Level [Back](#)

ADD a new item to the list:

English The default language link must be saved before modifying alternate language links

Logging Type

[Save](#)

MODIFY Items in the list:

Language: English

Logging Type	Delete
Book or Buds Change	<input type="checkbox"/>
Books per week Change	<input type="checkbox"/>
Books Read Change	<input type="checkbox"/>
Hours Change	<input type="checkbox"/>
Levels Change	<input type="checkbox"/>
Minutes Change	<input type="checkbox"/>
Pages read Change	<input type="checkbox"/>
Sign-Up Change	<input type="checkbox"/>

[Save](#) [Delete](#)

Figure 2.8.2 A Logging Types List Maintenance

Access logging types by selecting System Maintenance → Program Setup → Logging Type:

1. Adding a Logging Type: To add a *Logging Type*, simply type in the name of the logging type and click the *Save* button to add it to the list.
2. Deleting a Logging Type: To delete a type from the list, click the *Delete* checkbox corresponding to the type, and then click the *Delete* button.
3. Modify a Logging Type: To modify, double click on the *Logging Type* or click on the accompanying *Change* button.

2.8.3 Registration Defaults

From here, the default settings for *Patron Registration* can be set. In other words, whatever information is selected here appears as the default 'pre-fill' when registering patrons. Categories include *City*, *State*, *Country*, *Zip Code*, *Area Code*, *School District*, *School Name*, *Primary Library*, and *Library Card # Prefix*.

Registration Defaults allows libraries to set default field names on the Patron Registration Page.

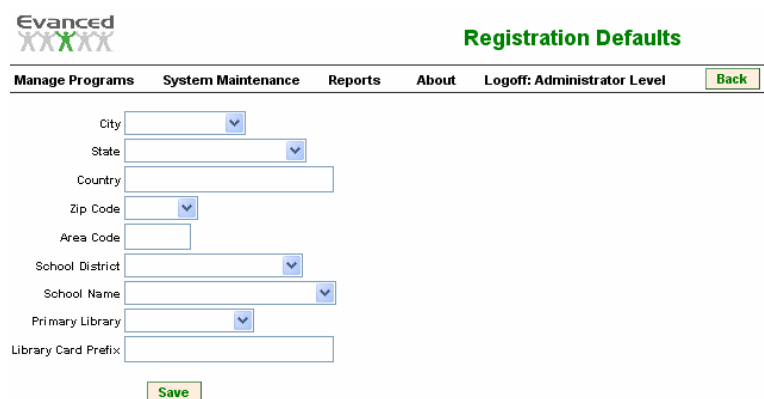


Figure 2.8.3 A Registration Defaults

To work with Registration Defaults:

1. Select *System Maintenance* → *Program Setup* → *Registration Defaults*. The system displays the page illustrated above.
2. Type the desired default value in the text box of the appropriate field.
3. Click *Save*.

2.8.4 Set Program Order

The Set Program Order function allows you to determine the order in which your program tabs are displayed.

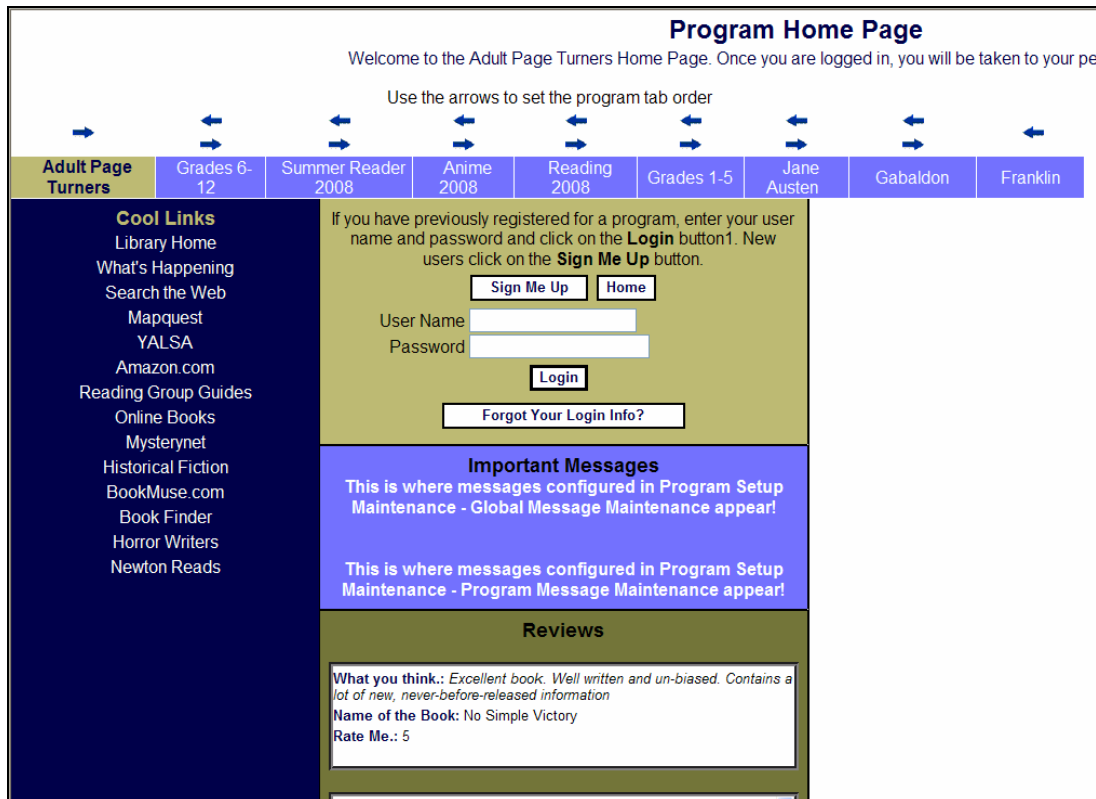


Figure 2.8.4 A Program Home Page Order

To adjust the order of programs:

1. Select *System Maintenance* → *Program Setup* → *Set Program Order*. The system displays the Program Home Page illustrated above.
2. Click on the arrows above the desired program to move the program in the direction indicated by the arrow. Continue clicking the arrow until the program is in the desired location.
3. Close the Patron Home Page.

2.8.5 Script Entry


Use script entry to enter javascript code that affects the patron-side web pages. The best example for using script entry is to implement Google Analytics. For more information on Google Analytics go to <http://www.google.com/analytics/>. Another example is implementing online survey tools.

Enter code in the Global Script option to load the code for all programs. Enter code in the Program Script option to load the code for a specific program. Using the Google Analytics example, to track page usage statistics for the entire Summer Reading site (all patron pages) then the script should be entered in the Global Script option. To track page usage for each program separately, the code should be entered in the Program Script option for each program.

2.9 Links and Messages

2.9.1 Program Links

Program Links allows you to add, modify or delete Global Links and Program Links. *Global Links* are visible to all programs. *Program Links* are visible to only those programs to which they are assigned. The links created appear in the [Cool Links] section of the patron's home page for the specific program. The [Cool Links] section displays both Global Links and Program Specific Links.


Paws, Claws, Scales

Program Links

Manage Programs System Maintenance Reports About Logout: Administrator Level Back

ADD a new link to the list:

English The default language link must be saved before modifying alternate language links














Link Title
Link URL

Test URL [Include "http://" as part of the URL]

Open in Same Window Yes No
Order Weight 140

Save

MODIFY item in the list:

English	Español	Français	Link Title	Link URL	Same Window	Order Weight	Delete	
			Animal FBI Change	http://www.fffbi.com/ Change	N	10	<input type="checkbox"/>	
			Animal Planet Change	http://animal.discovery.com Change	N	20	<input type="checkbox"/>	
			Animal Puzzles Change	http://www.kidsturncentral.com/games/jigsaw/jigsawezani.htm Change	N	30	<input type="checkbox"/>	
			National Geographic Kids Change	http://www.nationalgeographic.com/kids/games/ Change	N	40	<input type="checkbox"/>	
			So You Wanna Iguana Change	http://www.iguana-news.com/wanna.html Change	N	50	<input type="checkbox"/>	
			PBS Kids Change	http://pbskids.org/ Change	N	60	<input type="checkbox"/>	
			The Black Stallion Change	http://theblackstallion.com/ Change	N	70	<input type="checkbox"/>	
			Horse Fun Change	http://horsefun.com Change	N	80	<input type="checkbox"/>	
			Bookpals Change	http://www.bookpals.net/content/staticpages/index.php?page=join Change	N	90	<input type="checkbox"/>	
			Fun Brain Change	http://www.funbrain.com/ Change	N	100	<input type="checkbox"/>	
			Bonus Games Change	http://www.bonus.com Change	N	110	<input type="checkbox"/>	
			Funology.com Change	http://www.funology.com/ Change	N	120	<input type="checkbox"/>	
			Read, Imagine, Explore. Change	http://kids.kokielibrary.info Change	N	130	<input type="checkbox"/>	

Save Delete

Figure 2.9.1 A: Program-Specific Links Maintenance

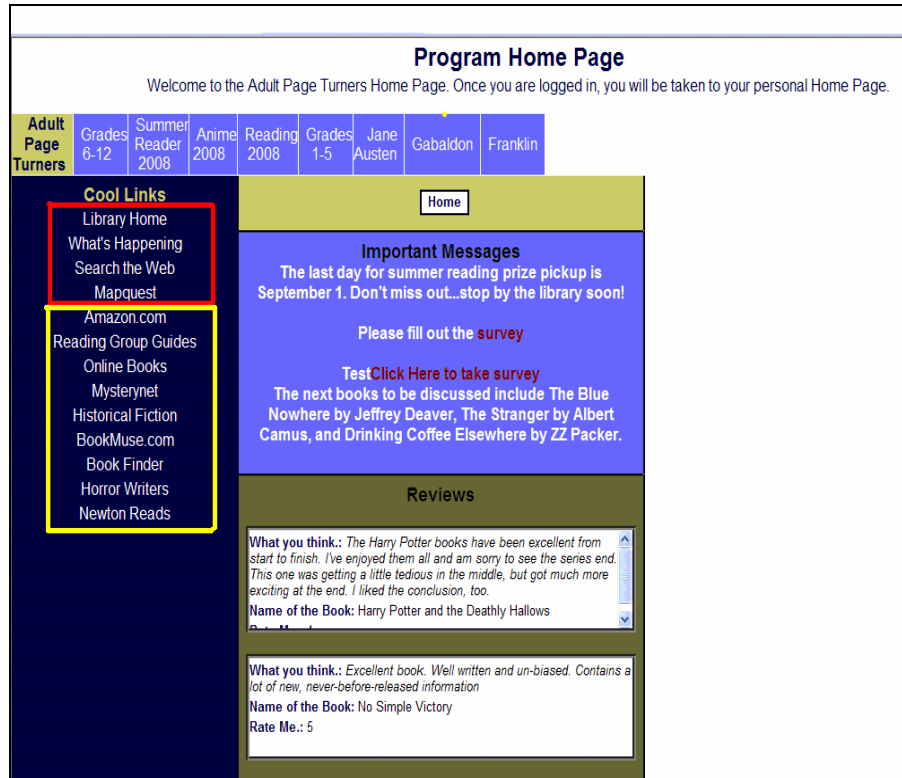


Figure 2.9.1 B Patron Home Page links

To work with Program Links Maintenance, select *System Maintenance* → *Links and Messages*.

1. **Add a New Link** - To *add* a new link type a short link title in the *Link Title* field, the *Link URL* (for example, <http://www.evancedsolutions.com>), and the *Order Weight*.


Note: The link title should be short to prevent it from wrapping to a second line on the patron's home page. Click *Save* to save the new link.

Sorting Lists:

When adding items to a list, the order weight is required for each item. By default lists are sorted by 'Order Weight' which enables lists to be sorted in any fashion.

If the list already contains multiple items (order weights 10, 20, 30, 40, etc.) and a 5th item needs to be added but listed third, enter an order weight of 25. This puts the new item third between items 20 and 30. When a new item is added to the list, the system automatically re-orders all items to appear in increments of 10.

There is also an option to sort the list alphabetically by selecting the 'List Item' option.

2. **Modify a Link** - To *modify* an existing link, click 'Change' next to the appropriate link or click on the corresponding *Edit* button  to the far right of the page. From here changes can be made to *Link Title*, *Link URL*, or *Order Weight*. Click the *Save* button to save the changes.
3. **Delete a Link** - To delete a link(s), click the *Delete* checkbox to the far right of the corresponding link(s) to be removed and click the *Delete* button located at the bottom of the page.

2.9.2 Program Messages

From here, program-specific message(s) can be added, modified, or deleted. These messages appear to participants in the Messages section on the patron home page only for the specific program.

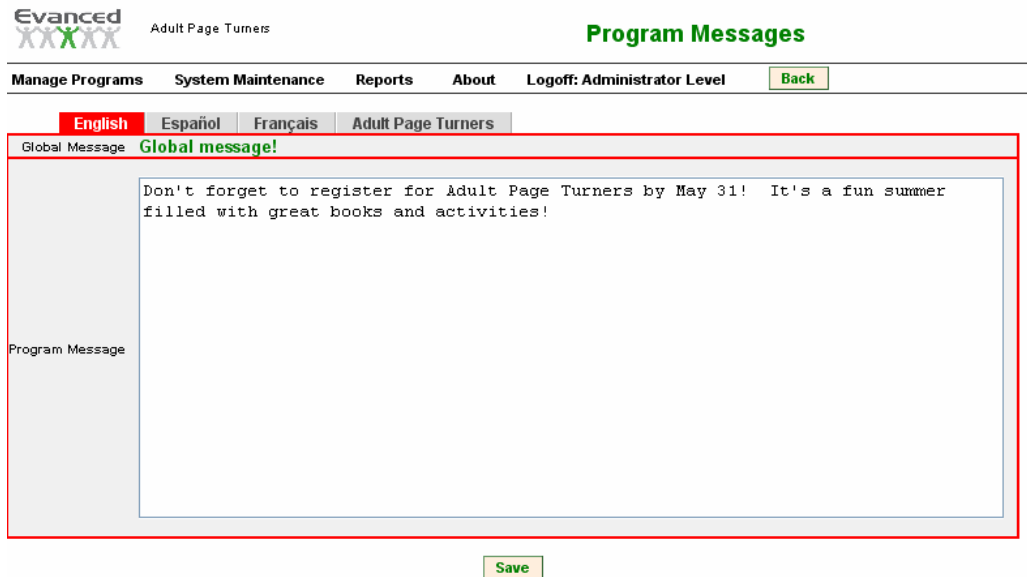


Figure 2.9.2 A Program Messages page

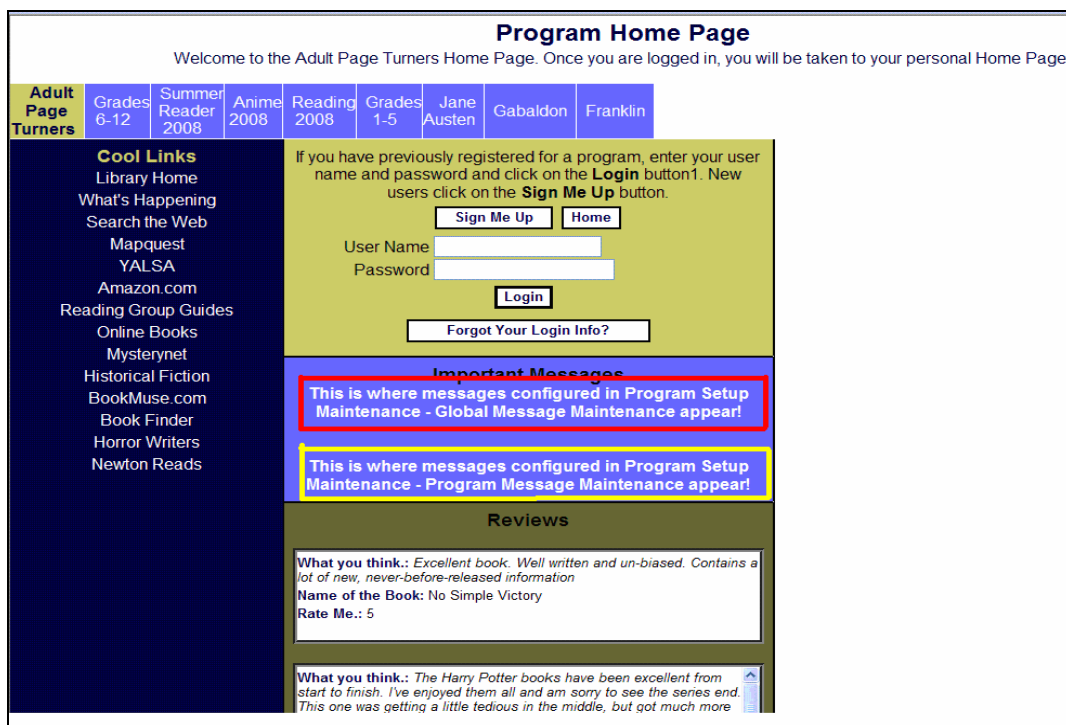


Figure 2.9.2 B Program Home Page Message Example

2.9.2.1 Global Messages

From here, global message(s) can be added, modified, or deleted. These messages appear to participants in the Messages section on the patron home page of all programs.

To work with Global Message Maintenance:

1. Click on *System Maintenance → Links & Messages → Program Messages → Global Messages*.
2. Type the global message(s) that in the Global Message text field. When entering multiple messages, use a hard return to leave a blank line in between messages.
3. Click the *Save* button to save changes.

2.9.2.2 Program Specific Messages

To work with Program Message Maintenance:

1. Click on *System Maintenance → Links & Messages → Program Messages → [Select a Program]* and select the appropriate program.
2. From this screen type in the program message(s) that are to appear to all program participants. When entering multiple messages, use the hard return to use a blank line separator between messages. Click *Save* to save the changes.

2.10 Manage Reviews

Staff with *Administrative* or *Staff* passwords can manage patron reviews in active programs by going to *System Maintenance* → *Manage* → *Reviews*.

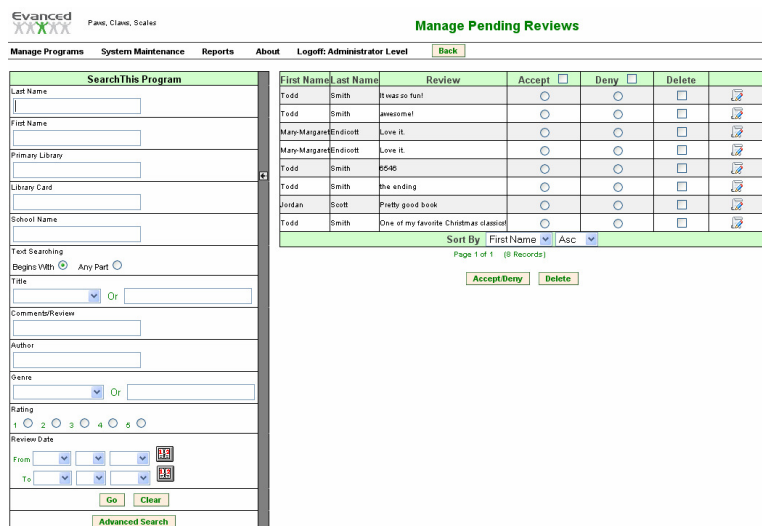
From there staff can view the total number of reviews pending, denied and accepted.



Program	Pending	Denied	Accepted
Adult Page Turners	0	0	3
Anime Club	1	0	1
Paws, Claws, Scales	9	1	30

Figure 2.10 A Manage Reviews Page

From the *Manage Reviews* page, staff can accept, modify, and deny reviews. The page also displays the total number of reviews in each category (i.e., # of Pending, # of Denied, etc.) Clicking the in either the pending, denied or accepted column of a program will open the appropriate reviews screen for that program.



First Name	Last Name	Review	Accept	Deny	Delete
Todd	Smith	Keweenaw fun!	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Todd	Smith	awesome!	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Mary-Margaret	Endicott	Love it.	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Mary-Margaret	Endicott	Love it.	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Todd	Smith	Paw	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Todd	Smith	the ending	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Jordan	Scott	Pretty good book	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Todd	Smith	One of my favorite Christmas stories	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

Figure 2.10 B Manage Reviews

2.10.1 Review Types

2.10.1.1 Private Reviews

A review is classified as Private when the option to *Save Private Reviews* in the System Settings is enabled and the patron has submitted a review as private. Private reviews can only be submitted when a program accepts reviews from the logging page. Reviews submitted from the home page are public always. To view all private reviews, click on the link in the Private column associated with the desired program.

2.10.1.2 Pending Reviews

A review is classified as Pending when it requires staff approval before it is accessible to the public. Pending reviews may be accepted, denied, edited or deleted.

To view and approve all pending reviews, click on the link in the Pending column associated with the desired program. The page displays '*No [XX] Reviews*' if there are not any private reviews for the selected program.

2.10.1.3 Denied Reviews

Denied reviews are those reviews staff feels should not be displayed or otherwise made accessible to the public. To view all denied reviews, click on the link in the Denied column associated with the desired program.

2.10.1.4 Accepted Reviews

A review is considered Accepted when approved by the staff for public access. To view all Accepted Reviews, click on the link in the Accepted column associated with the desired program. The page will display '*No [XX] Reviews*' if there are reviews for the associated program.

2.10.2 Review Management

When working within a review classification, the system provides the following options:

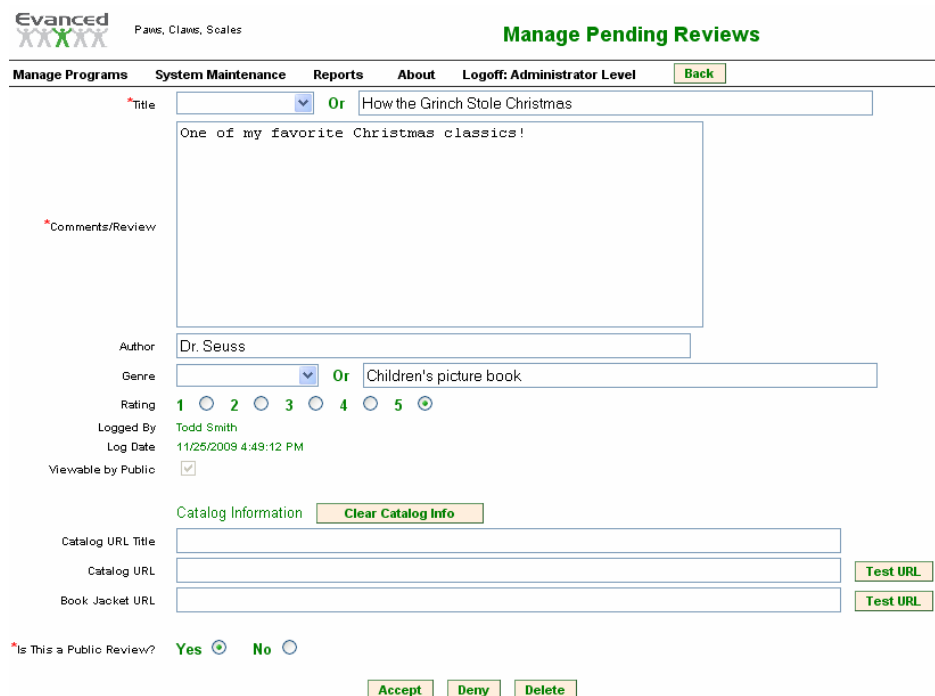
2.10.2.1 Delete Reviews

Mark reviews for deletion by clicking on the *Delete* checkbox. Click the *Delete* button at the bottom of the page to erase the marked reviews from the program.

2.10.2.2 Editing Reviews

To edit a review, click the *Edit* icon associated with the review or double click on the review. The system opens the selected review, which allows staff to:

- Modify the review.
- See who logged the review ("Logged By").
- Add links to *Catalog Information* by including *Catalog URL Title*, *Catalog URL*, and *Book Jacket URL*.
- See whether the patron has agreed to post their review for public access ("Viewable by Public").



Evanced Paws, Claws, Scales **Manage Pending Reviews**

Manage Programs System Maintenance Reports About Logoff: Administrator Level [Back](#)

*Title Or

*Comments/Review

Author

Genre

Rating ☒ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒

Logged By

Log Date

Viewable by Public ☒

Catalog Information [Clear Catalog Info](#)

Catalog URL Title

Catalog URL [Test URL](#)

Book Jacket URL [Test URL](#)

*Is This a Public Review? ☒ Yes ☐ No

[Accept](#) [Deny](#) [Delete](#)

Figure 2.10.1.6 A Edit Review

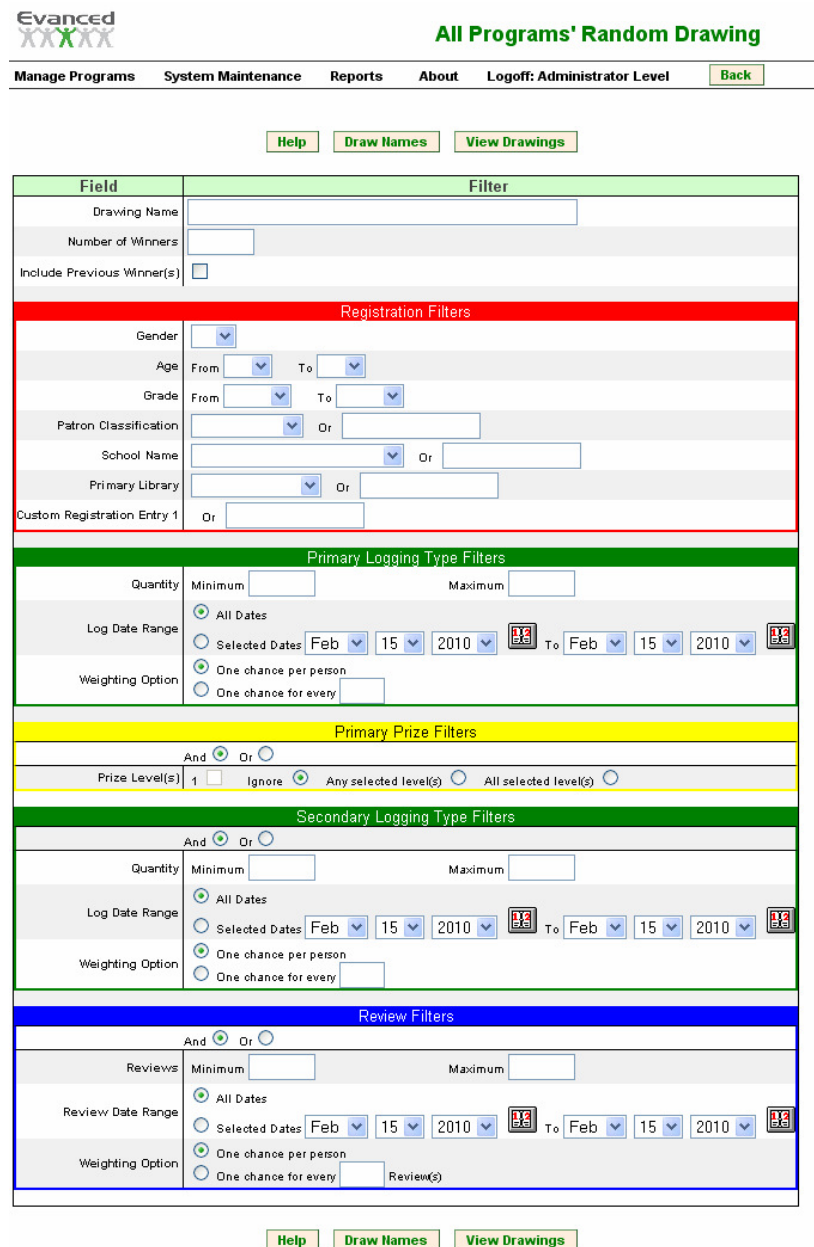
Do one of the following to close the record:

- Click *Accept* (at the bottom of the page) to save the review as accepted and make it accessible to the public. If editing a private review a *Save* button appears in lieu of the *Accept* button.
- Click *Deny* (at the bottom of the page) to save the review as denied and accessible only to staff. The *Deny* button is not applicable for Private reviews.
- Click *Delete* to permanently erase the review from the database.

2.10.3 Random Drawings

Random drawings can be run for a specific program or for all programs. To perform a random drawing for all programs, go to the *Manage Programs Home Page* and click on the *Random Drawing* button. Click on the *Help* button to get help on random drawings.

Once the *Random Drawing* button is clicked, the *Random Drawing* page appears.



Evanced
XXXXXX

All Programs' Random Drawing

Manage Programs System Maintenance Reports About Logoff: Administrator Level [Back](#)

[Help](#) [Draw Names](#) [View Drawings](#)

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

Registration Filters

Gender

Age From To

Grade From To

Patron Classification Or

School Name Or

Primary Library Or

Custom Registration Entry 1 Or

Primary Logging Type Filters

Quantity Minimum Maximum

Log Date Range ☒ All Dates ☐ Selected Dates Feb 15 2010 To Feb 15 2010

Weighting Option ☒ One chance per person ☐ One chance for every

Primary Prize Filters

And ☒ Or ☐

Prize Level(s) 1 ☐ Ignore ☒ Any selected level(s) ☐ All selected level(s) ☐

Secondary Logging Type Filters

And ☒ Or ☐

Quantity Minimum Maximum

Log Date Range ☒ All Dates ☐ Selected Dates Feb 15 2010 To Feb 15 2010

Weighting Option ☒ One chance per person ☐ One chance for every

Review Filters

And ☒ Or ☐

Reviews Minimum Maximum

Review Date Range ☒ All Dates ☐ Selected Dates Feb 15 2010 To Feb 15 2010

Weighting Option ☒ One chance per person ☐ One chance for every Review(s)

[Help](#) [Draw Names](#) [View Drawings](#)

Figure 2.10.3 A Random Drawings

Note: The filters that are available are dependent upon the programs' configuration; i.e., if the School District field is not enabled in the program's registration setup, there will not be a filter for that field. If the secondary log type or reviews are not configured there will be no filters for those items. The prize filtering only applies for programs that are set up for *Manual* prizes.

To perform a random drawing for a specific program, select the program first and then click on the *Random Drawing* button.

Enter the Drawing Name in the Drawing Name textbox.

Enter the number of prize winners in the *Number of Winners* text box.

Check the *Include Previous Winners* check box to allow previous winners to be included in the drawing pool. Leave this setting unchecked to not include previous winners.

Use the registration filters to limit the results based on the criteria entered/selected. The filter is applied with an "and" condition for each criteria. For example: if 3rd Graders is selected for both the "From" and the "To" for the grade range and "Male" is selected for the gender, the drawing pool consists of male 3rd graders.

Note: The fields available in the registration filters section are dependent upon the fields enabled in the registration setup for the program.

Use the primary logging type filters to filter based on the criteria entered/selected. The filter is applied with an "and" condition in this section along with any criteria entered/selected in the registration filters. For example: if 2 is entered for the minimum and the same filters were set in the example above, the drawing pool consists of male 3rd graders who have logged a quantity of 2 or more.

Use the primary prize filters to filter based on the prize levels the patron has reached. This is only applicable for programs that have their prize type set to "Manual". For example, a program is set for 5 prize levels. In this case there will be 5 check boxes available to click on.

Note: There are 3 options available for additional filtering on prize levels. The first option is to "Ignore" this criteria. In this case primary prize filters have no effect on the drawing pool. The second option is "Any selected level(s)". This option means that checked prize levels apply an "or" condition (meaning if the 1st and 2nd check box is selected, then patrons with either of these levels completed are included in the pool). The last option is "All selected level(s)". This option means that checked prize levels apply an "and" condition (meaning if the 1st and 2nd check box are selected, then only patrons with both prize levels completed are included in the pool).

The "And/Or" option is for applying additional logic from the registration and logging filters set above. Using the above examples for the filter settings the "And/Or" option is set to "And" and "Any selected level(s)" is selected, and boxes 1 and 2 are checked. The drawing pool consists of male 3rd graders that (have logged 2 or more books) and (have completed the 1st or 2nd prize level). If the "And/Or" option is set to "Or" then the drawing pool consists of male 3rd graders that (have logged 2 or more books) or (have completed the 1st or 2nd prize level).

Use the review filters to filter based on the accepted reviews that patrons have submitted. This is only visible for programs that have reviews enabled and there are 1 or more accepted reviews. This filter has an "And/Or" option available as well. Continuing with the same example, a 1 is entered for the minimum.

Recapping the settings in the example:

- Male is selected for gender
- 3rd grade is selected for both the "From" and "To" for grade range
- 2 is entered for the minimum quantity
- The prize level "And/Or" option is set to "And"
- "Any selected level(s)" is selected in the prize level section
- The reviews "And/Or" option is set to "And"
- 1 is entered for the minimum reviews

In this example the drawing pool consists of male 3rd graders that have (read a quantity of 2 or more) and (have completed the 1st or 2nd prize level) and (have submitted 1 or more accepted reviews)

Additional Notes:

- **Minimum and Maximum fields**– The Minimum and Maximum fields that appear depend on the filter selected and the program's setup. Enter quantities to limit the drawing pool of patrons. Multiple Minimum Amount and Maximum Amount fields may appear depending on the number of logging types the program uses. When multiple logging types do appear, the random drawing may be based on one or more of the logging types.
- **Log Date Range** – If *All Dates* is selected, no additional filtering takes place. If *Selected Dates* is selected then enter a date range to limit the drawing pool to patrons that have logged progress between the date range entered.
- **Weighting Option** - Select *One chance per person* to give every person in the drawing pool 1 equal chance or select *One chance for every ___ logged item(s)* to give chances for each person in the pool based upon their log quantities. For example: if a patron A logged 10 books and patron B logged 5 books and the *Weighting Option* is set to 5 then patron A would get 2 extra chances and patron B would get 1 extra chance. Anyone with less than 5 logged books would not receive any extra chances. If the program uses more than one logging type, the weighting option may be based on one or more of the logging types used.

Click the *Draw Names* button to execute the drawing. The system displays a list of winners with an option to email them assuming the patron supplied their email address during registration. The random drawing prizes can be awarded from here as well – for awarding individuals click on the *RD Eligibility* icon associated with the individual or to award prizes to all of the individuals in the drawing, click on the *Award All RD Eligibility* button. To clear a prize from an individual, use the *RD Received* icon associated with the individual or to clear all prizes from all of the individuals, click on the *Clear All RD Received* button.

