

Today Counting Opinions has released a number of updates to the RC Configure, Front-end Registration form and RC Admin views.

## RC Configure

### Authentication Update

The Authentication tab has been updated to support a new Accounts workflow. User accounts are no longer distinguished as needing to be Authenticated by ILS look-up or Virtual Account. This new approach simplifies the Registration process by reducing the number of steps, and streamlines the workflow especially for Registrants that are themselves Participants.

User accounts apply to all users -- Registrants and Participants.

The Authentication tab includes settings for how accounts are created at the time of Registration (Reg) and in turn what credentials are used or are required for both Registrants and Participants to Login.

Registration still includes Authentication via ILS look-up when LibCard or LibCard/Pin and a SIP/API connection is configured/enabled.

At least one combination of libcard/pin, username/password, member\_id must be configured for Login and thus is required for Registration (Registrant and Participant). If all authentication combinations are enabled for Login then all will be required for Registration (Registrant and Participant).

**Reg** determines what Authentication fields are included in the Registration forms for the Registrant and Participant.

**Login** determines what Authentication fields are supported for Login, and thus are required at Registration for Account creation.

**PIN is a protected field.** This information is not available in any RC Admin views or Reports and is not provided back to the browser.

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

Method	Reg	Login	Field	Length	Min	Max	Start	End
Library Card	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Library Card					
Pin Code	<input type="checkbox"/>	<input type="checkbox"/>	Pin Code					
Username	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Username	Length: 0	15			
Password	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Password	Length: 0	15			
Auto	<input type="checkbox"/>	<input type="checkbox"/>	Auto	Members: 20000	50000			
Pre-assigned	<input type="checkbox"/>	<input type="checkbox"/>	Pre-assigned	Members: 2000	5000			

If set as a Reg option, Members numbers can be auto-generated or provided at Registration time, and optionally may or may not be used for Login.

Auto member numbers will be generated for accounts (both Registrant and Participant) Pre-assigned member numbers, if also enabled for Login and/or an option at login time, will be required for Registration (i.e., for both Registrant and Participant). So, if a Registrant is registering 3 participants, 4 membership numbers are required (Registrant (1), Participants (3)).

## Periods

A new Periods tab has been added to the RC Configure interface. The Period tab enables Reading Clubs to be defined by the start/end dates that the Club is offered, and to determine the start/end dates for Registration, as well as the start/end dates for Activity. Periods enable Clubs to recur based on the same configuration and thus creates comparable data, as well as opportunities to follow returning registration and participation.

A period select list has also been added at the top of the RC Configure screen, to the right of the Reading Club select list. The Periods select list offers, by Period Name, the Periods that have been created in the Periods tab for the selected Reading Club. By selecting a period, any updates made to the configuration settings are applied to the selected period.

Reading Clubs: 1000 Books Before Kindergarten [Add Club](#) Periods: Jan - Dec 2015

Period	Period Name	RC Start Date	RC End Date	Reg Start Date	Reg End Date	Acl Start Date	Acl End Date	Enabled	Test Mode
20140101	Jan - Dec 2014	2014-01-01	2014-12-31	2014-05-01	2014-07-01	2014-07-01	2014-08-31	No	No
20150101	Jan - Dec 2015	2015-01-01	2015-12-31	2015-01-01	2015-12-31	2015-01-01	2015-12-31	Yes	No

## Periods - Test Mode

This feature is planned to be released in the coming days. A release note will accompany the release of this feature.

## Re-ordering of Tabs

Tabs for Periods and Groups have been moved closer to the beginning of the tab list. This order better reflects the sequence for planning and configuration of the Reading Club(s).

## Summary Tab Update

### ILS Configuration Summary - Removed

Summary tab no longer includes summary of ILS SIP2 or API information. The date format field has also been removed. These settings and information can only be accessed by Counting Opinions staff.

## Multi-participant Activity Log URL - Removed

Multi-participant Activity Log URL has been removed from the Activity Form list. This feature is being integrated in the Activity form itself. This feature will be offered to Registrants on login and on detection that they have registered multiple participants.

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

Summary | Portal | Feedback | Groups | Authentication | Registration | Activities | Achievements | Books | Schools | Images | Style | Email | Templates | Contacts | CO Admin

Reading Club Name: 1000 Books Before Kindergarten

Description:

enable quick config

Registration Form

Internal URL: [http://www.countingopinions.com/rc/reg.php?rc\\_id=212&key=828b597228c2799779d748bc096d1a](http://www.countingopinions.com/rc/reg.php?rc_id=212&key=828b597228c2799779d748bc096d1a)

Public URL: [http://co.countingopinions.com/rc/reg.php?rc\\_id=212](http://co.countingopinions.com/rc/reg.php?rc_id=212)

Address URL: [http://co.countingopinions.com/rc/reg.php?rc\\_id=212](http://co.countingopinions.com/rc/reg.php?rc_id=212)

Widget: `<iframe src=http://co.countingopinions.com/rc/reg.php?rc_id=212?style=height:700px,width:1000px?></iframe>`

Activity Form

Internal URL: [http://www.countingopinions.com/rc/act.php?rc\\_id=212&key=828b597228c2799779d748bc096d1a](http://www.countingopinions.com/rc/act.php?rc_id=212&key=828b597228c2799779d748bc096d1a)

Public URL: [http://co.countingopinions.com/rc/act.php?rc\\_id=212](http://co.countingopinions.com/rc/act.php?rc_id=212)

Address URL: [http://co.countingopinions.com/rc/act.php?rc\\_id=212](http://co.countingopinions.com/rc/act.php?rc_id=212)

Widget: `<iframe src=http://co.countingopinions.com/rc/act.php?rc_id=212?style=height:700px,width:1000px?></iframe>`

Update | Delete

ILS Summary information has been removed. This information is now only accessible, manageable by Counting Opinions staff.

