

# Table of Contents

[1 Login](#)

[2 RCApp Installation](#)

[2.1 Single Reading Club Configuration](#)

[2.2 Multiple Reading Club Configurations](#)

[2.3 RC Configurator](#)

[2.3.1 Reading Clubs Select List](#)

[2.3.2 Localization of prompts](#)

[2.4 Quick Configuration](#)

[2.4.1 Summary](#)

[2.4.1.1 Widget](#)

[2.4.2 Period Settings](#)

[2.4.2.1 Test Mode](#)

[2.4.3 Groups](#)

[2.4.3.1 Group Settings](#)

[2.4.3.1.1 Group Summary](#)

[2.4.3.1.2 Achievements](#)

[2.4.3.1.3 Books](#)

[2.4.3.1.4 Schools](#)

[2.4.3.1.5 Avatars](#)

[2.4.3.1.6 Style](#)

[2.4.4 Authentication](#)

[2.4.4.1 Registrant Authentication](#)

[2.4.4.1.1 Library Card Only Authentication](#)

[2.4.4.1.2 Library Card and PIN Authentication](#)

[2.4.4.2 Account Creation](#)

[2.4.4.3 Account Registration and Login Options](#)

[2.4.4.4 Account Login](#)

[2.4.4.4.1 Activity Tracker Login Mock-up: Option 2 and Option 3&5](#)

[2.4.5 Registration](#)

[2.4.5.1 Registrant](#)

[2.4.5.1.1 Registrant Details](#)

[2.4.5.1.1.1 Number of Participants](#)

[2.4.5.1.2 Opt-in Questions](#)

[2.4.5.1.3 Registrant Protected Fields](#)

[2.4.5.1.4 Sample Registrant Form View](#)

[2.4.5.2 Registrant- Custom](#)

[2.4.5.3 Participant](#)

[2.4.5.3.1 Participant Details](#)

[2.4.5.3.2 Membership Numbers](#)

[2.4.5.3.3 Participant Protected Fields](#)

[2.4.5.4 Custom](#)

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- [2.4.5.5 Thanks](#)
- [2.4.6 Setting Options](#)
- [2.4.7 Activities](#)
  - [2.4.7.1 Track](#)
    - [2.4.7.1.1 Book Title](#)
    - [2.4.7.1.2 Activity Dates](#)
    - [2.4.7.1.3 Activities Tracked](#)
  - [2.4.7.2 Profile](#)
    - [2.4.7.2.1 Goals](#)
    - [2.4.7.2.2 Participant Options](#)
  - [2.4.7.3 Messages](#)
- [2.4.8 Achievements](#)
  - [2.4.8.1 Badges](#)
  - [2.4.8.2 Certificates](#)
    - [2.4.8.2.1 Sample certificate with dynamic form field](#)
      - [2.4.8.2.1.1 List of Form Field Placeholders](#)
      - [2.4.8.2.1.2 Upload Certificate](#)
  - [2.4.8.3 Goals](#)
  - [2.4.8.4 Contests](#)
  - [2.4.8.5 Achievement Options](#)
    - [2.4.8.5.1 Occur Once](#)
      - [2.4.8.5.1.1 Occur Once Criteria](#)
    - [2.4.8.5.2 Occur Multiple](#)
      - [2.4.8.5.2.1 Schedule](#)
      - [2.4.8.5.2.2 End after](#)
- [2.4.9 Books](#)
- [2.4.10 Schools](#)
  - [2.4.10.1 Homeschooled](#)
- [2.4.11 Images](#)
  - [2.4.11.1 Avatars](#)
  - [2.4.11.2 Badges](#)
  - [2.4.11.3 Certificates \(Images\)](#)
  - [2.4.11.4 Other \(Images\)](#)
- [2.4.12 Style](#)
- [2.4.13 Contact](#)
- [3 Administrative views](#)
  - [3.1 Review of records](#)
    - [3.1.1 Accounts](#)
    - [3.1.2 Signups](#)
    - [3.1.3 Registrants](#)
    - [3.1.4 Participants](#)
    - [3.1.5 Activity](#)
  - [3.2 View and Update](#)

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[3.3 Using the Data Tables](#)

[3.3.1 Table Features](#)

[3.3.2 Search and View Features](#)

# RCApp Installation Guide

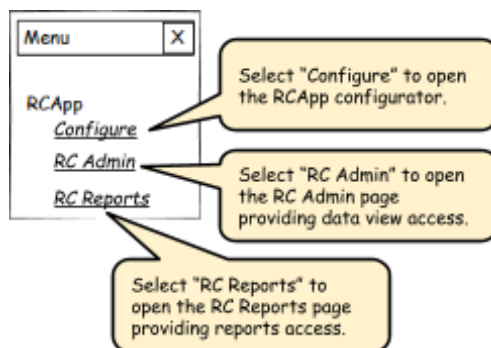
Thank you for choosing the RCApp by Counting Opinions. This document offers guidance on how to quickly configure the installation of the RCApp for your Reading Club program(s).

## 1 Login

Please login at [nc.countingopinions.com](http://nc.countingopinions.com)

Your username and password were provided to the RCApp Subscription contacts. If you do not know the username and password, please contact [support@countingopinions.com](mailto:support@countingopinions.com).

From the navigation “Menu” select “Configure” under RCApp to begin configuration. This menu option is shown only to users that have the “Collection Manager” user role.



RC Admin provides access to grid (record) views of the data for “Registration”, “Participation”, “Activity” and “Profiles”. This menu option is shown only to users that have either the “Data Manager” or “Data Entry” roles.

RC Reports provides access to the RC reporting tools. This menu option is shown only to users that have either the “Reports Manager” or “Report Viewer” role.

## 2 RCApp Installation

The RCApp is pre-configured with a Reading Club, hereafter referred to as the “Default”. This configuration can be deployed “out-of-the box” and/or one or more Reading Clubs with custom configurations can be installed and deployed.

Explore the configurator to review the settings of the Default configuration and/or read-on to learn more about these settings as the quick install is discussed.

**Important Note:** The default “Reading Club” configuration can be customized. Any changes will replace the initial settings when “Update” is selected. For example, changing the name “ Reading Club” will replace this name and the reference to this default club in the configurator and throughout this document. The only way to revert changed settings back to the original default is to manually change the settings back to the original. **Care should be taken when updating the default.**

## 2.1 Single Reading Club Configuration

For Libraries offering and managing a single reading club, the Default configuration can be fully customized for local use. Updating the Default configuration establishes a new Default.

## 2.2 Multiple Reading Club Configurations

The Default provides a “master” configuration for all clubs and is the “template” configuration for each subsequent club that might be added. Updates can be made to the Default thereby creating a localized master-template. If clubs have been added and changes are made to the Default, these changes cascade to each club. However, if a club has specific configuration settings (e.g., Group settings, images, styles), these settings will prevail.

To configure more than one club, these additional reading clubs must be added.

The screenshot shows the 'Add Club' configuration page. At the top, there is a dropdown for 'Add Club' and a 'Periods' dropdown set to 'Jan - Dec 2015'. Below this is a tabbed interface with tabs for Summary, Portal, Periods, Groups, Authentication, Registration, Activities, Achievements, Books, Schools, Images, Style, Email, Templates, Contacts, and CO Admin. The 'Summary' tab is active, showing fields for 'Reading Club Name' (1000 books before kindergarten), 'Description', and a checked 'Enable Online Config' option. Below these are sections for 'Registration Form' and 'Activity Form', each with 'Internal URL', 'Public URL', 'Redirect URL', and an 'iframe' widget. At the bottom, there are 'Update' and 'Delete' buttons.

Callout boxes provide the following explanations:

- Select existing reading club configuration or add new club.** (points to the 'Add Club' dropdown)
- Select Period (configured in Period tab).** (points to the 'Periods' dropdown)
- Identifies the club and used in the "Reading Clubs" select list for the selection of the Reading Club, as above.** (points to the 'Reading Club Name' field)
- Select tabs to view summary and configured settings for the selected reading club.** (points to the 'Summary' tab)
- URLs are unique to the selected Reading Club** (points to the 'Internal URL', 'Public URL', and 'Redirect URL' fields)
- On form submission, automatic redirection to the specified URL occurs (20 second delay)** (points to the 'Redirect URL' field)
- Use the <iframe> widget to embed the Registration and Activity forms respectively in your website.** (points to the 'iframe' widgets)
- Select Update to apply changes. When adding a new club, this button will be "Add".** (points to the 'Update' button)

## 2.3 RC Configurator

The RC configurator is a tabbed interface where the configuration for one or more reading clubs can be installed and managed. Reading Clubs are identified by name in the Reading Club select list and top level Summary Tab. Sub level tabs contain information and settings relative to the Reading Club selected in the Reading Club select list.

### 2.3.1 Reading Clubs Select List

The Reading Clubs select list enables selection of existing Reading Clubs. The Default selection is the “Reading Club”. When other Reading Clubs have been added they will be listed by name for selection. Names are set in the Summary Tab. To add a new reading club, select “Add Club”. The new Reading Club will require a name (minimum) and description to be set in the Summary Tab.

All configuration tabs relate to the selected reading club.

For first time users, the default “Reading Club” is the only reading club configured. The “Reading Club Name” is set in the “Summary” Tab in the tabs below the selected reading club. The “Details” Tab includes the “Description” of the reading club, and URLs for staff (internal) and public views of the Registration and Activity forms. Both name and description can be updated.

### 2.3.2 Localization of prompts

Throughout the RApp configuration the field “prompts” can be localized to better reflect local terminology. To update a prompt, replace the prompt with the new prompt and select “Update”. **Do not change the prompt if it will change the meaning and interpretation of the question.** Instead a custom question should be added. Please contact [support@countingopinions.com](mailto:support@countingopinions.com) if you require a custom question to be added to your Reading Club configuration.

## 2.4 Quick Configuration

### 2.4.1 Summary

The “Summary” Tab references the selected reading club, including name, description, registration form URLs, and activity form URLs.

The name and description for the Reading Club can be updated (added). Redirect URLs can be set for each form and the outcomes survey for the reading club. This determines the webpage that the user will be redirected to on submission of the respective form or survey. In the Default the redirect URLs are set to the Activity form URL since after registration, registrants may want to view the Activity form and/or add activities and after having input activities, the participant may want to add more activities.

The forms and outcome survey URLs are system generated and are unique to the selected reading club. These URLs can not be changed. Accuracy is important when referring to these URLs since the URLs identify the Reading Club and the forms therein capture information for that Reading Club and the registered participants.

#### 2.4.1.1 Widget

To add the Registration and Activity forms to your website, add the widget to your webpage. Simply select the Widget code in the Registration>>Summary Tab, copy and paste this code in

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the web page where you would like the form to appear and adjust the height and width accordingly for the most suitable presentation.

## 2.4.2 Period Settings

Select the Period Tab. Selection of the Period Tab reveals period settings fields where a period name, start and end dates can be added. The Reg Start Date and Reg End Date are the start date when registrations will begin and end. The Acl Start Date and Acl End Date are the start and end date of the activity tracking form. There are options to enable the period or toggle on/off test mode.

Period	Period Name	RC Start Date	RC End Date	Reg Start Date	Reg End Date	Acl Start Date	Acl End Date	Enabled	Test Mode
<a href="#">20140101</a>	Jan - Dec 2014	2014-01-01	2014-12-31	2014-05-01	2014-07-01	2014-07-01	2014-08-31	No	No
<a href="#">20150101</a>	Jan - Dec 2015	2015-01-01	2015-12-31	2015-01-01	2015-12-31	2015-01-01	2015-12-31	Yes	No
<input type="text" value="20150101"/>	<input type="text" value="Jan - Dec 2015"/>	<input type="text" value="2015-01-01"/>	<input type="text" value="2015-12-31"/>	<input type="text" value="2015-01-01"/>	<input type="text" value="2015-12-31"/>	<input type="text" value="2015-01-01"/>	<input type="text" value="2015-12-31"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		<input type="button" value="Update"/>		<input type="button" value="Delete"/>					

### 2.4.2.1 Test Mode

When enabled, “Yes” is displayed, for the selected period, any registrations or activity data captured while in test mode is flagged as test data in the database. Test data is not included in any of the RC App Reports or Batch Admin. Test data can be viewed in the RC Admin views.