Evanced
XXXXX Adult Page Turners

Program Random Drawing

Manage Programs System Maintenance Reports About Logout: Administrator Level [Back](#)

The following patron(s) have been randomly chosen as winner:

	Participant First Name	Participant Last Name	Participant Middle Name	Parent/Guardian Middle Name	Parent/Guardian Last Name	Gender	Birth Date	Patron Classification	Street Address 1	City	State	Zip Code	Phone Number	Email	Primary Library of Use	Library Card Number	character
1	Vanessa	Banana					1/1/1994	Senior									
2	Jane	Jones				F	1/1/1990	Adult	1234 Maple Lane	Indianapolis	Indiana	46123	(004) 123-1234	jones@gmail.com	ANN	212341234123	

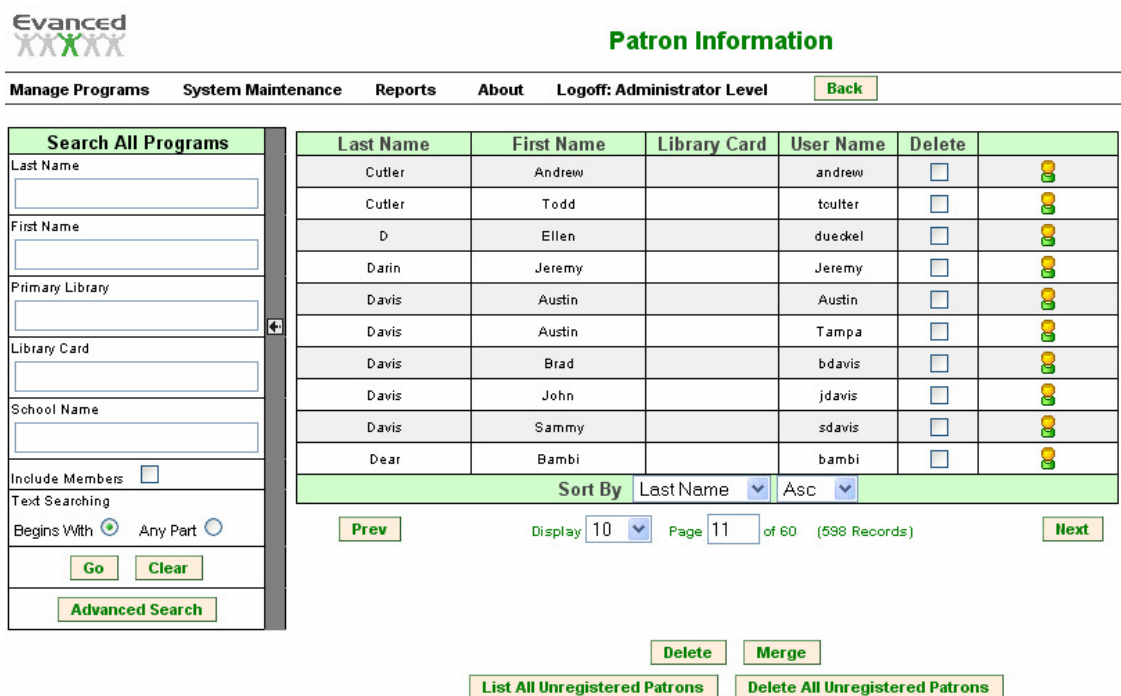
[Email](#)

Figure 2.10.3 B Random Drawings

To see a complete list of drawings to date, click on the *View Drawings* button. This button will only appear if there has been at least one drawing. A chronological listing appears. Click on the *View Details* button corresponding to the date of the drawing to see the results of the drawing. There is an option to send an email to one or more patrons from this screen as well. Drawings can be deleted from the *View Drawings* page by clicking on the check box(es) associated with the drawing(s) to be deleted and clicking on the *Delete* button. The random drawing prizes can be awarded from here as well – for awarding individuals click on the *RD Eligibility* icon associated with the individual or to award prizes to all of the individuals in the drawing, click on the *Award All RD Eligibility* button. To clear a prize from an individual, use the *RD Received* icon associated with the individual or to clear all prizes from all of the individuals, click on the *Clear All RD Received* button.

2.10.4 Patron Registration Information

Staff with *Administrator*, *Staff*, or *Basic* password levels may access *Patron Registration Information* for all registered patrons by going to *System Maintenance/Patron Registration Information*.



Patron Information

Manage Programs System Maintenance Reports About Logoff: Administrator Level [Back](#)

Search All Programs

Last Name

First Name

Primary Library

Library Card

School Name











Include Members ☐

Text Searching

Begins With ☒ Any Part ☐

[Go](#) [Clear](#)

[Advanced Search](#)

Last Name	First Name	Library Card	User Name	Delete	
Cutler	Andrew		andrew	<input type="checkbox"/>	
Cutler	Todd		tcutler	<input type="checkbox"/>	
D	Ellen		dueckel	<input type="checkbox"/>	
Darin	Jeremy		Jeremy	<input type="checkbox"/>	
Davis	Austin		Austin	<input type="checkbox"/>	
Davis	Austin		Tampa	<input type="checkbox"/>	
Davis	Brad		bdavis	<input type="checkbox"/>	
Davis	John		jdavis	<input type="checkbox"/>	
Davis	Sammy		sdavis	<input type="checkbox"/>	
Dear	Bambi		bambi	<input type="checkbox"/>	

Sort By Last Name Asc

[Prev](#) Display 10 Page 11 of 60 (598 Records) [Next](#)

[Delete](#) [Merge](#)

[List All Unregistered Patrons](#) [Delete All Unregistered Patrons](#)

Figure 2.10.4 A Patron Registration Information

From the *Patron Registration Information* page staff can do the following:

- **Search** for participants/patrons by last and first names (and guardian names)
- **View** participant/patron information
- **Send emails**
- **Delete** participants/patrons from the database individually
- **Delete ALL unregistered patrons**

Note: A button labeled 'Delete All Unregistered Patrons' appears after a search is performed and there are one or more unregistered patrons. This button is only available to a user logged in at the 'Administrator' level and the 'Allow Bulk Deletion of Patron Records' setting in 'System Settings' is set to 'Yes'.

- **Merge** allows you to combine two patron records into one record.
- **Edit** participant/patron information
- **Reset passwords** (access this option by clicking on the *Edit* button)

Display Options

Records can be displayed 10 – 100 records per page. Click on the appropriate number under the *Display* drop list at the bottom of the screen.



Search Tip: The Search fields may be searched by typing in one or more of the fields. Names can be searched by typing a complete name or by typing in one or two letters.

Examples:

- Search all Robert Smiths by typing Smith (in Last Name field) and Robert (in First Name field),
- Pull up all people with last names that begin with Sm by typing Sm (in the Last Name field)

2.10.4.1 Send Email

The email function is only available if email is enabled and the patron has supplied an email address. If there are no e-mails in the patron records displayed, the Email button does not appear. Clicking on the Email button opens up the default Email application, automatically attaching the email addresses contained from the search results. Select the desired template from the Select Template drop down list. The system automatically enters a subject and message based on the template (i.e., Prize Won). To send an attachment (i.e., a completed certificate), click the Browse button at the bottom of message to locate and attach the desired document (**this option is only available to installed customers**). A message may also be manually composed and sent. Templates are created in System Settings – Email Settings – System-Wide Email Templates.

2.10.4.2 Delete Patrons

To delete patrons click the *Delete* checkbox to the far right of the appropriate person(s) to be removed from the Summer Reader database. To finish, click the *Delete* button at the bottom of the screen.

2.10.4.3 Delete All Unregistered Patrons

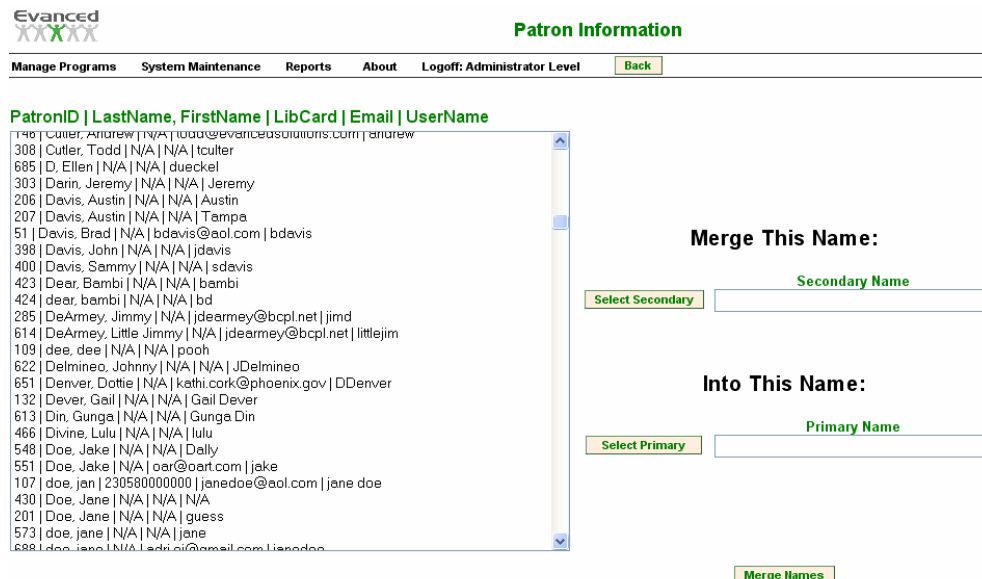
This button only appears when the database contains patron records that are not associated with any programs. This occurs when someone has used the “Delete All Program Records” button in the Program Setup. Delete All Unregistered Patron’s clears what are essentially inactive patrons from the database. For further information about the Delete All Program Records function, see System Maintenance - Programs– Edit Program.

To clear inactive patron records, click Delete All Unregistered Patrons. The system will ask you to confirm – Are you sure you want to delete all unregistered patrons? Click Ok. The system deletes the appropriate records and refreshes the screen. When successful, the Delete All Unregistered Patrons button disappears.

2.10.4.4 Merge

The Merge button allows you to combine two patron records into one record and eliminate duplicate records. You merge two records by selecting a secondary record and merging it into a selected primary record. When the records are merged the secondary record disappears and the primary record remains the only record. The system uses the information in the primary record when there is conflicting information and deletes secondary information when merging.

To merge two records, click the Merge button. The system displays the Patron Registration Information page illustrated below. In the list of patrons, click on the secondary (or duplicate) record and click the Select Secondary button. The system copies the selected name into the Secondary Name field. In the list of patrons, click on the primary record (or controlling record) and click the Select Primary button. The system copies the selected name into the Primary Name field. Click Merge Names. The system merges the secondary record into the primary record. The system will ask you to confirm that you want to merge the selected records. Click OK. The system merges the selected records and displays a “Merge completed.” confirmation. Click OK to close the confirmation and returns to the Patron Registration Information page.



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XXX

Patron Information

Manage Programs System Maintenance Reports About Logout: Administrator Level [Back](#)

PatronID | LastName, FirstName | LibCard | Email | UserName

140	Cutler, Andrew	N/A	N/A	andrew@evanced.com	andrew
308	Cutler, Todd	N/A	N/A	tcutler	
685	D, Ellen	N/A	N/A	dueckel	
303	Darin, Jeremy	N/A	N/A	Jeremy	
206	Davis, Austin	N/A	N/A	Austin	
207	Davis, Austin	N/A	N/A	Tampa	
51	Davis, Brad	N/A	bdavis@aol.com	bdavis	
398	Davis, John	N/A	N/A	jdavis	
400	Davis, Sammy	N/A	N/A	sdavis	
423	Dear, Bambi	N/A	N/A	bambi	
424	dear, bambi	N/A	N/A	bd	
285	DeArmy, Jimmy	N/A	jdarmey@bcpl.net	jimd	
614	DeArmy, Little Jimmy	N/A	jdarmey@bcpl.net	littlejim	
109	dee, dee	N/A	N/A	pooh	
622	Delmineo, Johnny	N/A	N/A	JDelmineo	
651	Denver, Dottie	N/A	kathi.cork@phoenix.gov	DDDenver	
132	Dever, Gail	N/A	N/A	Gail Dever	
613	Din, Gunga	N/A	N/A	Gunga Din	
466	Divine, Lulu	N/A	N/A	Lulu	
548	Doe, Jake	N/A	N/A	Dally	
551	Doe, Jake	N/A	oer@oart.com	jake	
107	doe, jan	23058000000	janedoe@aol.com	jane doe	
430	Doe, Jane	N/A	N/A	N/A	
201	Doe, Jane	N/A	N/A	guess	
573	doe, jane	N/A	N/A	jane	
688	doe, jane	N/A	N/A	jane	

Merge This Name:

[Select Secondary](#)

Into This Name:

[Select Primary](#)

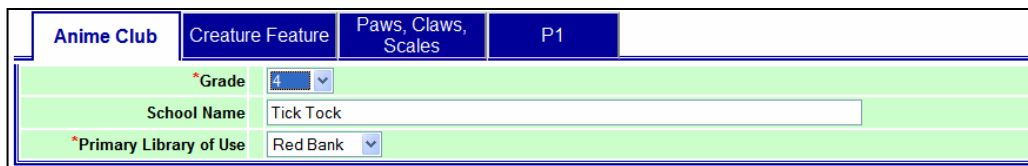
[Merge Names](#)

Figure 2.10.4.4 A Merging Patrons

2.10.4.5 Edit Patron Information

Click the *Edit* icon (or double click the entry) to update or change a patron's information. The *Patron Registration* page is displayed with all of the patron's registration information. The patron's *PatronID* is also displayed (this field is read-only and is used to reference patrons when using the *ReaderXML* page). Once the appropriate fields have been modified, click the *Save* button.

Note: If a patron is registered for one or more programs, program-specific registration information such as 'Age', 'Grade', 'Patron Classification', 'School Name', 'School District', 'Primary Library', and any enabled 'Custom Registration Entries' are displayed in a tabbed format with each tab displaying the program name that the patron is registered for. Each of the fields is also highlighted to help distinguish them from other registration fields. To display or edit the program-specific registration information, simply click on the specific program tab. An example of this is illustrated below.



Anime Club	Creature Feature	Paws, Claws, Scales	P1
*Grade	4		
School Name	Tick Tock		
*Primary Library of Use	Red Bank		

Figure 2.10.4.5 A Program-Specific Registration Information

2.10.4.6 Reset Passwords

If a patron has forgotten their password, click the *Reset Password* button. Once this is done, the password is set to nothing. The next time the patron logs in to the public side of the system; they are prompted to create a new password.

2.11 System Setup

2.11.1 System Settings

This section contains various system settings and includes:

- **Library Name** – the library's name
- **Home Page** – the library's home page
- **Library Contact Email Address** – the email address of the contact person responsible for answering questions related to Summer Reader programs
- **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. Set to *Yes* to enable list mouse-overs. Set to *No* to disable list mouse-overs.
- **Program Activity Days** - The # of days to retrieve summary information displayed on the program management page for active programs. The summary totals for the duration of the program are shown by default. After applying this setting the summary totals for the duration of the entire program and the summary totals for the setting are shown together. Set to '0' to disable the setting.
- **Data Records/Page** - The default # of data records displayed in lists throughout the application.
- **Report Records/Page** - The default # of records displayed per page for report results.
- **Center Home Page** – Choose *Yes* to center the patron home page. Choose *No* (default) to left-justify the patron home page.
- **Home Page Setup** – Set this option to display the programs in various formats on the home page. Set to "Tabs" so that active programs are displayed with tabs on the patron home page. Clicking the tab navigates the patron to the various programs. Set to "Drop Down List" to display active programs in a drop-down list. Selecting a program from the drop down list navigates the patron to selected program's home page. Set to "Links" to display active programs as links on the home page. Selecting a program link navigates the patron to the program's home page.
- **Tab Type** – Set to "Rounded" to display tabs with rounded edges. Set to "Square" to display tabs with square edges. When you select "Rounded", the system displays a field asking you to specify the number of tabs to display per row. Set this to a number to limit the number of tabs per row. This option is useful if there are a large number of active programs or programs with longer names.
- **Prize Scrolling on Home Page** – Choose *Yes* to display a fixed prize message on the patron's home page and logging page. Choose *No* to display a scrolling prize message on the patron's home page and logging page. This setting only applies when Prize Notifications are enabled.
- **Prize Scroll Speed** - Set to a number between 1 and 10 to control the speed of the scrolling prize message. This setting only applies when 'Prize Scrolling' is on.
- **Regional Settings** - Regional Settings allows you configure your geographical region, time, and daylight savings time settings. This allows the system to automatically adjust the program's settings to coincide with the region. This ensures that program settings related to program and logging start and end dates and times remain accurate.

- **International Field Entry** - Set to 'Yes' to allow any format for phone numbers and zip codes. Set to 'No' to restrict phone numbers to 7-digit or 10-digit numeric entry and zip codes to 5-digit or 9-digit numeric entry.
- **Library Card Length** - For a fixed length library card, set this field to a non-zero value. Setting this option to '0' allows for variable length library cards.
- **Password Length** - Set the minimum and maximum for the password length that patrons must enter for their passwords.
- **Patron Recall Limit** - Set to the number of patron recalls to allow during registration. This setting applies to patron-side registration only. Staff-side registration recalls are unlimited. A 'Recall' button appears that allows the user to register for another program using their current registration information. The number represents the number of times the recall feature can be used in succession. Setting this option to '0' disables the recall feature for patrons.
- **Program Specific Custom Registration Entries** - Set to 'Yes' to allow for program-specific custom registration entries; i.e., there are six unique configurable custom registration entries for each program. Set to 'No' to use global custom registration entries; i.e., there are six custom registration entries to be shared among all programs.
- **Start Birth Year** - the earliest birth year that is accepted by the system for all programs
- **Default Catalog URL Title** – Set this field to pre-populate the catalog URL title for patron reviews in Reviews Management.
- **Default Catalog URL** – Set this field to pre-populate the catalog URL for patron reviews in Reviews Management.
- **Default Book Jacket URL** – Set this field to pre-populate the book jacket URL for patron reviews in Reviews Management.
- **Populate Catalog URLs Automatically** - Set to 'Yes' to populate the catalog URLs with the defaults within the review in reviews management. Set to 'No' to not populate the catalog URLs with the defaults in reviews management unless the patron has provided the required information (one or more of the tagged fields in the default URLs).
- **Review Paging** – Set to Yes to enable review paging (reviews are limited per page by the number set for Reviews Per Page). Set to No to return all reviews on one page.
- **Reviews/Page** – Set to a number that limits the number of reviews displayed per page. This setting only applies if Review Paging is enabled. The number must be between 5 and 100.
- **Links/Page** – Set to a number that limits the number of links to display at the top/bottom of the reviews page. This setting only applies if Review Paging is enabled. The number must be between 5 and 25.
- **Save Private Reviews** – Set to Yes to save private reviews (reviews that patrons do not select for public use). Set to No to discard private reviews.
- **Private/Public Question Default** – Set to Private to have reviews being submitted default to a private review. Set to Public to have reviews being submitted default to a public review.

- **Advanced Security** – Set to *Yes* to enable Advanced Security. Set to *No* to disable Advanced Security.
- **Bulk Deletion of Patron Records** – Choose *Yes* to allow patron registration records to be deleted when deleting a program's records or deleting unregistered patrons from *Patron Registration Information*. Choose *No* to not allow either of the aforementioned capabilities. When set to *Yes*, a button labeled *Clear All Program Records (Including Patrons)* appears on the *Program Setup* page when there are one or more registrants. A button labeled *Delete All Unregistered Patrons* also appears on the *Patron Registration Information* page after a search is performed and there are one or more unregistered patrons. These buttons are only available to a user logged in at the *Administrator* level.
- **Bulk Approvals for Reviews** – Choose *Yes* to allow staff to approve multiple reviews in Reviews Maintenance. Choose *No* to require that each review be approved individually.
- **Basic-Level Access to Prize Management** – Choose *Yes* to allow basic-level users access to prize management. Choose *No* to not allow basic-level users access to prize management.
- **Patron Access to Registration Info** – This feature determines whether patron's have access to their registration information. Choose *Edit* to allow patrons to edit their registration information after signing up for a program. Choose *View* to give patron's read-only access to their registration information. Choose *None* to hide patron registration.
- **Patrons Log Deleting** – Choose *Yes* to allow patrons to delete their own log entries. Choose *No* to not allow patrons to delete their own log entries.
- **Patrons Log Editing** – Choose *Yes* to allow patrons to edit their own log entries. Choose *No* to not allow patrons to edit their own log entries.
- **'Signed Up Before?' Feature** - Set to 'Yes' to show this button that allows users to use their old information to sign up for another program. Set to 'No' to hide this button on the registration page so that users cannot use their old information to sign up for another program.
- **Patron Prize Notifications** – Choose *Yes* to display a prize message on the patron's home page and logging page (if "Show prize message on patron log page" setting is set to *Yes*) when they become prize eligible. Choose *No* to not display any prize messages to the patron.
- **Random Drawing Notifications** - Set to 'Yes' to display a random drawing prize message on the patron's home page and logging page (if 'Show Random Drawing Prize Message on Patron Log Page' setting is set to 'Yes') when they have won a random drawing. Set to 'No' to not display any random drawing prize messages to the patron.
- **Show Prize Message on Log Page** - Set to 'Yes' to display a prize message on the patron's logging page when they become prize-eligible. This setting only applies when 'Patron Prize Notifications' is enabled.
- **Show Random Drawing Prize Message on Log Page** - Set to 'Yes' to display a random drawing prize message on the patron's logging page when they become prize-eligible. This setting only applies when 'Random Drawing Notifications' is enabled.
- **Staff Prize Notifications** – Choose *Yes* to display a pop-up window for prize management content on the staff side when the patron becomes prize eligible. Choose *No* to disable the prize management pop-up window on the staff side. This pop-up window appears on the logging page when a log entry is added or modified and the patron is prize eligible.

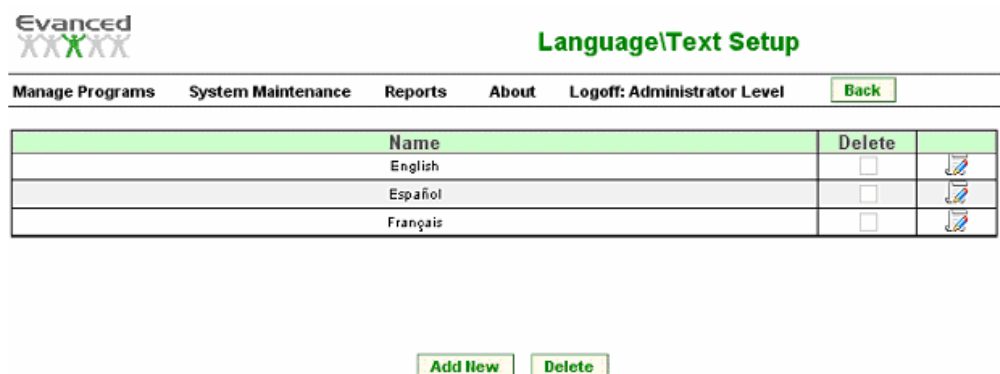
2.11.2 Language\Text Settings




With Language\Text Settings, you can customize your Summer Reading programs by language, allowing patrons to view Summer Reader and receive emails in their native language.

Currently, the software supports Latin-based languages only. English, Spanish, French, and Italian are examples.

Language Settings for New Users

System Maintenance > System Settings > Language\Text Settings



Evanced		
Language\Text Setup		
Manage Programs	System Maintenance	Reports
About	Logoff: Administrator Level	Back
Name	Delete	
English	<input type="checkbox"/>	
Español	<input type="checkbox"/>	
Français	<input type="checkbox"/>	

Add New Delete

Figure 2.11.2.1 A Language Setup

Adding A New Language

Summer Reader features Spanish and French as options. Other Latin-based languages maybe added by clicking “Add New” and changing the Style Sheet as needed.

Note: You may not want to use our Language\Text Setup feature for languages such as Spanish or French, but you may want to consider developing language types that appeal to your different library audiences.

Creating a “Teen” Language setup that might include certain phrases or terms, or developing a more child-friendly set of terms is another way to put Language Setup to good use for your library and library users.

Editing Language\Text

If you are using the Language Style Sheets that are pre-installed with the software, but would like to modify the text used, the process is the same as editing the text in the default English Style Sheets.

Evanced

XXXXX

Language/Text Setup

Manage Programs

System Maintenance

Reports

About

Logoff: Administrator Level

Back

Test

Save

Language ID

0

Name

Español

Description

Español

Region

Spanish-Mexico

Button Text

Load Default

***** The text on the home button on the patron home page *****

HomeButtonText_HomePage = "Inicio"

***** The text on the sign me up button on the patron home page (not logged in) *****

SignUpButtonText_HomePage = "Registrarme"

***** The text on the forgot your login info button on the patron home page (not logged in) *****

LoginButtonText_HomePage = "Iniciar sesión"

Field Labels

Load Default

***** Registration Field Labels *****

UserNameLabel = "Nombre de usuario"

PasswordLabel = "Contraseña"

ParticipantFirstNameLabel = "Nombre"

ParticipantLastNameLabel = "Apellido"

ParticipantMiddleNameLabel = "Segundo nombre"

ParentFirstNameLabel = "Nombre de padre/madre/tutor"

ParentLastNameLabel = "Apellido de padre/madre/tutor"

ParentMiddleNameLabel = "Segundo nombre de padre/madre/tutor"

Messages

Load Default

***** The default message displayed when a patron is eligible for a prize *****

DefaultPrizeMessage = "Usted califica para recibir los siguientes premios: ^PrizeString^"

Comuniquese con ^ContactLibrary^ para reclamar su premio."

ParentalConsentMessage = "Marque la casilla si acepta que su hijo/a participe del programa."

***** The message displayed when a patron has won a prize in a random drawing *****

DefaultRandomDrawingMessage = "Usted ha ganado un premio ^PrizeEligibility^ en un sorteo."

Page Text

Load Default

***** The text displayed right below the home page title (this text is displayed when the home page setup in system settings is set for tabs) *****

SubtitleText_HomePage = "Bienvenido a la página de inicio del Programa de lectura. Después de iniciar sesión, ingresará en su Página de inicio de lecturas.

"

***** The text displayed right below the home page title (this text is displayed when the home page setup in system settings is set for tabs) when the patron is logged in *****

SubtitleTextPatron_HomePage = ""

Page Titles

Load Default

***** The title text displayed in the events section on the home page (only applicable when Events XML Feed is defined in program's setup) *****

EventsSectionTitle_HomePage = "Próximos eventos"

***** The title text displayed in the link section on the home page *****

LinkSectionTitle_HomePage = "Vinculos interesantes"

***** The title text displayed in the messages section on the home page *****


MessagesSectionTitle_HomePage = "Mensajes importantes"

Test

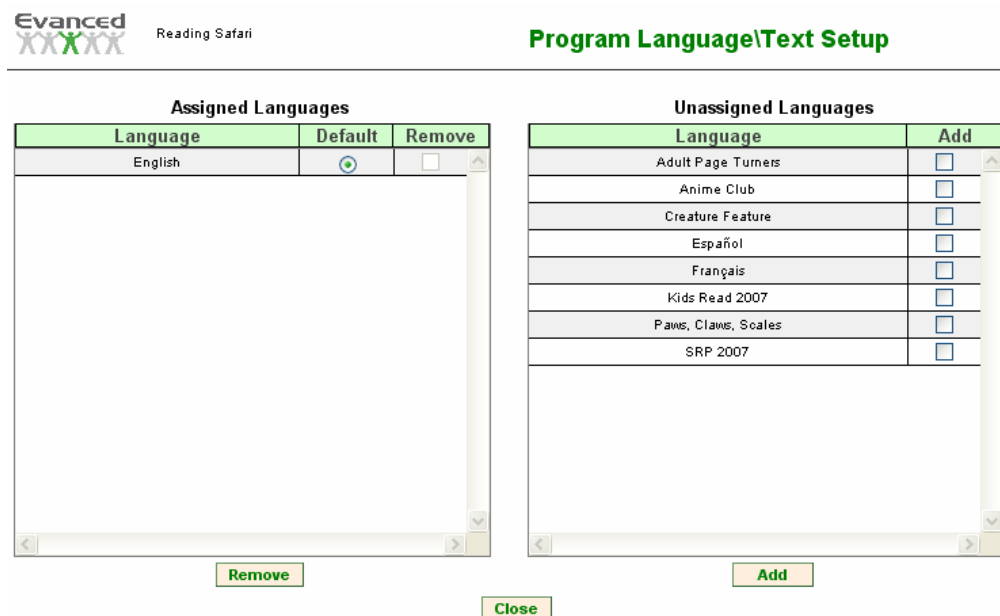
Save

Figure 2.11.2.1 B Editing a Language

Assigning a Language or Multiple Languages to a Program

Manage Programs > Setup Icon  > Language Setup

The following screen will appear when Language\Text Setup is chosen:



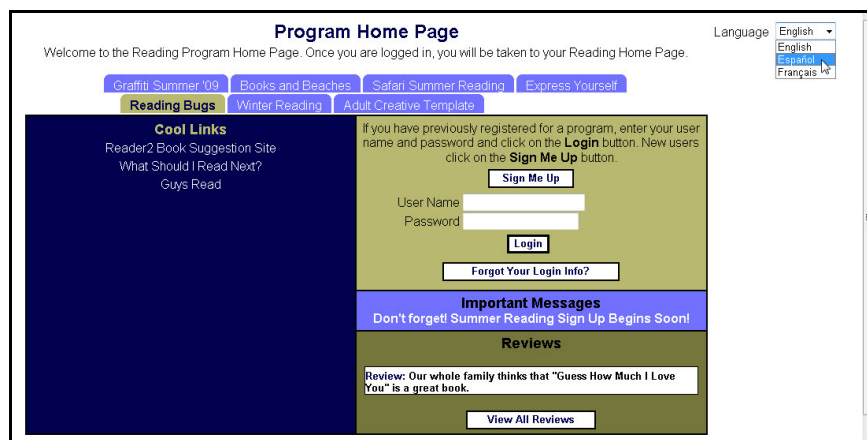
Assigned Languages			Unassigned Languages	
Language	Default	Remove	Language	Add
English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Adult Page Turners	<input type="checkbox"/>
			Anime Club	<input type="checkbox"/>
			Creature Feature	<input type="checkbox"/>
			Español	<input type="checkbox"/>
			Français	<input type="checkbox"/>
			Kids Read 2007	<input type="checkbox"/>
			Paws, Claws, Scales	<input type="checkbox"/>
			SRP 2007	<input type="checkbox"/>

Remove Close Add

Figure 2.11.2.1 C Assigning a Language to a Program

In the previous view, English is the only language assigned to the Reading Safari Program. To add Spanish or French, one or both must be chosen and the Add button must be clicked.

This will then insert a small drop down menu in the Reading Bugs Program that will allow users to select the language of their choice:



Program Home Page

Welcome to the Reading Program Home Page. Once you are logged in, you will be taken to your Reading Home Page.

Gratiti Summer 109 Books and Beaches Safari Summer Reading Express Yourself

Reading Bugs Winter Reading Adult Creative Template

Cool Links

Reader2 Book Suggestion Site
What Should I Read Next?
Guys Read

If you have previously registered for a program, enter your user name and password and click on the **Login** button. New users click on the **Sign Me Up** button.

Sign Me Up

User Name
Password

Login

Forgot Your Login Info?

Important Messages

Don't forget! Summer Reading Sign Up Begins Soon!

Reviews

Review: Our whole family thinks that "Guess How Much I Love You" is a great book.

View All Reviews

Language: English Spanish Français

Figure 2.11.2.1 D Home Page Language Selection


The page is then translated into the selected language, in this case, Spanish.



Figure 2.11.2.1 E Home Page Language Translation

Note: Information not added in Spanish – such as link names by staff and book reviews by patrons, are still seen in English or the language in which they were originally added. Library staff must translate and add the links in the appropriate language for them to appear.

Editing Program Text Settings

Manage Programs > Setup Icon 

Text Settings that provide Program Descriptions, Eligibility Requirement Text and Instructional Text may easily be translated from the Program Setup Page:

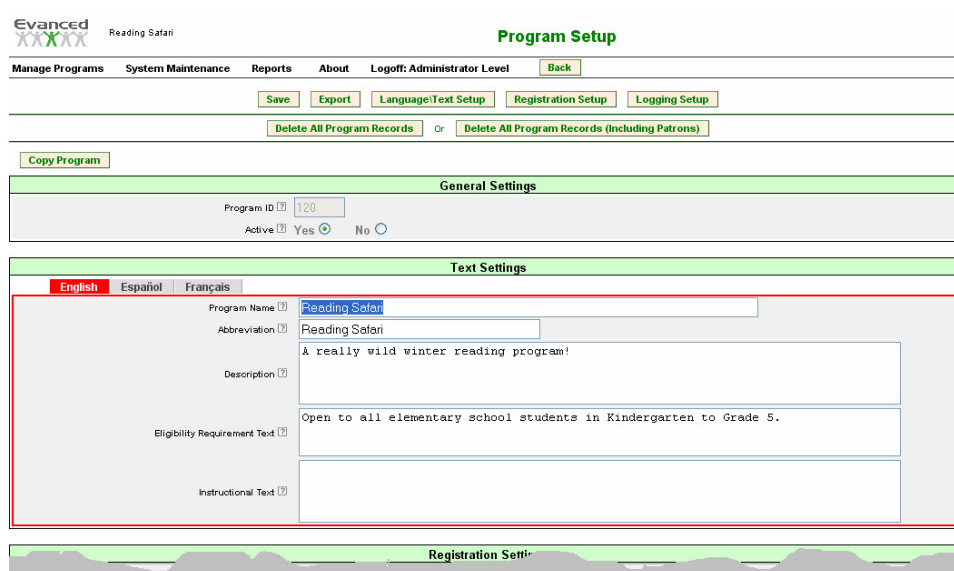


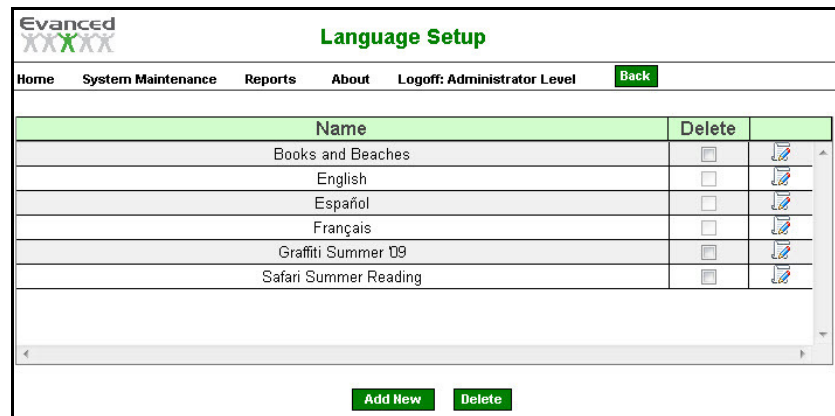
Figure 2.11.2.1 F Program Text Settings

By clicking on the appropriate tab (here you see English, Spanish and French) and typing in the translation, you can quickly edit the program information for library users to see.

