User Manual for

Summer Reader –2008

Web Based Reading Program & Interest Group Manager

MAN0104-06C

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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:

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<tr>
<td>Phone</td>
<td>888-519-5770</td>
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<td>E-mail</td>
<td><a href="mailto:support@evancedsolutions.com">support@evancedsolutions.com</a></td>
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| Web   | http://www.evancedsolutions.com  
       | and  
       | http://evanced.blogspot.com      |
CHAPTER 2: STAFF INTERFACE

2.1 Summer Reader 2008 – New Features and Improvements

Please refer to 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

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

*See Section 2.6.7 Security Maintenance for more information on system security.*

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2.4 Manage Programs Home Page

Once staff are logged in to Summer Reader, they are taken to the Manage Programs Home Page (see Figure 2-1). The Manage Programs Home Page is separated into two areas:

- **Search** - Search for registrants by Last Name and/or First Name. Additional search can be configured and included in the Search All Programs filter.
- **Programs** - Select from the Programs box to quickly move between programs/interest groups for registration, logging, awarding prizes, etc. Clicking on an individual program navigates to the Management Page for the selected 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 begin with Sm by typing Sm (in the Last Name field)

Please see Program Management for more information about registering, editing, and transferring patrons, and managing program logging, prizes and drawings.
2.5 Navigation Menu

There is a navigation menu 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
- Log Out
- 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 (see Figure 2-2) from System Maintenance (located on the Main Navigation Menu):

- **Program Maintenance** - Go here to add, edit or import existing programs and view inactive programs.
- **Program Setup Maintenance** – Go here to configure the features used to setup and configure individual programs, including drop lists, e-mail templates, field labels and defaults, program and message links, style sheets, etc.

![Figure 2-2 System Maintenance for Administrator Users](image-url)
- **Reviews Maintenance** - Go here to manage reviews, including accepting, denying and modifying new and existing reviews.

- **Patron Maintenance** - Go here to manage the patron database (edit and delete records, and bulk email).

- **Setup Maintenance** – Go here to perform initial system setup, including system settings, style sheet maintenance, search field configuration, e-mail settings, etc.

- **Security Maintenance** - This is where an administrator manages the password levels.

### 2.6.1.2 General Staff Access

Those with the general *staff* password see a different screen when they go into *System Maintenance* (see Figure 2-3).

![](image)

**Figure 2-3 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 in **Figure 2-4**. They only have access to searching and *Patron Maintenance*.

![](image)

**Figure 2-4 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 (see Figure 2-5).

**Figure 2-5 Manage Programs for Volunteer Users**

2.6.2 Program Maintenance

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

- Add a new program
- Edit program setup of an active program
- Import programs
- View and modify inactive programs
2.6.2.1 Add New Program

2.6.2.1.1 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** and **Patron Logging** must be enabled. When this field is enabled, the program only appears on the Patron Home Page when the current date falls within the program’s registration and logging period. When these fields are set to No, the system displays the **Show Program on Patron Home Page** field.
- Enable **Show Program on Patron Home Page** to display a program on the Patron Home Page when registration and logging do not apply.

2.6.2.1.2 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 3 – Add Program** (see **Figure 2-6**). Staff is directed through each step of the three step process, which includes adding the program, 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 3**

![Figure 2-6 Adding a Program (Step 1 of 3).](image-url)
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.*

- **Program Name** - Enter program name here.
  
  *Note: It is best to use a unique name for each program added because the system uses this name as a reference in links throughout.*

- **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.

- **Description** - Enter the Description of the program. This is free-form text field. HTML links may also be inserted here.

- **From Address** – This field is new to 2008. The From Address field uses the [program’s name] in lieu of the From address configured in Setup Maintenance - Email Settings.

- **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 Registration and Logging, regardless of their configured settings. Setting this field to Yes enables Patron Registration and Logging making them accessible to patrons during the defined registration and logging periods. Patron Registration and Logging are active so long as this field is set to Yes.

- **Required Login Type** - This option determines whether a User Name or Library Card Number is required for registration.

- **Eligibility Requirement** (formerly known as Age/Grade) – The Eligibility Requirement field sets how program eligibility is determined (i.e., by age, grade, or other classifications as determined by the library).
  
  - Age requires patrons to enter their age. The default option requires a birth date entry. The alternate option is a configured age list.
  - Grade requires patrons to select their age from a configured list.
  - Classification requires patrons to select a classification from a configured list.
  - None indicates the program has no eligibility requirements.

  Drop lists are configured by clicking the accompanying Edit button.

  *Note: This field cannot be modified after one or more patrons have registered for the program.*

- **Eligibility Requirement Text** (formerly known as Age/Grade Text) - This is a text field that gives libraries a place to enter instructions related to a program’s eligibility requirements.

- **Eligibility Type Configuration** (formerly known as Age/Grade Minimum and Maximum and Patron Classification) – These fields vary depending on the Eligibility Requirement option selected above.
  
  - Age displays the fields shown in the illustration below.
  
  - Grade displays the fields shown in the illustration below.
Classification displays the fields shown in the illustration below.

None displays the fields shown in the illustration below.

- **Patron Registration** – Patron Registration determines whether patron’s can register themselves 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.

- **Patron Logging** – Click Yes to grant patrons the opportunity to record or log their progress. Click No to disable the progress log. When set to Yes, the following additional fields are displayed under Primary Logging Type: Patron Logging Restriction, Log Amount Increment, Maximum Log Entries/Day, Maximum Log Amount Entry, and Maximum Log Amount/Program. When set to No, these fields are hidden.

  **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 record or 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 Patron Home Page** - This field only appears when the Patron Registration and Patron Logging fields are set to No. It is hidden when these fields are set to Yes. Show Program on Patron 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. This allows patrons to see a program before registration and logging are open.

  - 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 Integrated with Log Page to add a review section to the progress log on the Patron’s Program Home Page.
  - Click Independent Via Patron Home Page to create a link to reviews on the Patron’s Program Home Page.

- **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.
- **Allow Patron’s to Print Certificates** – This field appears only when *Patron Registration* and *Patron Logging* is set to *Yes* and there is one or more configured *Patron* certificates. See Appendix [Creating Patron Certificates](#) for more information about creating patron certificates.

  - *Yes* allows patrons to print their own certificates.

    - **Patron Certificate** (formerly Select Certificate) only appears when *Allow Patron’s to Print Certificates* is set to *Yes*. Selecting a certificate template displays the Certificate Eligibility field.

      - **Certificate Eligibility** determines when a patron becomes eligible for a certificate. When a patron become eligible for a certificate, a *Print Certificate* button appears on the patron home page.

        - **Prize Eligible** makes a patron eligible for a certificate when they become eligible for one or more prizes.

        - **Min Log Qty** (Minimum Log Quantity) makes a patron eligible for a certificate when their log reaches the amount equal to or greater than the quantity entered into this field. Minimum log quantity options include:

          - ✓ The Primary Logging Type and/or Chapters
          - ✓ Use Books Only
          - ✓ Use Chapters Only

        - **Anywhere** allows a patron to print a certificate any time.

    - **No** denies patrons access to certificates and requires patrons to contact the library for their certificate.

    - **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.’

    - **Authentication Type** – *Authentication Type* allows libraries to use information in their ILS system to allow patron’s to register for the program. This option sets the authentication type. Select *Not Used*, *Optional*, or *Required*.

      - **Note**: Authentication must be configured and enabled before this option is displayed. Configuring authentication requires some technical details about the ILS system used by the library; the scope of these details are not covered in this manual.

    - **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** – These appear only when *Patron Logging*, above, is set to *Yes*. 
Yes restricts patrons to the settings configured in:

- **Log Amount 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 Log Amount|Entry** field.
- **Maximum Log Amount|Entry** represents the largest number of logging types a patron may include in one log entry. The amount entered here will be the highest number in the **Log Amount** drop down list on the patron’s log for the program.
- **Maximum Log Entries|Day** restricts the number of log entries a patron may enter each day.
- **Maximum Log Amount|Program** restricts the total number of log entries a patron may enter for the entire program.

For example:

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

Under this configuration, a patron can make 1 log entry per day. That log entry must contain at least 2 books and may not contain more than 4 books. The patron is restricted to logging no more than 10 books total for the program. Under this configuration, the Log Amount Increment drop list include 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 Eligibility Timeframe* field. Fields include:

  ✓ *Interval* (formerly known as Prize Interval) appears regardless of the *Prize Eligibility 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 Level* 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* (formerly known as Prize Maximum) fields are dependent upon the *Prize Eligibility Timeframe* and represent the maximum number of prizes a patron can claim during the time frame selected. When the *Prize Eligibility Timeframe* is set to By Week or By Month, the *Prize Level* field is split into 2 fields – *Prize Levels*[the *Prize Eligibility Timeframe]* and *Prize Levels*/Program. When *Prize Eligibility Timeframe* is set to Entire Program, the *Prize Levels* field is a single field.

  ✓ *Prize Eligibility Timeframe* works with the *Prize Level* field(s) and represents the time period – Per Week, Per Month or the during the Entire Program - during which a patron may earn the maximum number of prizes set in the *Prize Levels* field(s).