## 2.4.3 Groups

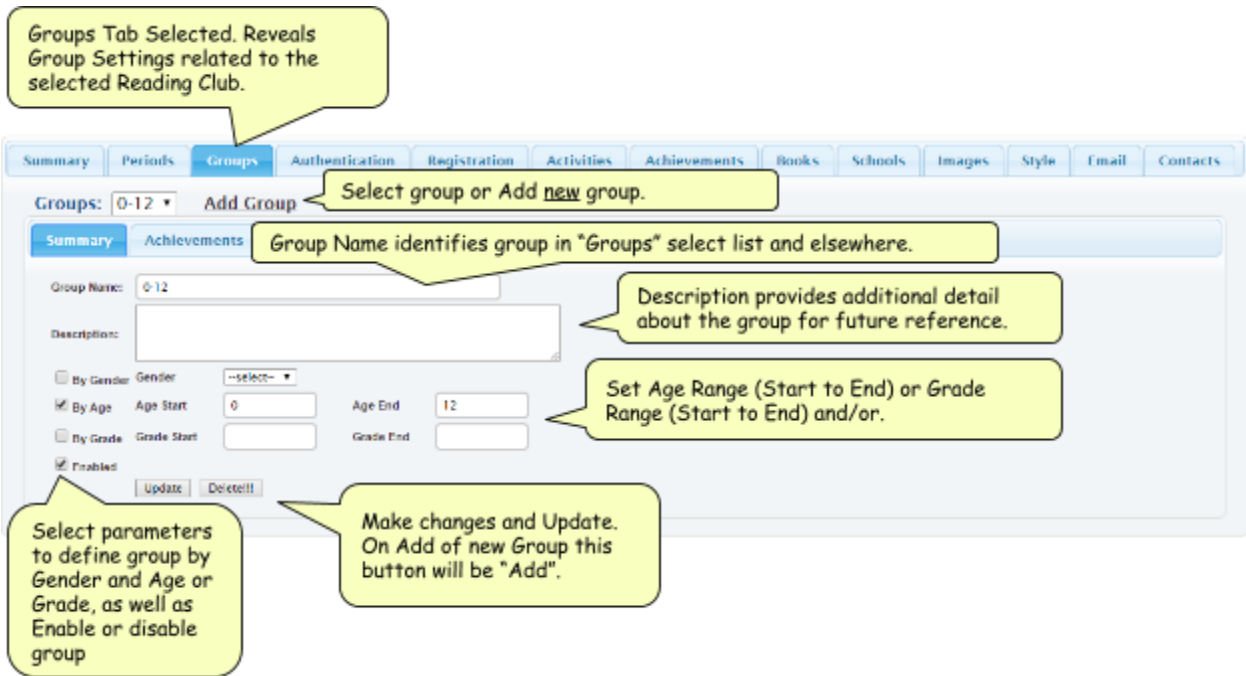
The Groups Tab contains the configuration settings for Groups related to the selected Reading Club. Reading Groups can be created within each Reading Club. Groups are defined by common attributes (e.g., gender and/or age, grade, themes, etc.) and can offer an experience tailored to members of that group, including images, styles, books list and schools list.

Many jurisdictions have predefined groups for reporting and analysis of participation and activity. This is a good place to start when considering group requirements.

If there is no need for any groups to be defined, then a Reading Club can be configured without the addition of any groups.

### 2.4.3.1 Group Settings

Select the Groups Tab. Selection of the Groups Tab reveals the Groups Tabs (Summary, Achievement, Books, Schools, Avatar, Style), the Groups select list and the settings relative to the selected group, if groups exist. Groups are configured with a Group Name and Description. The Group Name is required and can not be left blank or deleted. It is this name that is used in the Groups select list for selection of groups. The sub-tabs in Groups section, reflect the settings relative to the group selected in the Groups select list.



Groups can be defined by Gender and Age, Gender and Grade, Gender alone, Age alone, or Grade Alone. But Groups should never be defined by both Age and Grade since these two parameters are not mutually exclusive of one another.

For the Default, 8 groups have been pre-configured. These Default Groups can be modified, if needed. The group settings are summarized in Table 1 (below).

**Table1. Default Groups and Settings**

Group Name	Description	Gender	Age Start	Age End	Grade Start	Grade End	Enabled
B0-5	Boys, Age 0-5	Boys	0	5	-	-	Yes
B6-8	Boys, Age 6-8	Boys	6	8	-	-	Yes
B9-12	Boys, Age 9-12	Boys	9	12	-	-	Yes
B13+	Boys, Age 13+	Boys	13	-	-	-	Yes
G0-6	Girls, Age 0-6	Girls	0	5	-	-	Yes
G6-9	Girls, Age 6-9	Girls	6	8	-	-	Yes
G9-13	Girls, Age 9-13	Girls	9	12	-	-	Yes



G13+	Girls, Age 13+	Girls	13	-	-	-	Yes
------	----------------	-------	----	---	---	---	-----

To add a new reading Group, select Add Group. The “Add Group” dialog window will open and appear blank, as shown. Fill in the information and define the group then select the “Add” button and the new group is added to the list of available groups for the selected Reading Club (i.e., selected in the Reading Clubs list).

#### 2.4.3.1.1 Group Summary

Groups may be defined by Age or Grade and/or Gender for the automatic determination of which group a participant belongs. The group definition questions (Age, Grade, Gender) relevant to the defined group must be asked during registration for this automated classification to work. For example, the group Boys 0-5 years of age, is shown. During registration the participant is asked for Date of Birth and Gender. If the response is a birth date 5 years or less from the date of registration (Aged 5 or younger) and Gender:Boy, then the participant belongs to the Boys 0-5 group. The benefit of asking Date of Birth is that the data will include the specific date of birth for the participants versus the general age range of the participants.

Groups: B0-5 ▾ [Add Group](#)

Summary Achievements Books Schools Avatars Style

Group Name:

Description:

By Gender Gender  ▾

By Age Age Start  Age End

By Grade Grade Start  Grade End

Enabled

If groups are defined by other parameters not including Age, Grade or Gender, such as, theme, topic, interest, then the Group Name should effectively convey the Group definition, e.g., Budding Sleuths or Mystery Readers, a reading group dedicated to young readers of mystery stories.

#### 2.4.3.1.2 Achievements

Achievements configured for the Reading Club are offered as select options at the Group level. Since Achievements may apply to more than one group the selection of an achievement is easier than having to set these up for each individual group.

To configure and new achievement or update an existing achievement, this must be done at the Reading Club level. If an achievement is selected at the Group level and updated at the Reading Club level, any updates will be effective for all Groups that have that achievement selected.

If a NEW achievement is added at the club level and selections have been made at the Group level then the NEW achievement will have to be selected within each Group where the achievement should apply. Otherwise, the achievement is ignored within the Groups where one or more specific achievements have already been selected.

All achievements apply within a Group only when **all** achievements have been selected at the Group level, or **none** of the achievements have been selected at the group level.

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### 2.4.3.1.3 Books

Books added to the Book List in the Books Tab for the Reading Club become the master list of books for selection in each group. If no book selections are made for a Group in the Group, Books Tab, the entire master list is made available to participants within that group. If one or more selections are made, it is this selected list that is offered to participants of the group.

For example, as shown, the selections from the master booklist become the list of books for the Group, Boys0-5.

Groups: **B0-5** [Add Group](#)

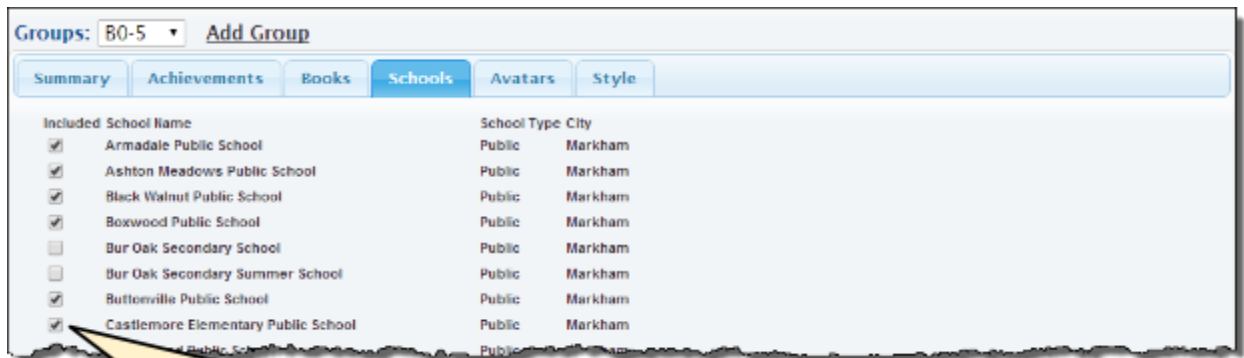
Summary	Achievements	Books	Schools	Avatars	Style
Enabled Book Name	ISBN	Author	Pages		
<input type="checkbox"/> 11 Experiments That Failed	0375847626	Jenny Offill	40		
<input checked="" type="checkbox"/> Anything Is Possible	1926973917	Giulia Belloni	32		
<input checked="" type="checkbox"/> Awesome Dawson	0316213306	Chris Gall	40		
<input checked="" type="checkbox"/> Boy and Bot	0375867562	Ame Dyckman	32		
<input checked="" type="checkbox"/> Callum's Incredible Construction Kit	1405252227	Jonathan Emmett	32		
<input type="checkbox"/> Cardboard	0545418739	Doug Tenllapel	288		
<input type="checkbox"/> Chester's Masterpiece (Chester)	1554535662	Mélanie Watt	32		
<input type="checkbox"/> Chill: Discover the Cool (and Creative) Side of Your Fridge	1554533015	Allan Peterkin	80		

The Book list shown is created and managed in the Reading Club, Books folder. Selected books from the "Reading Club Book list" become the "Group Book list". If no selections are made, all books are offered for the Group (i.e., Boys0-5).

### 2.4.3.1.4 Schools

Schools added to the School List in the Schools Tab for the Reading Club become the master list of schools for selection in each group. If no school selections are made for a Group in the Group, School Tab, then the entire master list is made available to participants within that group. If one or more selections are made, it is this selected list that is offered to participants of the group.

For example, as shown, the selections from the master school list are the list of schools for the Group, Boys0-5.

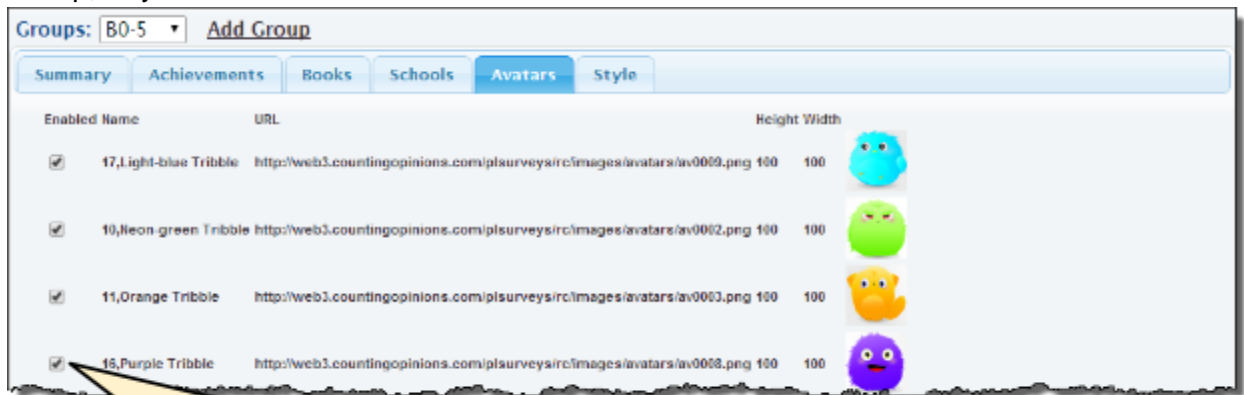


The School list shown is created and managed in the Reading Club, Schools folder, Selected schools from the "Reading Club School list" become the "Group School list". If no selections are made, all schools are offered for the Group (i.e., Boys0-5).

#### 2.4.3.1.5 Avatars

Avatars added to the Avatars List in the Images>>Avatars Tab for the Reading Club become the master list of avatars for selection in each group. If no avatar selections are made for a Group in the Group>>Avatars Tab, then the entire master list is made available to participants within that group. If one or more selections are made, it is this selected list that is offered to participants of the group.

For example, as shown, the selections from the master avatar list are the list of avatars for the Group, Boys0-5.



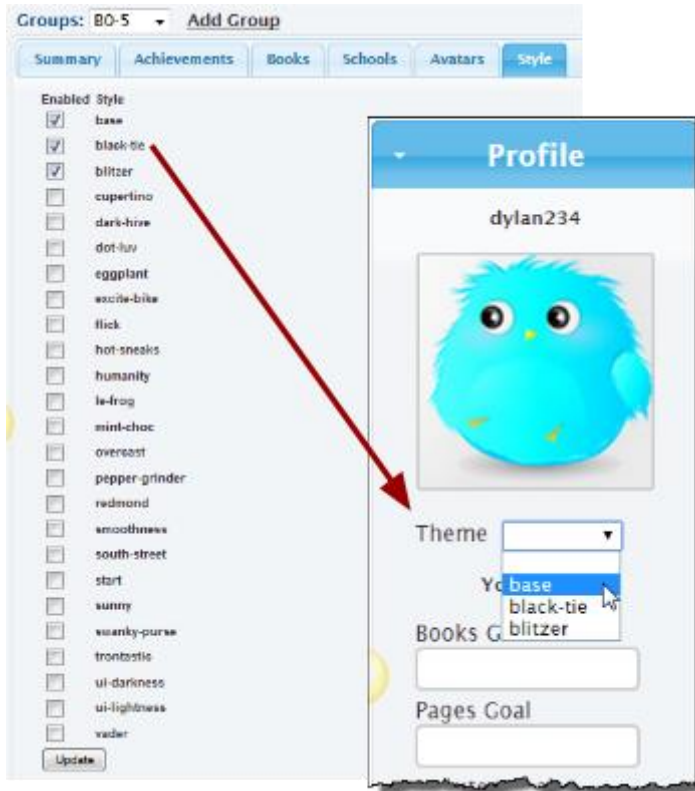
The Avatars list shown is created and managed in the Reading Club, Images>>Avatars folder, Selected avatars from the "Reading Club Avatar list" become the "Group Avatar list". If no selections are made, all avatars are offered for the Group (i.e., Boys0-5).