2.11.2.1 Language Settings for Upgraded Users (Upgraded from Version 6)

System Maintenance > System Settings > Language\Text Settings

When looking at the Language\Text setup area of your upgraded Summer Reader product, you will notice that your programs are not assigned a language, but instead have a program name. Your screen might look like this:




Name	Delete
Books and Beaches	<input type="checkbox"/>
English	<input type="checkbox"/>
Español	<input type="checkbox"/>
Français	<input type="checkbox"/>
Graffiti Summer 09	<input type="checkbox"/>
Safari Summer Reading	<input type="checkbox"/>

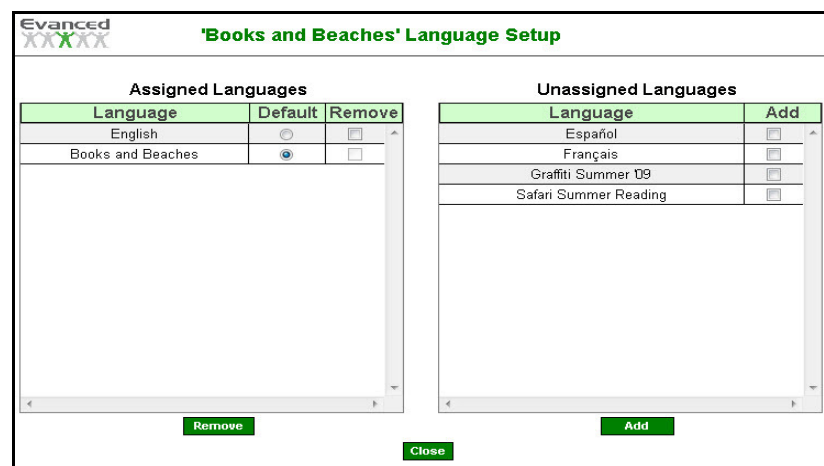
Buttons: Add New, Delete

Figure 2.11.2.2 A Language Setup

Because some Summer Reader users already had translated Summer Reader pages that they had created on their own, we could not simply assign “English” as the default language for all programs. So instead, we chose to provide the program name as the default language name. The program name that you see is the equivalent to having the default set as English.

Adding Languages to Your Programs

Manage Programs > Setup Icon  > Language Setup



Assigned Languages			Unassigned Languages	
Language	Default	Remove	Language	Add
English	<input checked="" type="radio"/>	<input type="checkbox"/>	Español	<input type="checkbox"/>
Books and Beaches	<input type="radio"/>	<input type="checkbox"/>	Français	<input type="checkbox"/>
			Graffiti Summer 09	<input type="checkbox"/>
			Safari Summer Reading	<input type="checkbox"/>

Buttons: Remove, Add, Close

Figure 2.11.2.2 B Assigning a Language to a Program

Upon opening Language Setup, there are two assigned “languages” in the figure above – one is the original program title, the other is English. To add other languages, simply click the Add checkbox and then click the Add button at the bottom of the screen. Then click Close. Disregard the other program names that you see in the Unassigned Languages portion of the screen. This will then insert a small drop down menu in the Reading Bugs Program that will allow users to select the language of their choice:

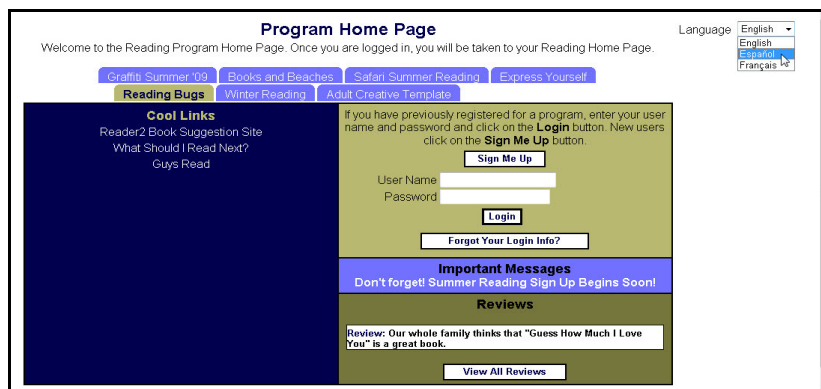


Figure 2.11.2.2 C Home Page Language Selection

The page is then translated into the selected language, in this case, Spanish.

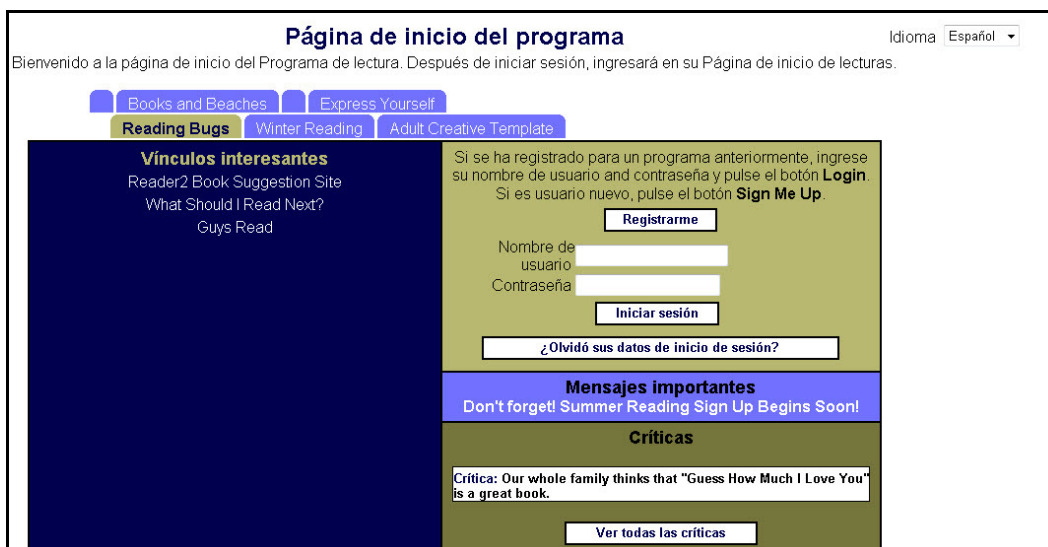



Figure 2.11.2.2 D Home Page Language Translation

Note: Information not added in Spanish – such as message and links, are still seen in English or the language in which they were originally added. Library staff must translate and add the links and/or messages in the appropriate language for them to appear for the selected language.

Editing Program Text Settings

Manage Programs > Setup Icon 

Text Settings that provide Program Descriptions, Eligibility Requirement Text and Instructional Text may easily be translated from the Program Setup Page:

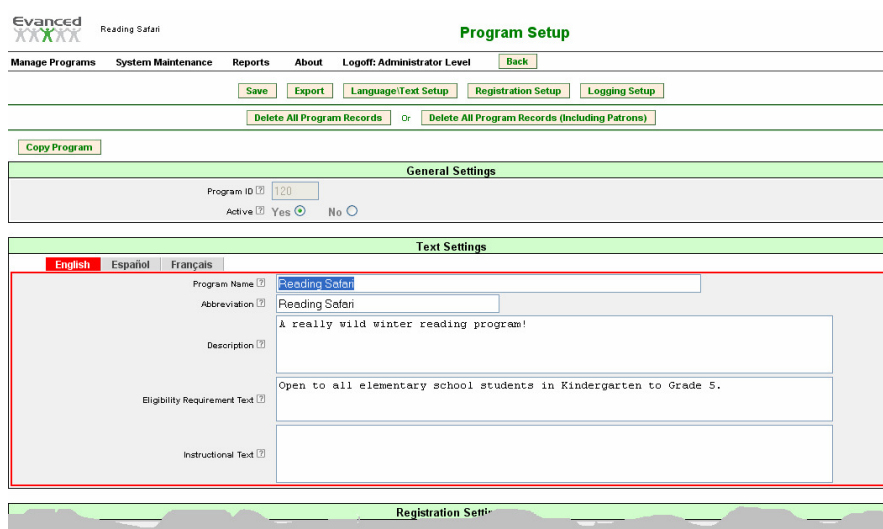


Figure 2.11.2.2 E Editing Program Text Settings

By clicking on the appropriate tab (here you see English, Spanish and French) and typing in the translation, you can quickly edit the program information for library users to see.

2.11.2.2 Configuring Other Text

Configurable text is now contained in language files within Language\Text Setup. The configurable text is contained in 5 separate areas:

- Button Text – text that appears on the buttons on the patron-side pages
- Field Labels – text that appears next to input fields on the patron-side pages
- Messages – text that appears on the patron-side pages such as input validation messages or confirmation messages after submitting a record
- Page Text – text that appears on the patron-side pages. This section contains mostly fixed text phrases such as instructions to log in or instructions to register.
- Page Titles – text that appears on the patron-side pages such as page titles and section titles

Some of the configurable text options are described below:

- **PageTitle_HomePage:** This is the text displayed at the top of the patron home page when patron IS NOT logged in.

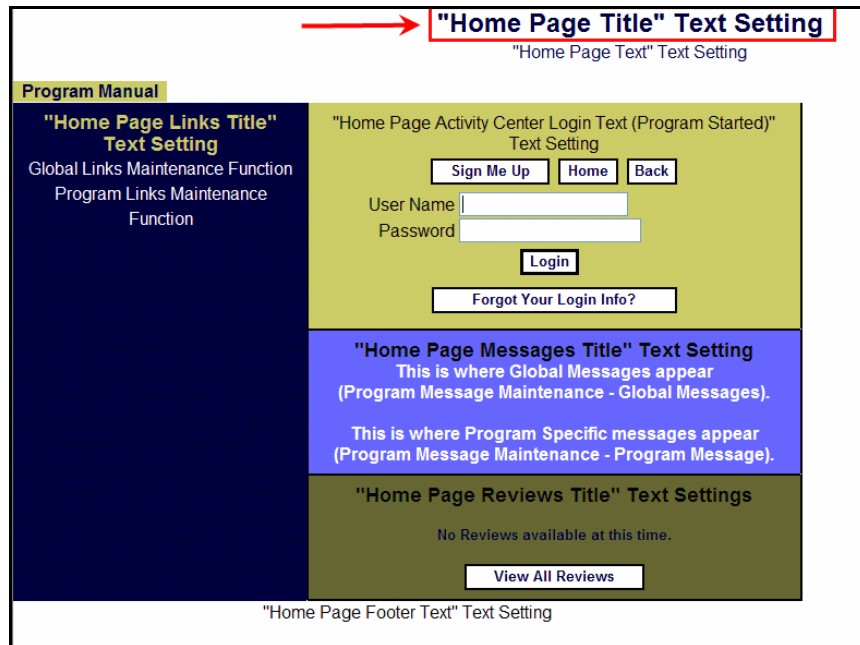


Figure 2.11.2.3 A Home Page Title

- **PageHeaderPatron_HomePage** refers to the text that appears when the Patron is logged in. Use the ^PatronName^ tag in this text to display the patron's name.

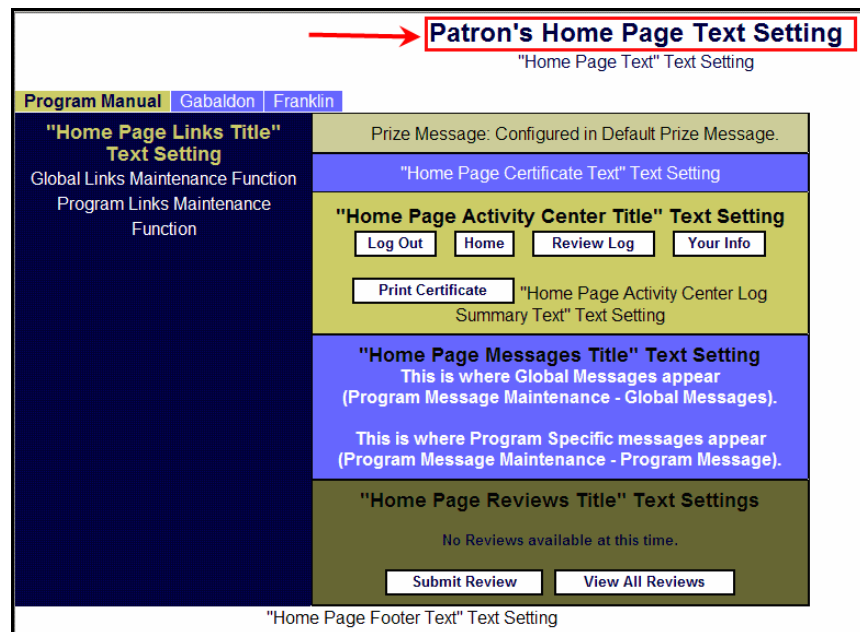


Figure 2.11.2.3 B Patron Home Page Title

- **LinkSectionTitle_HomePage** refers to the title of the helpful links section of the patron's home page (i.e., library home page, MapQuest, program related links, etc.).

Patron's Home Page Text Setting
"Home Page Text" Text Setting

Program Manual | Gabaldon | Franklin

"Home Page Links Title" Text Setting
Global Links Maintenance Function
Program Links Maintenance Function

Prize Message: Configured in Default Prize Message.

"Home Page Certificate Text" Text Setting

"Home Page Activity Center Title" Text Setting
Log Out | Home | Review Log | Your Info
Print Certificate "Home Page Activity Center Log Summary Text" Text Setting

"Home Page Messages Title" Text Setting
This is where Global Messages appear (Program Message Maintenance - Global Messages).
This is where Program Specific messages appear (Program Message Maintenance - Program Message).

"Home Page Reviews Title" Text Settings
No Reviews available at this time.
Submit Review | View All Reviews

"Home Page Footer Text" Text Setting

Figure 2.11.2.3 C Links Section Title

- **MessagesSectionTitle_HomePage** refers to the title of the messages section of the patron's home page.

Patron's Home Page Text Setting
"Home Page Text" Text Setting

Program Manual | Gabaldon | Franklin

"Home Page Links Title" Text Setting
Global Links Maintenance Function
Program Links Maintenance Function

Prize Message: Configured in Default Prize Message.

"Home Page Certificate Text" Text Setting

"Home Page Activity Center Title" Text Setting
Log Out | Home | Review Log | Your Info
Print Certificate "Home Page Activity Center Log Summary Text" Text Setting

"Home Page Messages Title" Text Setting
This is where Global Messages appear (Program Message Maintenance - Global Messages).
This is where Program Specific messages appear (Program Message Maintenance - Program Message).

"Home Page Reviews Title" Text Settings
No Reviews available at this time.
Submit Review | View All Reviews

"Home Page Footer Text" Text Setting

Figure 2.11.2.3 D Messages Section Title

- **ReviewsSectionTitle_HomePage** refers the title of the reviews section of the patron home page.

The screenshot shows the 'Patron's Home Page Text Setting' form. On the left is a sidebar with 'Program Manual', 'Gabaldon', and 'Franklin' tabs, and a section titled '"Home Page Links Title" Text Setting' with sub-items 'Global Links Maintenance Function' and 'Program Links Maintenance Function'. The main content area has a title '"Home Page Text" Text Setting' and a subtitle 'Prize Message: Configured in Default Prize Message.'. Below this are several sections: '"Home Page Certificate Text" Text Setting', '"Home Page Activity Center Title" Text Setting' (containing buttons for 'Log Out', 'Home', 'Review Log', 'Your Info', and 'Print Certificate'), '"Home Page Messages Title" Text Setting' (with explanatory text about global and program messages), and '"Home Page Reviews Title" Text Settings' (highlighted with a red box and a red arrow). Below the reviews section is the text 'No Reviews available at this time.' and buttons for 'Submit Review' and 'View All Reviews'. At the bottom is the '"Home Page Footer Text" Text Setting'.

Figure 2.11.2.3 E Reviews Section Title

- **ActivitySectionTitle_HomePage** refers to the title of the activity center section of the patron's home. This section appears when the patron has logged into the program

This screenshot is identical to the previous one, showing the 'Patron's Home Page Text Setting' form. However, in this version, the '"Home Page Activity Center Title" Text Setting' section is highlighted with a red box and a red arrow, indicating it is the focus of the figure.

Figure 2.11.2.3 F Activity Center Section Title

- **SubtitleText_HomePage** appears beneath the Home Page Title or Patron Home Page Title when the patron has logged into the program.

Figure 2.11.2.3 G Subtitle Text

- **SponsorText_HomePage** appears in the Sponsor section of the Home Page (beneath the program tabs) when the patron has logged into the program.

Figure 2.11.2.3 H Sponsor Text

- **CertificateText_HomePage** appears above the Activity Center section of the patron's home page once they are logged in. This text appears when a patron becomes eligible to print a certificate for reaching a program milestone (dependent upon certificate eligibility setting in the program's setup).

Figure 2.11.2.3 I Certificate Text

- **LoginTextDuringProgram_HomePage** is the text that is displayed at the top of the Activity Center section on the home page when the program is in progress. The ^LoginFields^ tag is used to inform the user which fields to enter to login and displays accordingly based upon the program's setup. The ^StartPatronEnrollment^ and ^EndPatronEnrollment^ tags are used to identify the specific part of the text related to describing how to register for a program and is only displayed when a program has patron registration turned on.

Figure 2.11.2.3 J Login Text (During Program)

- **LoginTextAfterProgram_HomePage** appears in the same location as "LoginTextDuringProgram_HomePage". This is the title that appears when the patron has registered to participate in the program, but the program has not yet begun or has ended.

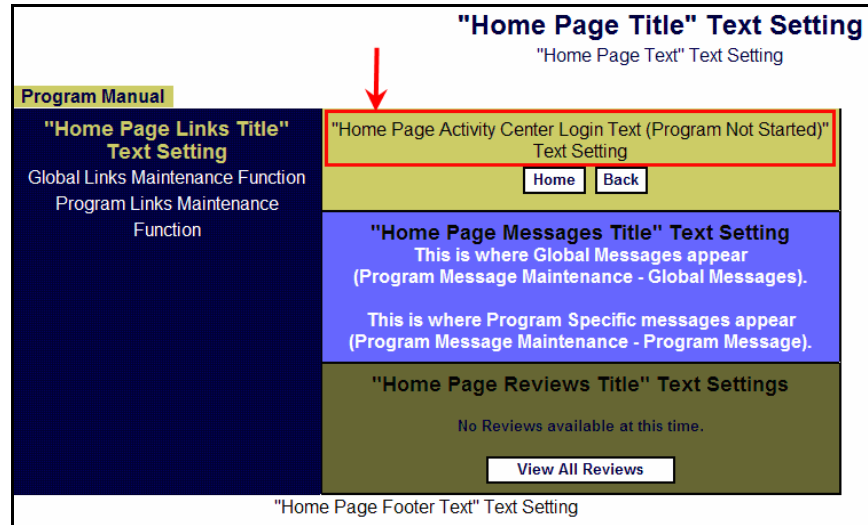


Figure 2.11.2.3 K Login Text (Program Not Started or Program Has Ended)

- **LogSummaryText_HomePage** appears on the patron's home page in the Activity Center section once they have logged into the program. The text provides a summary of the patron's participation in the program and important program dates. Tags are used to pull in patron-specific information.



Figure 2.11.2.3 L Log Summary Text

- **FooterText_HomePage** appears at the bottom of the patron's home page regardless of whether the patron is logged in or not.

Figure 2.11.2.3 M Footer Text

- **InstructionText_EmailLoginInfoPage** are the instructions that appear on the e-mail page displayed when a patron selects the "Forgot Your Login Info?" button on the patron home page.

Figure 2.11.2.3 N Email Login Information Text

- **InstructionText_RegistrationPage** is the introduction or instructions that appear beneath the registration title on the registration page. Patron's access the registration page from the home page by clicking on the "Sign Me Up" button.

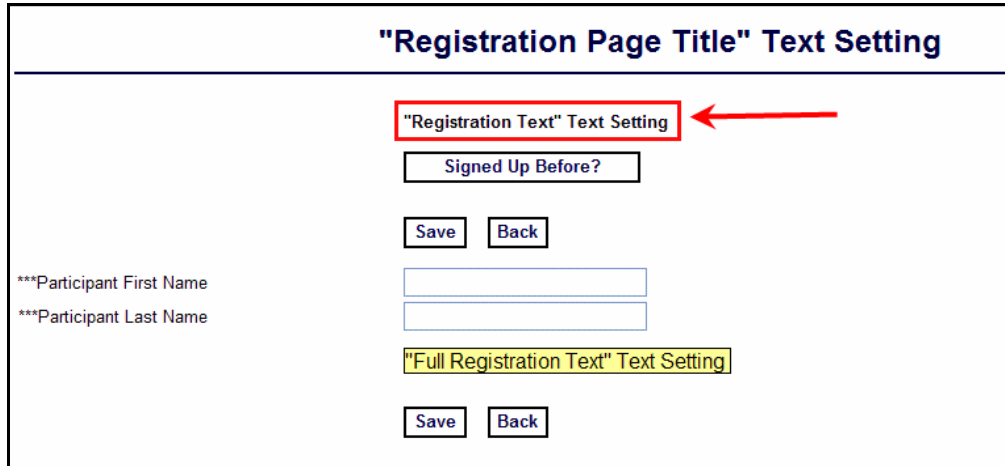


Figure 2.11.2.3.1 O Registration Instructions Text

- **FullRegistrationText_RegistrationPage** appears on the link on the Registration Page when the patron selects the "Sign Me Up" button on their home page. This setting is only applicable when *Quick Registration* is enabled in the program's setup."

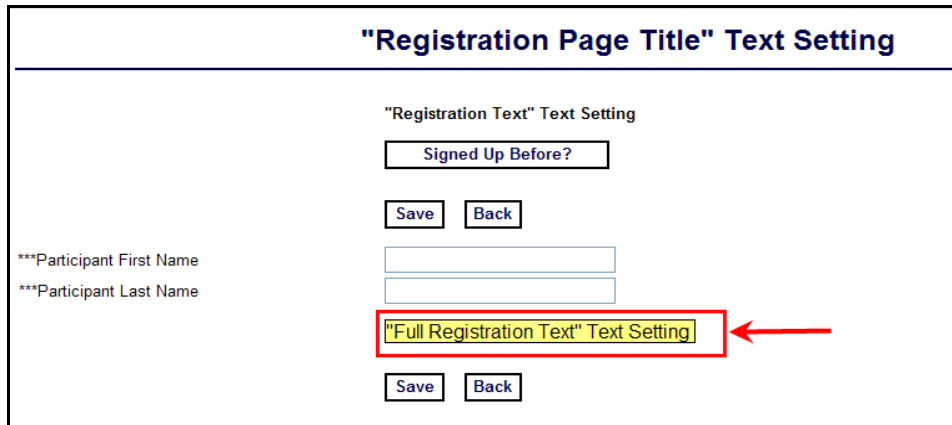


Figure 2.11.2.3 P Full Registration Link Text

- **QuickRegistrationText_RegistrationPage** appears on the link on the Registration Page when the patron selects the “Sign Me Up” button on their home page. This setting is only applicable when *Quick Registration* is enabled in the program’s setup.”

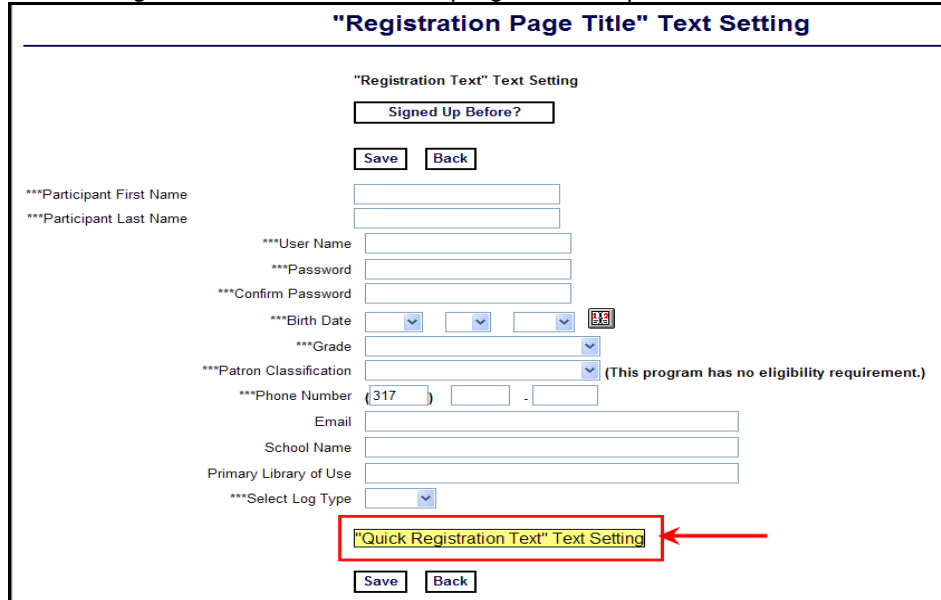


Figure 2.11.2.3 Q Quick Registration Link Text

- **SingleRegistrationText_RegistrationPage** appears on the link on the Registration Page when the patron selects the “Sign Me Up” button on their home page. This setting is only applicable when the *Registration Type* is set to *Both* in the program’s setup.”

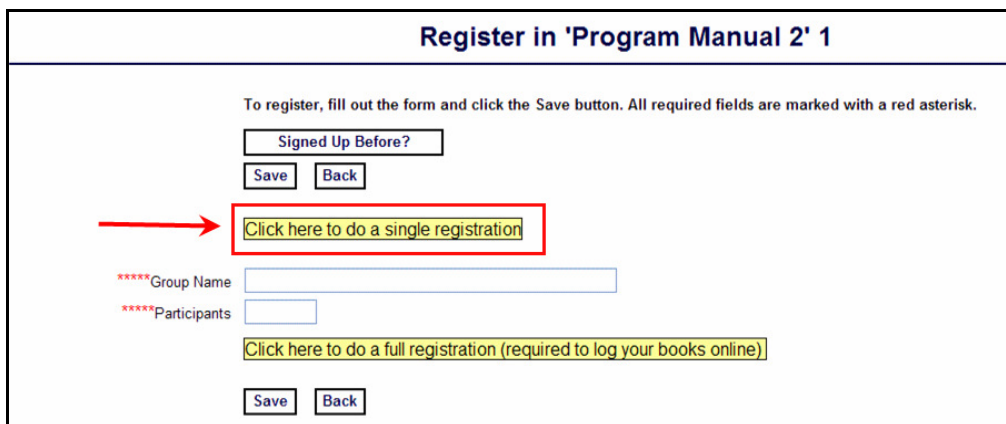


Figure 2.11.2.3 R Single Registration Link Text

- **GroupRegistrationText_RegistrationPage** appears on the link on the Registration Page when the patron selects the “Sign Me Up” button on their home page. This setting is only applicable when the *Registration Type* is set to *Both* in the program’s setup.”

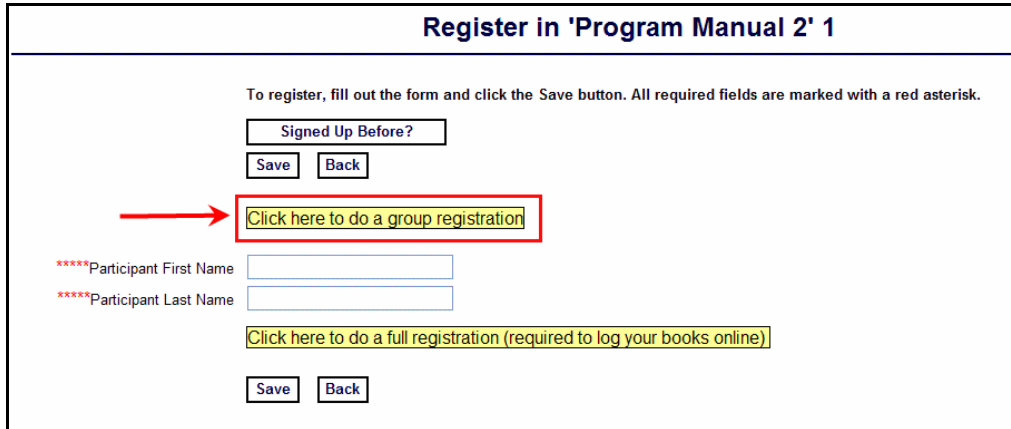


Figure 2.11.2.3 S Group Registration Link Text

- **RequiredFieldsText_RegistrationPage** refers to the text that precedes input field labels to highlight fields as required.

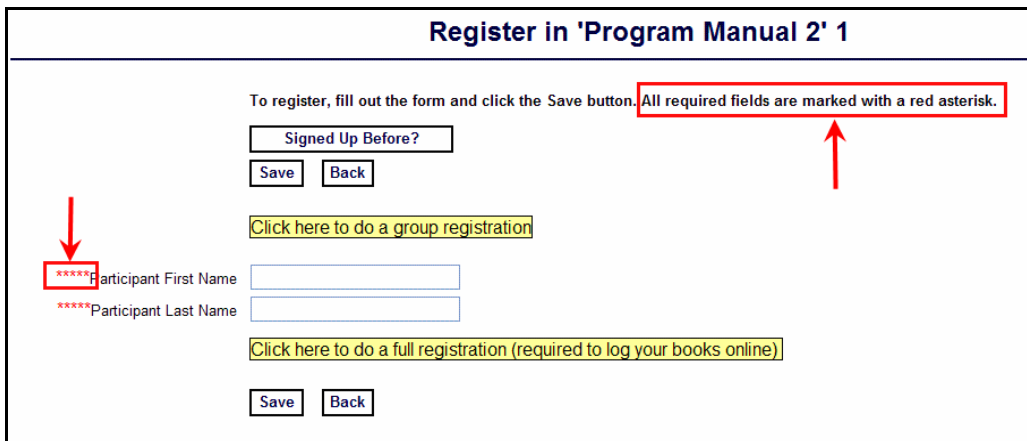
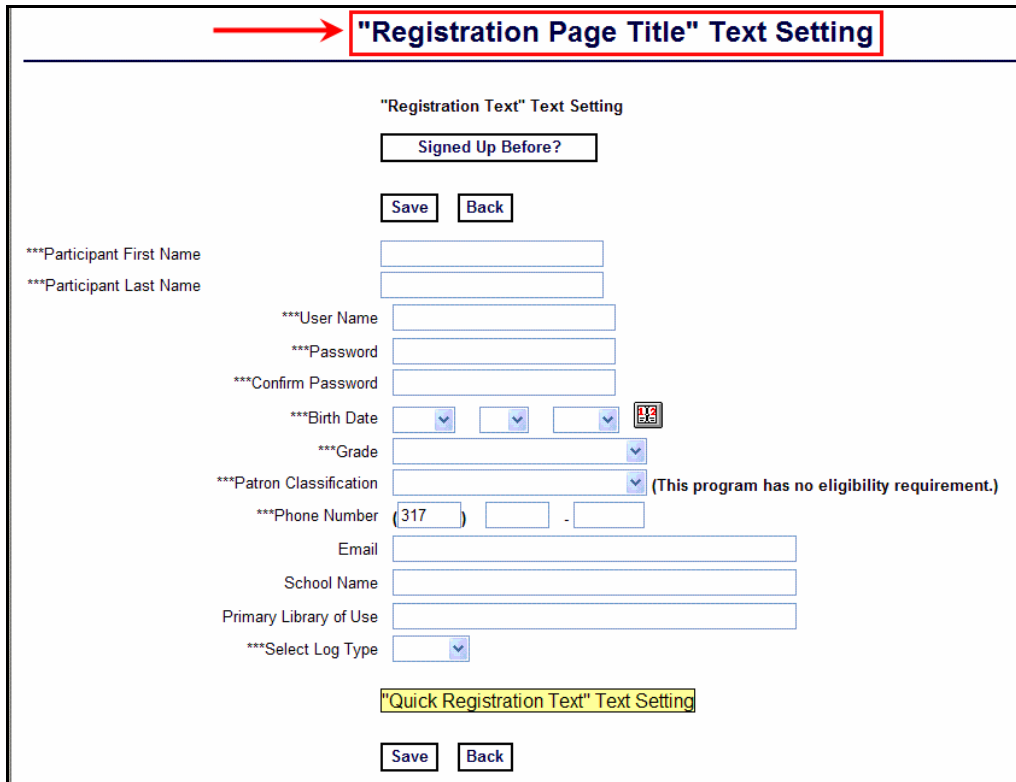


Figure 2.11.2.3 T Required Fields Text

- **PageTitle_RegistrationPage** refers to the title that appears at the top of the patron registration page. The system displays the patron registration page when the patron selects the “Sign Me Up” button from the home page.



Registration Page Title

"Registration Text" Text Setting

SIGNED UP BEFORE?

Save Back

***Participant First Name

***Participant Last Name

***User Name

***Password

***Confirm Password

***Birth Date

***Grade

***Patron Classification (This program has no eligibility requirement.)

***Phone Number (317) -

Email

School Name

Primary Library of Use

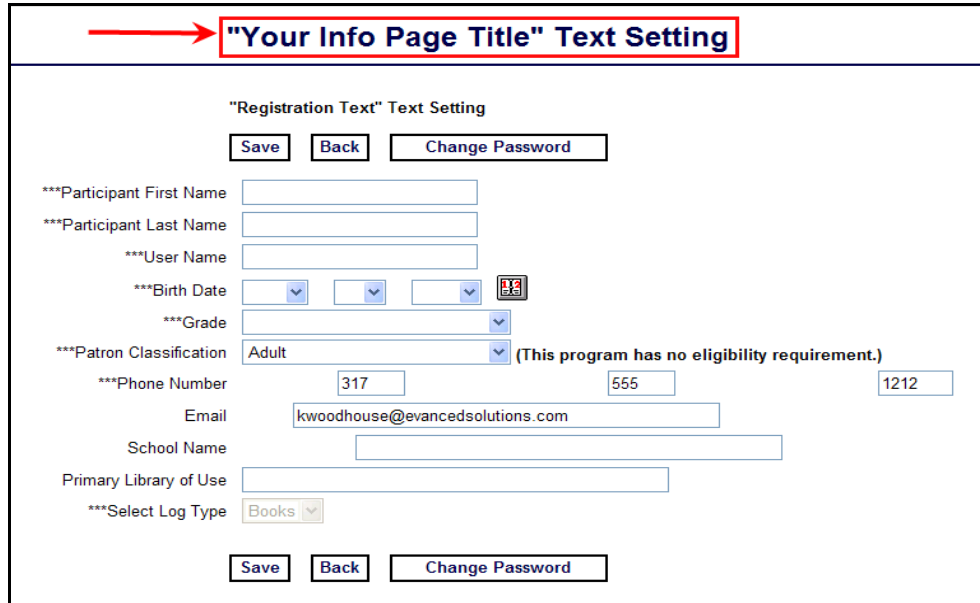
***Select Log Type

"Quick Registration Text" Text Setting

Save Back

Figure 2.11.2.3 U Registration Page Title

- **PageTitle_PatronRegistrationPage** appears at the top of the patron's information page, which the system displays when the patron selects the "My Info" button on their home page. The "My Info" button only appears after the patron has logged into the system.



