

EDITORS - BOTH EVENTS & ROOMS MODULES

Donald W. Reynolds Library Serving Baxter County
 Updated Thursday, September 26, 2013

EVENTS by EvancedSolutions.com

EVENTS provides everyone across our library and community instant, online access to our library's programs and events. More than a Web calendar, Events is a full featured program/event management and planning utility with online registration options & outreach and public relations tools. **By default, use EVENTS to add all Library sponsored events to the calendar.** Use ROOM RESERVE for patron's room reservations.

All BCL Staff: [EVENTS Staff Track Training Videos](#)

Department Heads: [EVENTS Staff Track Training Videos](#)

BASIC

Additional Features:

[Calendar/List](#)
[ViewUnderstanding](#)
[Patron Options](#)

[Event Registration*](#)
[Attendee Lookup](#)
[Subscriber Lookup and Details](#)
[Running Reports](#)
 *Register individuals NOT GROUPS unless you are a Dept. Head.

[Creating A One-Time Event**](#)
[Publishing Rules](#)
[Ongoing Events](#)
[Recurring Events](#)
[Using the Archive***](#)
[Event Maintenance](#)
[Waiting Lists](#)
[Running Reports](#)

Admin. ONLY
[Holiday Settings](#)

**Currently, Department Heads do not publish. Events are subject to acceptance.
 ***Whenever possible, archive rather than delete events.

Patron's (public) ROOM RESERVE

ROOM RESERVE is room scheduling software to manage our public meeting and study rooms as well as the equipment in our library. **Mainly for patrons**, but accessible to staff, self-service options for making room reservations will be provided through Room Reserve.

All BCL Staff: [ROOM RESERVE Staff Track Training Videos](#)

ADMIN

[Patron View~](#)
[Creating a Patron Reservation~~](#)
[Making a Reservation for a Patron~~~](#)
[Finding a Reservation](#)

[ROOM RESERVE Staff Track Training Videos](#)

[Changing Reservations Staff Archive Reports](#)

[Room Reserve 201](#) (more, but older videos)