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 = 3 - the patron may earn a maximum of 3 prizes during the program.
- *Prize Eligibility 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 3 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 Eligibility 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, up 3 books and up to 5 books.
Prize Levels/Program (formerly known as Prize Maximum) only appears when the Prize Eligibility 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 Eligibility Timeframe is set to Entire Program.

Prize Eligibility 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 Level field. When set to Entire Month, prizes are awarded based solely on the benchmarks entered in the Intervals 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.
- Prize Levels/Program = 3 - the patron may earn a maximum of 3 prizes during the program.
- Prize Eligibility 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 3 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 = 1.
- Daily Goal Maximum = 20.
- Result = To earn a prize, the patron must read between 1 and 20 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 distinct prize levels 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 a prize based on the secondary logging type.

• **Prize Quantity** [awaiting information from Doug.]

• **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.

  ➢ **Both Prize Setups Determine Prize Eligibility** requires patrons to satisfy both the Primary and Secondary prize criteria to be eligible for a prize.

### 2.6.2.3 Registration Setup

Once Step 1 is complete, a second page appears entitled **Registration Setup** (see Figure 2-7). This is Step 2 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.
Figure 2-7 Adding a Program (Step 2 of 3)

- **Use quick registration?** allows participants to provide First and Last Name only to register for a program. When enabled, staff are responsible for completing at a later date the remaining information required for allow patrons to log their progress.

- **Allow group registration?** allows groups to register as a group rather than as individual members. Reports will reflect the number of participants in the group when calculating registration totals for the program.

- **Display Order** - Click the Up or Down arrow in the Change Display Order column to reorder the registration fields.

- **Registration Field** 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. These fields only appear when Use Program Specific Custom Registration Entries is set to Yes in System Settings. When set to No, Custom Registration Fields apply to all programs system-wide.

**Note:** See Appendix 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 selection 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 Maintenance - Drop List Maintenance. 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 Maintenance - Drop List Maintenance.

- **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.
• **Group Enabled** - If the *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 List Maintenance’. 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*.

### 2.6.1.1.4 Logging Setup

Once *Step 2* is complete, the third and final screen appears entitled *Logging Setup* (see Figure 2-8). This is *Step 3* in adding a program. These options are specifically related to how log information is collected for the program.

**Step 3 of 3**

![Figure 2-8 Adding a Program (Step 3 of 3)](image)

- **Display 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
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. Establish whether it is a required logging item by checking the checkbox corresponding to the item.

- **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 (see Figure 2-6). From here, click the Save button again to finalize and go to the Program Selection page (see Figure 2-5).
**2.6.2.2 Edit Program Setup**

An active program can be edited at any time by going to System Maintenance → Program Maintenance → Edit Program Setup. Click on the appropriate program from the list.

The Program Setup page for the selected program appears.

**2.6.2.2.1 Editing Registration and Logging Setup**

From here, staff may edit the general program information or click on the Registration Setup button or Logging Setup button (located at the top of the page) to modify the registration and logging setups. The program’s ProgramID is also displayed (this field is read-only and is used to reference programs when using the ReaderXML page). 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.

**2.6.2.2.2 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 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 Clear All Records button appears at the top 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 Allow 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 top of the page labeled Clear All 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.

**2.6.2.2.3 Exporting a Program**

The Exporting Programs button allows you to export your program to a file that can be imported into another library’s Summer Reader system. Exporting allows you to export one or both of the program and style sheet. This feature allows libraries in a consortium to share programs.

To export a program, go to System Maintenance → Program Maintenance → Edit Program Setup and select the desired program. Click Export Program to display the export window. Select either “Program”, “Style Sheet” 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 can be saved to a file in .html or .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 → Program Maintenance → Import Program. When complete, click Import to setup the program. The recipient may then edit the program by going to System Maintenance → Program Maintenance → Edit Program Setup. 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.
2.6.2.2.4 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. The system will assign the program copy a new Program ID number to differentiate it from the original. To copy a program, go to System Maintenance → Program Maintenance → Edit Program Setup and select the desired program. Click the Copy Program button to display a naming field. This page will also display an “Include Patrons” checkbox that allows you to copy patron information when copying a program. When deselected, only the program settings will be copied. 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.

2.6.2.3 Importing Program

The Import Program function allows libraries in a consortium to share programs. In order to import a program, the library which has the original program must export the program to an .html or .txt file and send it to the recipient library.

To import a program, open the .html or .txt file. Select and copy the contents of the file. Then, go to System Maintenance → Program Maintenance → Import Program and paste the contents Import Text window. When complete, click Import button to save the program. Edit the program by going to System Maintenance → Program Maintenance → Edit Program Setup. The program title will appear in the program list. Click the Close button at any time to cancel the import process.

2.6.2.4 Inactive Programs

2.6.2.4.1 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 → Program Maintenance → Edit Program Setup and change the Active field to No. Click the Save button to save the change.

2.6.2.4.2 Viewing an Inactive Program

To view inactive programs at any time, go to System Maintenance → Program Maintenance → Inactive Programs. From this page, all inactive programs are listed. Click on the appropriate program name to see Program Setup information.

2.6.2.4.3 Reactivating an Inactive Program

General program information, registration setup, and logging setup can be edited from here. 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.

2.6.3 Program Setup Maintenance

To locate Program Setup Maintenance, select System Maintenance → Program Setup Maintenance. Program Setup Maintenance controls the configuration of the variables that determine how a program looks and functions within Summer Reader, including the following:

- Drop List Maintenance allows staff to configure the drop lists that appear throughout the system.
2.6.3.1 Drop List Maintenance

Drop List Maintenance 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 2.6.3.7 – Registration Field 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).

2.6.3.1.1 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 of Use** 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 2 of 3 – Registration Setup – of the Add New Program process. The new customized list is only available to the program for which it 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 Group List option. To use the Modify Group List option:

A. Enter the names of all schools into the School Name List Maintenance page.

B. Click the Modify Group List button located at the bottom of the page. The system the School Name (Grouping) List Maintenance page.

C. Enter the school group or category names using the “ADD a new group to the list”. Group Name refers to the groups into which the schools will be categorized. Each category listed in the Groups List is associated with Edit Item and Edit List buttons.
   
   A. Edit Item loads the ‘School Name’ (Grouping) List Maintenance page, which allows you to revise the name of the selected group.

   B. Edit List loads the '[Group Name]' Group List Maintenance page, which allows you to add and remove schools from the selected group list.

D. Click Edit List to load the '[Group Name]' Group List Maintenance page. You may close the '[Group Name]' Group List Maintenance page at any time by clicking the Close button at the bottom of the page.

A. Add a School to a Group List: Schools that have not been assigned to a group are listed in the Unassigned Items list on the right side of the page. Select schools by clicking on their associated checkboxes and click Save. 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.

2.6.3.1.2 Modifying a List

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

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.

2.6.3.1.3 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 40 (Mr. Williams). The system will automatically assign the next list item a value of 40 + 10 = 50.

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 Jones and Mr. Smith in the example above, assign the new item a value of 25. When saved, the system places the new name between Miss Jones and Mr. Smith and reassigns order weight values so that the list appears in the desired order and all order weights appear in increments of 10.

### 2.6.3.2 Email Templates

Email Templates uses the Default Email Templates created under System Maintenance → Setup Maintenance as the basis for creating program specific e-mail templates. The system default templates include the Login Information template and Registration Confirmation template. Any additional templates must be configured first in System Maintenance → Setup Maintenance → Default Email Templates before they can be selected by the program.

#### 2.6.3.2.1 Template Tags

Each template contains tags that allow the system to insert variable information into the email. The table below describes the available tags and the templates to which they are available.

<table>
<thead>
<tr>
<th>Tag</th>
<th>System Template</th>
<th>Custom Template</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First Name</strong> – the patron’s first name</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>Last Name</strong> – the patron’s last name</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>Library Contact</strong> – the email address for the library contact provided in System Settings.</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td><strong>Library Name</strong> – the library name as entered in System Settings (Set Library Name field).</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td><strong>Patron Login Info</strong> – the login information supplied by the patron (this information is dependant upon the program’s setup).</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>Program Name</strong> – the name of the program the patron registered for.</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td><strong>Program URL</strong> – the URL to the patron home page for the specific program.</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

Add a tag to a template by placing your cursor in the desired location in the template; selecting the desired tag and clicking the ‘<’ button. The selected tag will appear in the e-mail template enclosed by ‘^’ characters.

Load the default template by clicking the Load Default Template button at the bottom of the page.

Click Save at the bottom of the page to save the changes.

#### 2.6.3.2.2 Creating a New Template

To create a new custom template:

1. Click Default Email Template on the Setup Maintenance menu.
2. Complete the configuration page.
3. Click Save to save the template.
The resulting template becomes a default template accessible to all programs and will not reflect customizations made in connection with specific programs.

### 2.6.3.2.3 Customizing a Program-Specific Template

To customize an existing template for a specific program:

1. Click *Email Templates* on *Program Setup Maintenance* menu. The system displays a list of Program-Specific Email Templates.