#### 2.4.3.1.6 Style

The list of Themes for selection in the Group>>Styles Tab is created in the Reading Club>>Styles Tab by selecting and updating each theme that is wanted for activation. If no selections are made in the Group>>Styles Tab, all themes are made available for participant selection in the activity Tracker, participant profile options. If one is selected, this theme

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becomes the default for the group. If more than one theme is selected, this selected list of themes are offered to the participant for selection in the participant profile section of the Activity tracker, as shown.



The following Activity Tracker view shows the “Avatar”options and “Theme” selection options. These options are set in the Group>>Avatars and Group>>Styles Tabs respectively.

The image shows a user profile page for a participant named 'cjunior'. The page is divided into two main sections: 'Profile' and 'Progress'. The 'Profile' section includes a current avatar of a yellow chick, a grid of 12 alternative avatars, a theme selection dropdown menu (currently showing 'cupertino'), and input fields for 'Books Goal' (10), 'Pages Goal' (1000), 'Minutes Goal' (2000), and 'Review Goal'. A 'Save Profile' button is at the bottom. The 'Progress' section shows three progress bars: '3 books read!', '700 pages read!', and '350 minutes read!'. Below the progress bars are two buttons: 'Record Activity' and 'Past Activity Log'. Two callout boxes point to the avatar and theme options.

Avatar options for the participant to select from.

Theme options for the participant to select from.

#### 2.4.4 Authentication

The Authentication tab includes settings for how accounts are created and in turn what credentials are used or are required for both Registrants and Participants to Login for the selected reading club.

The image shows the 'Authentication' tab in a settings interface. It features several sections for configuring login requirements: 'Reg Login' with checkboxes for 'Library Card' and 'Pin Code'; 'Username' and 'Password' fields with 'Length' and 'Min/Max' constraints; and 'Auto' and 'Pre-assigned' membership options with 'Start' and 'Max' values. A callout box points to the 'Pre-assigned' membership field.

If "Pre-assigned" members numbers are to be used, be sure to enable the "Membership Number" field in the "Registration»Participants" tab.

#### 2.4.4.1 Registrant Authentication

Registrant authentication can only occur using Library Card or Library Card and PIN, and if a connection with your ILS is established. This authentication option reasonably determines the person registering is who they say they are.

With Library Card or Library Card and PIN enabled for registrant authentication, the registrant provides their Library Card number or Library Card/PIN combination, then a SIP2 /API look-up confirms the Library Card number or Library Card/PIN combination are valid, then returns and prefills user information required for registration. Only information as configured for registration is prefilled in this process. No other ILS information is stored during registration.

**To enable ILS authentication, please provide Counting Opinions at [support@countingopinions.com](mailto:support@countingopinions.com) with the SIP2 or other API connection details (e.g. Patron API), including:**

- **ILS server IP address**
- **Port**
- **Library Card number (AA) and PIN (AD) for testing**
- **Other information required for server authentication,**
  - **Login user id (CN)**
  - **Login password (CO)**
  - **Location code (CP)**

**Note: In brackets (XX), these codes refer to those used in the SIP2 protocol.**

##### 2.4.4.1.1 Library Card Only Authentication

If Library Card only is required for authentication, then select the Reg checkbox to enable “Library Card” for Registration. The Registrant will be prompted to provide their Library Card for authentication during the account creation process. The Registrant will not have to provide their PIN number.

##### 2.4.4.1.2 Library Card and PIN Authentication

If Library Card and PIN is required for authentication, then select the Reg checkbox to enable both “Library Card” and PIN for Registration. The Registrant will be prompted to provide their Library Card and PIN for authentication during the account creation process.

#### 2.4.4.2 Account Creation

At the time of Registration a user account is created for the Registrant as well as for the Participant(s) that is(are) registered by the Registrant. This workflow allows the Registrant to create an account for him/herself, to include him/herself as a participant, and/or, if multiple-participant registration is enabled, to register others as participants. Subsequently the Registrant has authority to view, add, and manage information and activities on behalf of each of the participants. Participants have the authority to view, and manage only their own information and activities.

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User account options apply to all users -- Registrants and Participants.

#### 2.4.4.3 Account Registration and Login Options

Thought must be given to how users will be authenticated (or not) at the time of Registration and what credentials users will need to provide and subsequently need to Login to view, add, and manage their information and activities.

The Registration (Reg) and Login options are not mutually exclusive. Login options are dependent on the Registration (Reg) options enabled. For example, if username and password is desired for Login, then during Registration, a username and password must be provided at the time of Registration for the Registrant and Participant(s) and thus username and password need to be enabled under Reg in the Authentication tab as well as for Login.

The following details the Registration and Login options and their function.

- Library Card
- PIN

- Library Card /PIN provides a means for Registrant authentication when an ILS connection has been enabled
- Enable Reg for Authentication of users at the time of Registration (Reg)
- Enable Login for future account Login
- If an ILS connection is not configured, Library Card/PIN can be stored and used for Login if enabled for both Reg and Login.
- Library Card alone can be used for Reg and Login
- PIN alone is not a valid requirement for authentication for Registration or Login.

- Username
- Password

- If Username/Password are enabled for Registration (Reg), then Username/Password form fields will be included in the Reg form for Registrant and Participant(s)
- If Username/Password are enabled for Reg, Username/Password can be enabled for Login
- Usernames must be unique
- Username alone can be used for Reg and Login
- Password alone is not a valid requirement for Reg and Login
- Min and Max Length fields determine the acceptable number of characters for the Username or Password. The Min length should not be set less than 3.
- Email addresses are often used for Usernames since they are inherently unique. Consider this when setting the Max number of characters allowed for the Username.

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- ❑ Auto members
  - ❑ Pre-assigned members
- Members are membership numbers that are specific to Participant registration and login
  - If Auto or Pre-assigned members is enabled for Reg, an input field will be added for Pre-assigned member numbers to be input for the Participant
    - The Pre-assigned membership number is checked to have been unused within the valid range of numbers determined by the Min and Max number range
  - Membership numbers can be automatically (Auto) assigned at Registration or Pre-assigned prior to Registration
  - If Auto members is enabled for Reg, an available number within the Min and Max number range will be automatically allocated to the Registrant and Participant
  - If Auto members is enabled for Reg, then Auto members can be enabled for Login. The unique number assigned to the Registrant and Participant can be used for Login.
  - If Pre-assigned members is enabled for Reg, then Pre-assigned member numbers can be enabled for Login. Only Registrants and Participants that have had their pre-assigned member number assigned to their account during registration can use this number for Login.

#### 2.4.4.4 Account Login

There are 5 options for Activity Tracking User Authentication (Login), and can be combined in any combination.

1. Library Card
2. Library Card and PIN
3. Username
4. Username and password
5. Membership Number (Auto and/or Pre-assigned)

One of these five options (or any combination of these 5 options) must be configured for Login to the Reading Club Activity Tracker.

When enabled, the Registration form will automatically include input fields required for the selected option. For example, if option #4 is enabled, the registrant will have to provide a unique username and password for himself/herself and the participant(s).

If options 5 is wanted for Login then the Members number ranges (Auto and/or Pre-assigned) must be configured and the Membership Number option must be enabled for the participant, Registration Tab >> Participant Tab. If the Membership number option is not enabled for Participant Registration, then this option for activity authentication is dismissed even if auto and/or pre-assigned Members numbers are enabled. See [Participant Registration](#) for more details.

#### 2.4.4.4.1 Activity Tracker Login Mock-up: Option 2 and Option 3&5

##### Option 2 : Username and Password

The mock-up shows a window titled "Your Reading Club" with a sub-header "Activity Tracker". To the left, three person icons point towards the form. The form contains two input fields: "Username" with the placeholder text "Username" and "Password" with the placeholder text "\*\*\*\*\*". Below these fields is a "Login" button.

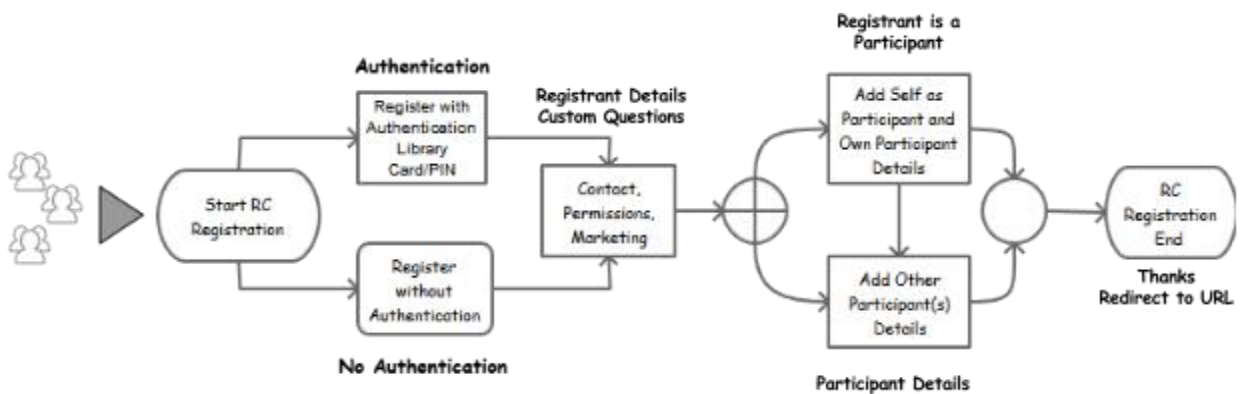
##### Option 3&5: Username or Membership Number

The mock-up shows a window titled "Your Reading Club" with a sub-header "Activity Tracker". To the left, three person icons point towards the form. The form contains two input fields: "Username" with the placeholder text "Username" and "Member #" with the placeholder text "XXXXX". Below these fields is a "Login" button.

#### 2.4.5 Registration

Registration defines the authentication and information requirements and process for becoming a registered participant of the Reading Club(s) offered by the Library.

##### Registration Workflow



The Registration Tab is where the Registration requirements and options are set for the reading club. The Registration process guides registrants to select club options and provide required and/or optional information. Information captured at the time of registration may be useful for

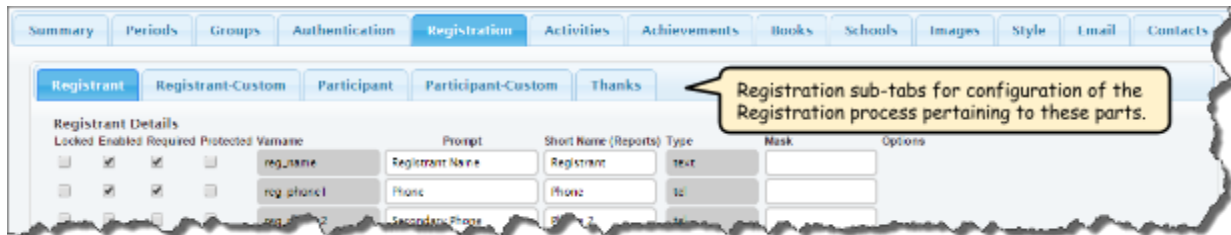
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review, comparison and analysis of participation and activity, including information such as, zip/postal code, city, county, and/or other custom information requests.

It is opportune at the time of registration to learn how the registrant learned of and decided to register for the program. Marketing feedback questions for the reading club may be offered and/or custom questions can be configured/added. As well, the opt-in question and options can be presented that ask the registrant for permission to use their email, to participate in club evaluations, and to identify prize winners.

The configuration of the Registration form has four parts:

1. Registrant - details and opt-in questions for the Registrant
2. Registrant-Custom - custom question(s) for the Registrant
3. Participant - details, membership number, and options for the Participant
4. Participant-Custom - custom question(s) for the Participant
5. Thanks - Thanks message posted after Registration is complete



#### 2.4.5.1 Registrant

Registration configuration for the Registrant determines the information captured about the registrant. Since the registration process can be configured for registration of one or more participants by one registrant, the registrant is the point of contact for all participant(s).

Form elements can be enabled/disabled and set to required (or not). The "Default" is preconfigured as shown.