"Your Info Page Title" Text Setting

"Registration Text" Text Setting

Save Back Change Password

***Participant First Name

***Participant Last Name

***User Name

***Birth Date

***Grade

***Patron Classification (This program has no eligibility requirement.)

***Phone Number

Email

School Name

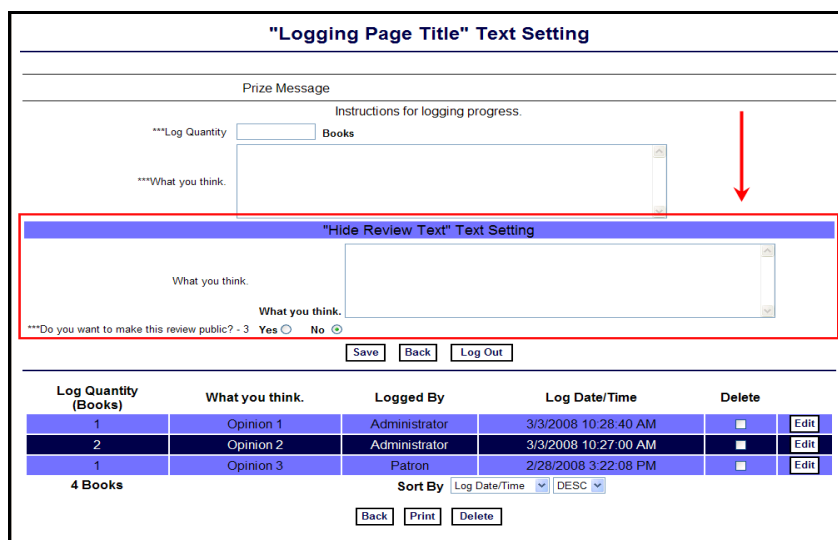
Primary Library of Use

***Select Log Type

Save Back Change Password

Figure 2.11.2.3 V Patron Registration Page Title

- **HideReviewText_LogPage** is the text displayed on the link that instructs the user to hide the review entry section of the logging page. This only applies when the following options are selected in a program's setup:
 - On the Program Setup Page: (a) Patron Logging is enabled and (b) Patron Reviews is set to "Log Page Entry" and (c) Separate Entry for Reviews is set to 'Yes'



"Logging Page Title" Text Setting

Prize Message

Instructions for logging progress.

***Log Quantity Books

***What you think.

"Hide Review Text" Text Setting

What you think.

***Do you want to make this review public? - 3 Yes ☐ No ☒

Save Back Log Out

Log Quantity (Books)	What you think.	Logged By	Log Date/Time	Delete
1	Opinion 1	Administrator	3/3/2008 10:28:40 AM	<input type="checkbox"/> Edit
2	Opinion 2	Administrator	3/3/2008 10:27:00 AM	<input type="checkbox"/> Edit
1	Opinion 3	Patron	2/28/2008 3:22:08 PM	<input type="checkbox"/> Edit

4 Books

Sort By Log Date/Time DESC

Back Print Delete

Figure 2.11.2.3 W Hide Review Text

- **ShowReviewText_LogPage** is the text that is displayed to instruct the user to show their review on the logging. This only applies when the following options are selected in a program's setup:
 - On the Program Setup Page: (a) Patron Logging is enabled and (b) Patron Reviews is set to "Log Page Entry" and (c) Separate Entry for Reviews is set to 'Yes'

Log Quantity (Books)	What you think.	Logged By	Log Date/Time	Delete
1	Opinion 1	Administrator	3/3/2008 10:28:40 AM	<input type="checkbox"/> Edit
2	Opinion 2	Administrator	3/3/2008 10:27:00 AM	<input checked="" type="checkbox"/> Edit
1	Opinion 3	Patron	2/28/2008 3:22:08 PM	<input type="checkbox"/> Edit

4 Books

Sort By: Log Date/Time DESC

[Back](#) [Print](#) [Delete](#)

Figure 2.11.2.3 X Show Review Text

- **PageTitle_LogPage** is the text displayed at the top of the patron logging page (when the patron clicks on the *Add/View Log* button. Use the ^PatronName^ tag in this text to display the patron's name. Use the ^ProgramName^ tag in this text to display the program's name.

Figure 2.11.2.3 Y Logging Page Title

2.11.3 Quick Search Setup

From here, the search fields found on the *Manage Programs (Home)* page, *System Maintenance* page, and the *Patron Registration Information* page can be configured. The options listed below are available for configuring the search fields:

- **Display Order** - Click on the *Up* or *Down* arrow located under the *Change Display Order* column to modify the order in which the fields are displayed.
- **Search Field** – This column includes the various search fields configured for searching. Any of the standard (non-custom registration fields) fields are available to be selected as a search field.
- **List Enabled** – Any of the fields that have associated drop lists created from *Drop List Maintenance* can be configured as a drop list. By checking the *List Enabled* checkbox, a drop-down list is displayed rather than a text box for selecting the search criteria.

Note: 'Last Name' and 'First Name' are enabled by default and cannot be disabled.

Click on the *Save* button to save the changes. Click the *Back* button on the tool bar to return to the *System Maintenance* page.

The *Setup Maintenance* pages may only be accessed by those staff with an Administrator password level.

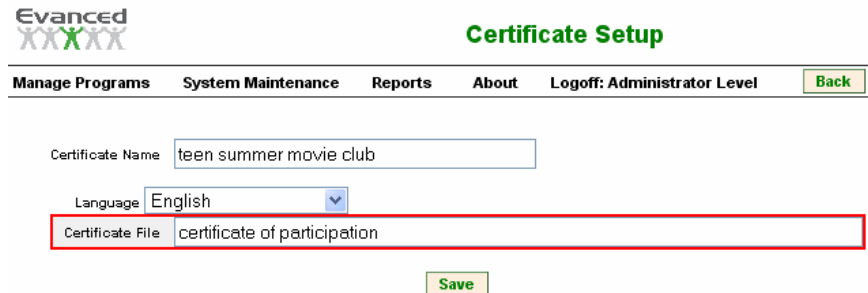
2.11.4 Manage Programs Setup

Use this configuration to display/hide fields on the "Manage Programs" page. Check the "Enable" check box to display a field. Uncheck the "Enable" check box to hide a field. All fields that can be displayed are listed but not all fields may be applicable to the program. If a field is enabled, the field is not displayed if the program is not configured to use that field.

2.11.5 Reviews Maintenance Setup

Use this configuration to display/hide fields on the "Reviews" maintenance page. Check the "Enable" check box to display a field. Uncheck the "Enable" check box to hide a field. All fields that can be displayed are listed but not all fields may be applicable to the program. If a field is enabled, the field is not displayed if the program is not configured to use that field. Use the character limit field to limit the # of characters displayed on the maintenance page. To display all characters enter 0 for the character limit.

2.11.6 Certificate Setup



The screenshot shows the 'Certificate Setup' page in the Evanced system. At the top, there is a navigation bar with links: 'Manage Programs', 'System Maintenance', 'Reports', 'About', 'Logoff: Administrator Level', and a 'Back' button. The main form contains three fields: 'Certificate Name' with the value 'teen summer movie club', 'Language' with a dropdown menu set to 'English', and 'Certificate File' with the value 'certificate of participation'. The 'Certificate File' field is highlighted with a red border. A 'Save' button is located at the bottom of the form.

Figure 2.11.6 A Certificate Setup

See Appendix D for details on creating certificates. *Certificate Setup* is used to identify certificates and their location/path. A list of certificates that have been added are displayed. If none have been added only an *Add New* button appears. Click the *Add New* button to create a reference to the certificate created. The following fields are required when adding a reference to a certificate:

- **Certificate Name** – This is a reference name to be used when staff selects the specific certificate to print. This must be unique to any existing certificate names.
- **Certificate Path** – This is the path to the certificate file. If the file is stored in the /doc subfolder wherever the application is installed then only the document name is required.

Example: PatronCompletionCert.html

If the certificate is stored remotely then a URL pointing to the document is required.

Example: <http://evanced.info/evanceddemo/sr/doc/PatronCompletionCert.html>

Note: Certificates should only be created in .html format.

Click on the *Save* button to save the entry.

When displaying the list of certificates a certificate configuration can be edited or deleted. To edit an existing entry, click on the accompanying *Edit* icon or double-click on the certificate name. To delete an existing entry click on the accompanying *Delete* checkbox and click on the *Delete* button on the bottom of the page.

2.11.7 Authentication Setup

Patron authentication assists with the following:

1. Verify the patron's identity
2. Restrict program registration to valid card number holders
3. Reduce data input required during registration (since some of the information is pulled over from their ILS system)
4. Data integrity – one record of the patron information vs. two records - so the data is more consistent between the SR application and the ILS system

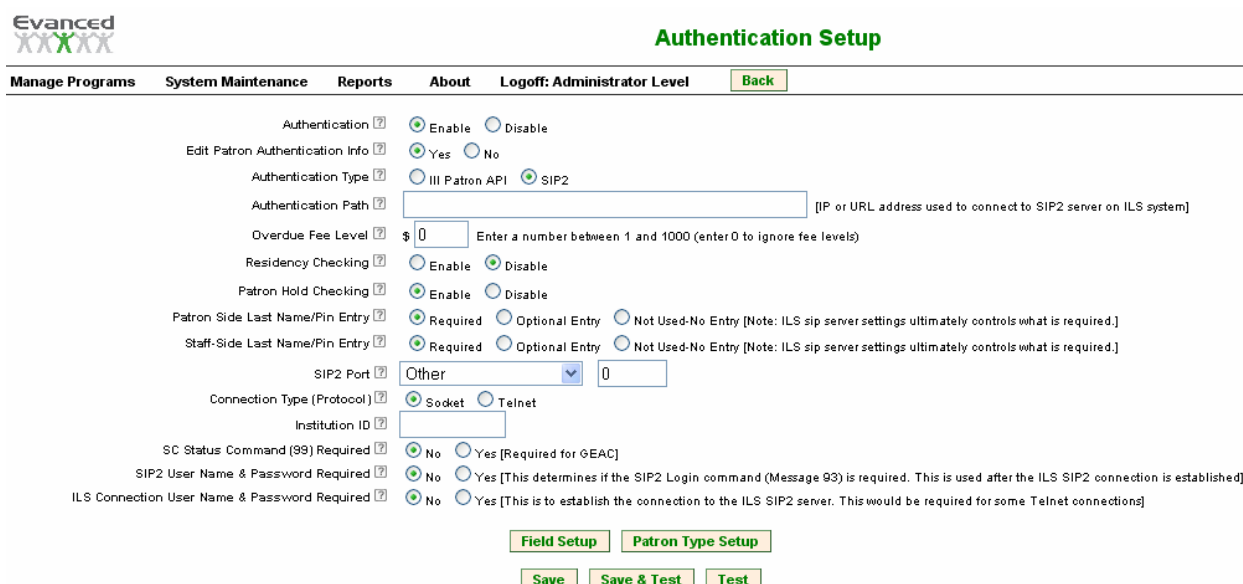


Figure 2.11.7 A Authentication Setup

Authentication fields are as follows:

- **Authentication** – Choosing “Enabled” will turn on patron authentication
- **Edit Patron Authentication Info** – Allows authentication information to be changed. This setting is not applicable if Advanced Security is enabled. If Advanced Security is enabled the role that the user is associated with controls this permission setting.
- **Authentication Type** – Indicates the type of authentication used by an ILS.
- **Authentication Path** – Indicates IP or URL address of ILS system containing the authentication server
- **Overdue Fee Level** – Allows staff to set overdue fee level for denying registration and/or room reservations
- **Patron Side Last Name/Pin Entry** – Sets patron side pin/last name entry option. ILS SIP server settings ultimately control what is offered.
- **Staff Side Last Name/Pin Entry** – Sets staff side pin/last name entry option. ILS SIP server settings ultimately control what is offered.

- **SIP2 Port** – Indicate SIP Port value
- **Connection Type (Protocol)** – Type of method used to connect to the ILS system.
- **Institution ID** – setting defined by the ILS system that uniquely identifies the ILS instance
- **SC Status Command (99) Required** – Sets whether or not the SIP2 connection requires the SC status command (99)
- **SIP2 User Name & Password Required** – Sets whether or not the SIP2 connection requires a user name and password to initiate connection.
- **SIP2 User Name** – SIP2 User Name used to establish an SIP 2 Connection not the connection to the ILS SIP2 server
- **SIP2 Password** - SIP2 User Name used to establish an SIP 2 Connection not the connection to the ILS SIP2 server
- **ILS Connection User Name & Password Required** – Sets whether or not the ILS system requires a user name and password in order to connect to the SIP2 server
- **ILS Connection User Name** – SIP2 Username used to create an SIP2 connection to the ILS SIP2 server
- **ILS Connection Password** - SIP2 Username used to create an SIP2 connection to the ILS SIP2 server
- **Username/Login Prompt:** Login/Username string returned by the ILS used for recognizing the username/login prompt. (Login is not case sensitive)
- **Password Prompt** – Password string returned by the ILS system used for recognizing the password prompt (Not case sensitive)
- **Ready/Logged In Prompt** – Ready log-in string returned by the ILS system used for recognizing the log in was successful and the SIP2 servers is ready for commands (Not case sensitive)

The following information is retrieved from the ILS system:

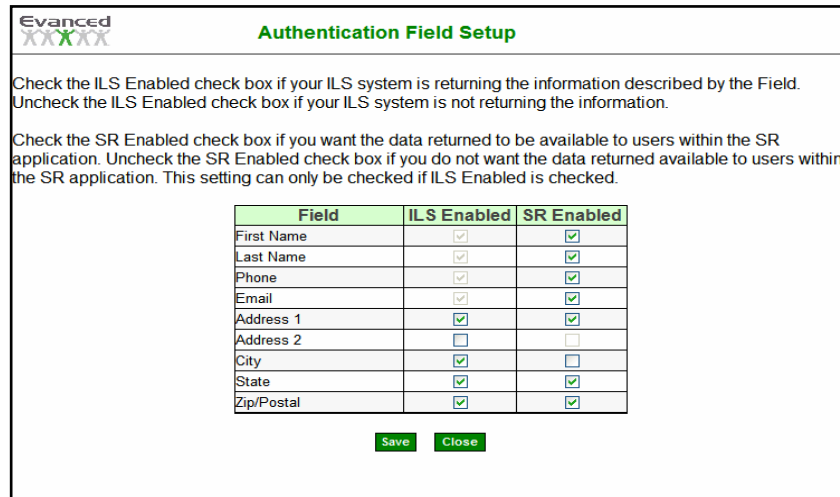
- First Name
- Last Name
- Library Card #
- Phone Number
- Email Address
- Street Address 1
- Street Address 2
- City
- State
- Zip Code

The program's registration setup determines the fields that the application attempts to retrieve from the ILS system. Use the *Test* button to test your connection and to troubleshoot problems. The *Save & Test* button saves the settings and prompts for the library card and pin to test.

Use the *Field Setup* button to enable/disable specific authentication fields. Generally, this configuration step is not needed but there are times when non-standard data is retrieved from the ILS and disabling specific fields allows the data to be mapped properly. Typically the address information is where a problem might exist. The data should be delimited in some fashion (either a comma or a carat character) so a typical address might look something like this:

123 W Main St., Plainfield, IN, 46259

In this example there are 4 comma-separated fields: Street Address1, City, State and Zip Code. The Authentication Field Setup should look like this:



Field	ILS Enabled	SR Enabled
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address 2	<input type="checkbox"/>	<input type="checkbox"/>
City	<input checked="" type="checkbox"/>	<input type="checkbox"/>
State	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Zip/Postal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 2.11.7 B Authentication Field Setup

Suppose the address data came back like this:

123 W Main St., IN, 46259

In this example there are 3 comma-separated fields: Street Address 1, State and Zip Code. In order to get the data mapped properly, the City field would need to be disabled.

The *ILS Enabled* field tells the application to look for the listed field in the information returned from the ILS. If unchecked, then the application moves on to the next field that is checked. The *SR Enabled* field tells the application to use the information returned wherever applicable in the application (such as the registration page). If unchecked and ILS Enabled is checked then the application retrieves the information but does not display the information. Information is displayed only when both are checked and some data is returned from the ILS and the program is configured to display the specific information.

2.12 Security Maintenance

Important Note:

It is **highly** recommended that the Evanced default passwords are changed immediately upon purchasing this system.

Administrators may modify the four password / login levels from here. The four submenus here are:

- **Administrator Login Maintenance**
- **Staff Login Maintenance**
- **Basic Login Maintenance**
- **Volunteer Login Maintenance**

For any of the password/login levels, follow these instructions:

1. Enter the old password
2. Enter then the new password
3. Re-enter the new password
4. Click on the *Save* button.

2.12.1 Advanced Security and Log-Ins

This new feature allows Summer Reader administrators to create and maintain user-based security. This feature assists in creating an audit trail to track the last changes made and by whom in Summer Reader.

2.12.1.1 Activating Advanced Security

To set up **Advanced Security**, the **Administrator** must be logged in. System Settings > Security > Advanced > Click YES > Click Save You will be Automatically Logged Off and redirected to the following page:

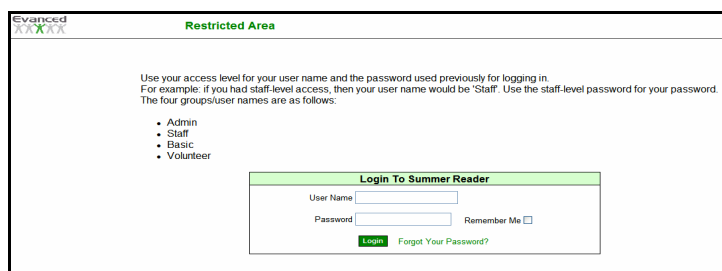


Figure 2.12.1.1 A Login Page for Advanced Security

The first time an administrator logs in, the administrator username is *admin*, the password is the **same password** used to log in previously. The same is true for the other group-level accounts.

Important Note: After enabling Advanced Security, four new users are created and assigned default permissions (or roles). The new users are 'Admin', 'Staff', 'Basic', and 'Volunteer'. By default, the new users' permission settings (roles) are set to mimic the access levels provided to users logging in with their group-level passwords. The four new users created have the same names ('Admin', 'Staff', 'Basic', and 'Volunteer') and the passwords for the user accounts are initially set to the group-level passwords. This enables staff to continue to log in normally while new security roles are being set up.

If email is enabled in *Email Setup* and the user is configured with an email address, a link appears on the login page that allows the user to enter their email address and the application sends out an email to the staff member with their password.

Upon logging in again, administrators have a new setting - **Security Setup** – the setting can be found under **System Setup**.

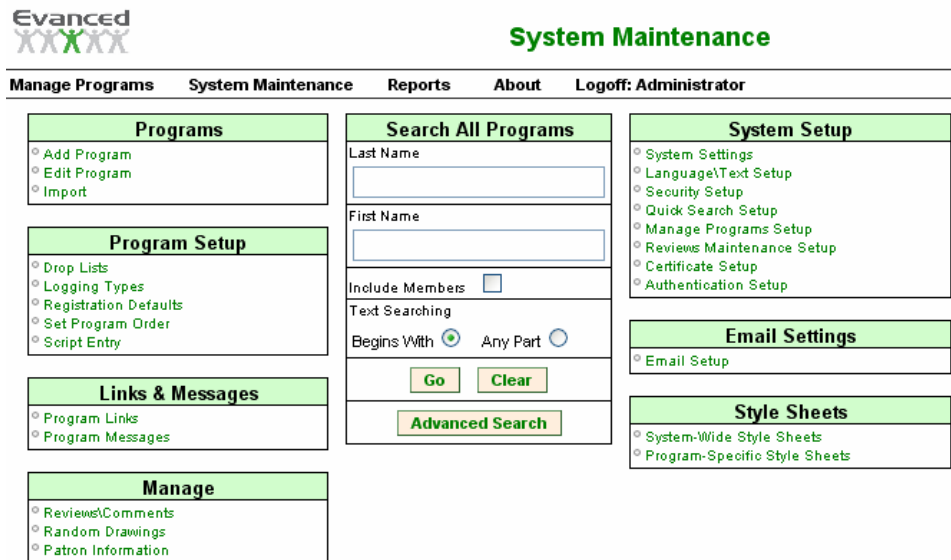
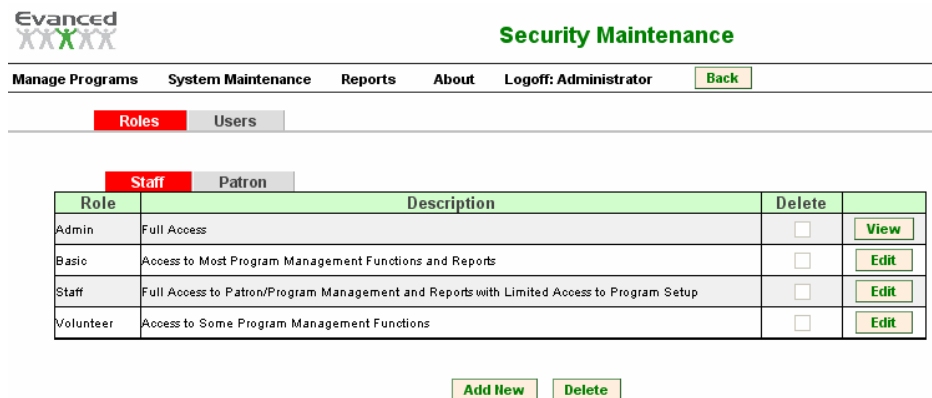


Figure 2.12.1.1 B System Maintenance for Administrator Users

Upon clicking Security Setup, you will see the following:



Role	Description	Delete	
Admin	Full Access	<input type="checkbox"/>	View
Basic	Access to Most Program Management Functions and Reports	<input type="checkbox"/>	Edit
Staff	Full Access to Patron/Program Management and Reports with Limited Access to Program Setup	<input type="checkbox"/>	Edit
Volunteer	Access to Some Program Management Functions	<input type="checkbox"/>	Edit

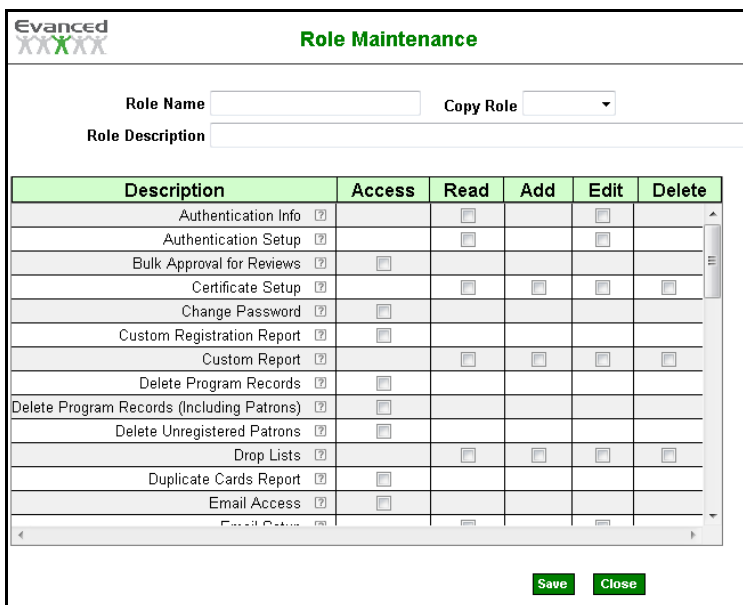
Figure 2.12.1.1 C Security Maintenance

There are four tabs available on this page. **Roles** are the tasks that a user is given permission to use in the software. Once a group of tasks is chosen and assigned a name, it is a “Role”. That role can then be assigned to user(s). **Users consist of a user name, full name, password, and the role.** **Staff** and **Patron** tabs allow you to create specific roles.

2.12.1.2 Creating Staff Roles

By clicking on both the **Roles** and **Staff** tabs, the following screen can be seen. The **Staff Roles** provided with the software can be seen and edited from this page. (The Administrator role cannot be edited but can be viewed.)

New Staff Roles can be added by clicking **Add New**.



Description	Access	Read	Add	Edit	Delete
Authentication Info ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authentication Setup ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bulk Approval for Reviews ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Certificate Setup ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Password ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Registration Report ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Report ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete Program Records ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete Program Records (Including Patrons) ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete Unregistered Patrons ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drop Lists ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Duplicate Cards Report ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email Access ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email Setup ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 2.12.1.2 A Role Maintenance

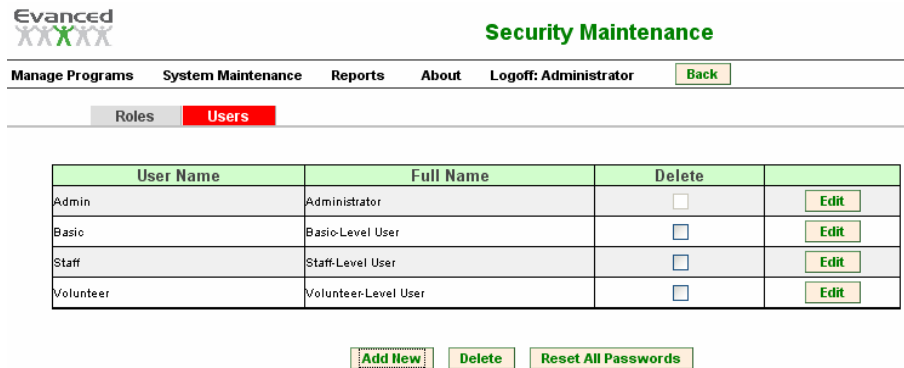
Role Name allows a new role to be assigned a specific name. It might be the same as the *Staff User* name, or it might be a branch name, for example.

Copy Role allows previously used roles to be copied and edited to create new roles.

Role Description is a descriptor of the role created. Once a role has been created, click **Save** and **Close**.

2.12.1.3 Creating Users

To create users, click the **Staff** tab and click the **Users** tab to view the following screen:



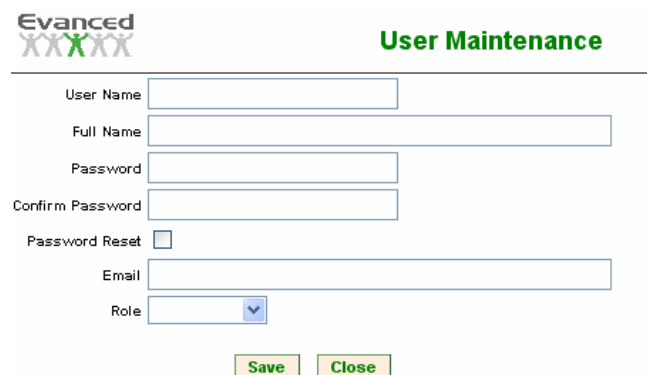
The screenshot shows the 'Security Maintenance' page with the 'Users' tab selected. It displays a table of existing users and buttons for adding new users.

User Name	Full Name	Delete	
Admin	Administrator	<input type="checkbox"/>	Edit
Basic	Basic-Level User	<input type="checkbox"/>	Edit
Staff	Staff-Level User	<input type="checkbox"/>	Edit
Volunteer	Volunteer-Level User	<input type="checkbox"/>	Edit

Below the table are three buttons: [Add New](#), [Delete](#), and [Reset All Passwords](#).

Figure 2.12.1.3 A User Maintenance

To create a new log-in, click **Add New**.



The screenshot shows the 'User Maintenance' page with the 'Add User' form. It includes fields for User Name, Full Name, Password, Confirm Password, Password Reset, Email, and Role.

Fields:

- User Name:
- Full Name:
- Password:
- Confirm Password:
- Password Reset: ☐
- Email:
- Role:

Buttons: [Save](#), [Close](#)

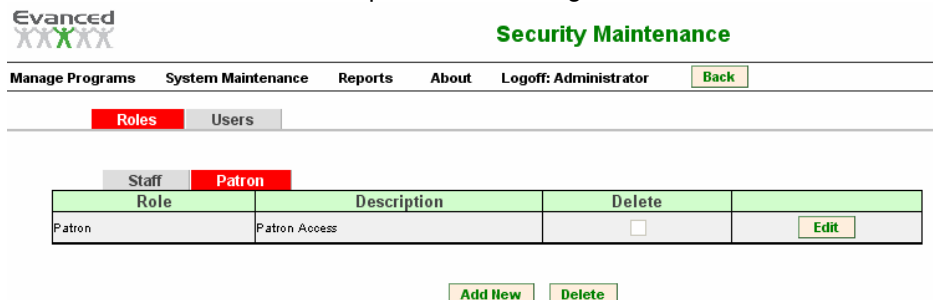
Figure 2.12.1.3 B Add User

From here a **User Name** and **Password** is created and a **role** is assigned. Clicking the **Edit** button on the Security Maintenance page will allow the administrator to edit the **Username** and **Password** and opens the User Maintenance screen above.

2.12.1.4 Creating Roles

The patrons that are registered for a specific program by default belong to a patron role. Summer Reader comes with a default patron role called 'Patron'. If a patron role is not specified in the program's setup then registered patrons for the program inherit/use this default 'Patron' role; otherwise, patrons inherit/use the specified patron role. The Patron Role is used to manage the patron's security in the program.

Clicking the **Roles** tab and the **Patron** tab opens the following screen:



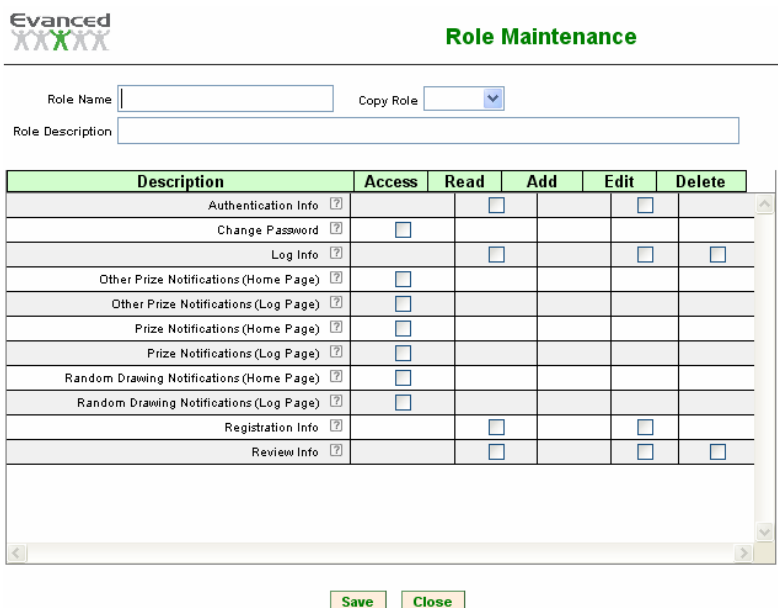
The screenshot shows the 'Security Maintenance' screen with the 'Roles' tab selected. Under the 'Roles' tab, the 'Patron' sub-tab is active. The main table lists the 'Patron' role with a description of 'Patron Access'. Below the table are 'Add New' and 'Delete' buttons.

Role	Description	Delete	
Patron	Patron Access	<input type="checkbox"/>	Edit

[Add New](#) [Delete](#)

Figure 2.12.1.4 A Role Maintenance

As with Staff Roles, Patron roles can be created and edited for specific needs. To add a new **Patron Role**, click the **Add New** button.



The screenshot shows the 'Role Maintenance' screen with the 'Add New' button clicked. The form includes fields for 'Role Name', 'Copy Role', and 'Role Description'. Below these fields is a table for assigning permissions to the new role.

Description	Access	Read	Add	Edit	Delete
Authentication Info ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Password ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Log Info ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Prize Notifications (Home Page) ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Prize Notifications (Log Page) ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prize Notifications (Home Page) ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prize Notifications (Log Page) ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Random Drawing Notifications (Home Page) ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Random Drawing Notifications (Log Page) ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Registration Info ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review Info ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save](#) [Close](#)

Figure 2.12.1.2 A Add Patron Role

As with staff roles, specific tasks may be enabled for patrons, however the tasks assigned are limited in scope and only involve the patron side of the software.

2.13 Email Settings

There are two types of email templates available: system-wide email templates and program-specific email templates. The system-wide template must be created first and from those system-wide templates, program specific templates may be built and edited.

2.13.1 System Wide Email Templates

System-Wide Email Templates allows you to setup standard emails that are sent to patrons (i.e., prize messages, certificate award notifications, etc.). There are five system templates to start with: Login Information, Registration Confirmation, Random Drawing, Reading List and Reading Log. Additional customized templates can be added for specific programs in the *Program-Specific Email Template* link.

To create an e-mail template, click System Maintenance – Email Settings - System-Wide Email Templates.

- Add a New Email Template. In the *Template Name* field enter a template name. In the *Subject*, enter the subject of the e-mail. Compose your message in the field below the subject. All email templates supports the following tags (tags are replace with the appropriate information from the database): *Library Contact*, *Library Name*, *Program Name* and *Program URL*. Some templates support additional tags. Look at the tag list on the right of the page to determine the tags that apply to the template that is being constructed. To enter a tag, click the tags desired location in the e-mail message, click on the desired tag and then click the <. The system inserts the selected tag in the selected location. Click the Save button to save the template.
- Modify Email Templates. The *Modify Email Templates* section contains a list of all templates in the system and allows you to edit or delete templates. The delete option is only available on custom templates. The system does not allow you to delete system email templates (i.e., *Login Information* and *Registration Confirmation*). To edit a template, select the edit icon associated with the desired template. The system opens the *Modify Email Template* page for the selected template. Modify the template as desired and click the Save button. To delete an email template, click the *Delete* check box(es) associated with the desired template(s) and click the *Delete* button. The system asks for confirmation to delete the template. Click OK. The system deletes the selected template and refreshes the template list.

Click the *Back* button on the tool bar to return to the *System Maintenance* page.