2. Select the desired program. The system displays the *Manage Email Templates* page.

3. Select the desired e-mail template from the drop list. The system displays the selected e-mail template.

4. Modify the email template as desired.

5. Click *Save* to save your changes.

Customizing a template for a specific program does not overwrite the original default template.

### 2.6.3.2.4 Restoring the Default Template

To restore a program’s email template to its original default configuration, open the desired template and click *Load Default Template* at the bottom of the screen.

### 2.6.3.2.5 Clearing a Template

To delete all text from the e-mail template and compose it from scratch, click *Clear*. Compose the desired e-mail template, inserting the appropriate tags as desired. **Note:** the system will not allow a blank template to be saved. You must enter and save some content in order to exit the template.

### 2.6.3.3 Logging/Review Field Labels

The system allows you to customize the field names that appear on program log and review pages accessible to patrons from their home page. The configuration of log and review pages is program specific and is determined by program configuration performed from the *Program Maintenance* menu. To customize fields:

2. Change a field name by typing the desired field name into the textbox associated with the default field name. The system also allows you to create up to three questions on the patron’s logging and review page.

3. Click Save to save changes.

2.6.3.4 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.

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

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 Edit button.

2.6.3.5 Program Links Maintenance

*Program Links Maintenance* allows you to add, modify or delete Global Links and Program Links. *Global Links* apply and are visible to all programs. *Program Links* apply and 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. [Cool Links] may be called something else, depending on your system’s configuration.
To work with Program Links Maintenance, select **System Maintenance → Program Setup Maintenance → Program Links Maintenance.**
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, double click the appropriate link or click on the corresponding Edit button under Modify items in the list. From here changes can 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.

**2.6.3.6 Program Message Maintenance**

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 2-11 – Program Message Maintenance page.](image-url)
2.6.3.6.1 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 → Program Setup Maintenance → Global Message Maintenance.

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.

2.6.3.6.2 Program Specific Messages

To work with Program Message Maintenance:

1. Click on System Maintenance → Program Setup Maintenance → 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.
2.6.3.7 Registration Field 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.

2.6.3.8 Registration Field Labels

Registration Field Labels allows libraries to customize the field names on the Patron Registration Page.

To work with Registration Field Labels:

1. Select System Maintenance → Program Setup Maintenance → Registration Field Labels. The system displays the page illustrated above.

2. Type revised field names in the text box of the field to be revised.

3. Click Save.
2.6.3.9 Set Program Order

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

To adjust the order of programs:

1. Select System Maintenance → Program Setup Maintenance → 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.

2.6.3.10 Style Sheet Settings

Important Note:

It is highly recommended that these pages only be edited by staff familiar with web programming.

Style sheets are managed from the Program Style Sheet Settings page. To access the Program Style Sheet Setting page, click System Maintenance → Program Setup Maintenance → Style Sheet Settings. Style Sheets contain the settings for the colors, graphics, etc. that create the look and feel of programs.
The Program Style Sheet Settings page contains one Default program style sheet plus additional links for each active program. Default style sheet settings are applied to all programs unless someone with Administrator privileges modifies the style sheet settings for the individual program.

2.6.3.10.1 Style Sheet Organization

Style Sheets are divided into 5 sections:

- **Home Page** affects the patron home page.

Patron Home Page - Login Prompt View
Patron Home Page – Patron Logged In

- **Registration Page** affects the *Patron Registration* page.
• **Logging Page** affects the patron log page.

```
<table>
<thead>
<tr>
<th>Amount (Books)</th>
<th>What you think.</th>
<th>Logged By</th>
<th>Log Date/Time</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Good program</td>
<td>Patron</td>
<td>2/19/2008 6:27:39 PM</td>
<td></td>
</tr>
</tbody>
</table>
```

**Patron Log Page**

• **Reviews Page** affects a program’s Reviews page. This is the page displayed when a patron clicks on the *View All Reviews* button.

```
No reviews at this time. Please check back later.
```

**Program Reviews Page**

• **Confirmation Page** affects the confirmation signup page. The system displays this when a patron clicks on the *Signed Up Previously* button on the *Patron Registration*.

```
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 TheBest's Library.

User Name: __________________________ Password: __________________________
Library Card: __________________________
```

**Patron Registration Confirmation Page**
• **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.

![Email Login Information Page](image)

**Email Login Information Page**

• **Program Selection Page** affects the patron program selection page. This page is displayed only when a patron that has registered previously logs in but is not currently registered in any programs and clicks on *Sign Me Up* button.

**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.

2.6.3.10.2 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.

![Style Sheet Maintenance for 'Program'](image)

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

Bright Colors

Classic
2.6.3.10.3 Using Style Sheets

To use style sheets:

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

3. 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 Style Sheet Settings 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 Style Sheet Settings page.

      Note: Set the #ImageControl class to display images in the Sponsor, Links, and/or Footer sections. When setting an image in the Sponsor section make sure to remove the 'visibility:hidden' attribute so that the image is displayed. The following is an example of #ImageControl class that sets an image in the Sponsor section:
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 Style Sheet Settings 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.

4. At this point, you should see the *Program Style Sheet Settings* 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.

**2.6.3.10.4 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 Settings’ Sections (patron not logged in)

Example program template provided by E"vanced Solutions

Home Page Settings’ Sections (patron logged in)

Example program template provided by E"vanced Solutions
Home Page Settings’ Style Classes (patron not logged in)

Home Page Settings’ Style Classes (patron logged in)
Sign Me Up Settings’ Style Classes

Registration Settings’ Style Classes

Add/View and Review Logging Settings’ Style Classes
Program Selection Settings' Style Classes

2.6.3.10.5 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.

2.6.3.11 Text Settings

Important Note:

It is highly recommended that these pages only be edited by staff familiar with web programming.

Text settings for a program can be edited at any time by select System Maintenance → Program Setup Maintenance → Text Settings. The system displays the Program Text Settings page, illustrated below.

This works the same way as the Style Sheet settings. To create text settings, you may either manually enter the desired code or click the Load Default button and edit it as desired. Click the Save button to save your changes.

The system’s default settings can be restored at any time by clicking on the Load Default button associated with desired section.

To preview the changes made on the patron home page, click on the Preview Home Page button on the Program Text Settings program page.
2.6.3.11.1 Text Maintenance Organization

To access the Text Maintenance program page, select a program from the list of programs. The system displays the page illustrated below.

<table>
<thead>
<tr>
<th>Text Maintenance Organization</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home Page Title</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Patron Home Page Title</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Home Page Links Title</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Home Page Messages Title</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Home Page Reviews Title</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Home Page Activity Center Title</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Home Page Text</strong></td>
<td></td>
</tr>
</tbody>
</table>

![Text Maintenance for Program](image_url)
The Text Maintenance page contains the following sections:

- **Home Page Text (No Active Programs)** appears in the Default text setting option.
- **Home Page Title**: This is the text displayed at the top of the patron home page when patron IS NOT logged in.

- **Patron Home Page Title** refers to the Home Page Title that appears when the Patron is logged in. Use the `^PatronName^` tag in this text to display the patron’s name.
- **Home Page Links Title** 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.).

- **Home Page Messages Title** refers to the title of the messages section of the patron's home page.
- **Home Page Reviews Title** refers to the title of the reviews section of the patron home page.

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

- **Home Page Sponsor Text** appears in the Sponsor section of the Home Page (beneath the program tabs) when the patron has logged into the program.
• **Home Page Certificate Text** 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 (i.e., number of page, chapters or books read).

![Home Page Certificate Text](image)

• **Home Page Activity Center Login Text (Program Started)** is the html/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.

![Home Page Activity Center Login Text (Program Started)](image)
• **Home Page Activity Center Login Text (Program Not Started)** appears in the same location as “Home Page Activity Center Login Text (Program Started).” This is the title that appears when the patron has registered to participate in the program, but the program has not yet begun.

• **Home Page Activity Center Log Summary Text** 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 what the user has logged to date (i.e., “X Books logged so far.”). HTML tags are used to pull in patron specific information. The following tags are supported for this field: Patron’s First Name (^FIRSTNAME^), Patron’s Last Name (^LASTNAME^), Log Quantity (Primary Logging Type) (^LOGQUANTITY^), Primary Logging Type (^LOGGINGTYPE^), Log Quantity (Secondary Logging Type) (^LOGQUANTITY2^), Secondary Logging Type (^LOGGINGTYPE2^).
• **Home Page Footer Text** appears at the bottom of the patron's home page regardless of whether the patron is logged in or not.

• **Email Login Info Text** 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.

• **Registration Text** 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.
• **Full Registration Text** appears on the link from the Quick Registration Page (first and last name only) to the Full Registration page when the patron selects the “Sign Me Up” button on their home page. The default text reads: “Click here to do a full registration (required to log your books online).”

• **Quick Registration Text** appears on the link from the Full Registration Page to the Quick Registration page (first and last name only) when the patron selects the “Sign Me Up” button on their home page. The default text reads: “Click here to do a quick registration.”
- **Single Registration** appears on the patron registration page on a button that toggles between a single registration and group registration option. This button appears when the registration page is set to accept a group registration.