The screenshot shows the 'Registrant' configuration page with several sections: Registrant Details, Opt In Questions, and Marketing Question. Callouts provide the following information:

- Registrant Details:**
  - Fields like `reg_name`, `reg_phone1`, `reg_email`, and `reg_postal` are checked for 'Enabled' and 'Required'. A callout states: "Enable and/or require Registrant details to be provided by the registrant."
  - Fields like `reg_lang` and `reg_branch` are checked for 'Enabled' and 'Protected'. A callout states: "Locked fields can not be altered/edited by lower level libraries and outlets if RApp configuration is allowed at these lower levels."
  - The `reg_questions` field is checked for 'Enabled' and 'Required'. A callout states: "Registration supports the registration of multiple participant. Enable this question to turn on multiple participant registration."
- Opt In Questions:**
  - The `email_lib` question is checked for 'Enabled' and 'Protected'. A callout states: "Protected, when 'on', prevents under any circumstance information captured for the selected field from being sent back to the browser, including RC Admin views, Batch Admin views and Reports. This information is stored, but can not be viewed."
- Marketing Question:**
  - The `find_program` question is checked for 'Enabled' and 'Required'. A callout states: "Opt-in questions confirm the Registrant's willingness to allow use of their email, personal information, and participation in other Reading Club related activities."

### 2.4.5.1.1 Registrant Details

For each of the form elements the **data type cannot be changed**. Field masks can be applied that show the format in which the information should be provided. For example, telephone fields could have (XXX) XXX-XXXX or (XXX) XXX-XXXX? XXXXX. The latter mask allows for the optional (?) inclusion of an extension.

Set Options enables the selection of option lists for select option questions. Options can be created, reviewed, updated and/or deleted through the Options Admin interface. See [Set Options](#) for more information and instructions.

#### 2.4.5.1.1.1 Number of Participants

The RApp supports the registration of multiple participant by one registrant. Enabling "Number of participants" turns on this feature. In the registration form, the Registrant has the options to select the "Add Participant" button or select "All Done". The Registrant can continue to add participants until they have added all participants, or they can return to the Registration form and add additional participants at a later time.

Participant 1

Participant Name\*

Participant Date of Birth\*

Participant Gender\*

Have you ever participated in the club before?\*

Username\*

Password\*

Registrants can add as many participants as needed by selecting "+ Add another participant". When all participants have been added they simply select "All Done!".

#### 2.4.5.1.2 Opt-in Questions

Two sets of opt-in question with options are included for configuration. **Please select only one of these two sets of opt-in questions with options.** The difference is the layout of the questions in the Registration form. The first set is laid-out as a multi-select question with question and option drop-down list. The question prompts the Registrant to make their selections from the drop down list of multiple options, as shown.

By selecting the following, I agree that the Library may..

3 selected

Check all  Uncheck all

communicate with me by email

post the name of prize winners

share the name of participants with local school

As a convenience, these select options are pre-selected. Note: in some jurisdictions these options should not be pre-selected. If this is the case in your jurisdiction, the second opt-in question and option set and format is a better choice.

The second set of questions are configured as a separate question with vertical list of multiple options to select from, as shown.

By selecting the following, I agree that the Library may..

- communicate with me by email
- post the name of prize winners
- share the name of participants with local school

Opt-in question with options listed as a vertical list helping the respondent to effectively make their choices.

The question and question options can be “tailored” and/or new opt-in options can be added. The question asks registrant permission to use their email for communication, to publish the name of winners, participate in the evaluation of the reading club, and to share information with the select school(s).

For the opt-in question and options, please contact [support@countingopinions.com](mailto:support@countingopinions.com) if you require a new/custom opt-in option not currently provided.

#### 2.4.5.1.3 Registrant Protected Fields

Protected fields are fields of information that are captured at the time of registration, but this information is never returned to the browser at any time or under any circumstances, including RC Admin views and reporting. For example, if the email address field is protected this information will not be provided back to the library, however this information can be used in the RC Admin features that enable communication via email (if email communications has been agreed to by the Registrant at the time of registration).

#### 2.4.5.1.4 Sample Registrant Form View

The screenshot shows a web form with two main sections: "Authentication" and "Contact Details". The "Contact Details" section contains the following fields:

- Registrant Name\*: DOE, JOHN
- Primary Phone\*: (905) 427-9632
- Email\*: [Empty text box]
- Postal/Zip: [Empty text box]
- Language: --- SELECT ---
- Branch Location\*: --- SELECT ---
- Have you ever joined the club before?: --- SELECT ---

Below these fields is a consent section:

By selecting the following, I agree that the Library may..

- communicate with me by email
- post the name of prize winners
- share the name of participants with local school

An "Agree" button is located at the bottom of the form.

A callout box on the right side of the form states: "If available, information retrieved from the Library Card look-up or Virtual Account Registration is prefilled in the RC Registration form."

#### 2.4.5.2 Registrant- Custom

If any custom questions are required as part of the Registration process, these can be added here. Registrant custom questions pertain to the Registrant.

To add questions, select the "Add Questions" button. This will insert a new question row. New questions are enabled automatically, but can be disabled if needed. New custom questions will appear automatically in the Registrant section of the Registration form and will proceed all other existing questions. The sequence of appearance can be changed among the custom questions that have been added, but these question cannot be inserted higher in the series of standard Registrant questions.

Select an appropriate question type for the new custom question. If you choose a select option type (select list, radio, multi-select, checkbox) you will have email [support@countingopinions.com](mailto:support@countingopinions.com) to add the custom list.

### 2.4.5.3 Participant

Registration configuration for the Participant determines the information captured about the participant, including Date of Birth, Gender and/or Grade that enable the classification of participants in groups (as per the Groups configured for the selected Reading Club - see [Groups](#)), and the option to include Membership Numbers for participants (automatic and/or pre-assigned membership numbers defined and enabled in the “Authentication tab”).

The screenshot shows the 'Participant' configuration tab in a software interface. It features a table of fields with columns for 'Locked', 'Enabled', 'Required', 'Protected', 'Varname', 'Prompt', 'Short Name (Response)', 'Type', and 'Mask'. Below the table are sections for 'Membership Number' and an 'Update' button. Four callout boxes provide additional information:

- Callout 1:** Points to the 'Enabled' checkbox for the 'part\_name' field. Text: "Enable and/or require Registrant details to be provided by the registrant."
- Callout 2:** Points to the 'Locked' checkbox for the 'part\_grade' field. Text: "Locked fields can not be altered/edited by lower level libraries and outlets if RCap configuration is allowed at these lower levels."
- Callout 3:** Points to the 'Protected' checkbox for the 'part\_school' field. Text: "Protected, when 'on', prevents under any circumstance information captured for the selected field from being sent back to the browser, including RC Admin views, Batch Admin, and Report views. This information is stored, but can not be viewed."
- Callout 4:** Points to the 'Enabled' checkbox for the 'badge\_id' field. Text: "If Membership Number are to be used for participant registration and subsequent activity login, this option should be enabled."

Locked	Enabled	Required	Protected	Varname	Prompt	Short Name (Response)	Type	Mask	Options
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	part_name	Participant Name	Participant	text		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	part_dob	Participant Date of Birth	Birth date	date	YYYY-MM-DD	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	part_gender	Participant Gender	Gender	select		Set Options
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	part_grade	Grade				Set Options
				Value	Prompt				
				M	Boy				
				F	Girl				
				Value	Prompt				
				PRE	Pre-School				
				JK	JK				
				K	K				
				1	01				
				2	02				
				3	03				
				4	04				
				5	05				
				6	06				
				7	07				
				8	08				
				9	09				
				10	10				
				11	11				
				12	12				
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	part_school	Participant School	School	text		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	part_club	Have you ever participate	Previous participa	select		Set Options
				Value	Prompt				
				Y	Yes				
				N	No				
<b>Membership Number</b>									
Locked	Enabled	Required	Protected	Varname	Prompt	Short Name (Resp	Type	Mask	Options
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	badge_id	Member # Prompt	Membership	text		

#### 2.4.5.3.1 Participant Details

The Default configuration has multi-participant registration enabled. If there is a requirement for all Reading Club participants to register individually, e.g., all must register with their own valid Library Card and PIN combination, simply Disable (uncheck Enabled) the “Number of Participants” question.



The capture of participant details in the registration process identifies the profile of the participant and the attributes for participant classification in groups (if groups are configured for the reading club). For school aged reading clubs if participant school and grade is captured it is possible to partner with the local schools to get participant academic scores to compare before and after results of their participation in the reading club to study if there is a correlation of reading club participation with academic performance.

Participant information can be used in the segmentation and review of participant activities in the reports.

#### 2.4.5.3.2 Membership Numbers

If needed the RApp offers Auto generation and/or the capture of Pre-assigned membership numbers (as defined in the Authentication tab). These numbers are unique, non-personal identification numbers for Registrants and Participants and are used for Activity Tracker login authentication. The following outlines how the Membership Numbers settings for Registrant/Participant Registration and Authentication function and are supported (green) or not supported/recommended (red).

Configuration					Forms		
Authentication			Registration>>Participant		Membership Number Field		
<i>Auto</i>	<i>Pre-assigned</i>	<i>Login with Membership number</i>	<i>Membership Number</i>		<i>Participant Registration Form</i>		<i>Activity Login Dialog</i>
Enabled	Enabled	Enabled	Enabled	Required	Status	Value	Status
No	No	No	Yes	No	<i>Not Supported</i>	<i>N/A</i>	<i>Not Supported</i>
No	No	No	Yes	Yes	<i>Not Supported</i>	<i>N/A</i>	<i>Not Supported</i>
No	No	Yes	No	-	Not Shown	<i>N/A</i>	Shown
No	No	No	No	-	Not Shown	<i>N/A</i>	Not Shown
Yes	No	No	Yes	No	Shown	Auto	Not Shown
Yes	No	Yes	Yes	Yes	Shown	Auto	Shown
No	Yes	No	Yes	No	Shown	Input	Not Shown
No	Yes	No	Yes	Yes	Shown	Input Required	Not Shown
No	Yes	Yes	Yes	Yes	Shown	Input Required	Shown
Yes	Yes	No	Yes	No	Shown	Auto or Input	Not Shown
Yes	Yes	No	Yes	Yes	Shown	Input Required	Not Shown
Yes	Yes	Yes	Yes	Yes	Shown	Input Required	Shown

**Note:** Enabling Membership Number for Activity Tracker login authentication is not as robust as having username and password only enabled for authentication. Since Membership Numbers are generated or assigned within a range of numbers, it is possible that a participant could make an error and enter another participant number or exploit the consecutive pattern of these numbers.

If the Library has Pre-assign Membership Numbers of some sort for its participants, enable the Membership number option and set the option to “Required”. This means that the Library has or will distribute membership numbers to each participant prior to registration and this number will

need to be input at the time of participant registration. The Pre-assigned membership number range must also be set in the “Authentication” tab.

The distribution of pre-assigned membership numbers can give the Library some additional insight with regards to participation. For example, if sub-ranges of the pre-assigned membership number range are given out at specific events or places, a participant that registers using a membership number from one of these sub-ranges indicates likeliness that they obtained the number at that specific event or place.

**Note:** The prompt for “Pre-assigned” membership number can be changed to reflect any name used by the Library for their unique participant numbering system (e.g., Participant ID, Badge ID, Club Card, etc.)

When membership number is enabled (auto and/or pre-assigned), the range for valid Member Numbers must be configured. The system will generate and/or it will require a unique membership number within the range of values.

**Important Note:** Membership number ranges must never overlap. Auto generated and pre-assigned number ranges need to be mutually exclusive of one another for the reading club and/or between any other reading club configured by the Library in the RApp.

To set the membership number range, on the “Authentication” tab change the start and max limits for the Member Number.

#### 2.4.5.3.3 Participant Protected Fields

Participant protected fields are fields of information that are captured at the time participants are registered, but this information is not returned to the browser at any time or under any circumstances, including RC Admin views and reporting.

#### 2.4.5.4 Custom

At the time of registration this is an opportune moment to learn about previous participation and/or the effectiveness of marketing channels to promote the reading club. A set of “custom” questions have been suggested and can be customized and/or enabled/disabled as needed. In the Default these questions are enabled.

**Note:** A custom question builder will be added shortly. Please advise if you have a requirement for a new question and options to be added. Counting Opinions support team will assist you, [support@countingopinions.com](mailto:support@countingopinions.com).

#### 2.4.5.5 Thanks

On submission of the registration form a custom “Thank you message” can be presented to the Registrant. To customize this message, update the “Default” message.