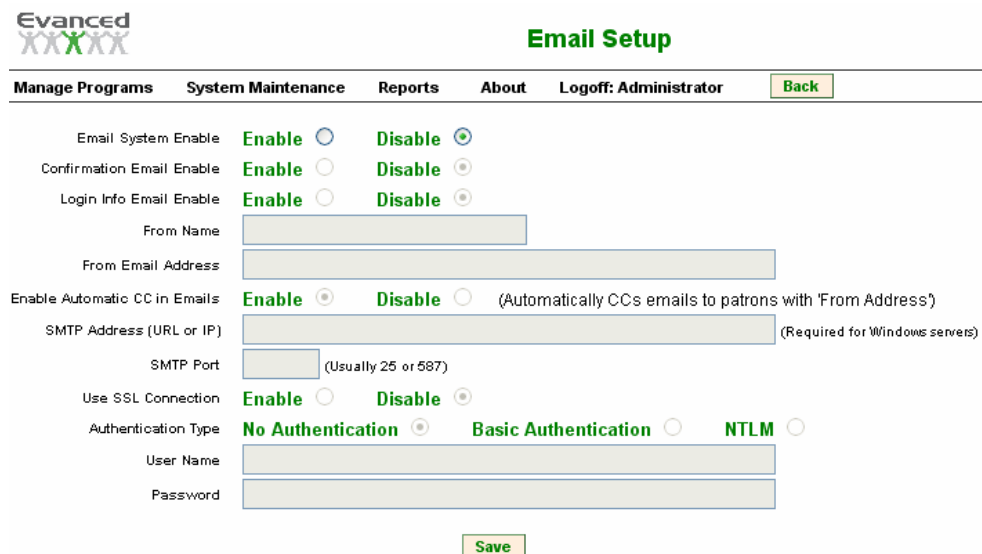
2.13.2 Program-Specific Email Templates

Program-Specific Email Templates must be created in System-Wide Email Templates and then applied to specific programs.

After creating the email template in the System-Wide Email Template area, click on Program Specific Email Templates and select the program you wish to apply the email template to. From there a drop down menu with the email templates will appear and the appropriate email may be edited using the same process as used for System-Wide Email Templates.

2.13.3 Email Setup

Various email settings can be enabled/disabled and configured here.



Evanced

Email Setup

Manage Programs System Maintenance Reports About Logoff: Administrator [Back](#)

Email System Enable **Enable** ☐ **Disable** ☒

Confirmation Email Enable **Enable** ☐ **Disable** ☒

Login Info Email Enable **Enable** ☐ **Disable** ☒

From Name

From Email Address

Enable Automatic CC in Emails **Enable** ☒ **Disable** ☐ (Automatically CCs emails to patrons with 'From Address')

SMTP Address (URL or IP) (Required for Windows servers)

SMTP Port (Usually 25 or 587)

Use SSL Connection **Enable** ☐ **Disable** ☒

Authentication Type **No Authentication** ☒ **Basic Authentication** ☐ **NTLM** ☐

User Name

Password

[Save](#)

Figure 2.13.3 A System Email Settings Page

Options include:

- **Email System Enable** - This setting determines if email is enabled or disabled for the application.
- **Confirmation Email Enable** – This setting determines if registration confirmation emails are to be sent after patron registrations. Confirmation emails are only sent if the patron supplies an email address.
- **Login Info Email Enable** – This setting determines if patrons have access to a feature on the patron home page that allows them to have the application email them their login information. If enabled a *Forgot Your Login Info* button appears on the patron home page. After the patron clicks on this button and supplies their email address they used to register for a program, the system finds a match and sends the login information to the supplied email address.
- **From Name** – This is the *From* name that appears in any emails sent by the system.
- **From Email Address** – This is the *From* email address that appears in any emails sent by the system
- **Enable Automatic CC in Emails** – This setting determines if the emails to patrons are automatically carbon copied to the *From Email Address*. If set to *Yes* then the CC address in emails is filled in with the *From Email Address*. If set to *No* then the CC address is left blank. Usually this field is enabled to serve as a mechanism for libraries to track emails to patrons.
- **SMTP Address (URL or IP)** – This is the SMTP server's URL or IP.
- **SMTP Port** – This is the port number for your SMTP server - usually 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 (No Authentication, Basic Authentication, NTLM)** – If the SMTP server requires authentication for sending email then select the either *Basic Authentication* or *NTLM*.
- **User Name** – This is the user name for authenticating to the SMTP server.
- **Password** – This is the password for authenticating to the SMTP server.
- **View Email Log Button** – Allows library staff to view a 30-day log of emails sent to library users

2.14 Style Sheet Templates

Important Note: Style sheet editing requires a working knowledge of .CSS. Style Sheet editing should only be performed by someone familiar with web programming and related coding. If you run into trouble with a style sheet, see “Restoring Default Style Sheet Templates” in this section.

Style Sheet Templates houses the basic templates used to create the program Style Sheets. These templates that appear in the *Load Template* drop down list found in the System Maintenance > Style Sheets > System Wide Style Sheets function. The system comes with five pre-programmed default templates that can be applied to or modified specific programs. You can also create and program your own style templates.

Each template contains seven sections:

- **Home Page** contains the styles that affect the program/patron home page
- **Registration** contains the styles that affect the patron registration page (accessed through the Sign Me Up button)
- **Logging Page** contains the styles that affect the patron’s logging page (accessed through the Add/View Log button)
- **Patron Reviews Page** contains the styles that affect the patron’s reviews page. The patron’s access to their own reviews is a configurable setting in the program’s security if Advanced Security is not enabled; if Advanced Security is enabled the setting is in the Security Setup.
- **All Reviews Page** contains the styles that affect the public reviews page (accessed through the View All Reviews button).
- **Confirmation Page** contains the settings that affect the confirmation signup page. The system displays this when a patron clicks on the Signed Up Previously button on the Patron Registration. Contains the styles that affect the registration confirmation page (accessed through the Signed Up Before button on the registration page).
- **Email Login Information Page** contains the styles that affect the email login information page (accessed through the Forgot Your Login Info button on the program home page). This feature is

only available if email is enabled and the Login Info Email Enable option is enabled in the Email Setup.

- **Program Selection Page** contains the styles that affect the program selection page. The program selection page can serve multiple purposes. If the Recall feature is enabled in the System Setup, a patron after successfully registering for a program has the option to click on the Recall button. Clicking the Recall button displays the program selection page allowing the patron to register another family member for a program. After selecting a program the patron is directed to the registration page for the selected program and the pertinent registration information is copied into the registration form for the family member.

If the Family Registration feature is enabled in the program's setup, an Add Member button is available to the patron after successfully registering for a program. Clicking the Add Member button displays the program selection page allowing the patron to register another family member for a program. After selecting a program the patron is directed to the registration page for the selected program and the pertinent registration information is copied into the registration form for the family member.

The primary difference between the Recall feature and the Family Registration feature is how family members are registered for their programs. The Recall feature registers family members with unique login credentials so all family members log in to the application separately. The Family Registration feature registers family members but only the parent has login credentials.

- **Add Comment Page** contains the styles for the add comment page. This feature is only available if the Review Comments setting in the program's setup is enabled. This page is displayed when patrons click on the Add Comment link right below a review.
- **RSS Selection Page** contains the styles for the RSS Selection page. This feature is only available if one or more RSS Options in the program's setup are enabled. An image with a link to this page appears when one or more of these options are checked.
- **Reading List Page** contains the styles for the Reading List page. This feature is only available if the Reading List option in the program's setup is enabled. After adding one or more titles to their reading list via the All Reviews page, a patron has the ability to view/modify their reading list by click on the Reading List button on their home page.

Any style codes not included in the default styles above can be added. For example, if links are embedded into the *.Message* line of the Home Page section and there is no style associated with the `<a>` tag, then add a style to format the links (i.e., *.Message a{color: yellow;}*). A few of the style classes do not apply to the default content on some of the pages. These styles can be applied just as any other valid styles included in the style sheet settings.

2.14.1 Creating a New Style Sheet Template

1. From the Home Page, select *System Maintenance* from the tool bar at the top of the page. The system will open the *System Maintenance* page.
2. In the *Style Sheets* area, select *System-Wide Style Sheets*.
3. Click the *Add New* button.

Important Note: This procedure is best completed by someone familiar with .html code and style sheets.

4. Enter a name for the template in the *Template Name* field.

5. Click *Save* to save the template. The page may return to system maintenance, if so, return to system-wide style sheets and select the new template.
6. Revise the template as desired.
7. Click the *Preview Home Page* button to preview the style sheet.
8. Select one of the following to continue.
 - A. Click *Save* to retain changes to the style sheet and return the home page,.
 - B. Click *Back* to return to the home page without saving.

2.14.2 Editing an Existing Style Sheet Template

1. From the Home Page, select *System Maintenance* from the tool bar at the top of the page. The system will open the System Maintenance page.
2. In Set Up Maintenance, select *System Wide Style Sheets or Program Specific Style Sheets* depending on your needs. The system opens the *Add/Edit Style Sheet Templates* page.
3. Click on the *Select Style Sheet Template* drop down menu and click on the desired style sheet template. The system displays the *Add/Edit Style Sheet Templates* for the selected style sheet.
4. Revise the templates as desired.

Important Note: This procedure is best completed by someone familiar with .html codes and style sheets.
5. Click *Preview Home Page* to preview the style sheet template.
6. Select one of the following to continue.
 - A. Click *Save* to retain changes to the style sheet and return the home page,.
 - B. Click *Back* to return to the home page without saving.

2.14.3 Restoring Default Style Sheet Templates

1. From the Home Page, select *System Maintenance* from the tool bar at the top of the page. The system will open the System Maintenance page.
2. In the *Style Sheets* area, select *System-Wide Style Sheets*.
3. Click on the *Select Style Sheet Template* drop down list and click on the desired style sheet template
4. Click the *Load Default* button. The system will ask

"Are you sure you want to load the default template? This will overwrite your existing style sheets."
5. Click one of the following to continue:

- A. Click *Ok* to restore the style template to its original settings and return to the *System Maintenance* page.
- B. Click *Cancel* to abort the process and return to the editing page. From here, you may select and continue working with another template, select another function from the tool bar, or select the *Back* button on the tool bar to return to the *System Maintenance* page.

2.14.4 Deleting a Style Sheet Template

The system allows you to delete only those templates that you have created. Templates created by Evanced cannot be deleted.

1. From the Home Page, select *System Maintenance* from the tool bar at the top of the page. The system opens the *System Maintenance* page.
2. In the *Style Sheets* area, select *System-Wide Style Sheets*.
3. Click on the *Select Style Sheet Template* drop down list and click on the desired style sheet template.
4. Click the *Delete* button. The system displays the following confirmation: "*Are you sure you want to delete this template?*"

Note: The *Delete* button only appears in templates that have been created by the library.

5. Do one of the following to continue:
 - A. Click *Ok* to confirm and delete the template and return to the editing page. To proceed from here, select one of the following:
 - (i) Select another style sheet from the *Select Style Sheet Template* drop down list
 - (ii) Click *Back* to return to the *System Maintenance* page.
 - (iii) Select a system option from the tool bar at the top of the page.
 - B. Click *Cancel* to cancel the delete process and return to the style sheet template. To proceed from here, do one of the following:
 - (i) Revise the template if necessary, then click *Save*. The system saves the template and returns to the *System Maintenance* page.
 - (ii) Click *Add New* to create a new template.
 - (iii) Click *Back* to return to the *System Maintenance* page.
 - (iv) Select a system option from the tool bar at the top of the page.

2.14.4.1 Style Sheet Organization

Style Sheets can be applied to 11 separate pages on the patron-side:

- **Home Page** affects the Patron Home page.

Program Home Page

Welcome to the Adult Page Turners Home Page. Once you are logged in, you will be

Adult Page Turners	Summer Reader 2008	Reading 2008	Anime 2008	Grades 1-5	Grades 6-12	Jane Austen	Gabaldon	Franklin
--------------------------	--------------------------	-----------------	---------------	---------------	----------------	----------------	----------	----------

Cool Links

- Library Home
- What's Happening
- Search the Web
- Mapquest
- YALSA
- Amazon.com
- Reading Group Guides
- Online Books
- Mysterynet
- Historical Fiction
- BookMuse.com
- Book Finder
- Horror Writers
- Newton Reads

If you have previously registered for a program, enter your user name and password and click on the **Login** button. New users click on the **Sign Me Up** button.

User Name:

Password:

Important Messages

This is where messages configured in Program Setup Maintenance - Global Message Maintenance appear!

This is where messages configured in Program Setup Maintenance - Program Message Maintenance appear!

Reviews

What you think.: The Harry Potter books have been excellent from start to finish. I've enjoyed them all and am sorry to see the series end. This one was getting a little tedious in the middle, but got much more exciting at the end. I liked the conclusion, too.

Name of the Book: Harry Potter and the Deathly Hallows

What you think.: Excellent book. Well written and un-biased. Contains a lot of new, never-before-released information

Name of the Book: No Simple Victory

Rate Me.: 5

Example program templates provided by E*vanced Solutions

Patron Home Page - Login Prompt View

Patron Home Page

Welcome to the Adult Page Turners Home Page. Once you are logged in, you will be ta

Jane Austen	Franklin
-------------	----------

Cool Links

- Library Home
- What's Happening
- Search the Web
- Mapquest
- YALSA
- Amazon.com
- Reading Group Guides
- Online Books
- Mysterynet
- Historical Fiction
- BookMuse.com
- Book Finder
- Horror Writers
- Newton Reads

Activity Center

Important Messages

This is where messages configured in Program Setup Maintenance - Global Message Maintenance appear!

This is where messages configured in Program Setup Maintenance - Program Message Maintenance appear!

Reviews

What you think.: Excellent book. Well written and un-biased. Contains a lot of new, never-before-released information

Name of the Book: No Simple Victory

Rate Me.: 5

What you think.: The Harry Potter books have been excellent from start to finish. I've enjoyed them all and am sorry to see the series end. This one was getting a little tedious in the middle, but got much more exciting at the end. I liked the conclusion, too.

Name of the Book: Harry Potter and the Deathly Hallows

Example program templates provided by E*vanced Solutions

Patron Home Page – Patron Logged In

- **Registration Page** affects the Patron Registration page.

Register in 'Adult Page Turners' 1

To register, fill out the form and click the Save button. All required fields are marked with a red asterisk.

[Click here to do a group registration](#)

***** Participant First Name

***** Participant Last Name

***** User Name

***** Password

***** Confirm Password

Participant Middle Name

Parent/Guardian Middle Name

Parent/Guardian Last Name

Gender

***** Birth Date

***** Patron Classification (Adult)

Street Address 1

City

State Indiana

Zip Code 46123

Phone Number 317

Email

School Name

Primary Library of Use

Library Card Number

***** Select Log Type

***** Patron Goal Pages

[Click here to do a quick registration](#)

- **Logging Page** affects the Patron Logging page.

'Jane Austen' Log for 'Patron Name ' 1

Instructions for logging progress.

***** Amount Books

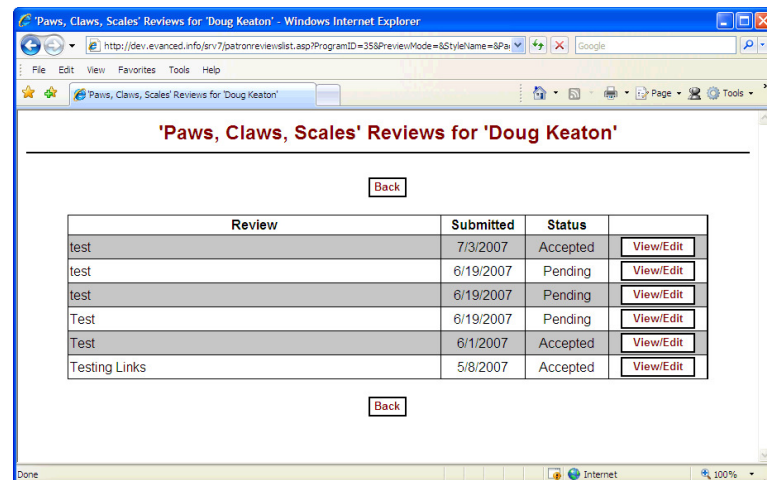
***** What you think.

Amount (Books)	What you think.	Logged By	Log Date/Time	Delete
2	Good program.	Patron	2/19/2008 5:27:39 PM	<input type="checkbox"/> <input type="button" value="Edit"/>

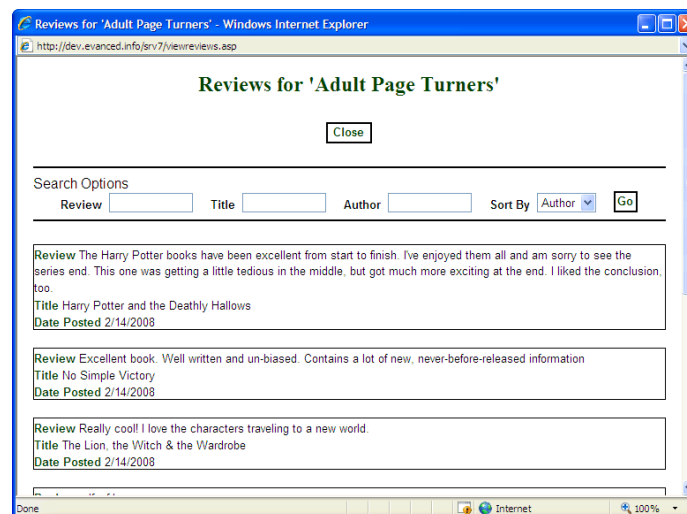
2 Books

Sort By Log Date/Time DESC

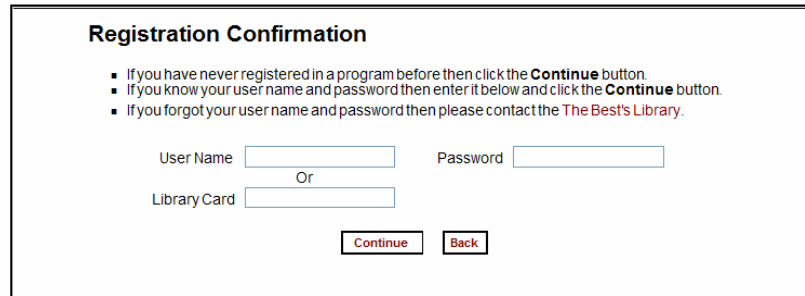
- **Patron Reviews Page** affects a Patron Reviews page and allows them to edit and review their own reviews. This page is only applicable if patrons are allowed access to their reviews. If Advanced Security is enabled, this can be specified by the 'Review Info' setting in the patron role. If Advanced Security is disabled, the 'Patron Access to Their Reviews' determines their level of access.



- **All Reviews Page** affects the All Reviews Page and allows users to see all current reviews.



- **Confirmation Page** affects the Registration Confirmation page. The system displays this when a patron clicks on the *Signed Up Before* button on the *Patron Registration* page. This page is only applicable if the '*Signed Up Before*' Feature setting in System Settings is enabled.



Registration Confirmation

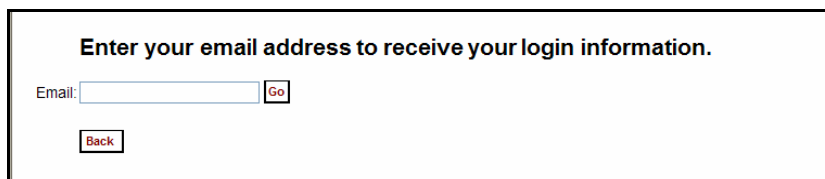
- If you have never registered in a program before then click the **Continue** button.
- If you know your user name and password then enter it below and click the **Continue** button.
- If you forgot your user name and password then please contact the [The Best's Library](#).

User Name Password

Or

Library Card

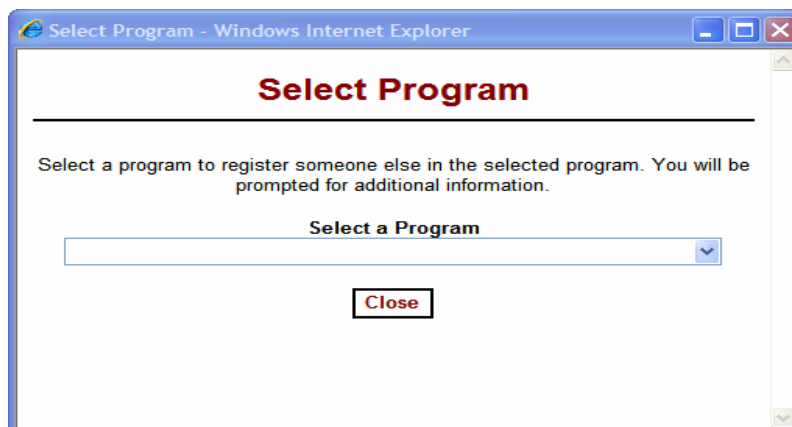
- **Email Login Information Page** affects the Email Login Information Page, which the system displays when a patron clicks on the *Forgot Your Login Info?* button on the program's home page. This page is only applicable when email is enabled and the *Login Info Email Enable* setting in Email Setup is enabled.



Enter your email address to receive your login information.

Email:

- **Program Selection Page** affects the Patron Program Selection page. This page is only applicable if Family Registration is enabled and the user click on the *Add Member* button or if Patron Recall is enabled by setting the *Patron Recall Limit* to a non-zero value in the System Settings and the patron clicks on the *Recall* button.



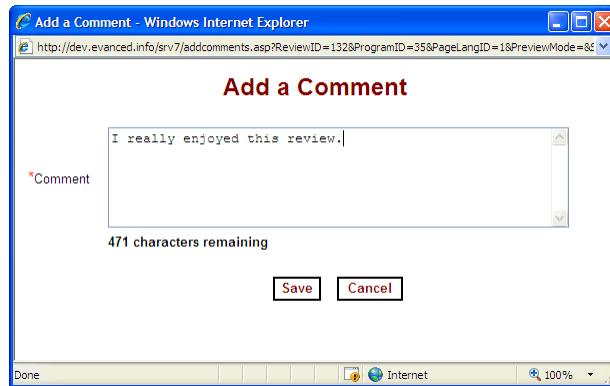
Select Program - Windows Internet Explorer

Select Program

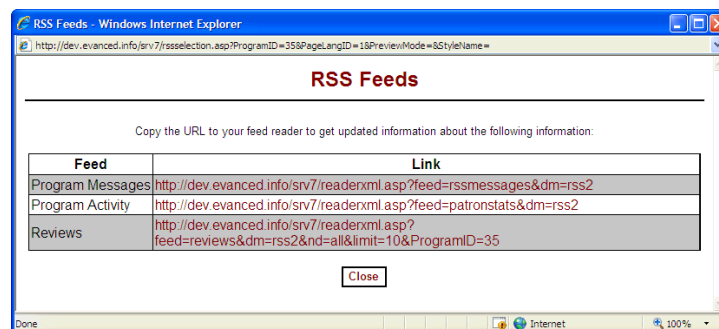
Select a program to register someone else in the selected program. You will be prompted for additional information.

Select a Program

- **Add Comment Page** affects the Add Comment Page. This page is only applicable if *Review Comments* is enabled in the program's setup.

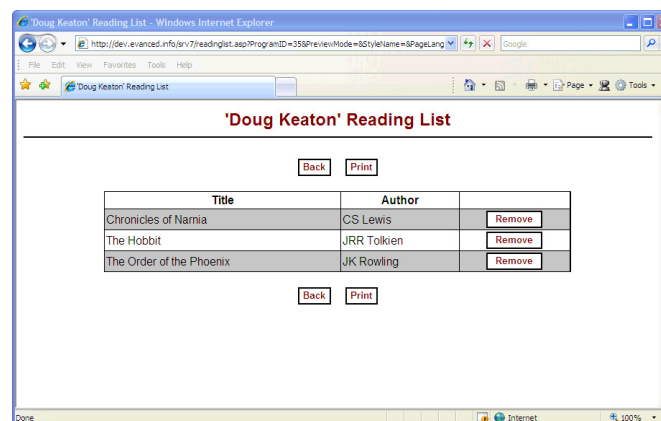


- **RSS Selection Page** affects the RSS Feeds page that allows patrons to copy and paste links into their favorite feed reader. This page is only applicable if one or more *RSS Reviews Feed* options are enabled in the program's setup.



Feed	Link
Program Messages	http://dev.evanced.info/srv7/readerxml.asp?feed=rssmessages&dm=rss2
Program Activity	http://dev.evanced.info/srv7/readerxml.asp?feed=patronstats&dm=rss2
Reviews	http://dev.evanced.info/srv7/readerxml.asp?feed=reviews&dm=rss2&nd=all&limit=10&ProgramID=35

- **Reading List Page** affects the patron's Reading List Page which allows users to edit and print their reading list.. This page is only applicable when the Reading List option is enabled in the program's setup.



Title	Author	Remove
Chronicles of Narnia	CS Lewis	Remove
The Hobbit	JRR Tolkien	Remove
The Order of the Phoenix	JK Rowling	Remove

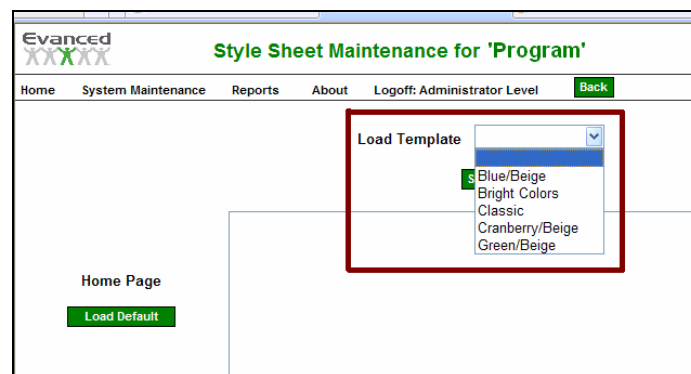
Note: Be aware that if specific default styles are not available, that they can be added. For example if links are embedded into the 'Message' section and there is no style for the <a> tag then simply add this style to the 'Home Page Settings' styles to format the links. An example of this is as follows:

```
.Message a{color:yellow;}
```

A few of the style classes do not apply to the default content on some of the pages and are not shown on the figures depicting the style classes. These styles can be applied just as any other valid styles included in the style sheet settings but are not shown to limit confusion.

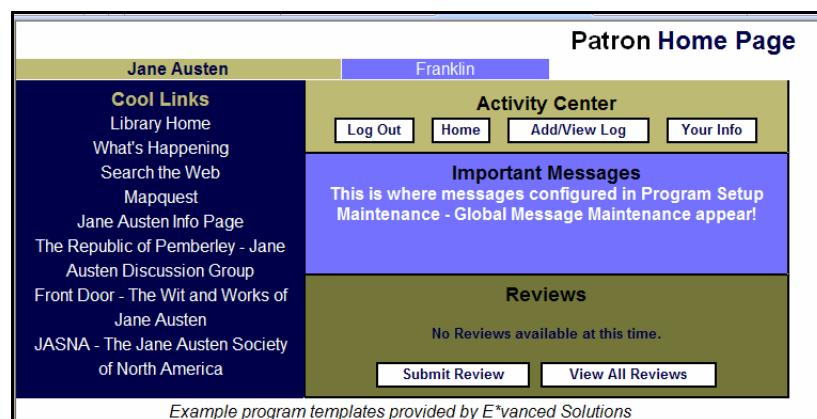
2.14.4.2 Default Templates

Summer Reader comes preconfigured with 5 standard style sheet templates, which are accessible from the *Load Template* drop down list on the Style Sheet.



The illustrations below display the color schemes associated with each default template.

Blue/Beige



Bright Colors

Patron Home Page

Jane Austen	Franklin
Cool Links Library Home What's Happening Search the Web Mapquest Jane Austen Info Page The Republic of Pemberley - Jane Austen Discussion Group Front Door - The Wit and Works of Jane Austen JASNA - The Jane Austen Society of North America	Activity Center Log Out Home Add/View Log Your Info
	Important Messages This is where messages configured in Program Setup Maintenance - Global Message Maintenance appear!
	Reviews No Reviews available at this time. Submit Review View All Reviews

*Example program templates provided by E*vanced Solutions*

Classic

Patron Home Page

Jane Austen	Franklin
Cool Links Library Home What's Happening Search the Web Mapquest Jane Austen Info Page The Republic of Pemberley - Jane Austen Discussion Group Front Door - The Wit and Works of Jane Austen JASNA - The Jane Austen Society of North America	Activity Center Log Out Home Add/View Log Your Info
	Important Messages This is where messages configured in Program Setup Maintenance - Global Message Maintenance appear!
	Reviews No Reviews available at this time. Submit Review View All Reviews

*Example program templates provided by E*vanced Solutions*

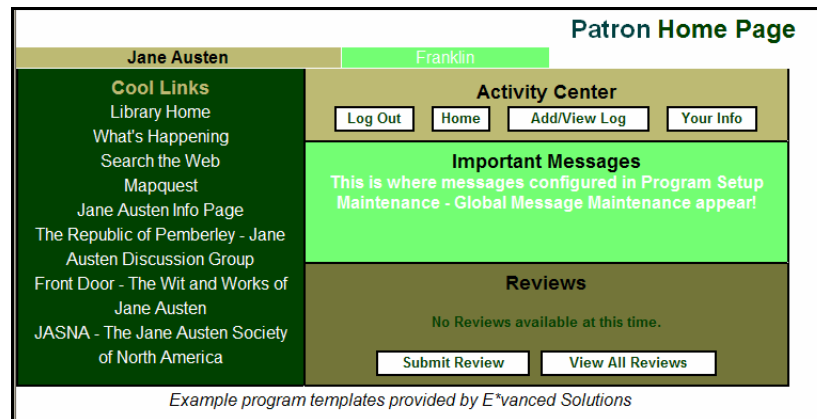
Cranberry/Beige

Patron Home Page

Jane Austen	Franklin
Cool Links Library Home What's Happening Search the Web Mapquest Jane Austen Info Page The Republic of Pemberley - Jane Austen Discussion Group Front Door - The Wit and Works of Jane Austen JASNA - The Jane Austen Society of North America	Activity Center Log Out Home Add/View Log Your Info
	Important Messages This is where messages configured in Program Setup Maintenance - Global Message Maintenance appear!
	Reviews No Reviews available at this time. Submit Review View All Reviews

*Example program templates provided by E*vanced Solutions*

Green/Beige



2.14.4.3 Using Style Sheets

Note: System-Wide Style Sheets are used to create or modify style sheet templates. There are five style sheet templates provided with the application. The style sheet templates can be applied to your program in the Program-Specific Style Sheets area. Select the program from the list and then select the template from the Load Template drop-down list. This feature loads the styles from the template to the program.

To use style sheets:

1. Select *System Maintenance* → *Program Specific Style Sheets*. The system displays the *Program List*.

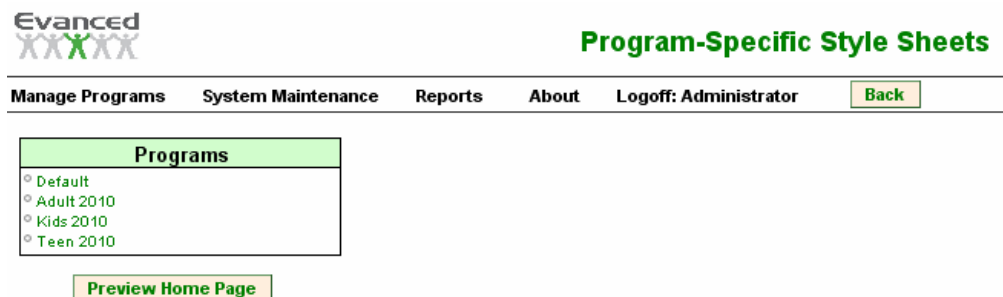


Figure 2.14.4.3 A Program-Specific Style Sheets

Click on the desired program to configure the program's style sheet. When a program is first added, the style sheet will be blank.

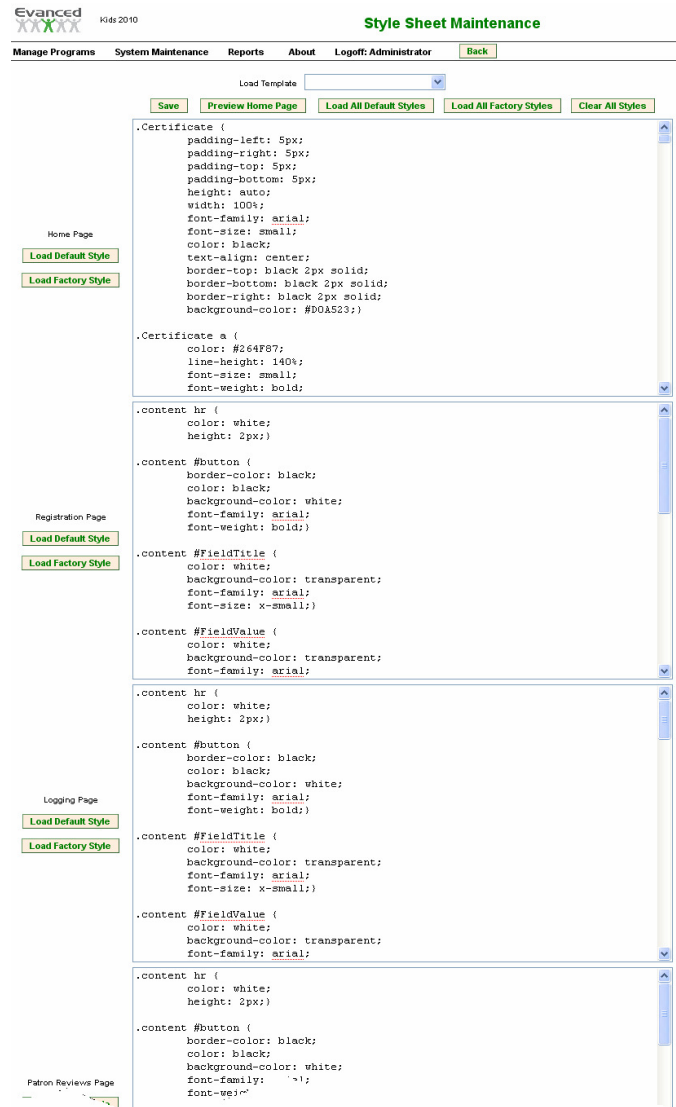


Figure 2.14.4.3 B Program-Specific Style Sheets Editing

2. Update the style sheet as desired.

Reminder: We highly recommended that these pages only be edited by someone familiar with web programming.