~Equipment is reservable ONLY with a room.
 ~~Public ROOM RESERVE-ations is enabled but e-commerce is not. Payment is cash or check only.
 ~~~All rooms are mediated.

# EVENTS MODULE

## STAFF EVENTS VIEWS

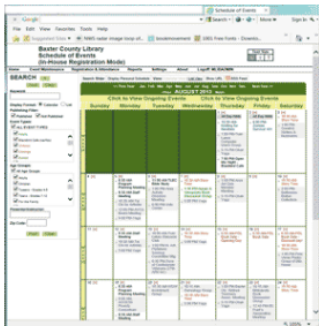
**By default, use EVENTS to add all Library sponsored events to the calendar.**  
 Staff will have access to enter events in rooms patrons will not.  
 Staff events entered in Room Reserve cannot be edited from EVENTS.

### EVENTS Calendar View

Complete Calendar - View Only - NON-EDITABLE

ALL Events + ALL Room Reserve public and private + Events not associated with a room + Private Library entries.  
 NOT EDITABLE

Login to Event Management System:  
<http://baxlib.evanced.info/maintenance.asp>  
 Enter User ID and Password.  
 Under Registration & Attendance, click on **Calendar/Registration**  
 Click on both the **Published and Not Published** events checkboxes and then click **Find**.



The **Staff** URL is to be used for internal use only. It includes **Private** and **Internal Only** events.  
 Link: <http://baxlib.evanced.info/maintenance.asp>

### EVENTS List

Complete List - View Only - NON-EDITABLE

ALL Events + ALL Room Reserve public and private + Events not associated with a room + Private Library entries.  
 NOT EDITABLE

Login to Event Management System:  
<http://baxlib.evanced.info/maintenance.asp>  
 Enter User ID and Password.  
 Under Registration & Attendance, click on **Calendar/Registration**. Click on both the **Published and Not Published** events checkboxes and then click **Find**. The default is **Calendar View**. In the left Search box, click on **Display Format: List** and then click **Find**.

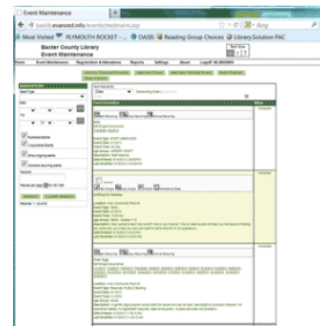


The **Staff** URL is to be used for internal use only. It includes **Private** and **Internal Only** events. Link:  
<http://baxlib.evanced.info/eventcalendar.asp?ag=&set=&dt=&mo&mo=8/1/2013&df=list&cn=0&private=0&in=0&pointer=inhouse>

### EVENTS List PARTIAL List - View, Add & EDIT EVENTS

Events ONLY, public and private - no Room Reserve entries - **EDITABLE**

Login to Event Management System:  
<http://baxlib.evanced.info/eventschedmaint.asp>  
 Enter User ID and Password.  
 Under Event Maintenance, click on **Add/Edit/Archive**  
 In left sidebar, click on all the checkboxes and then click **SEARCH**.



- List will not include entries created in ROOM RESERVE.
- List **will** include staff absences and National Library Week, etc. created in EVENTS not associated with a room.
- Closings can be edited here.

The **Staff** URL is to be used for internal use only. It includes **Private** and **Internal Only** events.  
 Link:<http://baxlib.evanced.info/pwlogin.asp?loc=maintenance.asp&from=events&libnum=0>

# EVENTS MODULE - CONTINUED

|                                   |                                            |
|-----------------------------------|--------------------------------------------|
| <b>Read-Only Level: All Staff</b> | <b>Create-Only Level: Department Heads</b> |
|-----------------------------------|--------------------------------------------|

**Typical Use : Search for an EVENT LIST VIEW**

1. Login to Event Management System:  
<http://baxlib.evanced.info/maintenance.asp>  
Enter User ID and Password.
2. Under Event Maintenance, click on Add/Edit/Archive
3. Enter a search Keyword and then click **Search**.

**Typical Use: Search for an EVENT CALENDAR VIEW**

1. Login to Event Management System:  
<http://baxlib.evanced.info/maintenance.asp>  
Enter User ID and Password.
2. Under Registration & Attendance, click on **Calendar/Registration**  
Click on both the **Published and Not Published** events checkboxes.
3. Enter a Keyword.
4. Click **Search**.

**Typical Use: Register a patron for an EVENT**

1. Login to Event Management System:  
<http://baxlib.evanced.info/maintenance.asp>  
Enter User ID and Password.
2. Under Registration & Attendance, click on either GO or Calendar/Registration
3. Events requiring registration will be underlined. Click on it.
4. Fill out each patron's information and click Complete Registration. Don't register a group even though you will see a place to do so. Patrons