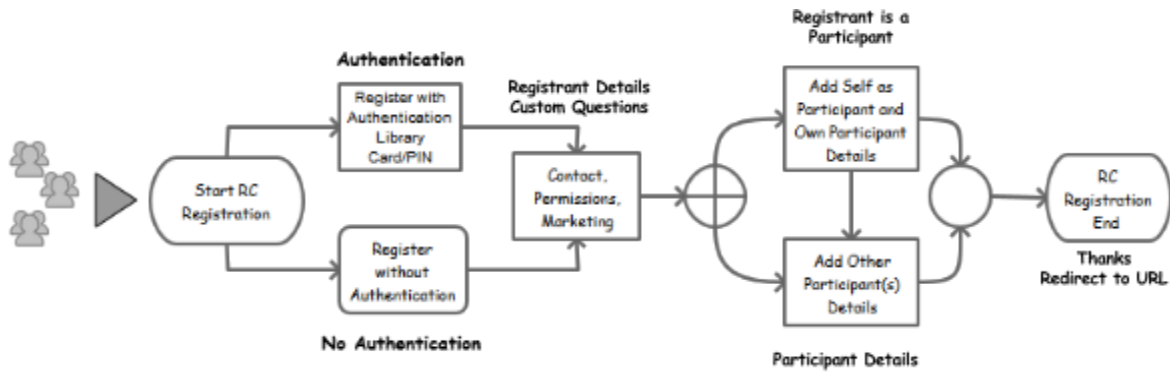
Multi-participant Activity Log has been removed from the Activity Form list. This feature is being integrated in the Activity form itself. This feature will be offered to Registrants on login and on detection that they have registered multiple participants.

## Front End Registration

### Registration Process and Form Update

The Registration form has been updated to streamline and simplify the Registration and authentication process for Registrants registering him/herself, another person or other person(s). The initial on screen prompt to choose Library Card or Virtual Account authentication has been removed and the authentication options for Registration and Login (i.e., future access to the Activity Tracker) have been add directly in Registration form. These changes better reflect the Authentication options (described above), and better support the possible configuration combinations therein, and gives a more simplified and intuitive, step-by-step process for Registrants to understand their options for Registration; whether the configuration supports Registration of him/herself, another person, and/or other person(s) in the selected Reading Club.

The following is a mock-up of the new workflow.



## Registration Example - Library Card/PIN required for Registration and Login

Registrant Registers other Participant(s)

Registrant Registers him/herself and other Participant(s)

Continue to add Participants until all done.

## RC Admin Views

### **Accounts**

Virtual Accounts has been replaced by a new Accounts view. 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.

### **Signup**

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.

### **Registrant and Participant RC Admin View Updates**

Registrant and Participant Admin Views now include all account information related to each Registrant or Participant for the Reading Club, Period, and/or Location which these account holders have registered.

## Activity Log - Update

### **Registrant Login through Activity Tracker**

Registrants can now Login through the Activity Tracker to view their account details and, if they also declared that they are a participant (Registrant is Participant) for the selected Reading Club, they can add/review their activity, as well as view/update their account details, including Password. (Note: Password must be enabled for Reg and Login in the Authentication tab for this feature to be enabled).

## Registrant Only View

Account

Library Card 99999777

Username burry

Password \*\*\*\*

Registrant Name\* Barry M

Primary Phone\* (444) 444-4444

Branch Location\* Fourth Location

I am participating and will track my activities

Have you ever joined the club before? Yes

How did you hear about the program? Select all that apply: I selected

By selecting the following, I agree as described, the Library may...

communicate with me by email

post the name of prize winners

share the name of participants with local school

Did you pick up your information sheet? No

Pre-assigned / Auto 20021

Update

## Registrant is Participant View

Profile

Johnny

Theme

Year Goals

Books Goal

Pages Goal

Minutes Goal

Book Trailer Goal

Other

Search Profile

Progress

Year Goals

0 books read

0 pages read

0 minutes read

0 reviews written

0 other

Record Activity

Past Activity Log

Achievements

Account

Library Card 99999999

Username johnny

Password \*\*\*\*

Registrant Name\* Johnny M

Primary Phone\* (222) 222-2222

Branch Location\* Counting Options (SQRD)

I am participating and will track my activities

Have you ever joined the club before? Yes

How did you hear about the program? Select all that apply: I selected

By selecting the following, I agree as described, the Library may...

communicate with me by email

post the name of prize winners

share the name of participants with local school

Did you pick up your information sheet? Yes

Pre-assigned / Auto 20025

Update

Account view closed by default on Login. Select the Account header to open the section.

## Upcoming Updates - Soon To be Announced

### Periods - Test Mode

- Users created in test mode will be designated test, and subsequent activity added/managed will also be attributed as test data.
- This mode will enable testing of configurations and any test accounts and data created as test will be excluded from reports when "test" mode is disabled.

### Unified Registration and Login

- A single URL will replace the separate Registration and Login URLs for the Registration form and Activity Log forms respectively. This will further simplify the Reading Club implementation process and make more apparent the options available to New Registrants or Past Registrant(s).
- As a past Registrant, these users will be enabled to Login and Register themselves and/or their Participants (previously registered or add new) in Clubs they have previously registered/participated or New clubs that they have not previously

registered/participated. As well, Registrants will be given the option to add activity for any participant under their account and Registered in the active Club.

- This new feature replaces the Multi-participant form that has been removed from the Summary tab under the Activity form section.

Many more updates are coming and will be announced and documented as these features become available.

For more information or clarification, please contact [support@countingopinions.com](mailto:support@countingopinions.com)

Thank you for your confidence.

Counting Opinions.