![Single Registration Example](image1)

- **Group Registration Text** appears on the patron registration page on a button that toggles from a single to a group registration setting. This button appears when the registration is set to accept a single registration.

![Group Registration Example](image2)

- **Required Field Identifier** refers to the symbols (*** ) that flag patron input fields as required.

![Required Field Identifier Example](image3)
• **Patron Registration Page Title** refers to the title that appears at the top of the patron registration. The system displays the patron registration page when the patron selects the “Sign Me Up” button from their home page.

![Patron Registration Page Title](image)

• **Your Info Page Title** appears at the top of the patron’s information page, which the system displays when the patron selects the “Your Info” button on their home page. The “Your Info” button only appears after the patron has logged into the system.

![Your Info Page Title](image)
• **Hide Review Text** is the text displayed on the toggle switch 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 are “Integrated with Log Page”.
  - On the Logging Setup Page: “Use a separate entry for reviews?” is set to ‘Yes’.

• **Show Review Text** is the text that is displayed to instruct the user to show their review on the logging page (only applies when reviews are integrated with logging and the separate review entry in the logging setup is enabled). 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 are “Integrated with Log Page”.
  - On the Logging Setup Page: “Use a separate entry for reviews?” is set to ‘Yes’.
• **Logging Page Title** is the .html/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.

![Logging Page Title Text Setting](image)

### 2.6.4 Reviews Maintenance

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

From the *Manage Reviews* page, staff can accept, modify, and deny reviews (see **Figure 2-9**). The page also displays the total number of reviews in each category (i.e., # of Private, # of Pending, # of Denied, etc.).

![Manage Reviews](image)

**Figure 2-9 Manage Reviews**
2.6.4.1 Review Classifications

2.6.4.1.1 Private Reviews

A Private Review is a review a patron does not want made public. They cannot be accessed by the public, nor made public by the library. To view all private reviews for a specific program, click the associated Private button. The page will display ‘No [XX] Reviews’ if there are no private reviews for the associated program.

2.6.4.1.2 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 the Pending button associated with the desired program. The page will display ‘No [XX] Reviews’ if there are no private reviews for the associated program.

2.6.4.1.3 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 Denied button associated with the desired program.

2.6.4.1.4 Accepted Reviews

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

2.6.4.2 Review Management

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

2.6.4.2.1 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.

2.6.4.2.2 Editing Reviews

To edit a review, click the Review button associated with the review or double click on the review. The system opens the selected review (see Figure 2-10), 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”).
Figure 2-10 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.
- Click Deny (at the bottom of the page) to save the review as denied and accessible only to staff.
- Click Delete to permanently erase the review from the database.

2.6.5 Patron Maintenance

2.6.5.1.1 Patron Registration Information

Staff with Administrator, Staff, or Basic password levels may access Patron Registration Information (see Figure 2-11) for all registered patrons by going to System Maintenance/Patron Registration Information.

Figure 2-11 Patron Registration Information  [Update Image]

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 (individual or in bulk)

• 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)**

#### 2.6.5.1.2 Send Email

The email function is only available if patrons on a page supplied an e-mail address. If there are no e-mails in the patron records displayed, the Email button does not appear. Click the Email checkbox to the right of the person(s) to send email. Once everyone has been selected, click the Email button at the bottom of the screen. This opens up the default Email application, automatically inserting the selected email address(es). 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. You may also manually type and send a message as normally done. Templates are created in System Settings - Setup – Default Email Templates.

#### 2.6.5.1.3 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.

#### 2.6.5.1.4 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 “Clear 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 Clear Program Records function, see System Maintenance - Program Maintenance – Edit Program Setup.

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.

2.6.5.1.5 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.
2.6.5.1.6 Edit Patron Information

Click the Edit button (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 of Use’, 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 in blue 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 in Figure 2-12.

![Figure 2-12 Program-Specific Registration Information](image)

2.6.5.1.7 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.

2.6.6 Setup Maintenance

The Setup Maintenance pages may only be accessed by those staff with an Administrator password level. Functions here include:

- Certificate Maintenance
- Default Email Templates
- Default Prize Message
- Email Settings
- Quick Search Configuration
- Regional Settings
- Style Sheet Templates
- System Messages
- System Settings

2.6.6.1 Certificate Maintenance

See for details on creating certificates. Certificate Maintenance is used to identify certificates and their location. The Certificate Type (Patron or Staff) selection is displayed at the top. To configure Staff certificates select the Staff selection. To configure Patron certificates select the Patron selection. 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:** CERTIFICATE_OF_COMPLETION.rtf or PatronCompletionCert.html

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

  **Example:** http://evanced.info/evanceddemo/sr/doc/CERTIFICATE_OF_COMPLETION.rtf or http://evanced.info/evanceddemo/sr/doc/PatronCompletionCert.html

**Note:** Patron certificates are always in .html format. Staff certificates may be in either .rtf or .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** button 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.

### 2.6.6.2 Default Email Templates

Default Email Templates allows you to setup standard emails that are sent to patrons (i.e., prize messages, certificate award notifications, etc.). There are two system templates to start with: Login Information and Registration Confirmation. Additional customized templates can be added.

To create an e-mail template, click System Maintenance – Setup Maintenance – Default Email Templates. The system displays the Add/Edit Default Email Templates page.

• **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. Email supports the following tags that will enter the appropriate variable information: Library Contact, Library Name, Program Name and Program URL. 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 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, click the **Edit** button 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. The system will save any changes and return to the Add/Edit Default Email Templates page. To delete an e-mail template, click the **Delete** checkbox(es) associated with the desired template(s) and click the delete button. The system asks you to confirm the template's deletion. 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.

### 2.6.6.3 Default Prize Messages

The Default Prize Message function allows you to create a default prize notification message that appears on the patron home page when they have won a prize. You may also create a program specific prize
notification in the Program Setup function. The program specific message replaces the default message when configured. When there is no program prize message, the system displays the default prize message. Prize messages only appear when the program Prize setting is set to Yes.

To create a Default 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.

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 Default 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.

### 2.6.6.4 Email Settings

Various email settings can be enabled/disabled and configured here (see Figure 2-13).
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.

### 2.6.6.5 Quick Search Configuration

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.

### 2.6.6.6 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.

To configure Regional Settings, select System Maintenance – Setup Maintenance – Regional Settings. Complete the template. Click the *Save* button to save your changes and return to the System Maintenance page.

### 2.6.6.7 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 *Program Setup – Style Sheet Settings* 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 settings that affect the program home page.
- **Registration** contains the settings that affect the patron registration page.
• **Logging Page** contains the settings that affect the patron’s logging page. Logging Page was formerly known as “Add/View & Review Logging Settings”.

• **Reviews Page** contains the settings that affect the patron’s reviews page. This is the page where patrons may submit or view all public reviews.

• **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*.

• **Email Login Information Page** contains the settings that affect the Email Login Information Page. The system displays this page when a patron clicks on the *Forgot Your Login Info?* button on the program’s home page.

• **Program Selection Page** contains the settings that affect the patron program selection page. The system displays this page when a patron, who has registered for prior a program but is not registered for a current program, logs into the system and clicks the *SIGN ME UP* button.

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.

**2.6.6.7.1 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 *Set Up Maintenance*, select *Style Sheet Templates*. The system opens the Add/Edit Style Sheet Templates page.

3. Click the *Add New* button. The system opens the selected style sheet template shown below.

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

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

5. Click *Save* to save the 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.

**2.6.6.7.2 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 **Style Sheet Templates**. 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.

### 2.6.6.7.3 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 **Set Up Maintenance**, select **Style Sheet Templates**. The system opens the **Add/Edit Style Sheet Templates** page.

3. Click on the **Select Style Sheet Template** drop down list and click on the desired style sheet template. The system displays the **Add/Edit Style Sheet Templates** page for the selected 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 **Add/Edit Style Sheet Templates** 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.

### 2.6.6.7.4 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 **Set Up Maintenance**, select **Style Sheet Templates**. The system opens the **Add/Edit Style Sheet Templates** page.
3. Click on the Select Style Sheet Template drop down list and click on the desired style sheet template. The system displays the Add/Edit Style Sheet Templates page.

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 Add/Edit Style Sheet Templates 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.

### 2.6.6.8 System Messages

This option is used to maintain System Messages. These messages are used to inform and instruct patrons.

Message options include:

- **Patron Not Eligible For Program** - This message is displayed to the patron after he/she logs in if the patron is not eligible for any programs. This can occur if there are no Active programs, if the patron’s Age/Grade is not within the program’s Minimum and Maximum Age/Grade, or the patron’s Classification does not equal the program’s Patron Classification selected in the program’s setup.

**Note:** The following tag can be embedded into the message to allow dynamic content, which means that the system automatically replaces the tags with relevant data in the message.

`^ContactLibrary^` - This tag embeds a link with the library’s email address that allows patrons to click on it to email the library. The data is derived from the Library Contact Email Address set in System Settings.