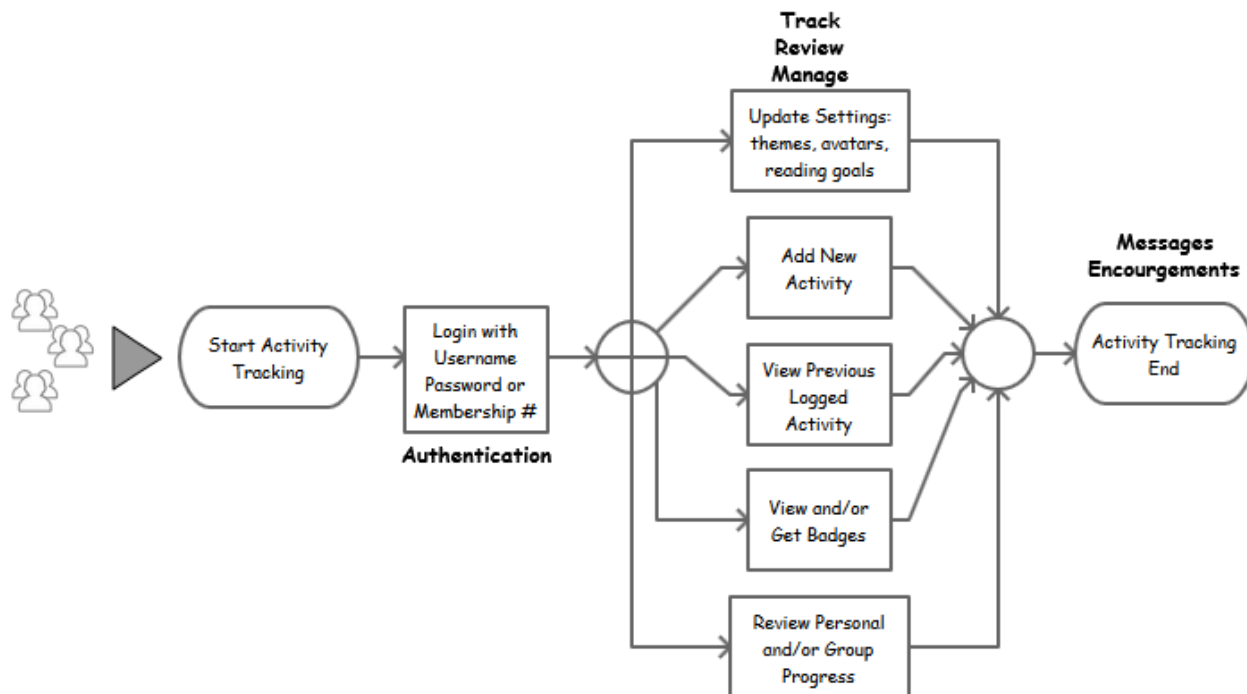
## 2.4.6 Setting Options

Set Options enables the creation, review, update and removal of options related to a select list form question, e.g., Gender: Boy; Girl. Please email [support@countingopinions.com](mailto:support@countingopinions.com) if you would like any updates or additions.

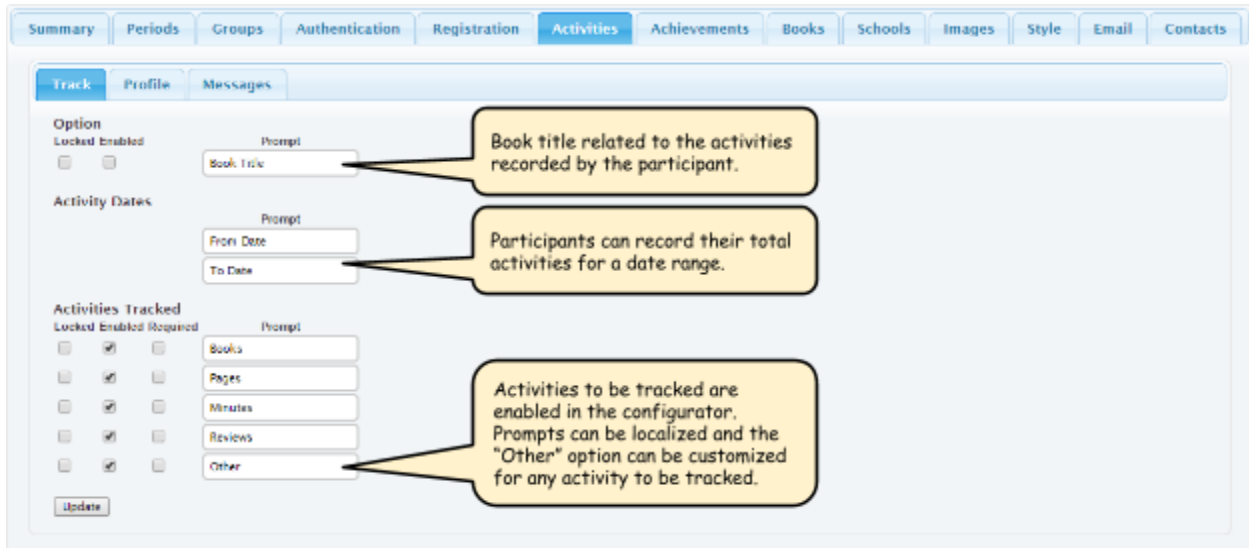
## 2.4.7 Activities

Activity Tracking defines the activities and measures that are tracked for progress, goals and achievements for the Reading Club.

### Activity Tracking Workflow



The Activities Tab includes the configuration options for tracking activities, goal and option settings, and managing messages of encouragement. As shown, these options are presented in three Tabs: Track, Profile, Messages.



### 2.4.7.1 Track

The activities to be tracked, date range and option to track book titles are configured in the Track Tab. Activity measures can be set as required to ensure data is input by the participant. As well, options can be locked so that lower level libraries or outlets can not alter the settings of these activity tracking options.

#### 2.4.7.1.1 Book Title

If “Book Title” is enabled, the participant can search and select book titles listed by Goodreads. The participant should report their activity related to each book title separately. As a convenience, when Book title is selected the Books Read count is automatically set to 1 and page number automatically fills with the page count as provided by the Goodreads API and the book title/version selected.

The Book Title field has a profanity filter to check for the use of profane words in searches and will not return any book titles that contain these words. Similarly the input and submission of book titles that contain profane words is not permitted by the RC App.

#### 2.4.7.1.2 Activity Dates

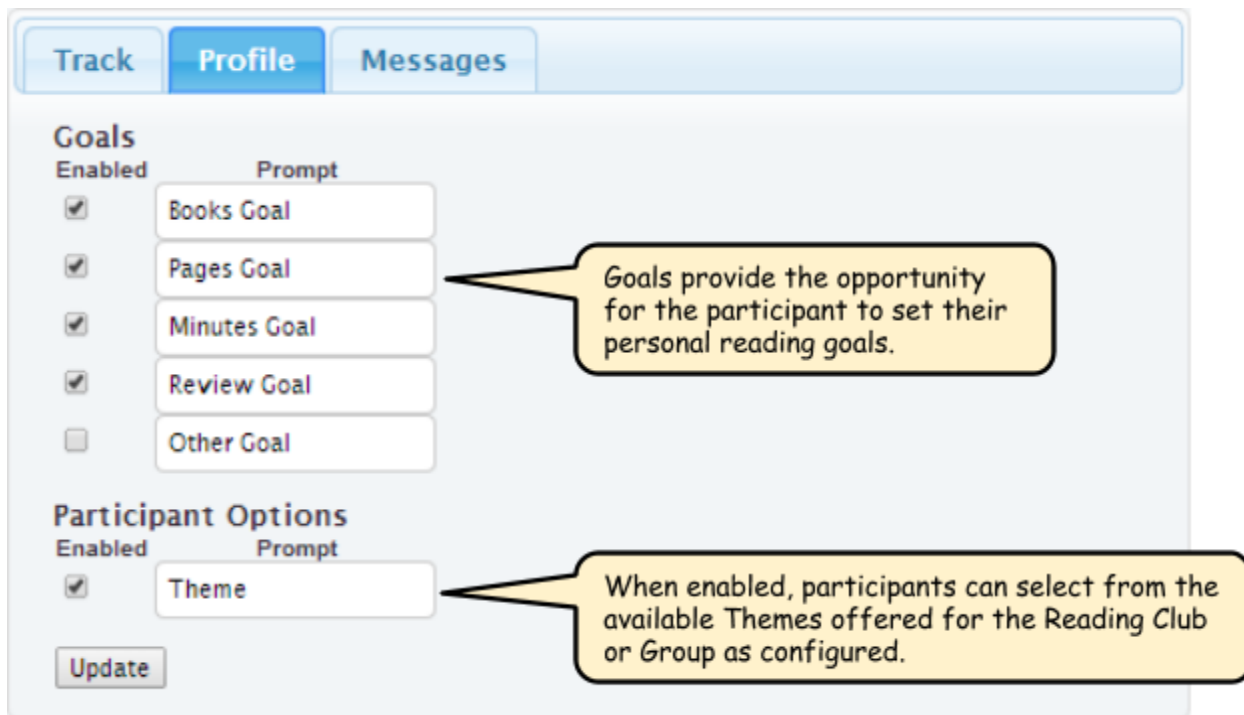
Enabled by default, participants can record their total activities for a date range that they choose. The date range options can not be disabled.

#### 2.4.7.1.3 Activities Tracked

Enabled activity measures are presented in the Activity Tracker and subsequently self-reported by the participant.

### 2.4.7.2 Profile

The Activity>>Profile options relate to the participant: their goals and options.



#### 2.4.7.2.1 Goals

Participants can set their own personal goals relative to the activities tracked. Enabling the Goal relative to the activity tracked will enable the goal questions in the activity tracker for the participant to set their personal goals.

**Note:** The Activities Tracked and Goals fields are essentially pairs. If an Activities Tracked field iprompt is updated/customized, then its pair in Goals should be updated/customized to match and vice versa.

#### 2.4.7.2.2 Participant Options

In the Activity Tracker the participant experience can be personalized by selection of an Avatar or Theme. As a consideration before these options are enabled, Avatar image files need to be added (see [Images](#)) and/or Themes need to be configured and saved (see [Style](#)).

#### 2.4.7.3 Messages

On submission of activities tracked one or more randomly displayed messages can be added to the configuration. The message(s) can express words of thanks and/or encouragement for the participants. One Default message is configured.

### 2.4.8 Achievements

The achievements Tab is where the library can create achievement milestones for participants in the reading club. The conditions for the achievement can be based on attaining or surpassing one-time, recurring and/or repeating reading targets, or for registration or logging activities and/or participation in events.

The Achievement Tab is separated into five Tabs: Badges, Certificates, Loot, Goals, Contests.

Reading Clubs: 1000 Books Before Kindergarten Add Club Periods: Jan - Dec 2015

Summary Periods Groups Authentication Registration Activities **Achievements** Books Schools Images Style Email Contacts

Badges Certificates Loot Goals **Contests**

Achievement Name

Description

Message

Occur  Once  Multiple

Upon registration

On date

Achievement Code

Achievement Conditions

Books Read

Pages Read

Minutes Read

Book Reviews

Enabled  Admin Only

Add Delete

There are 5 types of Achievements: Badges, Certificates, Loot, Goals, Contests. Select the type of Achievement by tab, then configure the conditions for the achievement to be awarded.

Admin Only option, when selected, does not trigger the achievement to appear on the activity tracker, but rather tallies those achievements in the background and they are available as filters through the Batch Admin.

Achievements are configured in each tab depending on the type of achievement that is to be awarded based on the activities of the participant.

Reading Clubs: 1000 Books Before Kindergarten Add Club Periods: Jan - Dec 2015

Summary Periods Groups Authentication Registration Activities **Achievements** Books Schools Images Style Email Contacts

Badges **Certificates** Loot Goals Contests

Achievement Name

Description

Message

Badge

Occur  Once  Multiple

Upon registration

On date

Achievement Code

Achievement Conditions

Books Read

Pages Read

Minutes Read

Book Reviews

Enabled  Admin Only

Add Delete

Name and describe the achievement for reference.

Select the badge to be awarded when the achievement condition(s) is(are) met(or surpassed). Badges are set-up in the Images folder inside the Badge tab.

Set options if the achievement should occur once on a specified date (e.g., End of program date or with the provision of an Achievement code), or multiple times (e.g., 2 or more times or scheduled to occur on a weekly basis).

Define the condition(s) that must be met (or surpassed) for the achievement.

Achievements can be disabled at any time if the achievement should not occur any longer.

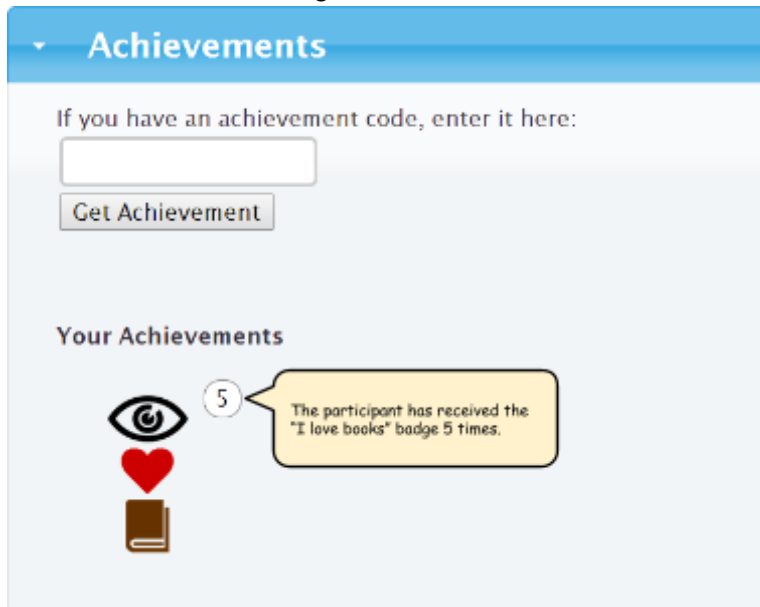
#### 2.4.8.1 Badges

Badges are distinctive images that represent an achievement realized by the participant.