A. Starting from a Blank Template – Using a Default Template

To insert a default template, select a template from the *Load Template* drop down list. The system will insert the default code into the program's style sheet and return the user to the *Program-Specific Style Sheets* page. Select the desired function from the toolbar to continue.

B. Revising Existing Code

We do not recommend adjusting default or template code unless you are familiar with web programming. Those with experience can simply scroll through and edit the code as desired. Click *Save* to save changes and return to the *Program-Specific Style Sheets* page.

Note: Set the #ImageControl class to display images in the Sponsor, Links, and/or Footer sections. When setting up an image make sure to remove the “display:none” attribute so that the image is displayed. The other two things to do when setting up an image is set to set the “height” attribute to the height (in pixels) of the image and to set the url in the “background-image” attribute to the url of the image. The default templates have the “background-image” attribute commented out (comments are denoted by “/*” and “*/”). Just remove the comment characters to apply the attribute to the styles. The following is an example of #ImageControl class that sets an image in the Sponsor section:

```
.Sponsor #ImageControl{
    height: 150px;
    width: 100%;
    background-image: url(http://evanced.info/evanceddemo/sr/graphics/dogimage2.jpg);
    background-position: top center;
    background-color: transparent;
    background-repeat: no-repeat;}
```

C. Restoring Default Code

You may reload the default code for any section at any time by clicking on the Load Default button associated with the desired field. The system will enter the default code into the associated field and returns to the *Program-Specific Style Sheets* page.

D. Preview Home Page

You may preview your home page settings by clicking the *Preview Home Page* button. The system will open a new window containing a view of the selected home page.

3. At this point, you should see the *Program-Specific Style Sheets* page. From here, you can:

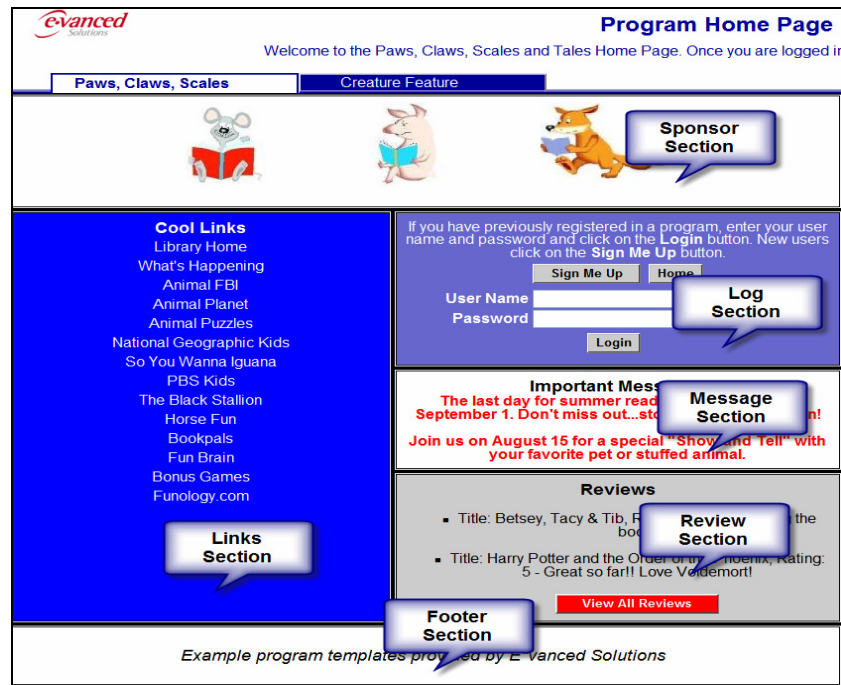
- A. Preview Home Pages by clicking the Preview Home Page button. The system will display the *Program Home Page*, which allows you to preview the style settings for all home pages by clicking on the desired home page tab.
- B. Modify style sheets by editing the code of each individual section.
- C. Load Default Style for individual sections or Load All Default Styles for the entire style sheet. The system will confirm your intent to load the default styles by displaying the following confirmation: “Are you sure you want to load the default style?” Click OK to proceed or Cancel to abort the process.
- D. Load Factory Style or for individual sections or Load All Factory Styles for the entire style sheet. The system will confirm your intent to load the default styles by displaying the following confirmation: “Are you sure you want to load the default style?” Click OK to proceed or Cancel to abort the process.
- E. Clear All Styles from the style sheet. The system will confirm your intent to clear styles by displaying the following confirmation: “Are you sure you want to clear all the styles?” Click OK to proceed or Cancel to abort the process.

- F. Continue with Another Function by clicking on the desired function from the tool bar at the top of the page.

2.14.4.4 The Impact of Style Sheet Settings on Program Pages

The following section presents illustrations of the various pages that appear in a program and where on those pages style sheet settings present themselves.

Home Page sections (patron not logged in)



Home Page styles (patron logged in)

Doug Keaton Home Page

Welcome to the Reading Program Home Page. Once you are logged in, you will be taken to your Reading Home Page.

Paws, Claws, Scales

Test

table.TabRowWidth

table.TabBackground

.Sponsor

.Prize

.Certificate

.Log

td.BlankCellCenter

td.BlankCellCenter

.Message

.Review

#ReviewSpacer

.Review #button

.Footer

Upcoming Events

Events #EventsTitle

Events #EventsList

#eventlink

#eventdate

#eventtime

#eventdescription

#eventlocation

Learn Email

Thursday, January 22nd, 2009

Cool Links

Global Links Maintenance Function

Animalo FBI

Animal Planet

Animal Puzzles

National Geographic Kids

So You Wanna Iguana

PBS Kids

The Black Stallion

Horse Fun

Bookpals

Fun Brain

Bonus Games

Funology.com

Activity Center

Log Out Log #button

Add View Log

Your Info

Reading List

View Reviews

Print Certificate

You have read 27 Hours so far

You have won 1 prize(s) so far

You need to read 8 Hours to win another prize

There are 346 day(s) remaining in the program

The program ends on January 31 de Diciembre de 2009

Important Messages

This is where Global Messages appear (Program Message Maintenance - Global Messages).

Test Message 1

Reviews

#GeneralLabel

#ReviewText

.Review span

#ReviewLink

.Review

#ReviewImage

#GeneralText

#ReviewBlock

Title: Kite Runner

Review: Testing Links...Test Link

Rating: 3

Title: Kite Runner

Review: testing accepted/pending statuses - this is an accepted one

Rating: 2

Submit Review

View All Reviews

Example Template Provided By Evanced Solutions

Home Page styles for prize section (patron logged in)



Registration Page styles

A screenshot of a registration form titled "Register for 'Paws, Claws, Scales and Tales Grades 3 - 6 Summer Reading 2006'". The form includes a header with the title and a ".content hr" element. Below the header is a ".content #FieldValue" element containing the text "To register, fill out the form and click the Save button. All required fields are marked with a red asterisk." and a ".content #button" element with the text "Signed Up Before?". There are "Save" and "Back" buttons. A link "Click here to do a group registration" is highlighted in yellow, with a ".content #spanGroupClick" callout. The form fields include: "*Language" (dropdown menu set to "Spanish"), "*Last Name", "*First Name", "*User Name", "*Password", "*Confirm Password", "Grade" (dropdown menu), "*Patron Classification" (dropdown menu with the text "(Select the classification that best describes you.)"), "Email", "School Name" (dropdown menu), "Primary Library" (dropdown menu), "Library Card", and "*Patron Goal" (text input with "Range (5-40) Hours" next to it). There are "Save" and "Back" buttons at the bottom. A ".content #FieldTitle" callout points to the "First Name" field, and a ".content #FieldValue" callout points to the "Patron Classification" dropdown menu.

Confirmation Page styles

Sign Me Up .content H2

- If you have never registered for a program before then click the **Continue** button.
- If you know your username and password then enter it below and click the **Continue** button.
- If you forgot your username and password then please contact the **The Best's Library**. .content a

User Name Password

.content td .content #button

Email Login Information Page styles

Enter your email address to receive your login information. .content H2

Email

.content td .content #button

Logging Page styles

'Paws, Claws, Scales' Log for 'John Doe'

You are eligible for the following prizes: **2 prizes for the 'Paws, Claws, Scales' program**. Please contact the **The Best's Library** to claim your prize.

Please enter the author and title of each book

Prize: Quantity: Hours:

Title:

Quantity (Hours)	Title	Author	Logged By	Log Date/Time	Delete	
5			Patron	12/12/2008 2:53:21 PM	<input type="checkbox"/>	<input type="button" value="Edit"/>
3			Patron	12/12/2008 2:52:11 PM	<input type="checkbox"/>	<input type="button" value="Edit"/>
2			Patron	11/18/2008 4:12:04 PM	<input type="checkbox"/>	<input type="button" value="Edit"/>
3			Patron	10/28/2008 2:24:37 PM	<input type="checkbox"/>	<input type="button" value="Edit"/>
6			Administrator	8/20/2007 2:49:24 PM	<input type="checkbox"/>	<input type="button" value="Edit"/>
3			Administrator	8/20/2007 2:40:53 PM	<input type="checkbox"/>	<input type="button" value="Edit"/>
2			Patron	8/15/2007 2:56:34 PM	<input type="checkbox"/>	<input type="button" value="Edit"/>
2			Patron	7/10/2007 5:04:20 PM	<input type="checkbox"/>	<input type="button" value="Edit"/>
1			Administrator	7/10/2007 5:01:26 PM	<input type="checkbox"/>	<input type="button" value="Edit"/>

27 Hours

Sort By Log Date/Time Desc

Patron Reviews Page styles

'Paws, Claws, Scales' Reviews for 'John Doe'

[Back](#)

Review	Submitted	Status	
let's see if the ip is logged	11/18/2008	Private	View/Edit
testing unmediated reviews	10/28/2008	Denied	View/Edit
test	6/19/2007	Accepted	View/Edit
test	6/19/2007	Pending	View/Edit
test	6/19/2007	Pending	View/Edit
Test	6/19/2007	Pending	View/Edit
Test	6/1/2007	Accepted	View/Edit
Testing Links	5/8/2007	Accepted	View/Edit
Scott Westerfeld's Midnighters series, BLUE NOON, is a tale of pulse-pounding danger and a race against time that may require the ultimate sacrifice.	3/13/2007	Accepted	View/Edit

[Back](#)

Patron Reviews Page styles

'Paws, Claws, Scales' Reviews for 'John Doe'

[Back](#)

***Title**

***Review**

***Author**

***Rating** 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒

[Save](#) [Back](#)

All Reviews Page styles

Reviews for 'Paws, Claws, Scales'

Search Options

Title Author Rating Sort By Date

12 reviews available
1 2 3 Next

Title test anon
Review test anon
Author test anon
Rating 3
Date Posted 12/15/2008

Add this book to your reading list?

Was this review helpful?

Add a Comment

Comment test comment
Date Posted 12/18/2008

Report this comment as offensive?

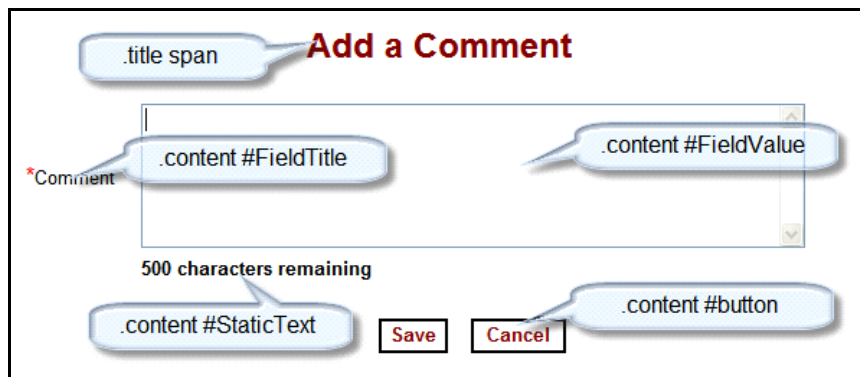
Title test
Review test xyz

Reading List Page styles

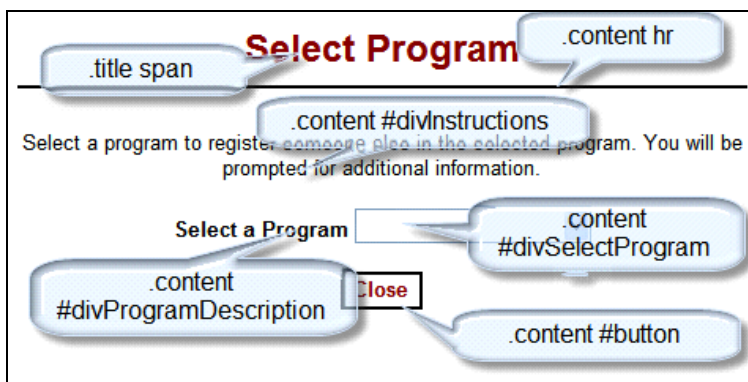
'John Doe' Reading List

Title	Author	
Cat in the Hat	Khaleq Hossein	<input type="button" value="Remove"/>
The Secret History	Donna Tartt	<input type="button" value="Remove"/>

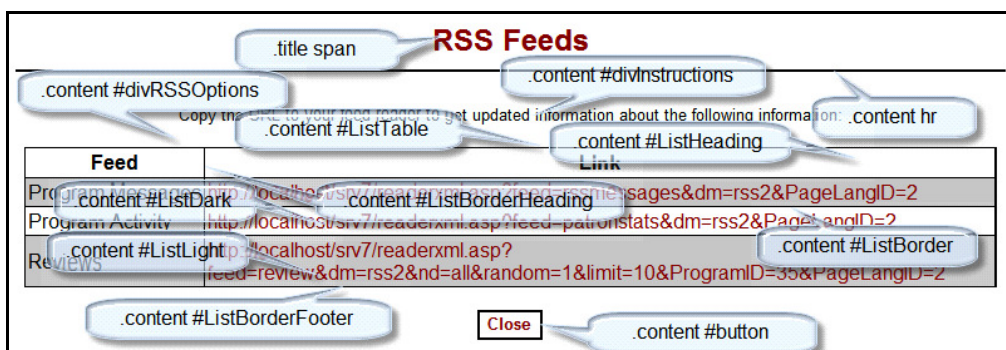
Add Comment Page styles



Program Selection Page styles



RSS Selection Page styles



When Your Style Sheet Doesn't Work

It is the responsibility of the individual library to attempt to find and solve any style sheet issues. Evanced is not responsible for correcting style sheet errors. If you cannot locate the problem, restore the default code by clicking the *Load Default* button associated the desired section. See *Appendix E – Troubleshooting Style Sheets* for additional information.

2.15 Reports

Summer Reader provides a number of report options for staff. There are three main types of reports, *Certificates*, *Custom Reports*, and *Preconfigured Reports*. All reports except for the Certificate Report can be generated in either HTML or Excel format.

2.15.1 Certificate Reports

2.15.1.1 Generate Certificates

Use the *Certificates Report* link to manually create and print certificates. This link only appears when one or more certificates have been added in Certificate Setup. The system displays the Certificates Report Page. Select a certificate from the Certificate drop down list. The system then displays a Program Status drop down list and a Select Program(s) box. Select the desired Program Status (Active or Inactive). Then select a program (or programs) from the Select Program(s) list by clicking on the checkbox next to the desired program or programs. When a selection is made, a checkmark appears in the desired box.

Note: The Program drop down list includes all active and inactive programs.

- **Print Certificates for All Program Participants** – To complete certificates for all program participants, enter a name in the Report Name box and click Run Report. The system will generate certificates for all program participants. The certificates will appear in a new window. Use the web browser's print function to print the certificates. The system will print certificates one certificate per page.
- **Create Certificates Based on Selected Criteria** – To generate certificates based on selected criteria, type the desired criteria in the appropriate filter fields and click the *Run Report* button. The filters are grouped by field types and can be accessed by clicking on the corresponding colored tab.

See Appendix D for information on creating certificates.

2.15.2 Reports

All reports, except for the Certificate Report, may be generated in either the HTML or Excel formats. Simply click the appropriate Format radio button when creating the report.

When the Excel reports are run, a dialog box is presented giving the options to *Open*, *Save*, or *Cancel*.

- **Open** - If *Open* is selected, the report merely opens up in Excel within the current window.
- **Save** - If *Save* is selected, an explorer window pops up allowing the user to save the file to the media of their choice.
- **Cancel** - If *Cancel* is selected, the report is canceled and navigation is returned to the report list.

The HTML reports appear in a new window when executed. If nothing seems to happen once the report is run, it is due to pop-up blocking on the client machine. Click the pop-up message at the top of the screen to continue or hold down the CTRL key while clicking the *Run Report* button to bypass the pop-up block.

2.15.2.1 Custom Report

This is a very flexible report that allows staff to select a program and then select desired information

about that program, including any of the program's registration fields.

This report provides filtering for each of the available fields which are displayed after selecting a program. The filters are grouped by color tabs. Simply click on the appropriate tab and enter filter criteria to limit the report results.

- **Report Name** – Enter a name for your report.
- **Records Displayed Per Page** - Set the *Records Per Page* number to limit the number of records displayed on each page of the report.
- **Format** – Select the desired format for your report (HTML or Excel).
- **Check All** - Use the *Check All* button to select all fields.
- **Clear All** - To clear all selections, click on the *Clear All* button.
- **Clear Filters** - Use the *Clear Filters* button to clear out filter entries.
- **Filters** – Filters are grouped by color tabs. Clicking on the tab reveals the corresponding filter fields. Click the include box to include the desired field(s). Enter the criteria for the individual fields you have selected.
- **Display Order** – The Display Order field allows you manipulate the order in which the fields appear. Click the up or down arrow to move the field up or down one position. Continue clicking on the desired until the field appears in the appropriate location.

After selecting one or more fields, drop-down lists – up to 3 - appear allowing you to sort the report by selected fields. The system allows you to display records in ascending or descending order.

Once all relevant options have been selected, click the *Run Report* button. Then, open, save or cancel the report as desired.

2.15.2.2 Report Templates

Creating a Template

You may save the selected settings into a template for future use. To save report criteria as a template, click the *Save Template* button located beneath the Program field. The system will prompt you to name the template. Enter the desired template name and click *Save* to keep the template or *Close* to cancel the template. When saved, the template name appears as an option in the Report Name drop down list on the Custom Report page.

Deleting a Template

When there are custom templates in the Report Name drop down list, the system displays a *Delete Template* button that allows you to permanently delete the template from the system.

Note: Deleted templates cannot be restored and must be recreated.

2.15.2.3 Individual Registration Report

The Individual Registration Report allows you to view registration information by program. After selecting a program or programs, library staff may select specific information for the report which includes registration information that is enabled for each of the programs selected.

- Go to Reports – Individual Registration Report. The system displays the Individual Registration Report page.
- Select a category of programs from the Program Status drop down list.
- Select one or more programs by clicking on a program(s) associated checkbox.
 - The system displays the Individual Registration Report template.
- Type the name of your report in the Report Name field.
- Set the *Records Per Page* number to limit the number of records displayed on each page of the report. The default is 20.
- For Format, select HTML or Excel.
- Click on the colored tabs to reveal the filter fields. Enter the desired criteria.
- Once all relevant options have been selected, click the *Run Report* button to execute the report.

2.15.2.4 Log Totals Report

This report displays the patron log totals by month for all patrons that have logged progress for a program. This report is ideal for capturing total logged quantities by *School Name, City, Primary Library of Use, Grade, Gender, and School District* but can be grouped by any combination of the program's registration fields by selecting the desired fields.

- Go to Reports – Log Totals Report. The system displays the Log Totals Report page.
- Select a category of programs from the Program Status drop down list.
- Select one or more programs by clicking on a program(s) associated checkbox.
 - The system displays the Log Totals Report template.
- Type the name of your report in the Report Name field.
- Set the *Records Per Page* number to limit the number of records displayed on each page of the report. The default is 20.
- For Format, select HTML or Excel.
- After selecting one or more fields, drop-down lists – up to 3 - appear allowing you to sort the report by selected fields. The system allows you to display records in ascending or descending order.
- Click on the colored tabs to reveal the filter fields. Enter the desired criteria.
- Once all relevant options have been selected, click the *Run Report* button to execute the report.

2.15.2.5 Program Totals Report

This report allows for *Registration* totals, *Logged Quantity* totals, and *Prizes Received* totals to be subtotaled for up to two selections. The registration fields that are available to be used as subtotals are *School District, City, Teacher, State, Country, Zip Code, School Name, Primary Library, Gender, Age, Grade, Patron Classification* and *Custom Registration Entry Field* and depend on the configuration of Program Setup. The subtotal drop-down lists are preconfigured and cannot be revised.

- Go to Reports – Program Totals Report. The system displays the Program Totals Report page.
- Select from the Program Status drop down, the desired program category.
- Select one or more programs in the Select Program(s) menu. The system adds additional report filter criteria based on the program(s) selected.

- Enter the name of your report in Report Name.
- For Format, select HTML or Excel
- Use the drop down list to select the desired report criteria.
 - Select a *Primary Subtotal* to subtotal the results by the selected field. If available, a *Secondary Subtotal* may also be selected which provides a secondary subtotal.
 - The *Date* range filters the results based on the *Registration Date* for *Registration* totals and the *Log Date* for *Log* totals. If no date range is entered, all results are returned.
 - The data can be reported *By Week* or *By Month*.
- Click on the colored tabs to reveal the appropriate group of filter fields. You may then enter the desired criteria in the filter field
- After selecting the report options, click the *Run Report* button to execute the report.

2.15.2.6 Random Drawings Report

The Random Drawings Report is designed to compile Random Drawings statistics for one or more programs. The Random Drawings Report menu allows staff to name the report, select the format and groupings, and use any desired filters.

- Go to Reports – Random Drawings Report. The system displays the Random Drawing Report page.
- Select from the Program Status drop down, the desired program category.
- Select one or more programs in the Select Program(s) menu. The system adds additional report filter criteria based on the program(s) selected.
- Enter the name of your report in Report Name.
- For Format, select HTML or Excel
- Click on the colored tabs to reveal the appropriate group of filter fields. You may then enter the desired criteria in the filter field
- After selecting the report options, click the *Run Report* button to execute the report.

2.15.2.7 Registration Totals Report

This report displays the patron registration totals by month for all patrons that have registered for a program. This report is ideal for capturing total registrations by *School Name*, *City*, *Primary Library of Use*, *Grade*, *Gender*, and *School District* but can be grouped by any combination of the program's registration fields by selecting the desired fields.

- Go to Reports – Registration Totals Report. The system displays the Registration Totals Report page.
- Select from the Program Status drop down, the desired program category.
- Select one or more programs by clicking on a program(s) associated checkbox. Use the *Check All* button to select all fields. To clear all selections, click on the *Clear All* button.
 - The system displays the Registration Totals Report template.
- Enter the name of your report in Report Name.
- For Format, select HTML or Excel
- Set the *Records Per Page* number to limit the number of records displayed on each page of the report.
- After selecting one or more fields, drop-down lists – up to 3 - appear allowing you to sort the report by selected fields. The system allows you to display records in ascending or descending order.
- Click on the colored tabs to reveal the appropriate group of filter fields. You may then enter the desired criteria in the filter field

- After selecting the report options, click the *Run Report* button to execute the report.

2.15.2.8 Review Totals Report

This report displays the patron review totals by month for all patrons that have submitted reviews for the selected program(s). This report captures review totals by any of the listed registration fields. The report can display one or more fields and can be sorted by up to 3 fields.

- Go to Reports – Reviews Totals Report. The system displays the Reviews Totals Report page.
- Select from the Program Status drop down, the desired program category.
- Select one or more programs by clicking on a program(s) associated checkbox.
 - The system displays the Reviews Totals Report template.
- Enter the name of your report in Report Name.
- For Format, select HTML or Excel
- Set the *Records Per Page* number to limit the number of records displayed on each page of the report.
- Select one or more fields in the report template. Up to 3 drop-down lists appear allowing you to sort the report by selected fields. The system allows you to display records in ascending or descending order.
- Click on the colored tabs to reveal the appropriate group of filter fields. You may then enter the desired criteria in the filter field
- After selecting the report options, click the *Run Report* button to execute the report.

2.16 Program Management

The Manage Programs home page allows staff members or volunteers with *Administrator*, *Staff*, *Basic* or *Volunteer* password access to manage programs, reviews or program setup. The links that appear on the Manage Programs home page depends on the configuration of the system.

2.16.1 Program Setup Management

You can access a program's Program Setup to make adjustments to the drop lists, logging types, registration defaults and program order. Please see System Maintenance – Programs – Edit Program Setup for more information about editing a program's setup.

2.16.2 Manage Program

From the *Manage Programs Home Page*, click on the appropriate program link. Navigation goes to the *Program Management* page for the selected program.

The screenshot shows the 'Manage Programs' page. On the left is a 'Search All Programs' form with fields for First Name, Last Name, Email, Primary Library, and Phone Number. Below these are checkboxes for 'Include Members' and 'Text Searching', and radio buttons for 'Begins With' (Any Part). There are 'Go', 'Clear', and 'Advanced Search' buttons. On the right is a table with columns: Program, Registrants, Quantity, Reviews, and Comments. The table lists four programs: 2009 Summer Read, Anime Club, Kids Only Club, and Winter Reading Extravaganza. Below the table are buttons for 'Reviews/Comments' and 'Random Drawing'. A yellow banner at the bottom states '1 comments have been reported as offensive. View'.

Program	Registrants	Quantity	Reviews	Comments
2009 Summer Read	83	748 Hours	44 (23 Pending)	4
Anime Club	10	2 Levels	1	n/a
Kids Only Club	164	181 Hours	22 (15 Pending)	1
Winter Reading Extravaganza	90	110 Books	38 (11 Pending)	2

Figure 2.16.2 A Program Management for All Programs

From this page the following functions can be performed:

- **Search** for patrons in the selected program
- **View** patrons registered in the selected program
- **Register** patrons in the selected program
- **Transfer** patrons from one program to another
- **Edit** individual patron information
- **Log** information for patrons
- **Manage Prizes**
- **Email** patron(s) in that program
- **Delete** patrons from the program
- **Random Drawings** (see Section 2.10.3 for more information on Random Drawings)

Note: If there are pending reviews they are shown in red brackets with the number of pending reviews when viewing all programs. When managing a specific program, random drawing prizes received and eligibility is shown in red as well.

The screenshot shows the 'Manage Program' page for the '2009 Summer Read' program. On the left is a 'Search This Program' form with fields for First Name, Last Name, Email, Primary Library, and Phone Number. Below these are checkboxes for 'Include Members' and 'Text Searching', and radio buttons for 'Begins With' (Any Part). There are 'Go', 'Clear', and 'Advanced Search' buttons. On the right is a table with columns: Manage, First Name, Last Name, Quantity (Hours), Prizes Received, Prize Eligibility, and Delete. The table lists ten patrons: Beth Adcock, Chris Angeli, Jennifer Aston, Jennifer Blalock, Fanny Brice, Kim Bunner, Cathy Chang, Mike Chase, Vanessa Cowie, and Peter Daveluy. Below the table are buttons for 'Prev', 'Display 10', 'Page 1 of 7 (63 Records)', 'Next', 'Register Patron', 'Reviews/Comments', 'Random Drawing', 'Delete', and 'Email'. The 'Sort By' dropdown is set to 'Last Name' and 'Asc'.

Manage	First Name	Last Name	Quantity (Hours)	Prizes Received	Prize Eligibility	Delete
	Beth	Adcock	8	1	0	<input type="checkbox"/>
	Chris	Angeli	18	3	0	<input type="checkbox"/>
	Jennifer	Aston	0	0	0	<input type="checkbox"/>
	Jennifer	Blalock	12	1	1	<input type="checkbox"/>
	Fanny	Brice	0	0	0	<input type="checkbox"/>
	Kim	Bunner	10	2	0	<input type="checkbox"/>
	Cathy	Chang	11	2	0	<input type="checkbox"/>
	Mike	Chase	157	10	0	<input type="checkbox"/>
	Vanessa	Cowie	10	2	0	<input type="checkbox"/>
	Peter	Daveluy	0	0	0	<input type="checkbox"/>

Figure 2.16.2 B Program Management for a Specific Program

2.16.2.1 Search and View List of Registered Patrons

Use the *Quick Search* feature located on the left side of the page to *Search* for patrons registered in the selected program.

To perform a *Quick Search* by *Last Name* and/or *First Name*, simply type in a full name or part of a name (e.g. 'Smith' or 'Sm' in the *Last Name* search box) and click the *Go* button. To view all patron records for that program, leave all the search fields blank and click the *Go* button.

Click the *Advanced Search* button to search by additional registration fields.

2.16.2.2 Registration

Register patrons for the program by clicking the specific program name.

The system displays the program's *Registration* page. If the person is a new registrant to the system and they do not currently exist in the system's database, complete all registration fields as requested and click the *Save* button. Alternatively, click the *Save → Logging* button to go directly to their logging page after registration is completed.

If the patron was previously signed up for a program (i.e. already exists in the database), click the *Signed Up Before?* button to search for the patron. There is an option to search the entire database using the *Find All* button or to search only for *eligible* patrons (i.e., those people that fit the criteria of the program), using the *Find Eligible* button.

Once the person is found in the database, click the corresponding *Select* button. This pre-populates the registration fields for the selected program.

Note: Additional registration fields may need to be filled in. The pre-population only gets information garnered from previous program registration(s) and the data required for the selected program may differ from previous programs.

There is also an ability to check for duplicates in the database by clicking on the *Check For Duplicates* button. One or more of the following fields are required before checking for duplicates:

- **Participant First Name**
- **Participant Last Name**
- **Library Card Number**
- **User Name**
- **Email**
- **Phone Number**
- **Birth Date**

Entering partial information in the text fields is fine (i.e., entering 'Sm' in the *Participant Last Name* field finds all patrons with last names starting with 'Sm'). Any matches are returned in a new window. Select a patron in the list if they are the person that is being searched for (click on the *Select* button). The selected patron's information is copied into the current registration form. If the person being searched for is not found, simply close the window to return to the current registration form.

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Check for Duplicate Patrons

Search For Duplicates	Last Name	First Name	Last Registration Date	Library Card	User Name	Email	Phone Number	Birth Date	
First Name	smith	dan			dan			1/12/1988	
Last Name	Smith	George			george		5555555555		
Library Card	smith	henny	3/15/2004	009877878781	henny	hsmith@aol.com			
User Name	Smith	Jane		28874000005	blaskhank			1/31/1997	
Email	smith	Jenny	1/12/2005		jsmith				
Phone Number	Smith	Jeremy	11/12/2009		JeremyCool	shadeworth@evancedsolutions.com			
Birth Date	smith	jill	2/5/2005	230291234567	jill	noemail@address.com	9161112222		
Street Address 1	Smith	Joe	4/10/2006	30000	jas	Kim@estli.net	3173339798		
	Smith	John	2/27/2007	12345	Johnboy			1/1/1977	
	Smith	Kate			Kate Smith		3175555555		
	Smith	Kelli			KellSmith	ksmith@smith.com	1234561235	5/5/1990	
	Smith	Maggie			123	smith@aol.com			
	Smith	Noah	4/25/2004	123456789000	Noah	deficdel@nklis.com			
	Smith	Peter					8473950026		
	Smith	Rob			robsmith		9046557777	1/23/1998	

Sort By Last Name Asc

Prev Display 15 Page 1 of 2 (18 Records) Next

Close

Figure 2.16.2.2 A Check For Duplicates

Note: To quickly register multiple family members once one family member's registration has been saved, click the 'Recall' button to pull up that person's information. From here, simply change the relevant information for the second registrant (e.g. 'First Name', 'Age', etc.) and click on the 'Save' button.

2.16.2.3 Transfer Patrons

To transfer patrons from one program to another, click the *Transfer* icon for the patron to be transferred. The system displays a Transfer page with the selected patron's name at the top.

Evanced XXXXX 2009 Summer Read

Manage Program

Manage Programs System Maintenance Reports About Logout: Administrator Level Back

Search This Program	Manage	First Name	Last Name	Quantity (Hours)	Prizes Received	Prize Eligibility	Delete
First Name		Julie	Russell	10	2	0	
Last Name		Kyle	Shontenham	0	0	0	
Email		Sharon	Shroyer	12	2	0	
Primary Library		Jeremy	Smith	11	0	2	
Phone Number		Will	Smith	0	0	0	
Include Members		Jon	Solomon	10	0	2	
Text Searching		Liz	Steffenson	36	2	5	
Begins With Any Part		Karlyn	Steward	12	2	0	
Go Clear		Alison	Waters	0	0	0	
Advanced Search		Johnny	Waters	0	0	0	
		Laura	Widstead	11	2	0	
		John	Wiles	0	0	0	
		Joanie	Williams	5	1	0	
		John	Williams	0	0	0	
		Kayla	Wilson	0	0	0	

Sort By Last Name Asc

Prev Display 15 Page 4 of 5 (63 Records) Next

Register Patron Reviews/Comments Random Drawing Delete Email

Figure 2.16.2.3 A Transfer Patrons

After finding the patron using the search slider click the transfer icon. The drop down menu will appear and the appropriate program can be chosen. When you select OK, the system opens the Registration page for the new program with the patron's information pre-populated into available fields. The new Registration form allows you to abort the transfer by clicking the *Cancel* button. To continue the transfer, complete any missing on the Registration Form. Once complete, click the *Transfer* button to finalize the transfer. The system completes the transfer and closes the transfer window. You are back at the Program's Management page.

2.16.2.4 Edit Patron Information

To edit patron/participant information from the *Program Management* page, click on the corresponding *Edit* icon . The *Patron Registration* page appears with all the program's configured registration fields. The patron's *PatronID* is also displayed (this field is read-only and is used to reference patrons when using the *ReaderXML* page). Make the necessary changes and click on the *Save* button.