- **Patron Review Disclaimer** - This message is displayed when reviews are enabled for a specific program. A checkbox followed by this message is presented on the Patron Log page and the Submit Review page to indicate their acceptance of making their review public. This message should contain phrasing that goes along with the library’s reviews policy. An example may include: “Please check the ‘I Agree’ box if you wish to make your review public.”
- **Parental Consent Agreement** - This message is for programs where a parental consent is required for participation. An example may include: “Please check the box if you agree to your child's participation in the program.” This message is displayed when Parental Consent in the program’s setup is set to Yes. A checkbox followed by this message is presented on the Patron Registration page to indicate parental consent for their child’s participation in the program.

### 2.6.6.9 System Settings

This section contains various system settings and includes:

- **Set Library Name** – the library’s name
- **Set Home Page** – the library’s home page
- **Set Library Contact Email Address** – the email address of the contact person responsible for answering questions related to Summer Reader programs
- **Set Starting Birth Year** - the earliest birth year that is accepted by the system for all programs
- **Set Records Per Page** - the default number of patron records to be displayed per page on the staff side
- **Allow 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.

- **Allow 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.

- **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.

- **Allow Patrons to Edit Log** – Choose Yes to allow patrons to edit their own log entries. Choose No to not allow patrons to edit their own log entries.

- **Allow Patrons to Delete Log** – Choose Yes to allow patrons to delete their own log entries. Choose No to not allow patrons to delete their own log entries.

- **Allow 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.

- **Enable 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.
• **Enable 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.

• **Turn Off 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.

• **Set Prize Scroll Speed (1-10)** – Set to a number between 1 and 10 to control the speed of the scrolling prize message. This setting only applies when Turn Off Prize Scrolling on Home Page is set to No.

• **Show Prize Message on Patron Log Page** – Choose 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.

• **Enable ‘Signed Up Before’ Feature** – Choose Yes to enable the Signed Up Before? button on the patron registration page. Choose No to hide the Signed Up Before? button on the patron registration page. The Signed Up Before? button allows patrons to register for programs using their previously saved registration information and is found on both the patron registration page and the staff-side registration page.

• **Enable 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.

• **Enable Auto User Name/Password Generation** – Choose Yes to allow the application to auto assign user names and passwords for staff side registrations. This does not apply to patron registrations. Choose No to allow staff to specify the user name and password for registrations. Using auto-generation, the user name is the first name concatenated with the last name and the password is the auto-generated user name and a random 3-digit number.

• **Set Maximum Number of Patron Recalls** – 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.

• **Set Library Card Number Length** – Enter a number that represents the fixed number of digits in the library’s card numbers.

  **Note:** Enter ‘0’ to allow for any number of digits to be entered for the patron’s library card number.

• **Enable International Zip Entry** – Choose Yes to allow for alpha-numeric entry in the zip code field. Choose No to allow for a standard 5 or 9-digit numeric entry in the zip code field.

• **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.

• **Center Home Page** – Choose Yes to center the patron home page. Choose No (default) to left-justify the patron home page.

• **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.

• **Enable 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 Per 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 Per 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.

• **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.

• **Use Program-Specific Custom Registration Entries** – Set to Yes to allow for program-specific custom registration entries; i.e., there are 6 unique configurable custom registration entries for each program. Set to No to use global custom registration entries; i.e., there are 6 custom registration entries to be shared among all programs.
2.6.7 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.

2.7 Reports

Summer Reader provides a number of report options for staff. Reports are divided into three categories: *Certificates*, *Excel Reports*, and *HTML Reports*.

2.7.1 Certificates

2.7.1.1 Generate Certificates

Use the *Generate Certificates* link to generate and print *Staff* certificates. The system displays the Generate Certificates Page. Select a certificate from the Certificate drop down list. The system displays a Program drop down list. Select a program by clicking on the Program Name in the drop down list. *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, go directly to the *Generate Certificate* button and click. The system will generate certificates for all program participants regardless of any other criteria. 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, complete the desired criteria field(s) on the template and click the *Generate Certificates* button.
2.7.2 Excel Reports

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.

2.7.2.1 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. Enter filter criteria to limit the report results.

- **Records Displayed Per Page** - Set the Records Per Page number to limit the number of records displayed on each page of the report.
- **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.
- **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.

2.7.2.1.1 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, but must be recreated.
2.7.2.2 Report Dump

Report Dump allows those with Administrator and Staff privileges to download reports from the system. When you select, Reports – Excel Reports – Report Dump, the system displays the page pictured below. Performing a Report Dump does not remove programs or program information from the database.

2.7.2.2.1 Fields and Buttons

- **Program Status** allows you to choose which programs to list – Active Program, Inactive Programs or All Programs.

- **Selected Programs** is a list of all active and inactive programs in Summer Reader.

- **Registration Information, Logging Information** and **Review Information** refers to the type information to be included in the report. You may select one or all of the options to include in a report. At least one option must be selected for the report to run.

- **Check All** will mark all programs in the Selected Program(s) list. The report will include all programs regardless of the selection of Include All Records or Include Only Selected Programs.

- **Clear All** will unmark or clear any selection in the Selected Program(s) list.

- **Run Report** prompts the system to create the report based on selected criteria.

2.7.2.2.2 Performing a Report Dump

To perform a report dump:


- Select the information to be reported.
• Click the Run Report button. The system displays the report in the browser window in excel format.

• Save or print the report as desired using the browser’s save or print function.

2.7.3 HTML Reports

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.

2.7.3.1 Custom Report

This report is the same report as Excel Custom Report with the addition of Show Filter(s) and Show Email Button.

• Show Filter(s) –

• Show Email Button –

The report output is in HTML rather than Excel format. For additional information about Custom Reports, please see Reports – Excel Reports. Any custom templates created in Excel Reports are available to HTML reports.

2.7.3.2 Duplicate Library Cards

This report displays the duplicate library card numbers in the database. The report also displays the count of the duplicates. This report can be used to find the patrons with duplicate library card numbers and possibly eliminate the duplicates so that programs can be set up to use Library Card Number for patrons to log in to the system.

To run the report, complete the template (pictured below). Set the Records Per Page number to limit the number of records displayed on each page of the report. Click on the Run Report button to execute the report.

2.7.3.3 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.

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. Use the Check All button to select all fields. To clear all selections, click on the Clear All button.

The system displays the Log Report Totals template (pictured below).

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.

Once all relevant options have been selected, click the Run Report button to execute the report.

2.7.3.4 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.

To run a Program Totals Report:

Go to Reports – HTML 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.

Use the drop down list to select the desired report criteria.

A. 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.

B. 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.

C. The data can be reported By Week or By Month.

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

2.7.3.5 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.
To run a report:

- Go to Reports – HTML Reports – Registration Totals Report. The system displays the Registration 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. 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.

- 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.

  Once all relevant options have been selected, click the **Run Report** button to execute the report.

### 2.7.3.6 Reviews Total 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.

To run a report:


- 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. 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.

- Set the **Records Per Page** number to limit the number of records displayed on each page of the report.

- In the Review Status field, use the drop down list to select a category of reviews – Accepted, Denied, Pending or All.

- 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.

  Once all relevant options have been selected, click the **Run Report** button to execute the report.
2.8 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.

2.8.1 Program Setup Management

You can access a program’s Program Setup to make adjustments to the program setup, registration or logging. Please see System Maintenance – Program Maintenance – Edit Program Setup for more information about editing a program’s setup.

2.8.2 Manage Program

From the Manage Programs Home Page (see Figure 2-1), click on the appropriate program link. Navigation goes to the Program Management page for the selected program. See Figure 2-21 for an example.

![Figure 2-21 Program Management](image)

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
- **Maintain Prizes**
- **Email** patron(s) in that program
- **Delete** patrons from the program
- **Do Random Drawings**
2.8.2.1 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.

2.8.2.2 Registration

Register patrons for the program by clicking the *Register Patron* button located at the bottom of the *Program Management* page.

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 (see Figure 2-22). 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
- Street Address

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.
Figure 2-22 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.

2.8.2.3 Transfer Patrons

To transfer patrons from one program to another, click the Transfer button for the transferring patron. The system displays a Transfer page with the selected patron’s name at the top.

Select from the Select Program drop down list the program the patron is transferring into. The system asks you to confirm the patron’s transfer. Click Ok to continue or Cancel to abort the transfer. 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.

2.8.2.4 Edit Patron Information

To edit patron/participant information from the Program Management page, click on the corresponding Edit button (or double click on the patron’s name). 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.

2.8.2.5 Logging

To log information for a patron, click on the Log button located to the far right of 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** (see Figure 2-23).

**Figure 2-23 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.

2.8.2.6 Prizes

From the Program Management page staff may also manage prizes within active programs. Click the Prizes button to the far right of the patron’s information (see Figure 2-21).

A pop-up window appears (see Figure 2-24). 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]

![Prize Management (Creature Feature)](image)

Figure 2-24 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 Award Prize(s) text box and click Award Prize(s) button at the bottom of the page. To award all eligible prizes at one time, simply click Award All Prize(s) 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 Clear Prize(s) text box and type in the number of prizes to be cleared and click the Clear Prize(s) button. To clear all prizes at one time, simply click the Clear All Prize(s) 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.