Badges are awarded automatically based on the timing and conditions of the achievement and

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are displayed in the “Achievements” panel of the Activity tracker. Badges can occur once or multiple times depending on the achievement settings. If a Badge can be received more than once, then a counter next to the Badge will show the participant how many times they have achieved the same Badge, as shown.



In the case of events, participants must be given an achievement code to confirm their participation at the event. This code can be input online to collect the award (e.g., badge or certificate images).

#### 2.4.8.2 Certificates

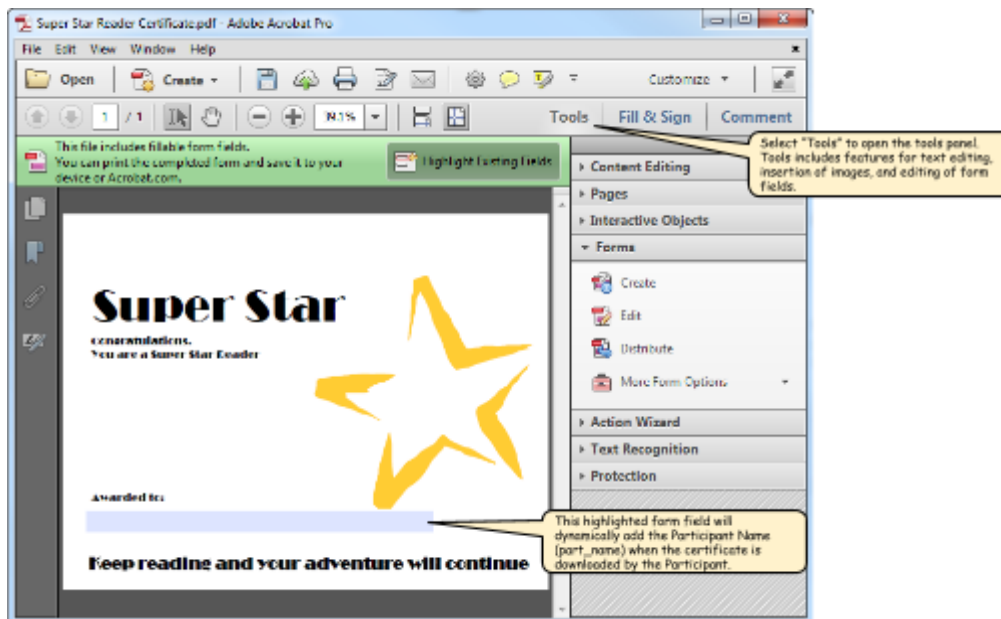
The RCApp supports the awarding of electronic Certificates (PDF documents).

Certificates templates are considered images and are uploaded to the RC App via the Images>>Certificates Tab.

Certificates may be generic in design or it is possible to merge fields in the PDF document to dynamically add Participant information into the PDF when downloaded by the Participant. The PDF content can be created using PDF editor and form fields can be added to the certificate using the form features of the software (e.g. Adobe Acrobat Pro).

#### 2.4.8.2.1 Sample certificate with dynamic form field

Using a PDF creator software like Adobe Acrobat Pro, it is possible to design PDF certificates that include dynamic form fields where information is merged automatically from the RCApp into the Certificate.



The following is a list of form fields and the corresponding placeholder to be inserted in the PDF document for merging.

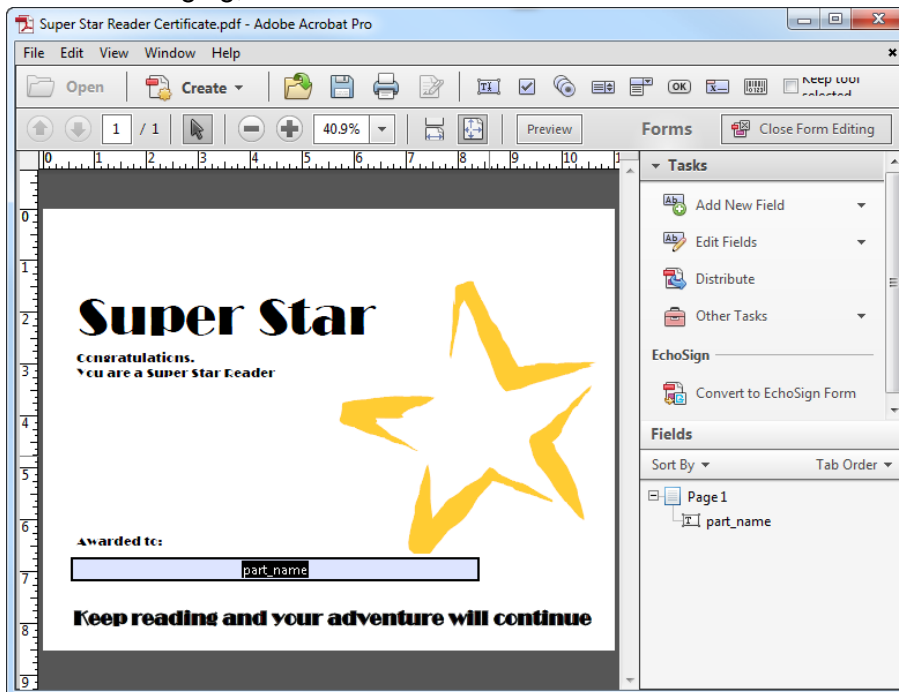
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### 2.4.8.2.1.1 List of Form Field Placeholders

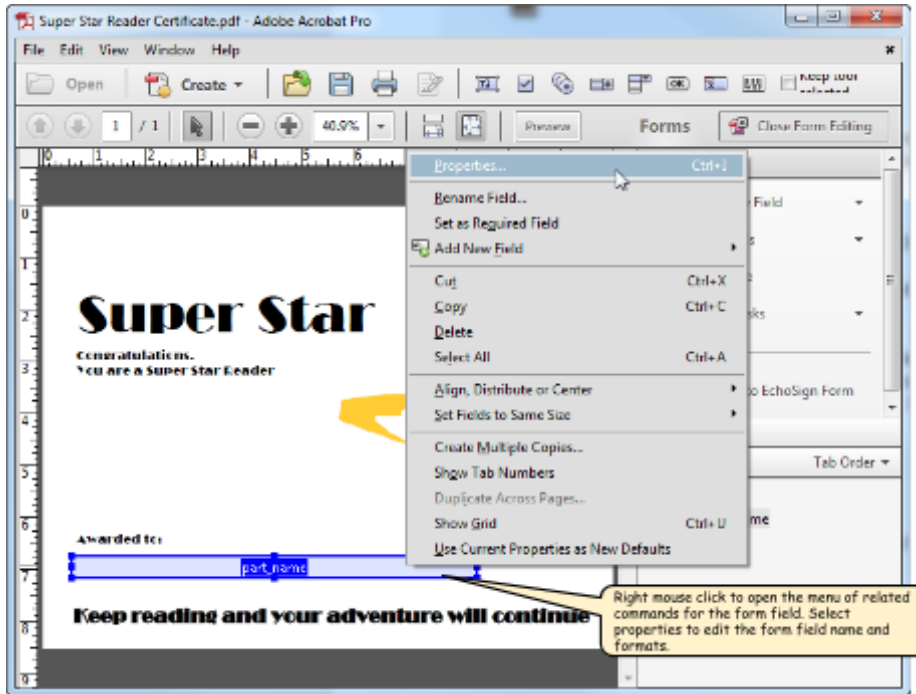
Prompt	Placeholder
Participant Name	part_name
Username	username
Date of Birth	part_dob
Gender	part_gender
School Name	part_school
Grade	part_grade
Library	ORGNAME
Location	LOCATION
Reading Club	rc_name
Achievement Name	achv_name
Achievement Message	achv_message
Books Read	books_read
Pages Read	pages_read
Minutes Read	minutes_read
(Number of ) Book Reviews	book_reviews

Form fields added to the PDF require the name of the form field to be given the placeholder name for merging, as shown.

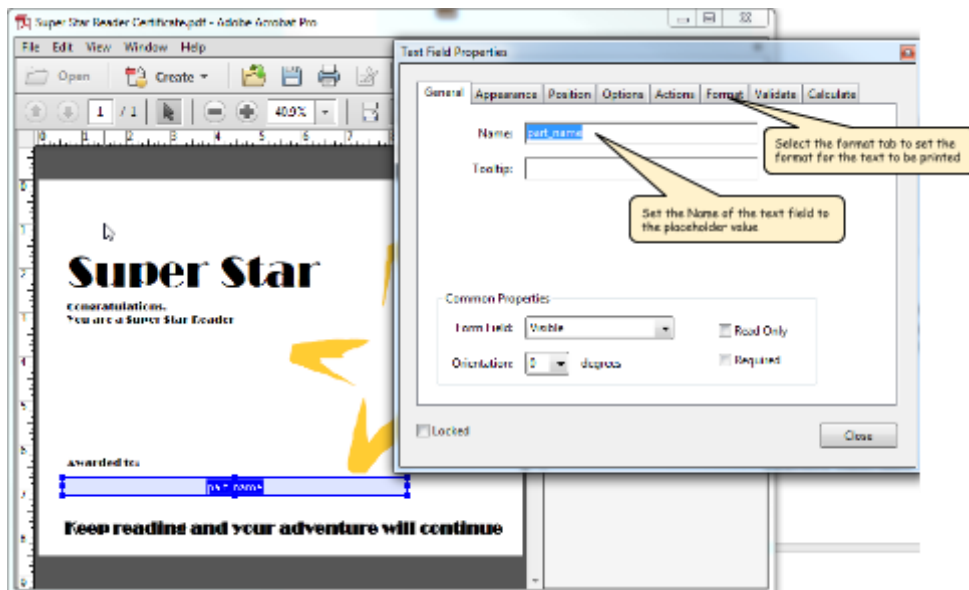


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Using Adobe Acrobat Pro, for example, the form field added to the document has been given the name “part\_name”. This name can be applied on “Add New Field” or using “Edit Fields” and double-clicking the left mouse button (PC) or by with a right mouse click and selecting properties, as shown. Properties enables changes to the format of the form field to be made as well.



In the Text Field Properties dialog, set the Name of the field to the placeholder value for merging. Then in the format tab, set the format of the text for printing.



Save the PDF and then upload the final template through the Images>>Certificates tab, as shown.

#### 2.4.8.2.1.2 Upload Certificate



#### 2.4.8.3 Goals

Goals are the reading targets set by the Library for the Club or Club Group. Goals provide participants a common threshold for attainment. In the Activity Tracker progress toward these

Goals are displayed in the Progress panel in the “Club Goal” tab. Goals can be set in the achievement conditions for one, some or all reading activities.

Goals can be set for the entire club if the Groups do not have any specific achievements selected. If achievements are selected at the Group level when a Goal is added and this Goal applies to one, some or all Groups, then the Goal must be selected at the Group level to apply to each Group as the other achievements have been selected. But care should also be taken to set Goals that apply either to the entire club or as appropriate for each group. If goals are to apply at the Group level the user should be careful not to allow more than one Goal per reading activity, otherwise the Activity Progress Panel will show all Goals that are enabled for the Club if not restricted for each group.

The screenshot shows the 'Goals' configuration interface. It includes tabs for 'Badges', 'Certificates', 'Loot', 'Goals', and 'Contests'. The 'Goals' tab is active. The form contains the following fields and callouts:

- Achievement Name:** A text input field containing 'Read 50 Books - Goal'. A callout bubble points to it with the text: 'Name and describe the Goal, for reference and selection at Group level as needed.'
- Description:** A large text area, currently empty.
- Message:** A text area containing 'Read 50 Books - Goal'. A callout bubble points to it with the text: 'On screen message presented to the participant when they enter activity that meets or surpasses the goal threshold.'
- Achievement Conditions:** A section with five input fields: 'Books Read' (50), 'Pages Read' (0), 'Minutes Read' (0), and 'Book Reviews' (0). A callout bubble points to the 'Books Read' field with the text: 'Set the conditions for the Goal, the threshold, for the participant to reach. Progress to these Goals are shown in the Progress panel of the Activity Tracker.'
- Enabled:** A checkbox that is checked, with the label 'Enabled'.
- Buttons:** 'Update' and 'Delete' buttons.

At the bottom, there is a table with the following data:

Name	Description	Message	Books Read	Pages Read	Minutes Read	Book Reviews	Enabled
<a href="#">Read 50 Books - Goal</a>		Read 50 Books - Goal	50	0	0	0	1

Selected goals apply to the Group similar to other Achievements, as shown.