5. do not see that option when they register.

**Typical Use: View an EVENT Class List**

1. Login to Event Management System:  
<http://baxlib.evanced.info/maintenance.asp>  
Enter User ID and Password.
2. Under Registration & Attendance, click on Event Attendance.
3. Navigate to and click on the event.
4. Print the list by exporting it. .csv (comma separated value) files can be "SAVE(d) AS" Excel files - a format you're probably used to using.

**Typical Use: Accept payment from a patron for an EVENT they've registered for**

1. Login to Event Management System:  
<http://baxlib.evanced.info/maintenance.asp>  
Enter User ID and Password.
2. Under Registration & Attendance, click on Event Attendance.
3. Navigate to and click on the event.
4. At left you'll see a box for payment. Click in it and in the notes box add cash or the check #, your initials, and the date.
5. At the bottom of the page Update or Save.

**Typical Use: Add a new EVENT (Add a Program or reserve a room for the Library)**

1. Login to Event Management System:  
<http://baxlib.evanced.info/maintenance.asp>  
Enter User ID and Password.
2. Under Event Maintenance, click on Add/Edit/Archive
3. Click on Add New Event.
4. Begin with an event date, select times and a location.
5. Click CHECK/RESOLVE CONFLICT.
6. Availability will be displayed. Click SELECT or remove or change dates until you are satisfied, then click SELECT.
7. Fill out the remainder of the information requested. Add registration information or click NO REGISTRATION. Add a number expected to MAXIMUM ATTENDEES and SAVE.
8. After adding or editing an event, it must be "Published" before you will see it on the calendar. Admin will check daily for events to publish. Or, contact an admin to accept and it will "appear" immediately. Admin are Kathe, Julie, Deta or Brenda.

**Typical Use: ADD MULTIPLE EVENTS OR A RECURRING EVENT**

Adding multiple events or a recurring event is similar to adding a single event. Work through steps 1-4. Choose to add additional dates or a recurrence and follow through with steps 5-8.

**Typical Use: EDIT RECURRING EVENT**

1. Login to Event Management System:  
<http://baxlib.evanced.info/maintenance.asp>  
Enter User ID and Password.
2. Under Registration & Attendance, click on **Calendar/Registration**  
Click on both the **Published and Not Published** events checkboxes.
3. Enter a Keyword.
4. Click **Search**.
5. Attempt to isolate your event - perhaps by clicking in the date range or by adding different keywords.
6. When your event is isolated, click **OFF "Combine recurring events"**.
7. The events become ungrouped, so in the event description, you can find the date of the individual event you're searching for and edit it.

**Anticipated Use: PUBLICITY REQUEST REPORTS**

1. Event creators can just click in the checkbox next to PR Request: when setting up events. If and when the Outreach coordinator runs a report, the event description will automatically be part of her report. If you have any special requests for her, add them to the "PR Details:" box.
  - ERROR MESSAGE: You may see a message: You have a start or end time outside of the standard library hours. Check setup and takedown times.
  - EQUIPMENT RESERVATIONS: If you know you want equipment the public is not permitted to reserve (like tablecloths and skirts, the popcorn machine, etc. currently the option is to add reserving the Great Hall (which has access to all Library equipment) to your Knox A+B reservation.
  - ERROR MESSAGE: If after entering your room and your event times you see the error message that there is a Conflict with your event and you click on Check/Resolve Conflict, you will have the option to delete date(s). Next to Check/Resolve Conflict there's a button **View Room Schedule**. Clicking on it brings up a screen of the room you've selected. See what else is scheduled that day in the room you want. If you are unable to resolve it yourself, set the time outside "normal" hours and save as much of the information as you can and then ask for the administrator's help. Admin are Kathe, Julie, Deta or Brenda.

**Public EVENTS Views**

**Public ROOM RESERVE View**

**EVENTS Monthly Calendar View**

(Public room reservations will be visible)