2.8.2.7 Random Drawings

Once a program has been selected from the Manage Programs Home Page, anyone with Administrator or Staff privileges sees a Random Drawing button located at the bottom of that program’s Program Management page (see Figure 2-21).

Once the Random Drawing button is clicked, the Random Drawing page appears (see Figure 2-25).

![Figure 2-25 – Random Drawings (Non-Filtered)](image)

The following options are available for random drawings:

- **Number of Prizes** – Enter the number of prizes that are to be given away for the drawing.

- **Include Previous Winner(s)** – Check this checkbox if previous winner(s) are to be included in the drawing. Leave the checkbox unchecked if previous winner(s) are to be excluded in the drawing.

- **Non-Filtered or Filtered** – Select Filtered for additional filtering options or select Non-Filtered if additional filtering options are not needed.

To see a complete list of drawings done 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. You may also delete drawings from the View Drawings page by clicking on the checkbox(es) associated with the drawing(s) to be deleted.

To perform an Non-Filtered drawing, simply click on the Draw Names button after entering the criteria.

For a Filtered drawing, click the radio button corresponding to the Filtered label. As with non-filtered drawings, enter the Number of Prizes to draw for in the text box. In addition, complete the other options as appropriate for the requirements of the drawings (see Figure 2-26).
Figure 2-26 Random Drawings (Filtered)

Additional options for Filtered drawings include:

- **Primary Library** – This filter refers to the Primary Library of Use registration field and is only applicable if the program has that registration field enabled in the program’s Registration Setup.

- **By Logging** or **By Reviews** – This filter determines how Random Drawings are performed - by the number of log entries or by the number of reviews.

- **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.

Finally, click the **Draw Names** button to execute the drawing. The system will display a list of winners with an option to email them assuming the patron supplied their email address during registration.

### 2.8.3 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).

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 (see Figure 3-1).

Important Note:

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

Figure 3-1 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 (see Figure 3-2) by entering their User Name and Password
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 (see Figure 3-1), 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 (see Figure 3-2) by typing in their User Name and Password on the Patron Home Page (see Figure 3-1).

![Figure 3-2 Personal Home Page](image)

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

3.3.1 Add/View Log

From here (see Figure 3-3), patrons may view their logs and, if patron self-logging is enabled, they can also add to their log.

![Image of Add/View Log page]

**Figure 3-3 Add/View Log**

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

3.3.2 Your Info

By clicking the **Your 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.

3.3.3 Change Password

Under **Your 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.

3.4 View and Submit Reviews

If enabled, two randomly selected reviews related to the program are automatically displayed on the **Patron Home Page** (see Figure 3-1) and the **Personal Home Page** (see Figure 3-2).

**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.

### 3.4.1 Links

The hyperlinks set up by staff appear to the far left of both the Patron Home Page (see Figure 3-1) and the Personal Home Page (see Figure 3-2).

### 3.4.2 Important Messages

The global and program-specific messages set up by staff appear in the middle of both the Patron Home Page (see Figure 3-1) and the Personal Home Page (see Figure 3-2).

### 3.4.3 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 2.6.6.6 for more details.
APPENDIX A: VERSION 2008 IMPROVEMENTS AND FEATURE LIST

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certificates</td>
<td>• Added support for HTML certificates for ‘Staff’ certificates. Previously, ‘Staff’ certificates were restricted to RTF files.</td>
</tr>
<tr>
<td></td>
<td>• Certificates can be printed based on the results of a custom report.</td>
</tr>
<tr>
<td></td>
<td>• Added book title and author tag support in certificates so that the patron’s reading list can be printed.</td>
</tr>
<tr>
<td></td>
<td>• Added a tag to capture the patron’s last review.</td>
</tr>
<tr>
<td></td>
<td>• Added a tag to capture log quantity.</td>
</tr>
<tr>
<td></td>
<td>• Added a tag to capture logging type.</td>
</tr>
<tr>
<td></td>
<td>• Added a tag to capture group name.</td>
</tr>
<tr>
<td>Default Email Templates</td>
<td>• Two default system email templates are provided (the Registration and Login Information templates).</td>
</tr>
<tr>
<td></td>
<td>• Custom email templates can be created as well.</td>
</tr>
<tr>
<td>Email</td>
<td>• Emailing all participants now from program management results in the participants from the filtered results of the search being emailed.</td>
</tr>
<tr>
<td></td>
<td>• Previously, emailing all would email all participants regardless of the filtered results.</td>
</tr>
<tr>
<td></td>
<td>• Added an option to email participants from the results of a custom report.</td>
</tr>
<tr>
<td></td>
<td>• Email templates can be selected to email program participants.</td>
</tr>
<tr>
<td>Email Settings</td>
<td>• Added configuration option for SMTP port</td>
</tr>
<tr>
<td>Email Templates</td>
<td>• Manage program-specific email templates.</td>
</tr>
<tr>
<td>Logging Setup</td>
<td>• Logging fields can be renamed and are reflected throughout the application.</td>
</tr>
<tr>
<td></td>
<td>• The quantity field can be configured as a drop-down list to help control entry of this field.</td>
</tr>
<tr>
<td></td>
<td>• Added an option to show/hide the ‘Logged By’ and ‘Log Date/Time’ fields on the log page.</td>
</tr>
</tbody>
</table>
### Feature Description

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Patron Home Page**            | • Allows libraries to further customize their summer reading home page using web widgets.  
                                 | • All patron pages now have style sheets.  
                                 | • Quick/Group registration options.  
                                 | • Authentication login available.  
                                 | • Option to separate log and review entry on log page.  
                                 | • Ability to sort log list.  
                                 | • Ability to print log list.  
                                 | • Added paging capabilities on ‘View All Reviews’ page.  
                                 | • Improved layout of ‘View All Reviews’ page.  
                                 | • Ability to search and sort on specific fields on the ‘View All Reviews’ page.  
                                 | • Added certificate section on patron home page to allow for configurable message when patron becomes certificate-eligible. |
| **Patron Registration Information** | • Modified sort capabilities. A drop-down list appears with sort fields to allow sorting. Previously, clicking on the column heading performed the sort.  
                                 | • Added a merge feature. This feature allows for staff to merge one patron’s records into another patron; mainly to be used for duplicate record maintenance. |
| **Prize Management**            | • Added support for configuring tiered prize messages. Prize messages can be configured for each prize level.  
                                 | • Added support for configuring tiered prize quantities. Prize quantities can be configured for each prize level.  
                                 | • Added a preview feature in prize message maintenance so that configured prize messages can be previewed. |
| **Program Management**          | • Modified sort capabilities. A drop-down list appears with sort fields to allow sorting. Previously, clicking on the column heading performed the sort.  
<pre><code>                             | • Added a transfer function. This allows staff to transfer a patron from one program to another. |
</code></pre>
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
</table>
| Program Setup       | • Programs can be configured to support 2 logging types.  
|                     | • Programs can be configured to support 2 prize levels based on either/both logging types.  
|                     | • Programs can be copied. All configuration information is copied but not any patron-specific information such as registration, logging records.  
|                     | • Added a ‘Get Registration Link’ feature that creates the url needed to link directly to a program’s registration page.  
|                     | • The program’s eligibility can be set to ‘None’. Previously, the program’s eligibility required age, grade or patron classification to be selected.  
|                     | • Patron classification can be set to allow patrons to select any classification. Previously, the only option was to restrict patrons to the classification selected.  
|                     | • Patron classification lists can be program-specific.  
|                     | • The patron’s log quantity can now be restricted based on the entire program.  
|                     | • Setting for how reviews are to be submitted is now program-specific; previously, this setting was system-wide.  
|                     | • Prize eligibility can be set up to calculate on per/week, per/month or per/program basis. Previously prize eligibility could only be set on per/program basis. |
| Registration        | • Added a quick registration option. Provides an option to allow participants to provide minimal (first and last name) registration information when registering for a program. The staff is responsible for filling in additional information required for the program if the patron needs to log in to their program at a later date.  
|                     | • Added a group registration option. Provides an option to register a group rather than just individuals. Reports reflect the number of participants in a group in registration totals for the program. |
| Registration Setup  | • Registration fields can be renamed and are reflected throughout the application.  
|                     | • Age and grade lists can be defined within a range. Previously, all ages and grades would be automatically used on the registration page.  
|                     | • Added an option for age, grade and patron classification to allow for any item from these lists to be selected.  
|                     | • Added option to disable the ‘Age’ month drop-down.  
|                     | • Added a ‘Teacher’ field as a standard registration field. |
| Report Templates    | • Selected report fields and filters can be saved in a template and recalled to run a custom report any time. |
| Reports             | • Added additional filtering to ‘Generate Certificates’ report  
|                     | • Custom report was enhanced to include logging and review fields. Most of the standard reports were removed due to redundancy.  
|                     | • Added support for selecting multiple programs in the totals reports.  
<p>|                     | • Added an option to email participants from the results of a custom report. |</p>
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reviews Maintenance</td>
<td>• Added support for doing bulk approvals. This includes mouse-over information on the review for scanning reviews prior to approval.</td>
</tr>
<tr>
<td></td>
<td>• Added search/filter and sort capabilities.</td>
</tr>
<tr>
<td></td>
<td>• Added a ‘Denied’ status so that denied reviews are kept rather than deleted. These reviews can be changed back to ‘Accepted’. The reviews can also be filtered on from the maintenance page.</td>
</tr>
<tr>
<td></td>
<td>• Private reviews can be filtered on from the maintenance page.</td>
</tr>
<tr>
<td></td>
<td>• Added a test feature in review approval to test URLs.</td>
</tr>
<tr>
<td>Review Setup</td>
<td>• Review fields can be renamed and are reflected throughout the application.</td>
</tr>
<tr>
<td></td>
<td>• An option was added to allow for log-entry specific fields and review-entry specific fields to be separated on the log entry page to make a better distinction between a log entry and a review entry.</td>
</tr>
<tr>
<td></td>
<td>• Added options to configure review fields separately. Review fields can be configured to be displayed or hidden on the ‘View All Reviews’ page. Review fields can also be configured to be included as a search field on the ‘View All Reviews’ page.</td>
</tr>
<tr>
<td></td>
<td>• Added paging capabilities to ‘View All Reviews’ page. Previously, all reviews were retrieved into a single page.</td>
</tr>
<tr>
<td></td>
<td>• Line breaks were used to make reviews more readable on the ‘View All Reviews’ page.</td>
</tr>
<tr>
<td>Set Program Tab Order</td>
<td>• Added option to allow program tabs on home page to be ordered.</td>
</tr>
<tr>
<td>Style Sheet Settings</td>
<td>• Added a feature that allows the pre-defined style sheet templates to be applied to a program or the default.</td>
</tr>
<tr>
<td></td>
<td>• Added the capability to load the default style sheet settings in each program. Previously, this option was only available in the default style sheet.</td>
</tr>
<tr>
<td></td>
<td>• Added a style sheet for the ‘View All Reviews’ page.</td>
</tr>
<tr>
<td></td>
<td>• Added a style sheet for the ‘Forgot Your Login Info’ page.</td>
</tr>
<tr>
<td></td>
<td>• Added a style class for text in ‘Sponsor’ section of home page.</td>
</tr>
<tr>
<td></td>
<td>• Added a style sheet for the new ‘Certificate’ section (this section can be configured to display when the patron is certificate-eligible)</td>
</tr>
<tr>
<td></td>
<td>• Added styles for new configurable text (see Text Settings)</td>
</tr>
<tr>
<td>Style Sheet Templates</td>
<td>• Added pre-defined style sheet templates. 5 uniquely themed templates are provided for home page style sheets.</td>
</tr>
<tr>
<td>System Settings</td>
<td>• Added an option to allow private reviews to be saved</td>
</tr>
<tr>
<td></td>
<td>• Added an option to enable review paging (applies to ‘View All Reviews’ page)</td>
</tr>
<tr>
<td></td>
<td>• Added an option to set the number of reviews/page (applies to the ‘View All Reviews’ page)</td>
</tr>
<tr>
<td></td>
<td>• Added an option to set the number of links/page (applies to the ‘View All Reviews’ page)</td>
</tr>
<tr>
<td></td>
<td>• Added system settings to set up a default url to the library’s catalog system and book jacket images. These urls automatically pre-populate urls in review approvals when attaching links to a review.</td>
</tr>
</tbody>
</table>
### Feature Description