Groups: **B0-5** ▾ [Add Group](#)

Summary | **Achievements** | Books | Schools | Avatars | Style

Enabled	Name	Books Read	Pages Read	Minutes Read	Book Reviews	Code	Recurring Badge
<input checked="" type="checkbox"/>	Read 5 Books	5	0	0			1
<input checked="" type="checkbox"/>	Weekly Book Reading Contest	0	500	0			1
<input type="checkbox"/>	Read 20 books	20	0	0			0
<input checked="" type="checkbox"/>	Weekly Prize for ages 0-5	7	0	0	0		0
<input type="checkbox"/>	Weekly Prize for ages 6-8	7	0	0	0		0
<input type="checkbox"/>	Certificate Test	5	0	0	0		0
<input type="checkbox"/>	I love reading	0	0	0	0	LOVEIT	0
<input type="checkbox"/>	Star Reader	0	0	0	0	STAR	0
<input checked="" type="checkbox"/>	Eureka Reading Goal	50	0	0	0		0
<input checked="" type="checkbox"/>	Reading Contest	30	2000	800	0		0
<input type="checkbox"/>	Weekly Prize for ages 9-12	7	0	0	0		0

Select achievements to apply at group level. If not selections are made, then all achievements apply to the group. Care should be taken not to offer achievements that do not apply to a Group. Also if one or more Achievements have already been selected at the Group level, then NEW achievements that apply to the group must also be selected to apply. If not selected the NEW achievement will seem not to work for the desired group.

#### 2.4.8.4 Contests

Contests are special achievements in that they give participants entries, one or more, to be selected as a winner of the contest. But, there is no guarantee of being a selected winner of the contest and subsequently receiving the “prize” associated with the contest.

Contests do not allow for backdating of activity for periods that have already transpired. So, for example, if contest entries can be earned on a weekly repeating schedule, then only activity input that applies to the current “active” week would be included determining if one or more contest entries should be given to the participant.

Contest Winners are selected from the pool of contest entries that have been accumulated by all participants. Contest winner selection are made through the Batch Admin interface.

#### 2.4.8.5 Achievement Options

##### 2.4.8.5.1 Occur Once

Achievements that occur once are assessed one-time based on the fulfillment of the set criteria. Once the achievement criteria is fulfilled, the achievement will not be assessed or awarded again for the same participant.

Achievements that occur once are awarded on fulfillment of all set criteria, such as date, upon registration, input of achievement code or any combination of activity thresholds (e.g., 10 books, 1000 pages).

<b>Occur</b>	<input checked="" type="radio"/> <b>Once</b> <input type="radio"/> <b>Multiple</b>
<b>Upon registration</b>	<input type="checkbox"/>
<b>On date</b>	<input type="text"/>
<b>Achievement Code</b>	<input type="text"/>
<b>Achievement Conditions</b>	
<b>Books Read</b>	<input type="text"/>
<b>Pages Read</b>	<input type="text"/>
<b>Minutes Read</b>	<input type="text"/>
<b>Book Reviews</b>	<input type="text"/>

#### 2.4.8.5.1.1 Occur Once Criteria

**Upon Registration** - The achievement is awarded to the participant at the time of registration. No other criteria should be set in combination with this setting.

**On date** - The achievement is awarded to the participant on a specific date. This achievement can recognize certain milestones for the Reading Club (e.g., on July 1st. Congratulations you completed another month of Reading. Are you ready for another exciting month of fun and prizes? Keep recording your activity and unlock the many surprises.)

The “on date” criteria can also be combined with other criteria, such as by “Books Read” threshold (e.g., if on June 30th, YYYY participants have read 10 books they will be awarded this achievement). All activity added up to and on this date is applied cumulatively to assess the participant(s) have met/surpassed the achievement condition(s). Activity added after this date is not included in the calculation of eligibility.

**Achievement Code** - These codes must be unique for each situation/event that these codes relate to. For example, if a participant attended a Group Reading event and they are given an achievement code (e.g., MYSTERY) at that event, the input of this code will grant them the achievement in their activity log (e.g., Mystery Group Badge). This code can only be input once by any one participant (or through the Batch Admin interface).

#### 2.4.8.5.2 Occur Multiple

The Multiple option determines that an achievement can occur more than once. For example daily, weekly or monthly achievements can be created with the Multiple option. To be eligible for the prize the activity submitted by the participant must have been completed within the active period, e.g., today (June 1), this week (Monday, June 2nd to Sunday, June 8th), this month (June 1 to June 30th). Or, an “End after number” can be set to determine after what number of occurrences an achievement will no longer be awarded

##### 2.4.8.5.2.1 Schedule

To schedule a repeating achievement period, select the “Schedule” checkbox. This will open the Repeating Setting dialog box. **1.** Set the start date, **2.** Set the frequency (Daily, Weekly or Monthly), **3.** Set Optional End Dates, and if Weekly or Monthly frequency selected, **4.** Select “Summary” to view a plain language summary of the settings and selections made. This summary is then linked from the Achievement Settings dialog and can be revised as needed, e.g., Summary: Repeat every 1 weeks on Sun, end on 2014-08-31.

Select Schedule to set-up the timing of repeating occurrences

Name	Description	Message	Books Read	Pages Read	Minutes Read
<a href="#">60 Minutes Daily - Contest</a>	60 Minutes Daily - Contest	60 Minutes Daily - Contest You have	0	0	60

#### 2.4.8.5.2.2 End after

Achievement can be earned on a recurring basis up to the “End after” number of occurrences. End after enables the Achievement to occur again after each time the achievement condition is reached up to the set number of intervals.

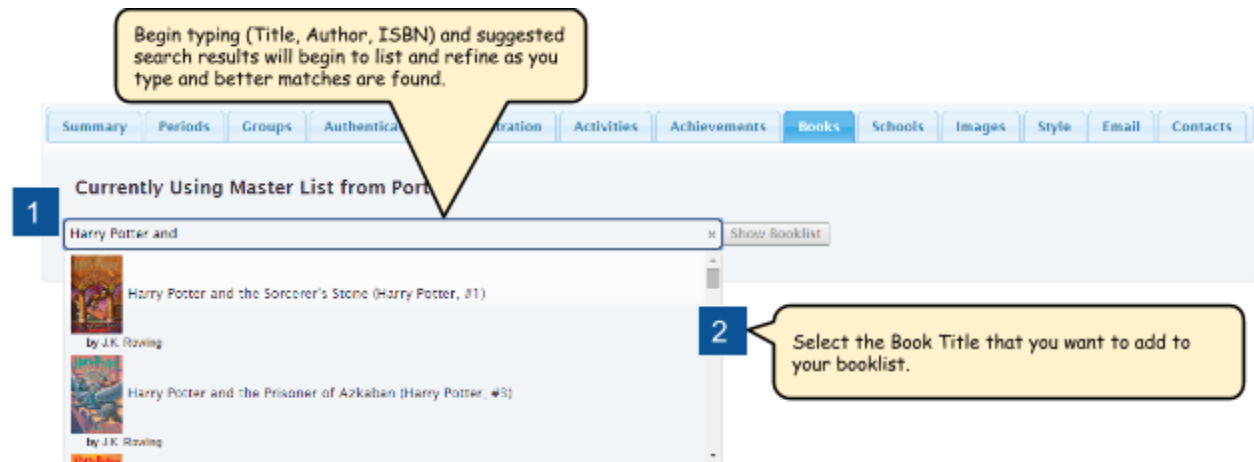
For example, if the Achievement threshold is Books Read=1 and the option to End after is set to 50 times, then the participant can earn up to 50 contest entries for each book read.

### 2.4.9 Books

For the creation of Book reading lists relating to the Reading Club or Group, the Books Tab enables the search (Title, Author, ISBN) and selection of books to create the booklist(s). The Book list assembled for the Reading Club becomes the master list for the groups. At the Groups level, the master list in the default list or books from the Reading Club master list can be selected specifically for each group.

To create a booklist...

1. Search and
2. select the book titles



3. Confirm selections and Add to Book List, then
4. Save the book to the Book List.





**Note:** The Goodreads Book List API has a known issue that when searching for book titles that have an "apostrophe s" ('s) in the title, e.g., "Henry's Amazing Machine", no results are returned. To workaround this issue, remove the 's from the title.

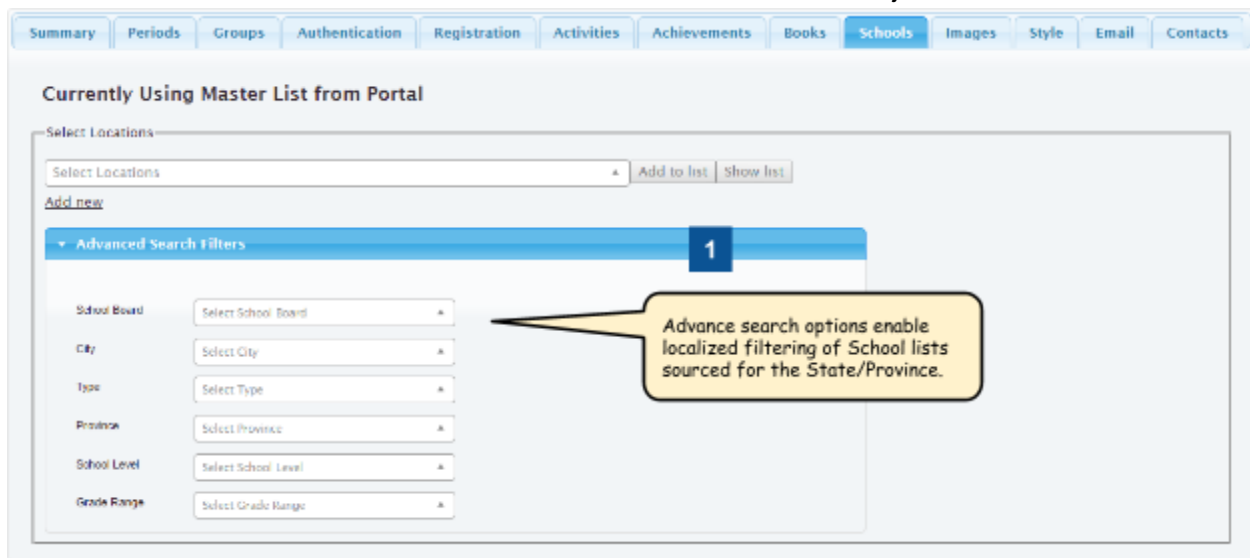
## 2.4.10 Schools

A schools list can be customized for the Reading Club enabling the selection and self-identification of the school that a participant attends. Participation and activity can be reviewed and reported by school if this information is captured on registration.

If cooperating with local schools, this selection of school is necessary to share participant information with the school and get student grades before and after participation in the reading program to research if participation in the reading club may be a factor in student achievement.

To create a school list...

1. Add advanced filters to localize the search results within the local jurisdiction.



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2. Search and/or select School names within the list.

Select Locations

Select Locations [2] Add to list Show list

- [Select all]
- 640921 - Youthdale Centres Ltd
- 642460-Observation & Detention Centre
- 642735-Country Haven Acres
- 643998 - Project Dare Wendigo
- 645106- PSHS Pathway Program
- 645435 Hands Algonquin Family
- 646471 School of Success(CAS)
- 646563-NNDSB Closed Custody
- 646571-Osprey Wendigo Treatment
- 646754 - PSHS Day Treatment High School
- A A Wright Public School

Select the "Select Locations" drop-down. The full or filtered list of schools will be shown. Search or select the schools to be added to the Reading Club school list. Scroll through the list if necessary.

3. After schools have been selected, Add to list.

Summary Periods Groups Authentication Registration Activities Achievements Books Schools Images Style Email Contacts

Currently Using Custom List

ID Number	School Name	School Type	City	Delete
663	Armadale Public School	Public	Markham	X
28533	Ashton Meadows Public School	Public	Markham	X
616722	Black Walnut Public School	Public	Markham	X
58405	Burnwood Public School	Public	Markham	X
833346	Bur Oak Secondary School	Public	Markham	X
583518	Bur Oak Secondary Summer School	Public	Markham	X
71873	Buttonville Public School	Public	Markham	X
66517	Cedemore Elementary Public School	Public	Markham	X
50059	Cedarwood Public School	Public	Markham	X
74527	Central Park Public School	Public	Markham	X
77011	Caledale Public School	Public	Markham	X
123058	Coppard Glen Public School	Public	Markham	X
123809	Cornel Village Public School	Public	Markham	X
249278	David Samki Public School	Public	Markham	X

Select Locations

Wlsmar Public School [3] Add to list Show list

Add new [4]

Advanced Search Filters

On select of "Add to List", selected schools are displayed in the Schools list. If a school was selected by mistake, simply "Delete" it.

After schools have been selected from the available list of school, the "add to list" button will become "active".

If you can't find a school in the "School List", "new" schools can be added to the list.

4. If a school can not be found in the School list, then "Add new" school to your list. Fill out the form and "Submit" to add new school to the school list.