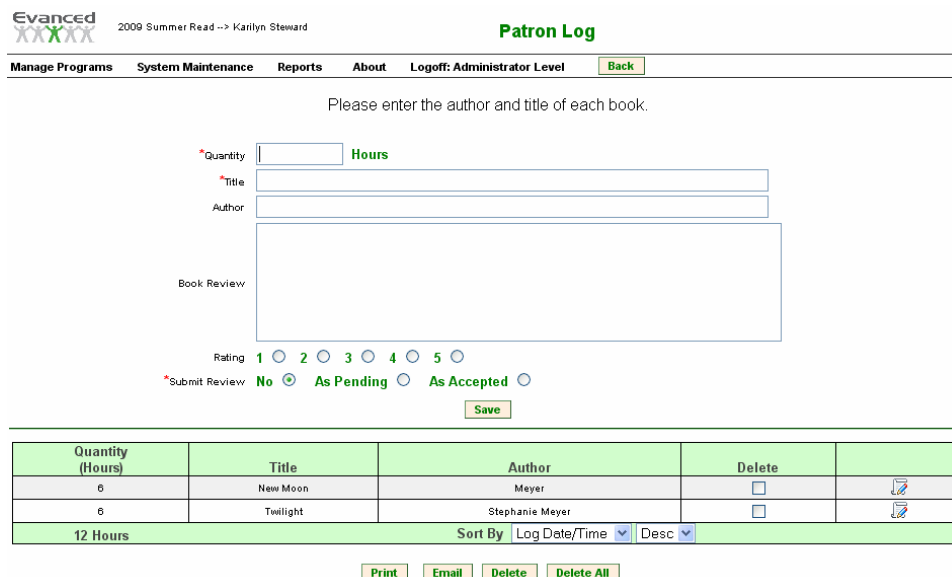
2.16.2.5 Logging

To log information for a patron, click on the *Log* icon to the right of the patron's name or double click in or around the patron's name on the *Program Management* page.



Once in the patron's *Log Entry Page*, the following actions can be performed:

- **View, Edit** and/or **Delete** the patron's past log information
- **Add** to the log

From *Log Entry Page* a patron's log can be *added*, a list of existing log entries can be *viewed* or *edited*, or a log entry can be *deleted*.



The screenshot shows the 'Patron Log' page for the 2009 Summer Read program. The page has a navigation bar with links: Manage Programs, System Maintenance, Reports, About, Logoff: Administrator Level, and a Back button. Below the navigation bar is a message: 'Please enter the author and title of each book.' The form contains fields for Quantity (with a dropdown set to 'Hours'), Title, Author, and a large text area for Book Review. There is a Rating section with radio buttons for 1 through 5, and a Submit Review section with radio buttons for No (selected), As Pending, and As Accepted. A Save button is at the bottom of the form. Below the form is a table of existing log entries.

Quantity (Hours)	Title	Author	Delete	
6	New Moon	Meyer	<input type="checkbox"/>	
6	Twilight	Stephanie Meyer	<input type="checkbox"/>	
12 Hours	Sort By Log Date/Time Desc			

At the bottom of the page are buttons for Print, Email, Delete, and Delete All.

Figure 2.16.2.5 A Log Entry Page

- To add a new log entry, complete the log information that appears on the screen and click on the *Save* button.

Note: The log entry fields vary program to program depending on how the program was initially set up.

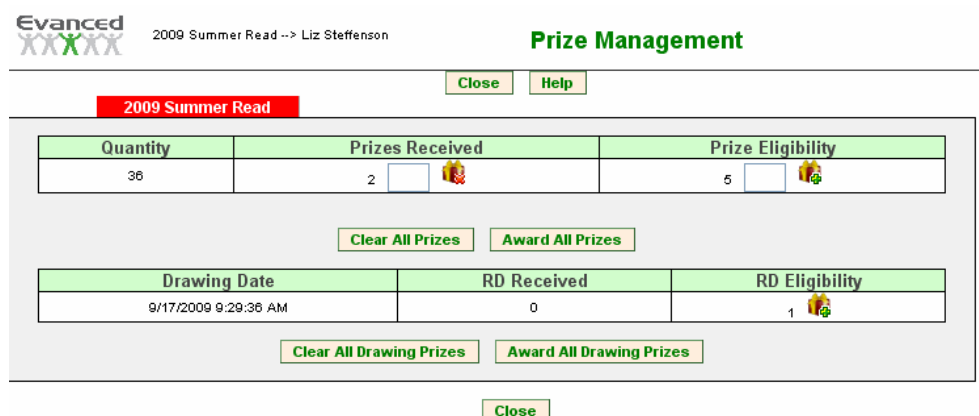
- Existing log entries appear at the bottom of the *Log Entry Page*. To edit a log entry, click the *Edit* button to the far right of the entry (or double click on the appropriate log entry), make the necessary changes and click on the *Save* button.

- To delete a log entry, click the *Delete* checkbox to the far right of the entry or entries to be deleted. Once all records have been selected, click the *Delete* button at the bottom of the screen to permanently delete the entry or entries.
- To print a list of log entries, click the *Print* button. The system opens the log entries in a print window. The system will ask you to select a printer, click Print. The log page prints and the system returns log entry print window. Click the *Back* button to return to the patron's log entry page.

2.16.2.6 Prizes

From the *Program Management* page staff may also manage prizes within active programs. Click the *Prizes* icon to the right of the patron's information. A pop-up window appears. From here the following options are available:



- **View** the person's prize information, including *Prizes Received* and *Prize Eligibility*
- **Award Prize(s)**
- **Clear Prize(s)** [i.e. *un-award* prizes]




Evanced 2009 Summer Read --> Liz Steffenson **Prize Management**

Close Help

2009 Summer Read

Quantity	Prizes Received	Prize Eligibility
36	2 	5 

Clear All Prizes Award All Prizes

Drawing Date	RD Received	RD Eligibility
9/17/2009 9:29:36 AM	0	1 

Clear All Drawing Prizes Award All Drawing Prizes

Close

Figure 2.16.2.6 A Prize Management

To award prizes, look under *Prize Eligibility* to see how many prizes the patron is eligible to receive. Type in the number of prizes to be awarded in the *Prize Eligibility* text box and click the *Award Prizes* icon next to the text box. To award all eligible prizes at one time, simply click *Award All Prizes* button. The system will ask you to confirm that you want to award all prizes at once. Click *Ok* to proceed or *Cancel* to abort.

After prizes are awarded, the totals in the *Prize Eligibility* and the *Prizes Received* areas are updated. *Prize Eligibility* is decreased by the number of prizes *awarded* and the *Prizes Received* is increased by the number of prizes awarded.

To clear a prize (i.e., a prize(s) is accidentally awarded and need(s) to be *un-awarded*, etc.), go to the *Prizes Received* text box and type in the number of prizes to be *removed* and click the *Clear Prize(s)* icon next to the text box. To clear all prizes at one time, simply click the *Clear All Prizes* button. The system asks you to confirm that you want to clear all prizes. Click *Ok* to proceed or *Cancel* to abort the process.

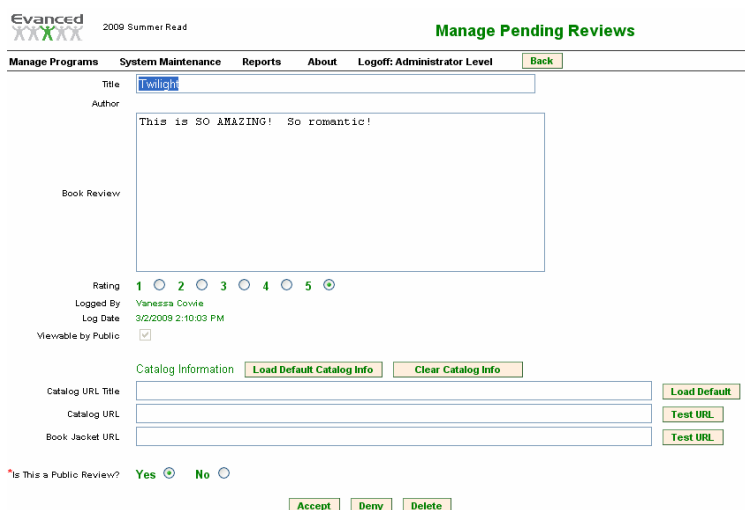
As when prizes are cleared, the totals in the *Prize Eligibility* and the *Prizes Received* areas are updated. *Prize Eligibility* is increased by the number of prizes *cleared* and the *Prizes Received* is decreased by the number of prizes *cleared*.

2.16.3 Reviews Management

A *Reviews* button will appear on the Program Management home page only when a program had pending reviews that have been submitted within the activity period displayed at the end of the program list. When the Program Activity Days (System Maintenance – System Settings) is set to 0, the home page displays the total of all activity for the programs listed.

To manage pending reviews, click the *Reviews* button associated with the desired program. The system displays the Managing Pending Reviews for the selected program. From this page, you may accept, deny, delete, or edit a review.

- **Accept Reviews** – To accept reviews, click on the radio button(s) associated with the desired reviews. Click the *Accept/Deny* button at the bottom of the page. The system accepts the selected reviews and refreshes the Manage Pending Reviews page. Accepted reviews no longer appear.
- **Deny Reviews** – To deny reviews, click on the radio button(s) associated with the desired reviews. Click the *Accept/Deny* button at the bottom of the page. The system accepts processes the reviews and refreshes the Manage Pending Reviews page. Denied reviews no longer appear.
- **Delete Reviews** – To delete reviews, click on the checkbox(es) associated with the desired review(s). Then click the *Delete* button at the bottom of the page. The system deletes the selected review(s) and refreshes the Manage Pending Reviews page. Deleted reviews cannot be recovered and no longer appear anywhere in the system.
- **Edit a Review** - To edit a review, click on the *Review* button associated with the desired review. The system opens the review. From here staff may edit *any* portion of the review form, including Catalog Information. The Load Default Catalog URL buttons only appear if default catalog URLs are defined in System Settings (System Maintenance → System Setup → System Settings).



Evanced 2009 Summer Read

Manage Pending Reviews

Manage Programs System Maintenance Reports About Logout: Administrator Level Back

Title

Author

Book Review

Rating ☒ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Logged By Vanessa Covie

Log Date 3/2/2009 2:10:03 PM

Viewable by Public ☒

Catalog Information Load Default Catalog Info Clear Catalog Info

Catalog URL Title Load Default

Catalog URL Test URL

Book Jacket URL Test URL

*Is this a Public Review? Yes ☒ No ☐

Accept Deny Delete

Figure 2.16.3 A Manage Review

When editing is complete, click Accept, Deny or Delete as appropriate. The system processes the review and returns to the Manage Pending Reviews page. The edited review no longer appears as a pending review. To return to the Manage Pending Reviews page without taking action, click the Back button on the tool bar.

CHAPTER 3: PATRON INTERFACE

3.1 General Overview

The Summer Reader patron interface is accessed through the *Patron Home Page*.

Important Note:

This interface is not recommended for staff use.
See Chapter 2 for information on how to use the staff interface.


Paws, Claws, Scales	Creature Feature
	
Cool Links Library Home What's Happening Animal FBI Animal Planet Animal Puzzles National Geographic Kids So You Wanna Iguana PBS Kids The Black Stallion Horse Fun Bookpals Fun Brain Bonus Games Funology.com	<p>If you have previously registered in a program, enter your user name and password and click on the Login button. New users click on the Sign Me Up button.</p> <p> <input type="button" value="Sign Me Up"/> <input type="button" value="Home"/> </p> <p> User Name <input type="text"/> Password <input type="password"/> </p> <p> <input type="button" value="Login"/> </p> <p> <input type="button" value="Forgot Your Login Info?"/> </p> <hr/> <p>Important Messages</p> <p>The last day for summer reading prize pickup is September 1. Don't miss out...stop by the library soon!</p> <p>Join us on August 15 for a special "Show and Tell" with your favorite pet or stuffed animal.</p> <hr/> <p>Reviews</p> <ul style="list-style-type: none"> Title: The Little Old Lady Who Wasn't Afraid of Anything, Rating: 5 - She was so brave and the empty clothes were funny.

Figure 3.1 A Patron Home Page

From the patron interface, patrons may:

- View general information about the various reading programs and interest groups being held at the library
- Sign up (or register) for a reading program(s) or interest group(s)
- Login to their *Personal Home Page* by entering their *User Name* and *Password*. Depending on the program's configuration the user may have different login fields.

To view general information, patrons can simply click through the tabs at the top of the page to see general information about the various *reading* programs the library has going on.

3.2 Sign-up for Programs

From the *Patron Home Page*, patrons can sign up for one or more reading programs or interest groups. To do so, they click on the appropriate program tab located across the top of the screen. Once the program has been selected, they click the *Sign Me Up* button.

3.3 Logging In

After a patron has registered for a program, he/she may login to their *Personal Home Page* by typing in their *User Name* and *Password* on the *Patron Home Page*.

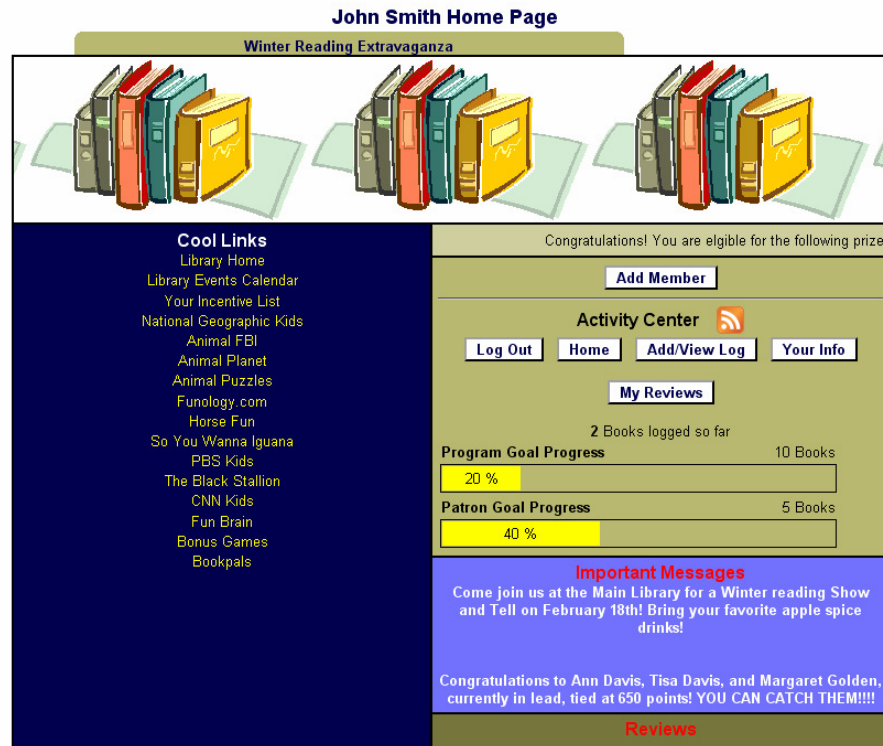


Figure 3.2 A Personal Home Page

The *Personal Home Page* shows all active programs the patron is registered for, which is indicated by the number of tabs displayed at the top of the page.

From the *Personal Home Page* patrons can:

- **Add/View** their log
- **Display** and **Edit** their registration information
- **Change** their password
- **View** and **Submit** Reviews
- Get notified about **Prizes**

3.4 Add/View Log

From here, patrons may view their logs and, if patron self-logging is enabled, they can also add to their log.

'2010 Winter Reading' Log for 'John Smith'

Congratulations! You are eligible for the following p

Please enter the author and title of each book. And tell us what you think! Your review might be made public!

***What You've Read**

***Quantity** Books

***Title**

Author

Book Review

Rating 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

***Do you want to make this review public?** Yes ☐ No ☐

Choose your Point total and enter below:

Save
Back
Log Out

Points	Quantity (Books)	Title	Author	Book Review	Logged By	Log Date/Time	Delete	Edit
1 100-page book - 25 Points	2	Midnight Oil			Patron	2/22/2010 12:27:36 PM	<input type="checkbox"/>	Edit
2 Books								

Sort By | Log Date/Time | Desc

Back
Print
Delete

Figure 3.3 A Add/View Log

This *log* page displays the fields that were determined by staff when the program was initially set up.

3.5 My Info

By clicking the *My Info* button, patrons may display and, possibly, edit their registration information. If *Patron Registration* is enabled, the patron information can be updated by the patron. If the setting is disabled, the patron cannot view the information. The data elements on this page are dependent upon the program's *Registration Setup* and all required fields are preceded with an asterisk.

3.6 Change Password

Under *My Info* a patron may change his/her password. First they must click on the *Change Password* button at the bottom of the *Registration Information* page. Next, a window opens that allows the patron to change their password. Enter the new password twice and click on the *Submit* button to save the new patron password. The system displays a message confirming the password has been changed. Click 'OK' to close the confirmation and return to the *Registration Information* page.

3.7 View and Submit Reviews

If enabled, two randomly selected reviews related to the program are automatically displayed on the *Patron Home Page* and the *Personal Home Page*.

Note: Reviews may only be submitted from the 'Patron Home Page'. Participants must log in before submitting reviews so that staff knows who is submitting the review.

When a patron is logged into the system and if the feature is enabled, they have the option to submit a review by clicking the *Submit Review* button. A popup window appears. Patrons may enter their review information and then click the *Save* button. Patrons have to acknowledge they want their review shared by checking the box above, "Please check the 'I Agree' box if you wish to make your review public."

To see all reviews related to a program, click the *View All Reviews* button.

Note: Patron reviews are not posted for other patrons to see until they have been approved by a staff member. When staff members 'Accept/Modify' reviews, they may make changes, add hyperlinks to the item in the online catalog, etc.

3.8 Links

The hyperlinks set up by staff appear to the far left of both the *Patron Home Page* and the *Personal Home Page*.

3.9 Important Messages

The global and program-specific messages set up by staff appear in the middle of both the *Patron Home Page* and the *Personal Home Page*.

3.10 Prize Notices

If a patron is eligible for prize(s), a marquee appears on their home page displaying a message along the lines of: "You are eligible for the following prizes. Please contact the Librarian at the Reference Desk to claim your prize."

This message appears each time the patron logs in until the prize(s) are awarded by the library.

Note: The message that is displayed is a configurable system message. See Section [2.7.2.2](#) for more details.

APPENDIX A: VERSION 2010 IMPROVEMENTS AND FEATURE LIST

A.1 Certificate Setup

- New easier-to-read layout
- Removed staff/patron option (not necessary anymore)

A.2 Facebook Configuration (new feature)

- Enable/Disable Facebook prompts for staff
- Configure the events that trigger Facebook prompts
 - Enable/Disable "Program Registration" Facebook prompt
 - Enable/Disable "Log Entry" Facebook prompt
 - Enable/Disable "Review Entry" Facebook prompt
 - Enable/Disable "Reading List Selection" Facebook prompt
- Configure each of these event's messages (the information that appears in the prompt to the user after they have completed one these events)

A.3 Language/Text

- Added language options for new features
 - prize messages for registration, patron goal and program goal prizes
 - registration field labels for group registrations (group registration field labels used to share the same labels used for individuals)
 - Facebook registration field and related messages

A.4 Log Page

- Log entry date can be entered/selected

A.5 Maintenance Page

- Added links for "Manage Programs Setup" and "Reviews Maintenance Setup"
- Renamed "Language Setup" to "Language\Text Setup"
- Renamed "Reviews" to "Reviews\Comments"

A.6 Manage Programs Setup (new feature)

- Configure the fields to be displayed in "Manage Programs" area

A.7 Patron Home Page

- Web widgets incorporate all new patron-side features (Facebook integration is still under development)
- Added Facebook connectivity
- Added "Patron Goal" and "Program Goal" progress bars

A.8 Prize Management

- New easier-to-read layout
- Incorporated prize cancellation feature
- Added support for managing registration, patron goal and program goal prizes

A.9 Program Management

- Added capability to "Advanced Search" to search on more criteria including aggregate information such as log quantity and reviews
- Information displayed can be configured via "Manage Programs Setup"
- Added patron notes to mouse-over
- Added new icon with indicator to signify when notes are attached to a patron

A.10 Program Setup

- New easier-to-read layout
- Added "Facebook Integration" option to enable Facebook connectivity in application
- Added "Allow Log Date Entry" option to allow users to enter/select log entry date when submitting log entries
- Language editing improved so that only the selected language setting is displayed when user uses "Edit Language" feature from program setup
- Added "Combined Prize Levels" setting to allow the maximum prize level to be set (this feature is only applicable when both prize setups are enabled and either prize setup determines eligibility)
- Added prize configurations for Registration, Patron Goals and Program Goals

A.11 Random Drawings

- Added capability to name the drawing
- All relevant patron information is returned in the results (previously, only a subset of the information was returned)

A.12 Registration Page

- Added Facebook option that allows user to post information directly to their wall

A.13 Reports

- Removed "Excel Reports" option since all reports now support exporting to Excel
- Renamed "Custom Registration Report" to "Individuals Registration Report"
- Added support for new features such as Registration Prizes, Patron Goal Prizes, Program Goal Prizes and Random Drawing Names
- Added filtering to "totals" reports
- Standardized filtering for all reports
- Added option to all reports to export to Excel
- Added capability to name the report (shown as the title on report output when set)

A.14 Reviews\Comments Maintenance

- Information displayed can be configured via "Reviews Maintenance Setup"
- Added an option to check/uncheck all statuses (Accept or Deny) when bulk approving reviews
- Review information associated with comment is now displayed when approving comments
- Review information associated with comment is now displayed in mouse-over in the comments section

A.15 Reviews Maintenance Setup (new feature)

- Configure the fields to be displayed in "Reviews\Comments" area

A.16 System Settings

- Added option to "Allow Prize Cancellation" – this feature allows staff to cancel one or more prizes that the patron is eligible for without awarding the prize or cancel a prize that has already been awarded

A.17 Styles

- Improved styles for maintenance pages
- Added styles for patron/program goal progress bars

APPENDIX B: IMPLEMENTATION GUIDE

B.1. Technology Implementation

This section lays out the technical requirements for the system and the various ways that the system can and has been implemented.

B.1.1 System Requirements

1. A Microsoft Server Platform (2000 Server, 2003 Server or 2008 Server)
 - 32 bit or 64 bit server for 2003 and 2008 are supported
 - If using 2000 Server, be sure that the MDAC version is 2.8 or newer
2. Microsoft IIS (Internet Information Services) installed and running
 - Version 5-7
 - If using 2003 or 2008 Server, be sure to check the option "Enable Classic ASP" to allow IIS to execute the application
3. MySQL Version 5.0.67
 - newer releases of version 5 are probably fine but have not been tested and are not officially supported
4. MySQL ODBC 3.51 Driver
 - version 3.51.12 is supported
 - some of the newer releases have been lightly tested and are probably fine but are not officially supported
5. Disk Space Requirements
 - Web files ~ 5.3 MB
 - Database files ~ 1.5 MB (a very large site might grow to 10 – 20 MB)
 - Program files (MySQL and Driver) ~ 90 MB

B.1.2 Implementation Options

Internal Server Configurations

These are servers that are housed inside of your organization. These servers must at least have port 80 (Web Service Port (HTTP) accessible through the firewall if external computers (e.g. patrons at home) are to access the system. Whichever configuration is chosen Evanced Solutions strongly recommends that you keep your server updated with all Microsoft security patches and fixes.

Main Web Server

This is the most common location for installation of Evanced software. Typically a folder is created under the wwwroot folder and the application software is installed there. The MySQL database is also then installed on this server typically on the root of a hard drive. Generally it is best to install MySQL on a secondary drive/partition and not on the C: drive.

Other Server

Any server running the required OS and Internet Services can be used to serve the Evanced software. The main consideration here is that this computer must be partially exposed through the firewall by opening port 80 to the server. This port is the main HTTP web services port that allows computers on the internet to see web pages on the server.

External or Hosted Server Considerations

Many organizations do not host their own website, in which case support of software can become a tricky issue. Some service providers are willing to allow the installation of our software onto their servers without any issues, while some do charge an additional fee. A few providers are not

positioned to be able to support such software. If your library is in such a situation or if you aren't sure of what your service provider would be willing to do, please contact us and we can work with you and your service provider to arrive at the most cost effective and workable solution for everyone.

Even if your main web site is hosted externally by a service provider, you may still be able to use a new or spare internal server to host Evanced software. As the software has a low performance impact and isn't necessarily getting constant hits, it usually has a very low impact on bandwidth and computer performance. Some customers have even installed our software on the same server as their webpac (Web Interface for their circulation system) and not had any performance issues. (We don't recommend this but mention it to illustrate the low requirements of the software).

B.2. Policy Implementation

This section lays out the various configuration issues that affect the way with your facility's policies. It also gives some recommendations about how to smoothly integrate this system into your facility.

B.2.1 Configuration Options

There are several options for this system that can be turned on and off by staff with administrative privileges, many of which are driven by your organization's policies or, in some cases, may force new policy considerations. Please work with your Evanced Solutions' representative to adjust these options. Most options can be turned on or off at anytime, so a decision to go with one feature does not lock the library into that feature forever.

B.2.2 Implementation Suggestions

- Create a lead team or at least a lead person for the implementation project. This group/person acts as the main point of contact with Evanced Solutions and leads feature and policy decisions related to the system for your organization.
- Determine areas where the software system and current organization policies are not compatible. Work with your Evanced Solutions' representative to resolve these issues in a satisfactory way.
- Determine an implementation schedule. This varies from library to library, but typically involves these key steps.
 - Installation
 - Key Staff Training (Usually Evanced personnel training your staff)
 - Pre-Pilot Trials, Limited Data Entry, and Configuration Adjustments
 - Full Staff Training (Usually the library's key staff training its general staff)
 - Full Staff Pilot and Data Entry (Enter library events into the system)
 - Public Launch and Promotion (Get the word out to your patrons)
 - Determine Policy/Procedures for handling updates

APPENDIX C: CONFIGURING CUSTOM ENTRIES

C.1. Configuring Custom Registration Entries

This section describes how to configure custom registration entries either for global use or for program-specific use.

C.1.1 Global Custom Registration Entries

Global Custom Registration Entries can be set as *Disabled*, *Per Program*, or *Always On*. Setting the entry to *Disabled* effectively disables the field (grayed out) in the program's *Registration Setup* so that it cannot be enabled. Setting the entry to *Per Program* allows for the field to be enabled in the program's *Registration Setup* but it is unchecked by default. Setting the entry to *Always On* enables the field (checked by default) in the program's *Registration Setup*.

C.1.2 Program-Specific Registration Entries

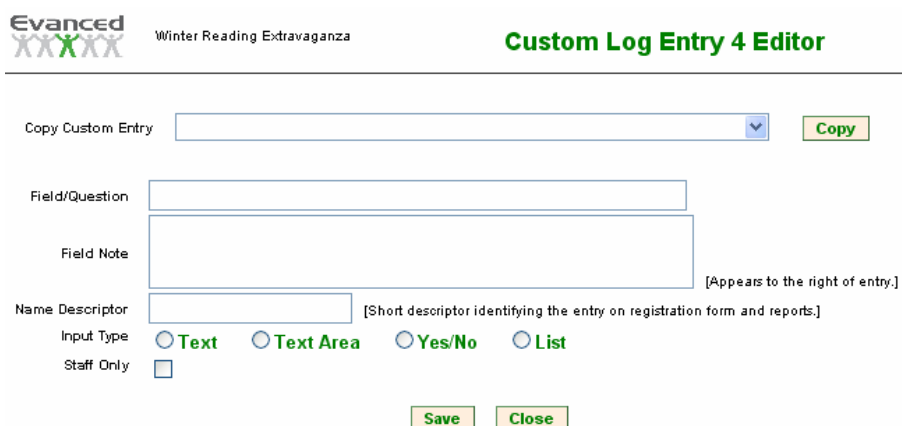
Program-Specific Registration Entries need to be configured in the program's *Registration Setup*. The custom entry field must be created before it can be enabled in the program's *Registration Setup*. Click on the corresponding *Edit* button to create the custom registration entry. See below for specifics on creating the custom registration entry. Once the custom registration entry is created, the corresponding field in the program's *Registration Setup* can be configured similarly to any other registration field.

C.2. Configuring Custom Log Entries

This section describes how to configure custom log entries. To configure a custom log entry click on the corresponding *Edit* button. See below for specifics on creating the custom log entry. Once the custom log entry is created, the corresponding field in the program's *Logging Setup* can be configured similarly to any other log field.

C.3. Creating a Custom Entry

The screen shown in Figure F-1 is the *Custom Entry Editor*. This is the page that appears whether a custom registration entry or custom log entry is being edited or created for the first time.



The screenshot shows the 'Custom Log Entry 4 Editor' interface. At the top, there is a header with the 'Evanced' logo, the text 'Winter Reading Extravaganza', and the title 'Custom Log Entry 4 Editor'. Below the header, there is a 'Copy Custom Entry' dropdown menu and a 'Copy' button. The main form area contains several fields: 'Field/Question' (a text input field), 'Field Note' (a larger text input field with a note '[Appears to the right of entry.]'), and 'Name Descriptor' (a text input field with a note '[Short descriptor identifying the entry on registration form and reports.]'). Below these fields, there are radio buttons for 'Input Type' with options: 'Text' (selected), 'Text Area', 'Yes/No', and 'List'. There is also a 'Staff Only' checkbox. At the bottom of the form, there are 'Save' and 'Close' buttons.

Figure C.3 A Custom Entry Editor

There is an option to copy an existing custom entry. Simply select a previously created custom entry and click on the *Copy* button and a new copy is created.

The following are the fields to be filled out to create the custom entry:

- **Name Descriptor** - Enter a name to use as a reference to the custom entry.
- **Field/Question** – Enter the question or name of the custom entry field that is to appear on the registration page or logging page (depending upon which type of custom entry is being created).
- **Field Note** – Enter a comment or note that appears to the right of the custom entry field. This field is optional.
- **Input Type** – Choose *Text* to use a text entry field for input, choose *Text Area* to use a text area field for input, choose *Yes/No* to use yes and no radio buttons for input or choose *List* to create a drop-down list to be used for input.

Note: The 'Text Area' option should be used for text input that may require more than 50 characters. A text box 4 rows high is displayed and allows for an unlimited number of characters for input.

If 'List' is chosen for 'Input Type' then the custom entry must be saved before creating the list. Once the entry is saved, an 'Edit List' link appears (the window closes after saving so the 'Edit' button on the entry form must be clicked to open the editor again). Click on the 'Edit List' link to create the custom entry list.

- **Staff Only** – Check this check box to make the custom registration entry available only to staff. Leave it unchecked to make it available to both patrons and staff.

Name Descriptor, *Field/Question* and *Input Type* are required entries. Click on *Save* to save the entry.

APPENDIX D: CREATING CERTIFICATES

There is a setting in *Program Setup* that allows patrons to print their own certificates. A universal format such as HTML is required for patron certificates because there are no guarantees that the patron's machine has Microsoft Office Word in order to print a certificate saved in a RTF format.

D.1. Creating Certificates

Certificates must be created in a HTML format. A Microsoft Office Word or Notepad document can be created and saved with a .htm extension. Evanced Solutions provides a HTML templates located in the /docs subfolder located on the application's server.

A copy of the templates can be obtained from these links:

<http://evanced.info/evanceddemo/sr/doc/certificate.html>
<http://evanced.info/evanceddemo/sr/doc/certificatetitle.html>
<http://evanced.info/evanceddemo/sr/doc/certificatetitleauthor.html>
<http://evanced.info/evanceddemo/sr/doc/certificatewithreview.html>

The template tags provided are as follows:

- **FirstName** – Patron's First Name
- **LastName** – Patron's Last Name
- **GroupName** – Group Name
- **ProgramName** – Program Name
- **LogQuantity** – primary logging type quantity
- **LogQuantity2** – secondary logging type quantity
- **LoggingType** – primary logging type
- **LoggingType2** – secondary logging type
- **Completion** – equivalent to “^FirstName^ read ^LogQuantity^ ^LoggingType^”

Note: If using Manual prize levels then the Completion tag is equivalent to “^FirstName^ completed X out of Y levels” where X is equal to the number of levels the patron completed and Y is equal to the total numbers of levels.

For creating title/author lists from the patron's log:

- **HeadingTitle** – replaced with “Title” or language-specific equivalent
- **HeadingAuthor** – replaced with “Author” or language-specific equivalent
- **BookTitle** – the book's title
- **BookAuthor** – the book's author

For including the patron's last accepted review:

- **LastReview**

Each tag is enclosed by ‘^’ characters to help identify them. The tags are the items that are replaced with data from the application.

The default certificate's text is displayed below.



Figure D.1 A Completion Certificate

D.2. Patron Access to Certificates

In order for the patrons to print their own certificates certain conditions must be met:

- The template must be configured via *Certificate Maintenance*
- The program's *Allow Patrons to Print Certificates* setting must be set to *Yes* in the *Program Setup* and a certificate must be selected in the *Program Setup*.
- The patron must meet the conditions set in *Certificate Eligibility* in the *Program Setup*.

When the conditions are met for a patron to print their certificate, a *Print Certificate* button appears in the *Activity Center* section on the patron's *Personal Home Page*.



Figure D.2 A Print 'Patron' Certificate

APPENDIX E: TROUBLESHOOTING STYLE SHEETS

Disclaimer

It is the responsibility of the individual library to attempt to find and solve any style sheet issues. *Evanced* is not responsible for correcting style sheet errors. If Evanced technical support is contacted about style sheet problems then the support technician begins the troubleshooting process by copying the default style sheet settings into the problem section. If this solves the problem(s) then it is the library's responsibility to find and fix syntax problems in the changes they made to the style sheet settings.

The first step in troubleshooting (before contacting Evanced technical support) is to look through the style sheet settings for:

- punctuation problems
- syntax errors
- spelling issues

If the above does not resolve the issue(s), refer to the following:

E.1. Troubleshooting Steps for a Specific Program

1. Copy and save the style sheet settings to *Notepad*
2. Go back to the program selection list under *Program-Specific Style Sheets* and select *Default*
3. Copy the style sheet settings for the same area that is having the problem (i.e.: *Home Page Settings* text area)
4. Go back to the program selection list under *Program-Specific Style Sheets* and select the program name
5. Paste the copied default settings into the specific program style sheet settings area
6. Open another browser window; set it to the *Summer Reader Home Page* (homepage.asp) and select the corresponding program tab.
7. Make a change to the style settings in the existing browser window
8. Refresh the *Home Page* browser window to see the updated settings
9. Repeat steps 7 and 8 until all of the desired changes have been completed

E.2. Troubleshooting Steps for the Default System Settings Page

1. Copy and save the style sheet settings to *Notepad*
2. Click the *Set to Default* button corresponding to the style sheet section that needs to be reset. (The system goes back to the program selection)
3. Select *Default*
4. Open another browser window; set it to the *Summer Reader Home Page* (homepage.asp) and select the corresponding program tab.
5. Make a change to the style settings in the existing browser window
6. Refresh the *Home Page* browser window to see the updated
7. Repeat steps 7 and 8 until all of the desired changes have been completed

APPENDIX F: USING READER XML.ASP

ReaderXML.asp provides for the ability to display the patron reviews, program links, and program messages. The page provides a feed that can be used on one's homepage or in other software programs. The page supports the following feeds:

- HTML
- XML
- RSS2
- ATOM1

Note: Use the help flag to see the available filter options for the ReaderXML.asp page. To invoke help, set the help parameter to 1. For help on a specific feed type, pass in the feed parameter (either 'reviews', 'links', or 'messages'). Each feed has its own help page. To access the help for the appropriate feed use the following examples:

- To get help on reviews use this type of URL:

'http://servername/sr/readerxml.asp?feed=reviews&help=1'.