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text Settings</td>
<td>• Added configurable text for displaying alternative HTML on the patron home page when there are no active programs (off-season or just prior to the beginning of your summer reading programs)</td>
</tr>
<tr>
<td></td>
<td>• Added configurable text for ‘Sponsor’ section on home page</td>
</tr>
<tr>
<td></td>
<td>• Added configurable text for ‘Certificate’ section on home page</td>
</tr>
<tr>
<td></td>
<td>• Added configurable text for ‘Activity Center’ section for displaying text prior to the start of the program</td>
</tr>
<tr>
<td></td>
<td>• Added configurable text for ‘Email Login Info’ page</td>
</tr>
<tr>
<td></td>
<td>• Added configurable text for required fields (the text that is displayed before the field label)</td>
</tr>
<tr>
<td></td>
<td>• Added configurable text for the ‘Registration Page Title’</td>
</tr>
<tr>
<td></td>
<td>• Added configurable text for the ‘Your Info Page Title’</td>
</tr>
<tr>
<td></td>
<td>• Added configurable text for the ‘Logging Page Title’</td>
</tr>
<tr>
<td></td>
<td>• Added configurable text for the ‘Submit Review Page Title’</td>
</tr>
<tr>
<td></td>
<td>• Added configurable text for the ‘View All Reviews Page Title’</td>
</tr>
<tr>
<td>Web Widgets</td>
<td>• Allows libraries to further customize their summer reading home page.</td>
</tr>
</tbody>
</table>

**Web Widgets** allows libraries to further customize their summer reading home page.
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 Professional, Server, Advanced Server, XP Professional) - 2000 Server or Advanced Server are the most recommended options.
2. Microsoft IIS (Internet Information Services) Installed and running
3. 50-100MB Free Disk Space (Preferably on the Drive where WWWROOT directory resides)

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 Appendix Creating a Custom Entry 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 Appendix Creating a Custom Entry 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.

![Custom Registration Entry 4 Editor](image)

**Figure F-1 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.

  **Name Descriptor, Field/Question and Input Type** are required entries. Click on Save to save the entry. **Figure F-2** below illustrates an example of a custom entry that has been created.

**Figure F-2** - Custom Entry Example
APPENDIX D: CREATING CERTIFICATES

There is a setting in Program Setup that allows patrons to print their own certificates (Patron certificates). These certificates are not the same as the certificates explained in the following section (Staff certificates). A more 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 Staff Certificates

Staff certificates must be created in a HTML format. A Microsoft Office Word or Notepad document can be created and saved in a HTML format. E*vanced Solutions provides a template HTML document located in the /docs subfolder located on the application’s server.

A copy of the template can be obtained from:


There are four template tags provided and they are as follows:

- **FirstName** – patron’s first name
- **LastName** – patron’s last name
- **ProgramName** – program name
- **Completion** – displays the patron’s log quantity and the program’s logging type

**Example:** The program’s logging type is ‘Books’ and the patron logged a total of 5 books. The ‘Completion’ tag is replaced with ‘read 5 books.’.

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 Staff certificate’s text is displayed in Figure G-1 below.

CERTIFICATE OF COMPLETION

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

^COMPLETION^

Congratulations!

Figure G-1 – Completion Certificate
D.2. Creating Patron Certificates

The library has the option to create their Patron certificates or to use the supplied template. The certificates should be created in standard HTML and can incorporate any of the template tags mentioned in the above section. E*vanced Solutions provides a template HTML document located in the /docs subfolder located on the application’s server.

A copy of the template can be obtained from:

http://evanced.info/evanceddemo/sr/doc/PatronCompletionCert.html.

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 (see Figure G-2).

![Figure G-2 – Print ‘Patron’ Certificate](image)
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 Style Sheet Settings 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 Style Sheet Settings 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:

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

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

**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 /></author>
    <genre /></genre>
    <isbn /></isbn>
    <rating>2</rating>
    <customentry1 /></customentry1>
    <customentry2 /></customentry2>
    <customentry3 /></customentry3>
    <customentry4 /></customentry4>
    <customentry5 /></customentry5>
    <customentry6 /></customentry6>
    <date>Friday, March 23, 2007</date>
    <time>03:58 PM</time>
  </item>
- <item>
```

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 Patron ID 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
<?xml version="1.0" encoding="ISO-8859-1" ?>
<programlink>
  <item>
    <program>Paws, Claws, Scales</program>
    <link>http://localhost/srv6/homepage.asp?ProgramID=35</link>
  </item>
  <item>
    <program>Paws, Claws, Scales</program>
    <link>http://localhost/srv6/homepage.asp?ProgramID=35</link>
  </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
<?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

节奏：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:

- Readerwidget.html contains the HTML code you will copy and paste into your Summer Reader home page code. You also want to make note of the server path to this file.

- Readerwidget.css contains the style sheet settings that support 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 in your system, but you won’t need to access 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.

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.

  6. Click SYSTEM MAINTENANCE from the toolbar.

  7. On the Program Maintenance menu, click EDIT PROGRAM.

  8. 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.

- Summer Reader: You will want to make note of the server path to your Summer Reader installation.
Example – Summer Reader Home Page

- **Evanced Solutions**
  - Library home
  - What's Happening?
  - Read Kids
  - Aramis HS
  - Animal Planet
  - Animal Planet Kids
  - National Geographic Kids
  - So You Wanna
  - "WELL..."
  - Horse Fun
  - BootBills
  - Fun Brain
  - Brain Games
  - Fanxxy.com

- **Evanced Solutions**

- **Login Widget**
  - Sign in
  - Username
  - Password

- **Program Reviews**
  - Title: John Adams
    - Rating: 3
  - Title: Joy of Cooking
    - Rating: 2

- **Reviews**
  - Review: I'm doing this book about spain... very nice
  - Rating: 3
  - Title: Traditional games
  - Rating: 2

- **Support**
  - Contact Us
    - Email us
    - Call us at 888.519.5770
    - Visit our website

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**Evanced Solutions**
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

A. Open the readerwidget.html file.

B. Find and copy the //global variables code as illustrated below.