Go to Public Events: <http://baxlib.evanced.info>



**EVENTS List View**

(Public room reservations will be visible)

Go to Public Events:  
<http://baxlib.evanced.info>  
The default is Calendar View.  
In the left Search box, click on Display Format: List



**ROOM RESERVE**

Requests are limited to Knox Community Rooms, Small Conference Rooms, Study Rooms and the Computer Lab

Go to Public Room Reserve:  
<http://baxlib.evanced.info/ROOMREQUEST.ASP>  
To see all rooms, click **Check All/Uncheck All** and then **Refresh**



# ROOMS MODULE

## STAFF ROOM RESERVE VIEWS

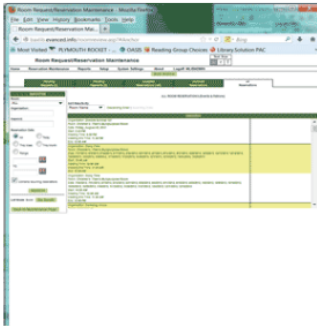
Open ROOM RESERVE to edit a public room reservation. By default, USE EVENTS to add all Library sponsored events to the calendar.

### ROOM RESERVE + EVENTS List View Only - NON-EDITABLE

**ALL** Room Reserve + **ALL** Events entries - public and private. NOT EDITABLE

- List entries which are not associated with a room such as staff absences or National Library Week, etc. will not be viewable.

Go to Rooms System Maintenance:  
<http://baxlib.evanced.info/roommaintenance.asp>  
Enter User ID and Password.  
Under Reservation Maintenance, Room: click on Requests/Reservations then click on the menu tab ALL Reservations, and in the Search/Filter box click on Reservation Date: All, and then click on SEARCH.



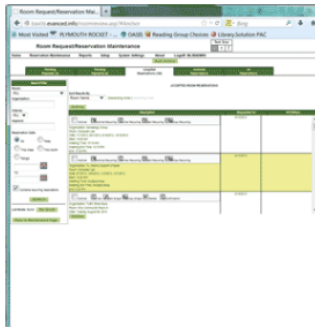
- Go to the "ROOM RESERVE List" or the "EVENTS List" to edit entries in this list.
- Go to the "EVENTS List" to view or edit staff absences or other entries which are not associated with a room such as National Library Week, etc.

### ROOM RESERVE List View, Add and EDIT ROOMS

ROOM RESERVE ONLY - public and private. EVENTS NOT EDITABLE FROM HERE.

- List will not include entries created in EVENTS.
- List entries which are not associated with a room such as staff absences or National Library Week, etc. will not be viewable.

Go to Rooms System Maintenance:  
<http://baxlib.evanced.info/roommaintenance.asp>  
Enter User ID and Password.  
Under Reservation Maintenance, Room: click on Requests/Reservations then click on the menu tab Accepted Reservations, and in the Search/Filter box click on Reservation Date: All, and then click on SEARCH.



Unfortunately, there is no way to have an editable view of all room reservations and event entries. See 6/21 email from Evanced.

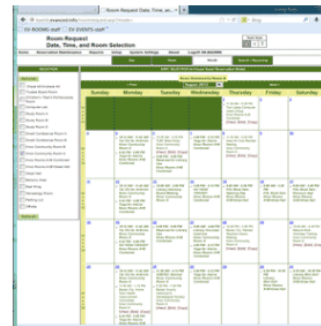
### ROOM RESERVE Calendar Individual Rooms View, and EDIT ROOMS

(matrix view of all rooms N/A)

Room Reserve + Events associated with a room - public and private. EVENTS NOT EDITABLE FROM HERE.

- List entries which are not associated with a room such as staff absences or National Library Week, etc. will not be viewable.

To see what's going on in a room on a given day Go to Rooms System Maintenance:  
<http://baxlib.evanced.info/roommaintenance.asp>  
Enter User ID and Password.  
Under Reservation Maintenance, Room: click on Mediated Reservation.  
In left sidebar, check the room you want to view and then click Refresh. Make sure the room you want is displayed above the Month/Year drop down menu. You'll see all reservations for that room on any date you choose.



## Read-Only Level: All Staff

Typical Use: Creating a reservation for a patron ROOM RESERVATIONS ONLINE  
(Paper forms will be available for those who do not want to submit their requests online.)

- Go to the public **PATRON ONLY** accessible ROOMS - don't log in:  
[http://baxlib.evanced.info/ROOMREQUEST\\_ASP](http://baxlib.evanced.info/ROOMREQUEST_ASP)
- In the column on the left, put a check in the box next to the room you'd like to request. Click REFRESH. (Room descriptions appear as you hover your mouse over the room names.)
- Navigate to the date in the calendar you'd like to request and click on the numeral in that box. (To submit multiple requests click on SEARCH/RECURRING in the menu bar.)
- Put checks in the boxes next to the times you'd like to reserve the room. Click CONTINUE and finish filling out the form.
- Click VERIFY REQUEST and then SUBMIT.

Typical Use: Accept Payment for Room Fees

- Go to Rooms System Maintenance:  