Add a new Location
✕

\* Indicates required fields

School Name*	<input style="width: 90%;" type="text"/>
School Type*	<input style="width: 90%;" type="text" value="---Select---"/>
School Level*	<input style="width: 90%;" type="text" value="---Select---"/>
Grade Range*	<input style="width: 90%;" type="text" value="---Select---"/>
City*	<input style="width: 90%;" type="text"/>
Province*	<input style="width: 90%;" type="text"/>
Street	<input style="width: 90%;" type="text"/>
Postal/Zip Code	<input style="width: 90%;" type="text"/>

#### 2.4.10.1 Homeschooled

If you require a “Homeschooled” option, add a “Homeschooled” location to your school list.

### 2.4.11 Images

The Images Tab enables images to be added for use in the Reading Club. The images added for the Reading Club become the master list of images. An Images Tab is also found at the group level where images can be selected from the master list of images for each specific Group. If an image list is not selected from the Master List for a Group, then the full master list of images for the Reading Club are available for that Group.

Images can be specified for use as Avatars, Badges or Other in the respective Image Tabs.

#### 2.4.11.1 Avatars

Images added in the Avatar Tab comprise the list of Avatars that are offered for participant selection at the time of registration and/or in the Activity Tracker interface.

To add an avatar image, name and describe the image, include the URL where the image is hosted, provide the dimensions for the image and an alt text description for web accessibility.



After adding an avatar image it is listed among the list of images. Images can be selected by name and the name, description and details of the image can be updated, or the image can be deleted from the list, as shown.

#### 2.4.11.2 Badges

Images added in the Badges Tab comprise the list of Badges that are offered for participant rewards in the Achievements Tab.

Adding a Badge image in the Badge Tab is the same process as described for Avatar images. Similarly Badge name, description and detail can be updated by selecting the image by name, or the image can be deleted from the list. Care must be taken when deleting a badge. If the badge has been used as a reward for an achievement, deleting the badge will break the reference to the image. If no badge image is found as a result of a broken link the first in the list of badge images will be used.

#### 2.4.11.3 Certificates (Images)

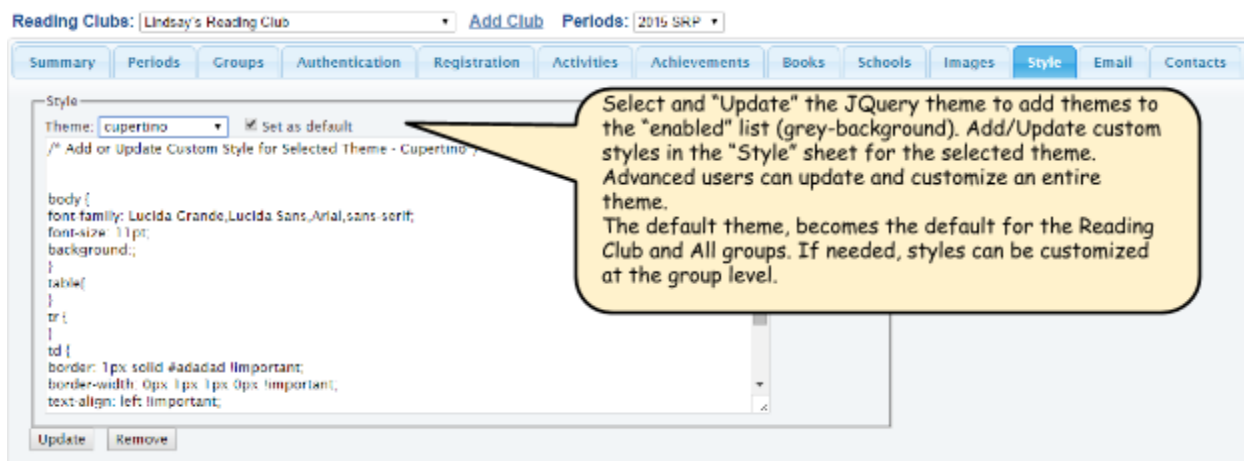
Certificates images added in the Certificates Tab are awarded to participants based on the criteria established for the selected certificate. Certificates are PDF forms and are loaded from your local computer. Please see [Certificates](#) for more information.

#### 2.4.11.4 Other (Images)

Images added in the Other Tab comprise the list of images available for use in Themes and other imagery for the Reading Club and Groups..

### **2.4.12 Style**

The style Tab enables styling of the look and feel for the Reading Club.

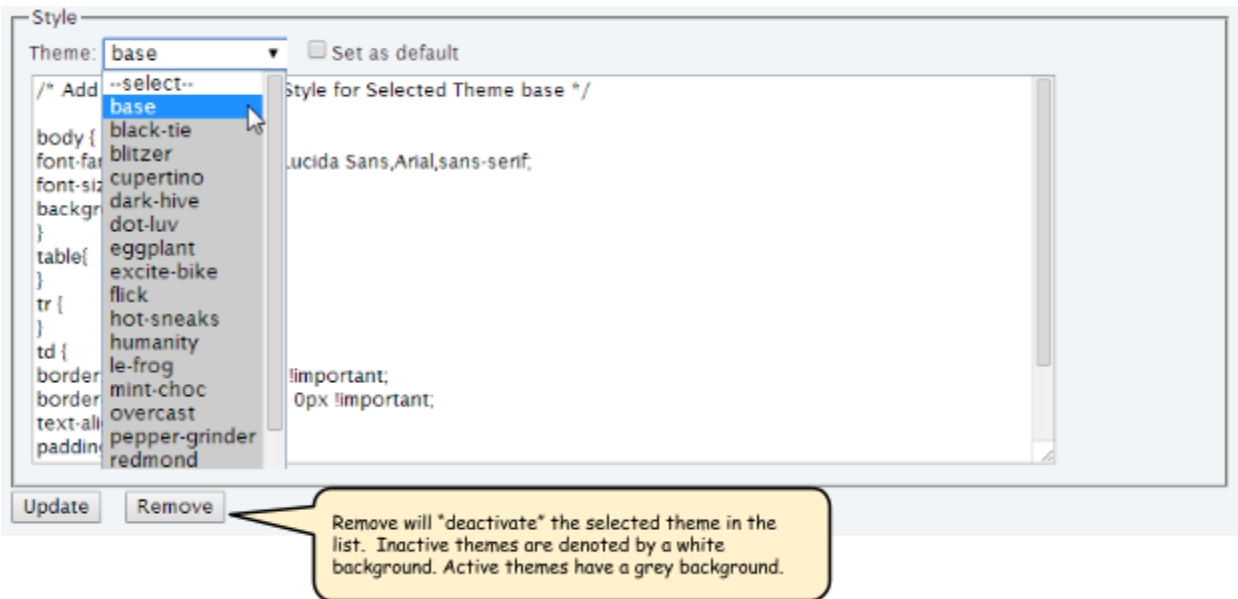


A set of JQuery User Interface themes (<http://jqueryui.com/themeroller/>) can be selected from, and/or custom styles can be added in the style text area. When the themes/styles are updated, these themes are "activated" and the theme name in the select list is given a grey-background. The grey background denotes the theme is active and can be selected at the Group level for the default (one selection) or multiple-theme options for participants to choose from. A default theme can be selected for the Reading Club. The Reading Club theme applies to the Registration and Activity Login views, as well as the Registration forms. The Group styles apply to the Activity view (i.e., when the participant group is known), and/or the participants personal settings are known and their theme selection can be applied.

As shown, the themes with the grey-background have been "updated" and have been made active. These styles are each active for selection at the group level. As well, the theme "cupertino" has been set as the default.

A Style Tab is also found at the Group level to choose from the active Reading Club theme list and to provide an experience specific for each group (select one) or options for participants belonging to the selected Group to select in the Activity tracker for their personal profile. See [Group>>Style](#).

In the "Default" all themes have been "activated". To "remove" a theme from the active list, select "Remove". This will "deactivate" the theme and this theme will no longer be available for selection at the "Group" level. Inactive themes appear with a white background in the theme select list.



### 2.4.13 Contact

For administrative purposes the Contact Tab enables collection of information about the Library key contacts responsible for the Reading Club. Counting Opinions will provide support to two key contacts per Reading Club.

## 3 Administrative views

Registration and activities are recorded and viewable in tabular views

### 3.1 Review of records

#### 3.1.1 Accounts

The Accounts view gives a view of all Accounts that have been created independent of which Reading Club the user may have registered for or participated in, or which period the account was created.

#### 3.1.2 Signups

The Signup view shows the list of account holders that have signed up (Registrant and/or Participant) for the selected Reading Club, Period and Location. The column Reg and Part denote if the account holder is a Registrant (reg=1 or not reg=0) and if the account holder is a Participant (Part=1 or not Part=0) for the selected reading club, period and/or location.

#### 3.1.3 Registrants

The Registration data view includes registrant details captured during registration.

Registrant details:

Library Card, Name, Phone, Email, Address, Zip/Postal Code, Gender, Date of Birth, Opt-in Choices, Past Participation, Source of Awareness

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### 3.1.4 Participants

The Participants data view includes participant details captured during registration.

Participant details:

Name, Date of Birth, Gender, Grade, School, Library Card, (LibCard) PIN, Username, Password, Members (Number), Avatar, Theme, Goals, Reviews

**Note:** Participant passwords are only available to users with the Data Manager role associated with their user account.

### 3.1.5 Activity

The Activity data view includes participant activity details:

From Date, To Date, Book Title, Books Read, Pages Read, Minutes Read, Reviews, Other (Activity), Achievements (Achv Name) awarded, and Achievement Code (Achv Code)

## 3.2 View and Update

Users that have the Data Manager role assigned to their account have the authority to view and update records in the RC Admin views.

Users that have only the Data Input role assigned to their account have the authority to view records. Data Input persons can not update records that have already been created (input).

## 3.3 Using the Data Tables

From the Menu under RApp, select RC Admin. You will now see a menu of links to the tables that make up the Reading Club database.

Registration - The Registration table contains a record of every registration and includes all the data entered by the registrant during the registration process including participant name, username, password, school and grade.

Activity -- The Activity table logs all participant activity and includes book titles, achievement codes obtained and the date they were achieved.

Profile -- The Profile table contains the participants' profile selections including their avatar and their individual activity goals.

Virtual Account -- If a patron chooses not to use their Library Membership Id to logon to the Reading Club app, they can create a virtual account instead (provided the library has enabled this feature in the Configurator under Authentication). The Virtual Account table contains all the contact information collected during the virtual account creation process.

Download Registration/Activity Data - Enables you to download the tables as Excel files to save and use locally.

### 3.3.1 Table Features

For all the tables, data can be filtered using the Reading Club and/or Locations drop-down menus above the tables in the upper left. Only one Reading Club and/or Location can be selected from the menu at one time when the filters are used.

Data can be sorted by clicking on the column headings at the top of the table. The illustration below shows that this table has been sorted by Branch in descending order.

RP - Virtual Accounts		
Branch ▾	Gender	Name
Fourth Location	Female	Sonja Whitfield
Fourth Location	Male	Ian Reid

It is also possible to rearrange the order of the columns by clicking and dragging the column to the desired location.

### 3.3.2 Search and View Features

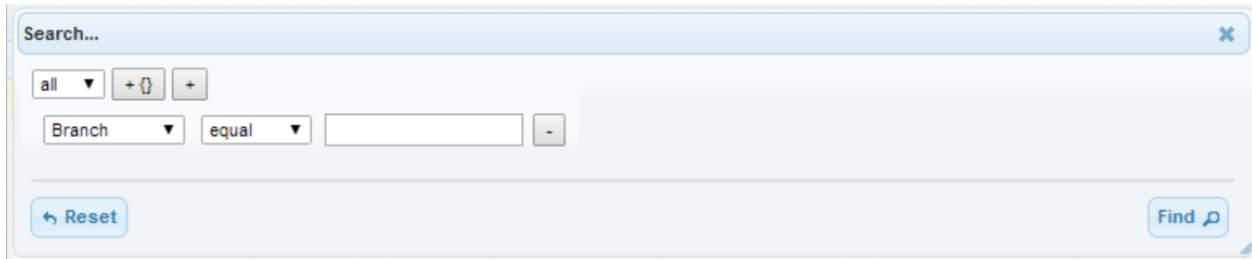
At the bottom right of the table view are a series of icons that perform various functions when



Paper - The Paper icon is for viewing the selected record. Selecting a row and then clicking on the paper icon will display a dialogue box with all of the record details, including password or pin, which are hidden from the grid view.

Magnifying Glass -- The Magnifying Glass icon is for conducting searches in the table. Clicking on the Magnifying Glass brings up a Search dialogue box. Use the drop-down menus to create your search criteria. The Plus and Minus buttons to the right of the search criteria fields allow you to add or remove additional criteria. Click on the Reset button to return the Search dialogue box back to the original settings.





Circular Arrows -- The Circular Arrows button reloads the table (referred to as the grid in this application) back to its original settings. It will remove any filters from the Search criteria or from sorting various columns. The default is that the newest record is at the top of the table.

Moving Square -- The Moving Square icon allows you to export the table. It will export the data into an excel file format. Note that all of the tables (except for the Virtual Account table) will export with the addition of a date stamp column at the end of the table.