- To get help on links use this type of URL:

'http://servername/sr/readerxml.asp?feed=links&help=1'.

- To get help on messages use this type of URL:

'http://servername/sr/readerxml.asp?feed=messages&help=1'.

F.1. Description

The output for the page is presented using XML tags to represent the review, links, or messages data. The following is an example of the XML output for reviews:

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
- <review>
- <item>
  <program>Paws, Claws, Scales</program>
  <link>http://localhost/srv6/homepage.asp?ProgramID=35</link>
  <text>This is hard to read!</text>
  <title>Joy of Cooking</title>
  <author />
  <genre />
  <isbn />
  <rating>2</rating>
  <customentry1 />
  <customentry2 />
  <customentry3 />
  <customentry4 />
  <customentry5 />
  <customentry6 />
  <date>Friday, March 23, 2007</date>
  <time>03:58 PM</time>
</item>
- <item>
  <program>Paws, Claws, Scales</program>
```

```

<link>http://localhost/srv6/homepage.asp?ProgramID=35</link>
<text>Test 2</text>
<title>Kite Runner</title>
<author />
<genre />
<isbn />
<rating>3</rating>
<customentry1 />
<customentry2 />
<customentry3 />
<customentry4 />
<customentry5 />
<customentry6 />
<date>Friday, March 23, 2007</date>
<time>03:58 PM</time>
</item>
</review>

```

There are two reviews in this example, each starting with <item> and ending with </item>. The tags that are between the <item> tags represent the specific review data:

- <program> is the program name
- <link> is the link to the patron home page for the specific program
- <text> is the review text
- <title> is the book title
- <author> is the author of the book
- <genre> is the genre of the book
- <isbn> is the ISBN of the book
- <rating> is the rating the patron submitted for the book
- <customentry1> is the custom log entry submitted
- <customentry2> is the custom log entry submitted
- <customentry3> is the custom log entry submitted
- <customentry4> is the custom log entry submitted
- <customentry5> is the custom log entry submitted
- <customentry6> is the custom log entry submitted

Some fields may not return any data because they are not required to submit a review or are not enabled in the program's *Logging Setup*.

Note: To filter the feed based on a specific program, use the ProgramID parameter to pass in the specific program's ProgramID. The program's ProgramID can be found in the program's setup. Similarly, to filter the feed based on a specific patron, use the PatronID parameter to pass in the specific patron's PatronID. The patron's PatronID can be found on the patron's registration page.

The following is an example of the XML output for links:

```

<?xml version="1.0" encoding="ISO-8859-1" ?>
<programlink>
  <item>
    <program>Paws, Claws, Scales</program>
    <link>http://localhost/srv6/homepage.asp?ProgramID=35</link>
    <title>Animal FBI</title>
    <url>http://www.fffbi.com/</url>
    <global>0</global>
  </item>
  <item>
    <program>Paws, Claws, Scales</program>
    <link>http://localhost/srv6/homepage.asp?ProgramID=35</link>

```

```

<title>Animal Planet</title>
<url>http://animal.discovery.com</url>
<global>0</global>
</item>
</programlink>

```

There are two links in this example, each starting with <item> and ending with </item>. The tags that are between the <item> tags represent the specific link data:

<program> is the program name
 <link> is the link to the patron home page for the specific program
 <title> is the link title
 <url> is the link url
 <global> is the flag that states whether the link is a global link (1) or a program-specific link (0)

Note: To filter the feed based on a specific program, use the ProgramID parameter to pass in the specific program's ProgramID. The program's ProgramID can be found in the program's setup.

The following is an example of the XML output for messages:

```

<?xml version="1.0" encoding="ISO-8859-1" ?>
- <programmessage>
  - <item>
    <program />
    <link />
    <message>The last day for summer reading prize pickup is September 1. Don't miss
      out...stop by the library soon!</message>
    <global>1</global>
  </item>
  - <item>
    <program>Paws, Claws, Scales</program>
    <link>http://localhost/srv6/homepage.asp?ProgramID=35</link>
    <message>Join us on August 15 for a special "Show and Tell" with your favorite pet or
      stuffed animal.</message>
    <global>0</global>
  </item>
</programmessage>

```

There are two messages in this example, each starting with <item> and ending with </item>. The tags that are between the <item> tags represent the specific message data:

<program> is the program name
 <link> is the link to the patron home page for the specific program
 <message> is the message content
 <global> is the flag that states whether the message is a global message (1) or a program-specific message (0)

Note: To filter the feed based on a specific program, use the ProgramID parameter to pass in the specific program's ProgramID. The program's ProgramID can be found in the program's setup.

APPENDIX G: USING WEB WIDGETS



Note: Knowledge and prior experience with web programming is necessary to work with web widgets.

Web widgets allow you to integrate program functions onto your program home page. In Summer Reader, web widgets allow you to

- Create links from your home page to links within a specific reading program
- Create a log-in prompt that allows patrons to access their account.
- Display patron reviews on the home page.

Please see the example on the next page.

G.1. What You Need

The following files must be available to create and make web widgets work:

See this <http://support.evanced.info/index.php?action=kb&article=80> article for more information.

- *Readerwidget.html* is a sample widget page that contains the HTML code you will copy and paste into your code.
- *Readerwidget.css* contains the style sheet settings that affect the web widgets. You may modify the settings in this file to make your web widgets consistent with the style of your web page.
- *Readerwidget.js* contains the executable code that makes the web widgets work. You need to make sure the file is accessible and referenced in your code, but you won't need to modify it.
- *Readerwidget.asp* contains the code your server uses to process the .html page. You'll want to make note of the server path to this file which is located in the root path of your installation. Example: <http://yoursrerver/evanced/sr/readerwidget.asp>

G.2. Other Information You Need

Make note of the following information to update within the web widget code:

- *ProgramID*: You can find a program's ID number by logging into Summer Reader using an Administrator login.

Click SYSTEM MAINTENANCE from the toolbar and click EDIT PROGRAM.

On the Programs menu, click on the desired program. The system displays the Program Setup page.

The ProgramID is the first field on the setup page.

- *PageLangID*: You can find your program's default language ID by logging into Summer Reader using an Administrator login.

Click SYSTEM MAINTENANCE from the toolbar and click EDIT PROGRAM.

On the Programs menu, click on the desired program. The system displays the Program Setup page. Click on the Language Setup button and make a note of your program's default language.

Return to SYSTEM MAINTENANCE and click LANGUAGE SETUP. Click on the desired language.

The Language ID is the first field on the setup page.

- *Summer Reader:* You will want to make note of the server path to your Summer Reader installation.

G.3. How to Do It

Using Web Widgets is as easy as copying and pasting the appropriate code from the *readerwidget.html* file to your Summer Reader home page. However, you must have web programming experience to work effectively with the code.

G.3.1 Define HTML Tags

- Open the readerwidget.html file.
- Find and copy the following script as illustrated below.

```
<script language=javascript>
//global variables
var ServerPath = "http://dev.evanced.info/srv7/"; //set to summer reader application
var ReturnPage = "http://localhost/srv7/readerwidget.html"; //set to location (url) of html wi
var ProgramID = 35; //set this ProgramID for the compo
var RegisteredProgramID = 0; //this is set by the application i
var NewWindow = "Y"; //set to 'Y' to open all navigatio
var PageLangID = 1; //set this to the default language

var arrScriptBlocks = new Array(4); //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=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&limit=3";
</script>
<script type="text/javascript" src="readwidget.js"></script>
<html>
<head>
```

Copy This Text

Figure G.3.1 A Print 'Patron' Certificate

- Open your web page file and paste this code before the <html> tag.
- Check to make sure the following paths are correct and fully qualified path URLs.
 - The ServerPath points to your Summer Reader installation.
 - The ReturnPage points to your readerwidget.html file.
- Enter the ProgramID number for the program that you are pulling information from.
- Enter the program's default language Language ID for the PageLangID variable.
- Save your changes.

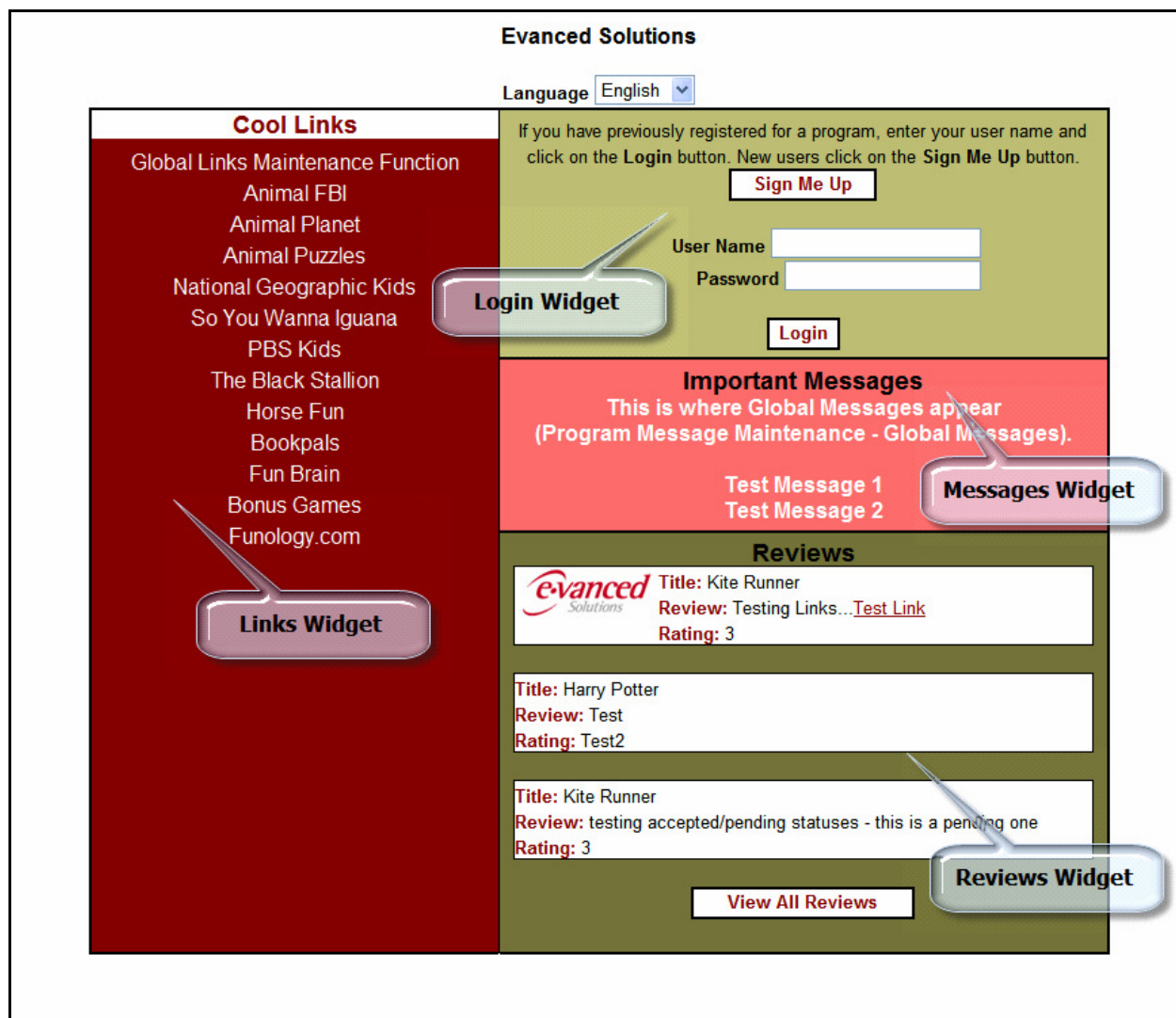


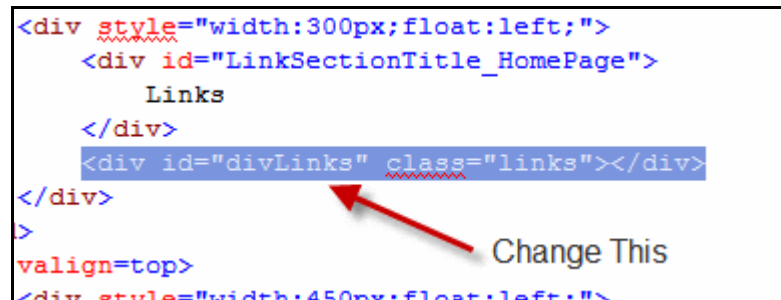
Figure G.3.1 B Widget Page Example

G.5. Troubleshooting

G.5.1 Links won't display from both my programs at the same time, on the same page.

Make sure that the "divLinks" references for the two programs are unique. The first divLinks ID can remain "divLinks"; the second should be renamed (i.e., "divLinks2"). Make this change to both the HTML and script code.

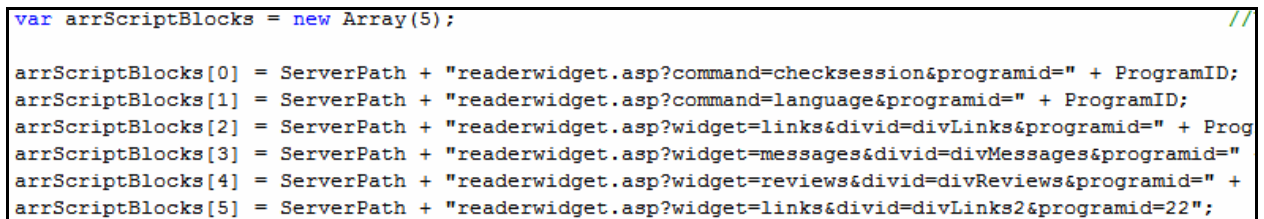
HTML



```
<div style="width:300px;float:left;">
  <div id="LinkSectionTitle_HomePage">
    Links
  </div>
  <div id="divLinks" class="links"></div>
</div>
<div style="width:450px;float:left;">
```

Figure G.5.1 A divLinks HTML Example

Script



```
var arrScriptBlocks = new Array(5);

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=" + 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";
```

Figure G.5.1 B Widget Script Blocks Example

G.5.2 Web widgets don't show information.

Double check the following if your web widgets don't show information:

- Make sure that the correct ProgramID is correct
- Make sure all the server paths are correct.
- Make the code has been pasted between the <HTML> </HTML> tags.
- Make sure your program has information available to be displayed.

G.5.3 My web widgets aren't the same color as the background of my website.

You are able to adjust the color of web widgets in the readerwidget.css file. **You must be able to read and understand HTML coding to work successfully with these web widgets.** See the style sheet information in the User Manual located at www.evancedsolutions.com for more information.

G.6. Widget Variables

The following variables are documented in the .html widget page example (readerwidget.html) supplied after installation.

Variables

```
//global variables
var ServerPath = "http://dev.evanced.info/srv7/";
var ReturnPage = "http://localhost/srv7/readerwidget.html";
var ProgramID = 35;
var RegisteredProgramID = 0;

var NewWindow = "Y";

var PageLangID = 1;

var arrScriptBlocks = new Array(4);

//set to summer reader application
//root path
//set to location (url) of html widget page
//this page)
//set this ProgramID for the components
//to retrieve content from the
//specified program
//this is set by the application if the user
//attempts to log in for a program but are
//not registered for the program defined
//by the log-in widget but are registered
//for another program (the application
//sets this variable to the program's
//programid with the most recent
//registration for the patron)
//set to 'Y' to open all navigation in a
//new browser window or to something
//other than a 'Y' to keep in the current
//window
//set this to the default language's
//LanguageID

//Use this array to load the script block
//urls (increment/decrement the bounds of
//the array based on the # of script blocks
//needed but arrScriptBlocks[0] and
//arrScriptBlocks[1] should not be
//modified or removed)

//sets activity center content based on if patron is logged in or out (do not delete or alter)
arrScriptBlocks[0] = ServerPath + "readerwidget.asp?command=checksession&programid=" +
ProgramID;
//sets up language selection and language-specific content on the page (do not delete or alter)
arrScriptBlocks[1] = ServerPath + "readerwidget.asp?command=language&programid=" + ProgramID;
//gets the program's links
arrScriptBlocks[2] = ServerPath + "readerwidget.asp?widget=links&divid=divLinks&programid=" +
ProgramID;
//gets the program's messages
arrScriptBlocks[3] = ServerPath +
"readerwidget.asp?widget=messages&divid=divMessages&programid=" + ProgramID;
//gets the program's reviews
arrScriptBlocks[4] = ServerPath + "readerwidget.asp?widget=reviews&divid=divReviews&programid=" +
ProgramID + "&random=Y&limit=3";
```

Reviews Widget - this widget display patrons reviews on the .html page.

URL parameter: widget

URL value: reviews

Description: Tells the application to get patron reviews.

URL parameter: divid

URL value: Assigned by developer to the id of a div block on the html page.

Description: Tells the application where to place the reviews on the html page.

URL parameter: programid

URL value: Assigned by developer to the program's programid.

Description: Tells the application which program to retrieve reviews from.

URL parameter: random

URL value: Assigned by developer.

Description: If set to 'Y' the application returns random reviews. If set to non-'Y' the application returns the most recent reviews.

URL parameter: limit

URL value: Assigned by developer

Description: Tells the application the number of reviews to return. If not set then the application returns all reviews from the program.

Example: show 2 random reviews from a program (ProgramID = 44 in this example)

```
arrScriptBlocks[4] = ServerPath + "readerwidget.asp?widget=reviews&divid=divReviews&programid=" +
ProgramID + "&random=Y&limit=2";
```

'View All Reviews' Button Widget - this widget opens a new browser window and displays patron reviews.

Javascript function call

```
Function showViewReviews(ProgramID, Random, Limit) {
    //code }
```

Function parameter: ProgramID

URL value: Assigned by developer to the program's programid.

Description: Tells the application which program to display reviews from.

URL parameter: Random

URL value: Assigned by developer.

Description: If set to 'Y' the application displays random reviews. If set to non-'Y' the application displays the most recent reviews.

URL parameter: Limit

URL value: Assigned by developer

Description: Tells the application the number of reviews to display. If not set then the application displays all reviews from the program.

Example: show 10 random reviews from a program (ProgramID = 44 in this example)

```
showViewReviews(44, 'Y', '10')
```

Example: show all reviews from a program (ProgramID = 44 in this example)

```
showViewReviews(44, "", "")
```

APPENDIX H: TIPS AND TRICKS

H.1. Inserting HTML Links

HTML address links can be embedded into either the *Description* and/or the *Instructional Text* text boxes when setting up a new program. Simply add the link as one would add a link on an HTML page. For example:

```
<a href="http://www.evancedsolutions.com">Evanced Solutions Website</a>
```

It is critical to use this exact syntax as it does not work otherwise. In particular note the double quotes (single quotes are acceptable as well) bracketing the address and the specific use of http://. Both of these elements are required for proper operation.

H.2. Linking to a program's registration page

To provide a link directly to a program's registration page, go to the program's setup (System Maintenance → Programs → Edit Program) and select the program, click on the *Get Registration Link* button. Copy the URL in the browser's address bar to use as the URL for the link and append the program's ProgramID to the URL.

Example:

<http://evanced.info/evanceddemo/sr/programregmaint.asp?ReturnPage=homepage.asp?PreviewMode=;&Mode=New&ProgramID=35>

H.3. Additional parameters for the home page

Use the *hidetabs* parameter to hide all other active program tabs other than the program that is passed in. Use the program's ProgramID in the URL to select the desired program.

Example: <http://evanced.info/evanceddemo/sr/homepage.asp?ProgramID=35&hidetabs=1>

H.4. Additional parameters for the registration page

If directly linking to the program's registration page from your library's home page, there are two parameters that can be used to direct the patron's navigation. These parameters should only be used when programs have patron registration enabled and patron logging disabled. The *Home* parameter can be passed in to be used to set the location the patron returns to when they click on the 'Back' button on the registration page. The *Away* parameter can be passed in to be used to set the location the patron is directed to after successfully registering for the program.

Example:

<http://evanced.info/evanceddemo/sr/programregmaint.asp?ReturnPage=homepage.asp;&Mode=New&ProgramID=35&Home=http://www.evancedsolutions.com&Away=http://evanced.blogspot.com>

H.5. Deleting patron records from a program

When using the *Delete All Program Records* button in the program's setup (available only to *Administrator* level users accessed via *System Maintenance* → *Programs* → *Edit Program*), only the program-specific information is deleted such as the patrons' log records, record of prizes awarded and

random drawing history. The patrons' registration records are retained in this process. The reason that the patron registration records are retained is for ease of registration for future programs or they may be registered in other program(s). To remove the patron registration records from the program use the *Delete All Program Records (Including Patrons)* which is only available to *Administrator* level users. This removes all the patrons' program-specific information as well as the patron registration records for this program. If patrons are registered for any other programs they are not deleted.

Note: Enable the 'Bulk Deletion of Patron Records' setting in 'System Settings' to have the 'Delete All Program Records (Including Patrons)' button displayed in the program setup.

H.6. Deleting all patron records from the previous year

To remove all patron registration records from previous year(s), use the *Delete All Program Records (Including Patrons)* in the program's setup (only available to *Administrator* level users accessed via *System Maintenance* → *Programs* → *Edit Program*). Click this button to remove all patrons' program-specific records and the patrons' registration records for the selected program. Do this for the prior years' programs to remove all the patrons for each program. After finishing go to *System Maintenance* → *Manage* → *Patron Information*, make sure all search criteria is clear and click on the *Go* button. This returns all remaining patron registration records still in the database. Theoretically, as long as all program information (i.e., registrations, logging, prizes, random drawing history, etc.) has been deleted, most, if not all, patron registration records should have been deleted. However, it is possible to delete patrons' program-specific information and have patron registration records remain. To remove all remaining patron registration records, click on the *Delete All Unregistered Patrons* button.

Note: Enable the 'Bulk Deletion of Patron Records' setting in 'System Settings' to have the 'Delete All Records (Including Patrons)' button displayed in the program setup.

To keep one or more programs in tact and delete all other patron records, use the same procedure described above but do not delete anything from the programs that are to remain in tact.

H.7. Removing duplicate library card numbers

Removing duplicate card numbers is necessary to use *Library Card Number* as the *Login Type*. Run the *Duplicate Library Cards* report to get a list of duplicates. This report displays the number of duplicates and the library card number(s). Go to *System Maintenance* → *Manage* → *Patron Information* and copy the duplicate library card number into the *Library Card Number* search field. If this field is not configured in the *Quick Search Setup*, use the *Advanced Search* button to get to this field. Click on the *Go* button to return all the records with the duplicate library card number. Either edit the library card number to something unique to other card numbers or delete the duplicate(s) until only 1 remains. Continue this procedure until all duplicates have been removed.

H.8. Make the program available on the patron home page

The appearance of programs on the patron home page is controlled by several settings. First and foremost the *Active* setting must be set to *Yes* in order for the program to appear on the patron home page. *Patron Registration* or *Patron Logging* or *Reviews* (set to *Home Page Entry*) must be enabled. The program also appears on the patron home page if the *Show Program on Home Page* setting is enabled. This setting is only applicable if the above options are not enabled. If none of these conditions are met the program does not appear on the patron home page and cannot be accessed by the public.

H.9. Advanced Searching

This section describes the advanced searching capabilities that are integrated throughout the system. Searching can be conducted for the entire system or for individual programs, depending on what page the search is being executed from in the staff interface.

Search results pages consist of various fields that are unique to the current working page. All searches are automatically wild-carded. For instance: if 'smith' is entered into the *Participant Last Name* field, the results return all the following names: Smithe, Smith, Smithman, Smitherton, etc. By the same token, if a 'C' is entered, all patrons with a last name that starts with 'C' appear in the search results page in alphabetical order.

To view all records at any time, keep all search fields blank and click the *Go* button.

H.10. Navigating Result Lists

This section describes how to navigate through results. By default, results are displayed in a list in sets of ten records at a time. To sort records by more than ten per page, select the appropriate number from the *Display* drop list at the bottom of the search results page. The default can be changed by changing the *Set Records Per Page* setting found in the *System Settings*.

H.11. Sorting Lists

This section describes how to sort lists. Most pages with result lists have sorting capabilities. To sort the list, click on the *Sort By* drop down list located at the bottom of the list. Click on the *ASC/DESC* drop down list to the right of the *Sort By* field to show the list in ascending or descending order.

APPENDIX I: Facebook Integration

I.1. Facebook Configuration

If the Facebook Integration feature (in a program setup) is set to "Yes," you may configure it by clicking the "Facebook Configuration" button that is next to this selection. Select any of the following Facebook notifications by clicking "Yes" next to the desired item. You may select as many or as few notifications as you wish.

- Staff-Side Prompts
- Program Registration
- Log Entry
- Review Entry
- Reading List Selection

The Edit Configuration button can be used to configure the default message for each of these prompts.

I.2. Message Configuration

I.2.1 Staff-Side Prompts

When enabled, this allows staff to include a Facebook message when performing patron-side functions such as adding a log or registering a patron.

I.2.2 Program Registration

A notification is posted to Facebook that the patron has registered for a program. The message configuration screen is shown below with the default message.

The (*actor*) tag (the Facebook user's screen name) can only be included in the Caption. The ^ProgramName^ and ^LibName^ can be included anywhere.

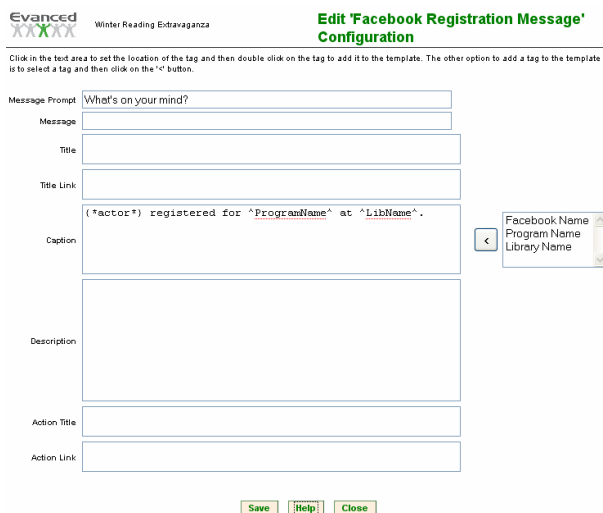


Figure I.2.2 A Facebook Configuration – Program Registration

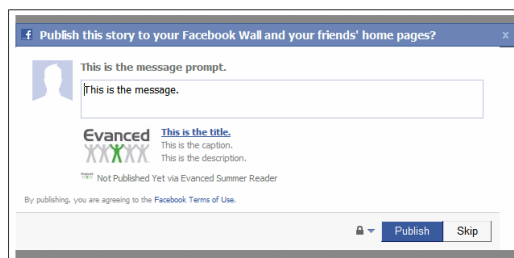


Figure I.2.2 B User Prompt – Unposted Program Registration Message



Figure I.2.2 C User Prompt – Posted Program Registration Message

I.2.3 Log Entry

A notification is posted to Facebook that the patron has logged a reading entry. The message configuration screen is shown below with the default message.

The (*actor*) tag (the Facebook user's screen name) can only be included in the Caption. The other tags can be included anywhere.

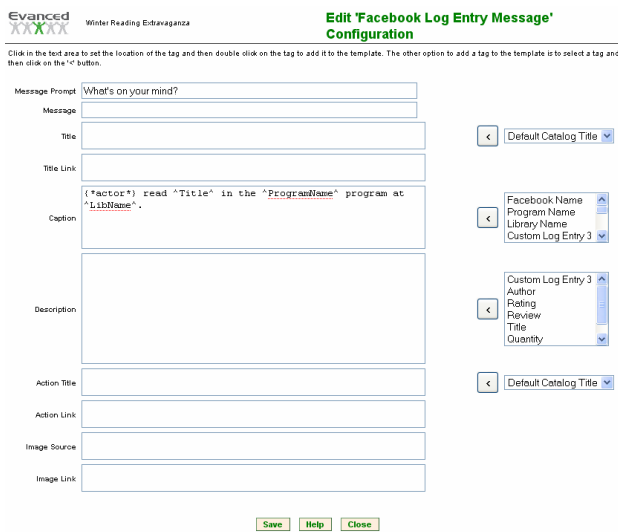


Figure I.2.3 A Facebook Configuration – Log Entry

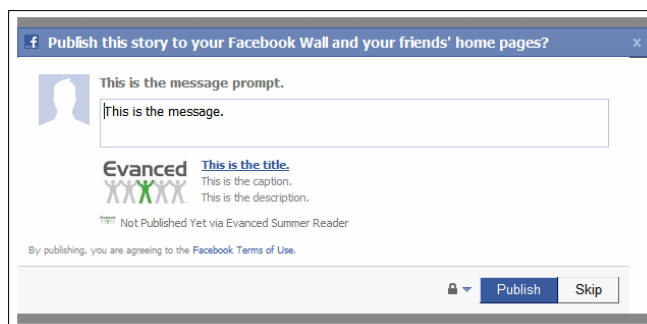


Figure I.2.3 B User Prompt – Unposted Log Entry Message

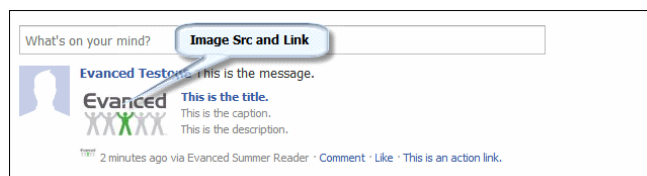


Figure I.2.3 C User Prompt – Posted Log Entry Message

I.2.4 Review Entry

A notification is posted to Facebook that the patron has posted a review. The message configuration screen is shown below with the default message.

The (*actor*) tag (the Facebook user's screen name) can only be included in the Caption. The other tags can be included anywhere.

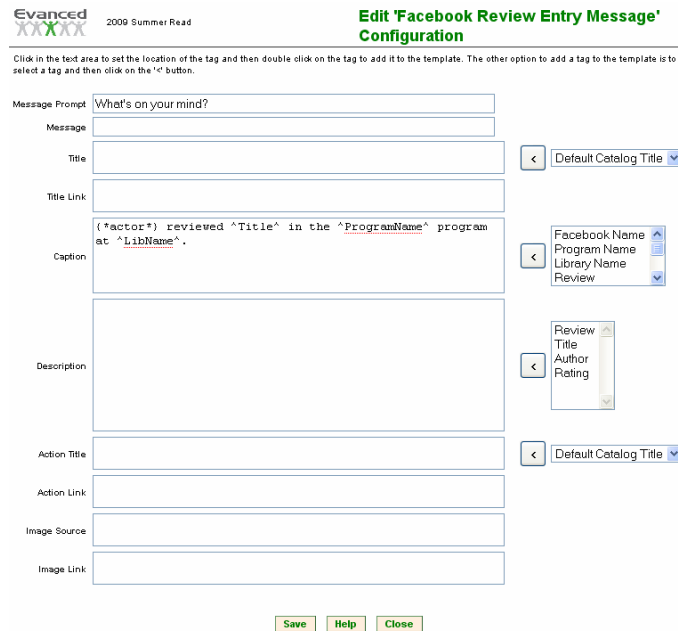


Figure I.2.4 A Facebook Configuration – Review Entry

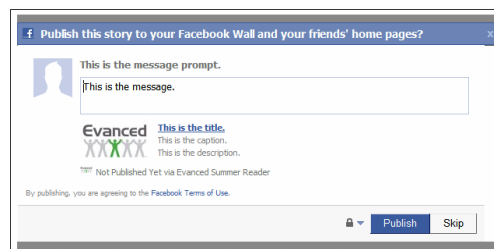


Figure I.2.4 B User Prompt – Unposted Review Entry Message

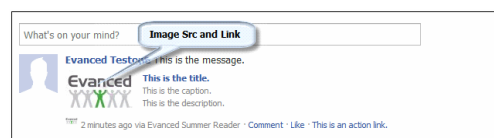


Figure I.2.4 C User Prompt – Posted Review Entry Message

I.2.5 Reading List Entry

A notification is posted to Facebook that the patron has selected a book for their reading list. The message configuration screen is shown below with the default message.

The (*actor*) tag (the Facebook user's screen name) can only be included in the Caption. The other tags can be included anywhere.

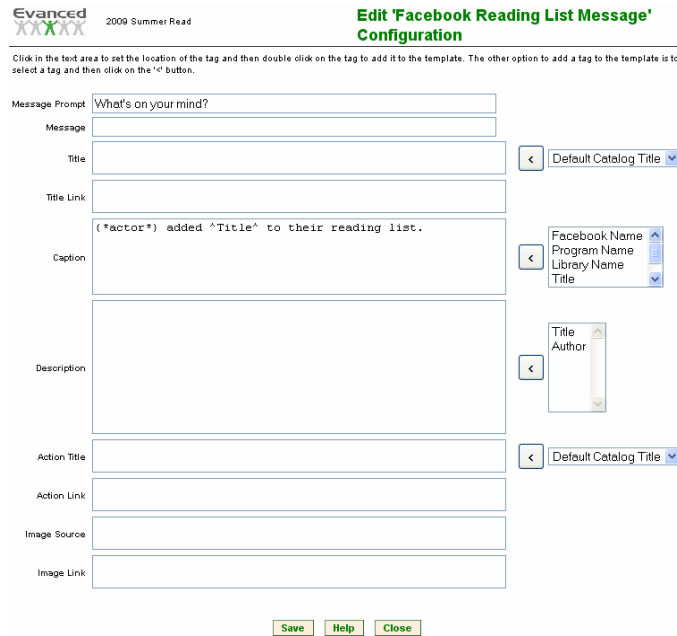


Figure I.2.5 A Facebook Configuration –Reading List Entry

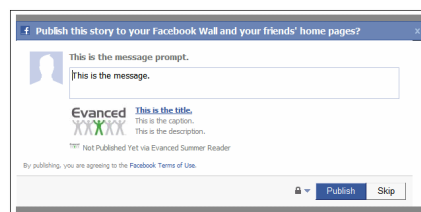


Figure I.2.5 B User Prompt – Unposted Reading List Entry Message

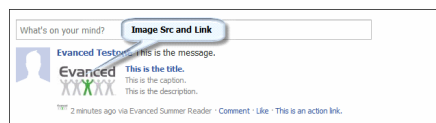


Figure I.2.5 C User Prompt – Posted Reading List Entry Message