<http://baxlib.evanced.info/roommaintenance.asp>  
Enter User ID and Password.
- Under Reservation Maintenance, Room: click on Requests/Reservations.
- In the Tab Menu at the top of the page click on "Pending" Payments".
- Enter a search Keyword and then click Search.
- Find the event that the patron wishes to pay for and click "View".
- You'll see what's owed and can accept a check or cash for that amount. Receipt it and give the payment to Brenda with a note who it's from, or simply print the page as a copy of their invoice.
- NOTIFY CALENDAR ADMIN THAT PAYMENT FOR A ROOM HAS BEEN RECEIVED SO THAT PAYMENT CAN BE NOTED IN THE CALENDAR SYSTEM AND THE EVENT WILL APPEAR ON THE CALENDAR.

## ADMIN Level

Typical Use: Add Single Patron Room Reservation

- Go to Rooms System Maintenance:  
<http://baxlib.evanced.info/roommaintenance.asp>  
Enter User ID and Password.
- If the request is from a group who has reserved rooms previously, click "Requests/Reservations".
- Enter a keyword and search for the organization. If there is an existing event, click "Copy single" or "Copy recurring", saving yourself some keystroking, and edit with the organization's new information.
- Click "Verify Request" and then "Submit".

Typical Use: Add/Edit Recurring Room Reservation

- Event creators

Typical Use: Reports ROOM SIGNS  
Hung Mondays. Events displayed Tuesday - Monday

- Go to Rooms System Maintenance:  
<http://baxlib.evanced.info/roommaintenance.asp>  
Enter User ID and Password.
- In the reports column go to WEEKLY - Room Signs and click on "Edit".
- Click on "Date Range" and select the dates of the days Tuesday - Monday.
- Click "Check All/Uncheck All" twice.
- Click on the room you want a sign for.
- Click "Submit". The document that will download is an Excel spreadsheet that can be edited after opening.
- Click "File" and "Print". If the document wants to be printed on more than one sheet, click around in the "No Scaling" box or the "Orientation" box until the preview shows one sheet. Then click print.
- (No need to print Knox A+B combined, just Knox A and then Knox B. All events for the combined room will be in those two reports.)

Typical Use: Reports WEEKLY - ALL ROOMS with Setup Events Sunday through Sunday

- Go to Rooms System Maintenance:  
<http://baxlib.evanced.info/roommaintenance.asp>  
Enter User ID and Password.
- In the reports column go to: "WEEKLY - ALL ROOMS with Setup" and click on "Edit".
- Click on "Date Range" and select the dates of the days Sunday - Sunday.
- Click "Submit". The document that will download is an Excel spreadsheet that can be edited after opening.
- Click "File" and "Print". The document will want to print on more than one sheet, so click around in the "No Scaling" box or the "Orientation" box until the preview shows on 1 or 2 sheets. Then click print. If you want it on one sheet, click on the "No Scaling" box and the "Fit to:" button and make it one page wide by 1 page tall. Adjusting the top and bottom margin will make it slightly more readable. Then click print.

Typical Use: Reports MONTHLY VIEW OF CONTRACTORS ROOM SET-UP SCHEDULE

- Go to Rooms System Maintenance:  
<http://baxlib.evanced.info/roommaintenance.asp>  
Enter User ID and Password.
- In the reports column click on: Monthly Setups (the date default is Next Month.) The document that will download is an Excel spreadsheet that can be edited after opening.
- Go to the "Data" tab in the top menu and click on "Sort" (may have to choose "Custom Sort.") Check to see that "My data has headers" is checked. In the drop down "Sort by" window, select "Setup" and then OK.
- Delete the rows "Default Setup" (Children's Multipurpose Room) and "Self Setup". The remaining rows should be the rooms that have requested, and plan to pay for set-up. Double check the "Status" column for payment. If there's no payment, it may be that an error in how the room reservation was entered. Fix.
- Use what lines remain to create a schedule for and then notify subcontractors of the dates you need them.

# ROOMS MODULE - CONTINUED

many subcontractors of the dates you need them.

## Typical Use: Reports WEEKLY - ALL ROOMS FOR GREETERS Events Sunday through Sunday

1. Go to **Rooms System Maintenance:**  