```javascript
//global variables
var ServerPath = 'http://example.com/readerwidget.html';
var ReturnPage = 'http://example.com/readerwidget.html';
var ProgramID = 35;

//error messages - if values for corresponding error message is blank then the alert will be suppress
errMessage_InvalidUserName = 'Invalid user name';
errMessage_PasswdReset = 'Your password has been reset';
errMessage_InvalidPassword = 'Invalid password';
errMessage_LoginFailed = 'You have been logged out';
errMessage_AuthFailed = 'Could not authenticate your library card (pin)';
errMessage_Connection = 'Could not connect to ILS server';
errMessage_PasswdResetBlank = 'The password cannot be blank';
```

C. Open your web page file and paste the //global variables code before the <html> tag.

D. Check to make sure the following paths are correct and fully qualified path URLs.

   (i) The Server Path points to your Summer Reader installation.
   (ii) The Return Page points to your readerwidget.html file.

E. Enter the ProgramID number for the program on whose page the web widget will appear.

F. Save your changes.
G.4. Links, Log-ins and Reviews Widgets

The process for creating a patron log-in field or displaying links and reviews on the home page is essentially the same. You must be able to read and understand HTML coding to work successfully with these web widgets.

A. Open the readerwidget.html file.

B. Locate and copy the desired sections of code – links, login, messages or reviews.

```html
<body>
  <link rel="stylesheet" type="text/css" href="readervidget.css">
  <input id="PatronID" type="hidden" value="">
  <input id="SessionID" type="hidden" value="">
  <input id="LoginStatus" type="hidden" value="">
  <input id="PrintCode" type="hidden" value="">
  <input id="ReportStatus" type="hidden" value="">

  <div width="100%" align="center">
    <div style="width:752px; font-family:arial;font-size:x-small;">
      <div style="width:350%; font-size:larger; font-weight:bold; text-align: center; margin: 2px;

        Evanced Solutions
    </div>
    </div>
    <table cellpadding=0 cellspacing=0 border=0>
      <tr>
        <td align="top" style="background-color:rgb(0.0, 0.79); border-style: double; border-

          style="width:300px; float: left;">
          <div style="text-align: center; color:rgb(0.0, 0.79); background-color: white;">
            Links
          </div>
          </td>
        <td id="divLinks" class="links"></td>
      </tr>
    </div>
  </div>
</div>
</body>
```

C. Open your webpage file and paste the code into the appropriate locations.

D. Double check the script at the bottom of the page to ensure the server path to your readerwidget.asp page and the ProgramID are accurate.

```html
<script type="text/javascript" src="http://evanced.info/evanceddemo/srv6_demo/readervidget.asp"></script>
<script type="text/javascript" src="http://evanced.info/evanceddemo/srv6_demo/readervidget.asp"></script>
<script type="text/javascript" src="http://evanced.info/evanceddemo/srv6_demo/readervidget.asp"></script>
<script type="text/javascript" src="http://evanced.info/evanceddemo/srv6_demo/readervidget.asp"></script>
<script type="text/javascript" src="http://evanced.info/evanceddemo/srv6_demo/readervidget.asp"></script>
```

E. Make sure that each widget you set up has an associated script tag.

F. Save your changes.
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**

```html
<div width=100% align=center>
  <div style="width:752px;font-family:arial;font-size:x-small;">
    <div style="width:100%;font-size:larger;font-weight:bold">
      E*vanced Solutions
    </div>
  </div>
  <table cellspacing=0 cellpadding=0 border=0>
    <tr>
      <td valign=top style='background-color:rgb(0,0,0,);'>
        <div style="width:300px;float:left;">
          <div style="text-align:center;color:rgb(0,0,0);">
            Links
          </div>
          <div id="divLinks" class="links"></div>
        </div>
        <div style="text-align:center;color:rgb(0,0,0);">
          Change
        </div>
      </td>
    </tr>
  </table>
</div>

<script type="text/javascript" src="http://evanced.info/evancedd">
  Change
</script>
```

**Script**

```javascript
;if(command==checksession) programid=35"></script>

```

```javascript
;if(widget=links&divid=divLinks&programid=1&

```
G.5.2 Web widgets don't show information.

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

A. Make sure that the correct ProgramID has been entered in all locations (see below).

HTML

```html
<script language=javascript>
    //global variables
    var ServerPath = 'http://evanced.info/evancedemo/srv6_demo/';
    var ReturnPage = 'http://localhost/srv6/readwidget.html';
    var ProgramID = 35;
    var RegisteredProgramID = 0;
    var NewWindow = 'Y';

    //error messages - if values for corresponding error message is blank then the alert will be suppressed.
    errMessage_InvalidUsername = 'Invalid user name.';
    errMessage_PasswordReset = 'Your password has been reset.';
    errMessage_InvalidPassword = 'Invalid password.';
    errMessage_InvalidLibraryCard = 'Invalid library card.';
    errMessage_PatronLoggedOut = 'You have been logged out.';
    errMessage_InvalidProgram = 'You are not registered for this program.';
    errMessage_AuthenticationFailed = 'Could not authenticate your library card or pin.';
    errMessage_AuthenticationConnection = 'Could not connect to TLS server.';
    errMessage_PasswordResetBlankPassword = 'The password cannot be blank.';
    errMessage_PasswordResetConfirmationFailed = 'The password confirmation failed.';
    errMessage_PasswordResetInvalidLength = 'Invalid password length.';

    </script>
</script>
```

B. Make sure all the server paths are correct.

C. Make the code has been pasted between the `<HTML>` `</HTML>` tags.

D. 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](http://www.evancedsolutions.com) for more information.
G.6. Variables, Error Messages and Widgets

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

Global Variables

//global variables
var ServerPath = 'http://evanced.info/evanceddemo/srv6_demo/'; //set to summer reader application root path
var ReturnPage = 'http://localhost/srv6/readerwidget.html'; //set to location (url) of html widget page (this page)
var ProgramID = 35; //set this ProgramID for the log-in components
var RegisteredProgramID = 0; //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)

var NewWindow = 'Y'; //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

Error Messages

//error messages - if values for corresponding error message are blank then the alert will be suppressed

errMessage_InvalidUserName = 'Invalid user name.'; //patron's user name not found in db
errMessage_PasswordReset = 'Your password has been reset.'; //patron's password was reset
errMessage_InvalidPassword = 'Invalid password.' //patron's password incorrect
errMessage_InvalidLibraryCard = 'Invalid library card.'; //patron's library card not found in db
errMessage_PatronLoggedOut = 'You have been logged out.'; //patron logged out of session
errMessage_InvalidProgram = 'You are not registered for this program.'; //patron's login information was validated for another program but not the one they are attempting to log in on
errMessage_AuthenticationFailed = 'Could not authenticate your library card/pin.';  //when using authentication for the log-in this error indicates the authentication failed (could be incorrect library card/pin)

errmMessage_AuthenticationConnection = "Could not connect to ILS server.";  //when using authentication for the log-in this error indicates the authentication failed (communication problem with ILS server)

errmMessage_PasswordResetBlankPassword = 'The password cannot be blank.';  //when patron's password is reset and they are prompted to enter a new one this error is produced if they attempt to enter a blank password

errmMessage_PasswordResetConfirmationFailed = 'The password confirmation failed.';  //when patron's password is reset and they are prompted to enter a new one this error is produced if their password confirmation fails

errmMessage_PasswordResetInvalidLength = 'Invalid password length.';  //when patron's password is reset and they are prompted to enter a new one this error is produced if their password is too short/long

Reviews Widget

Documentation for 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)*

**‘View All Reviews’ Button Widget**

Documentation for ‘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:

```html
<a href='http://www.e-vancedsolutions.com/index.html'>Evanced Solutions Website</a>
```

It is critical to use this exact syntax as it does not work otherwise. In particular note the single quotes 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, navigate to the home page and select the program’s tab. Click on the program’s Sign Me Up button to navigate to the program’s registration page. 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:

```
```

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:  
```
```

H.5. Deleting patron records from a program

When using the Clear All Records button in the program’s setup (available only to Administrator level users accessed via System Maintenance → Edit Program Setup), 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 Clear All 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 ‘Allow Bulk Deletion of Patron Records’ setting in ‘System Settings’ to have the ‘Clear All 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 Clear All Records (Including Patrons) in the program’s setup (only available to Administrator level users accessed via System Maintenance → Edit Program Setup). 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 → Patron Registration 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 ‘Allow Bulk Deletion of Patron Records’ setting in ‘System Settings’ to have the ‘Clear 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 any thing 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 Required 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 → Patron Registration 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 Configuration, 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 and/or Patron Logging must be enabled and the associated start/end dates
must fall within the current date. The program also appears on the patron home page if the Home Page On setting is enabled. This setting is only applicable if both Patron Registration and Patron Logging are disabled. 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.