<http://baxlib.evanced.info/roommaintenance.asp>  
Enter User ID and Password.
2. In the reports column click on: WEEKLY - All rooms for Greeters and click on "Edit".
3. Click on "Date Range" and select the dates of the days Tuesday - Monday.
4. Click "Submit". The document that will download is an Excel spreadsheet that can be edited after opening.
5. Click on the gray rectangle with a lighter triangle at the intersection of the columns (A,B, etc.) header & row numbers (1,2, etc.)
6. Go to the "Data" tab in the top menu and click on "Sort" (may have to choose "Custom Sort". Check to see that "My data has headers" is checked. In the drop down "Sort by" window, select "Date" and then OK. If the font size is too small, adjust it to a larger size in the box next to the font name. If some of your data becomes ### or hidden, click between the column rows in the header and they'll auto expand. (Manually insert rows if you want to separate the days.)
7. Click "File" and "Print". If the document wants to be printed on more than one sheet, click around in the "No Scaling" box or the "Orientation" box until the preview shows one sheet. Then click print.

## Typical Use: Reports DAILY VIEW OF ALL ROOMS (For Meeting Room Binder at Circ Desk)

1. Go to **Rooms System Maintenance:**  
<http://baxlib.evanced.info/roommaintenance.asp>  
Enter User ID and Password.
2. In the reports column click on: DAILY - All rooms and click on "Edit".
3. Click on "Specific Day:" and choose a date.
4. Click "Submit". The document that will download is an Excel spreadsheet that can be edited after opening.
5. Click "File" and "Print". If the document wants to be printed on more than one sheet, click around in the "No Scaling" box or the "Orientation" box until the preview shows one sheet. Then click print.
6. (No need to print Knox A+B combined, just Knox A and then Knox B. All events for the combined room will be in those two reports.

## Typical Use: ACCEPT SUBMITTED EVENTS

1. Go to **EVENTS System Maintenance**  
<http://baxlib.evanced.info/maintenance.asp>  
Enter User ID and Password.
2. Click on the tab "Add/Edit/Archive".
3. In the "Search" box on the left-hand side of the screen, check the box next to "unpublished" and, for an easier search, uncheck the box next to "published." Check "Show Ongoing Events" & "Combine recurring events."
4. Click "SEARCH"
5. Open the request by clicking on " Edit Single" or "Edit Recurring".
6. Review the event.
7. At the bottom of the page, check the box next to "Publish"
8. Click "Save".

## Typical Use: ACCEPT SUBMITTED ROOM REQUESTS

1. Go to **ROOM RESERVE System Maintenance:**  
<http://baxlib.evanced.info/roommaintenance.asp>  
Enter User ID and Password.
2. Click on the tab "Pending Requests".
3. Open the request by clicking on " View Single" or "View Recurring".
4. Review the request. Check that they've included set-up/take-down time, read "notes" if they've included any, by default "Is the reservation to appear on the event calendar?" should be clicked to "YES". If not, it should probably be edited before accepting. (Room reservations that may not appear on the calendar are those with set-up costs that haven't been paid. The room is blocked off, but won't appear on the calendar until the invoice is paid.
5. Click on "Accept" in the bottom row.

## Typical Use: Complete the ACCEPTANCE of Payment for Room Fees

1. Go to **Rooms System Maintenance:**  
<http://baxlib.evanced.info/roommaintenance.asp>  
Enter User ID and Password.
2. Under **Reservation Maintenance**, Room: click on **Requests/Reservations**.
3. In the Tab Menu at the top of the page click on "Pending Payments".
4. Enter a search Keyword and then click **Search**.
5. Find the event that the patron wishes to pay for and click "View".
6. You'll see what's owed and can accept a check or cash for that amount. Receipt it and give the payment to Brenda with a note who it's from, or simply print the page as a copy of their invoice.
7. In the "Requested Items:" area, click "YES" that payment has been received and their check #.
8. Click "Submit" releasing the reservation to be displayed on the calendar.