RC Batch Admin

Summary

The RC Batch Admin enables one or more actions to be performed on selected registrants/participant(s). Actions include add "Activity", send "Email", "Pick Winners", track loot/prize "Fulfillment"

Participants are found by selecting a Reading Club and relevant Period and then using the filters to define selections, and lists are refined by selecting/deselecting records in the various views. Actions can be performed at any time but often only after filters are set and/or one or more records are selected, e.g., adding activity, sending an email, picking prize winners, or tracking loot/prize fulfillment. Performing an action without having selected any filters will apply that action across all participants/registrants/activities.

In the Participant tab, participants can be selected by name to view the participant record details per the Reading Club participant configuration including: name, username, password, age, gender, grade, and group assignment. There is also an option to send an email to the registrant associated with the selected participant. For example, if the participant's password is changed an email can be sent to the registrant confirming/informing them that the password had been changed.

Navigation

To access the Batch Admin interface user accounts must include the Data Manager role. Data Managers will find links to the Batch Admin interface from the Menu, in the navigation banner along the top of the page, linked from the RC Admin main page, and in the Reports right hand navigation panel..

Getting Started

There are three parts to the Batch Admin.
1. Actions
2. Filters
3. Views

An action can be applied to all selected records -- which are determined by the scope of the filter settings and any records selected using the filters and views.

Actions

Actions are the functions of the Batch Admin that are applied to the selected records.

Activity

Activity adds/updates activities for the selected participant(s) (corresponding to the activities configured for the selected Reading Club). The activity/update is applied to all selected participants and any achievements that result from the added/updated activity are calculated and updated accordingly.

Activity records can be audited by Updating these activity records to "Test". Records set as Test are not included in the participant's regular activity and are not included in the calculation of achievements. Thereby, if an error occurs an activity record can be removed by setting the record to "Test" in the "Update Activity" tab of the "Add/Update Activity" dialog (as shown), Subsequently the Activity action can be used to add a correct activity record.

See "Regular and Test Data" and "Update Activity" for more information.

Email

Email sends an email/notification to the selected participants and their corresponding Registrants. Only registrants providing an email address and confirming agreement to receiving email are included in the send to list for the outgoing email message. After sending an email, the recipient list can be reviewed via the email tab.

Pick Winners

Pick Winners enables the selection of Winners from selected participants. Eligibility can be defined by a pre-existing achievement (i.e., Contest), or ad hoc from a set of participants (1 or more) that are selected in the Batch Admin using filters to sort eligible participants. Once the records are selected, Pick Winners enables the setting of the number of winners, a prize name, and notes (e.g., staff instructions/information) to be written relevant to the prize for later reference (e.g., for fulfillment).

Fulfillment

Fulfillment applies to participants who have been awarded physical prizes/loot. When Loot or Prizes are awarded to a participant the related fulfillment attribute in the activity record is set as "Pending" (i.e., awaiting fulfillment). When the participant(s) receive the loot/prize, the record can be updated to "Fulfilled" (i.e., received) through the Fulfillment action to record receipt.

Filters

Setting filters and/or search terms returns a list of matching records. Use any of the Views (Participant; Activity, Fulfillment; and Email) to see the results of the filter selections. Selecting additional "FIlters" will add records to the existing selections until you reset or exit the application.

For the best results and performance, we recommend setting specific filters that return only those records needed -- not filtering thoroughly may return too many results and slow processing.

Locations

If Branch Location is enabled for Registration the participant records can be filtered based on the Registrant selection.

Reading Club

If more than one Reading Club is active the selection of the Reading Club determines the scope of the participants, the registrants associated with these participants, the activities and associated achievements.

Period

By default the most recent period is selected. Previous periods are available.

Group

If the Reading Club is comprised of more than one group, the selection of a group can help to refine the scope of the participants returned.

Activity

Activity date ranges return the participant records for the activity completed according to the "To date" as recorded in their activity log.

Achievement

Achievements awarded are listed by name as configured for the selected Reading Club. Selection of Loot or Contest type achievements enable identification of Participants and the activity record associated with the selected achievement. Viewing achievements confirms that the Participant has or has not been awarded the achievement, Loot or Prize being claimed.

Search

Search parameters and search terms can be set to find one or more participant records. Searches may return one or more participants depending the number of matches found for the search term provided (e.g., Participant Name searching for a partial name, or Library Card number searching for a specific Library Card).

Views

Views, provide results based on filters and actions performed. Views also enable refinement to the selected participants/records.

Building Lists

Views can be built upon, meaning that until the Reset button is selected, filter results are appended to the View as new filter settings are applied. It is therefore possible, for example, to filter by participant names, usernames, library cards (depending on the configuration of your Reading Club), etc. As each new filter is applied, the results append to the Views.

Build a list

Set a filter (e.g., filter by username, selected period, or group)
In this example, the filter is set to find a unique username using an exact search term.

Next, the search term is changed and Filter is selected. The new record is added to the View, as shown.

It is possible to build lists in the manner outlined above or use any combination of filters to return the wanted results. In the View(s), if there are records that are unwanted, these records can be deselected and excluded from Actions.

Participant (Record) Selection

The Views enable the selection of participant records. Records can be selected/deselected by checking/unchecking the row containing the record.

On select of an "Action", only those records selected in a View become the subject of the action.

View (Button)

The selection of the View button will load the results in the current view that match the filter criteria unless another view contains records, in which case selecting the View button in the active will load the corresponding records from the other View(s) that met any previously set filter criteria.

Reset (button)

Reset clears the records from the selected view and only the selected view.

Participant Details View

While in the Participant view, Participants can be selected by name (or participant ID, if Participant name is not available), to view and/or update the participant's information collected at the time of registration. The information available corresponds to the questions for that Reading Club presented to participants at registration time. Note: if a question is *not* required then it is possible that some fields may be empty/blank when viewed in the Participant Details view.
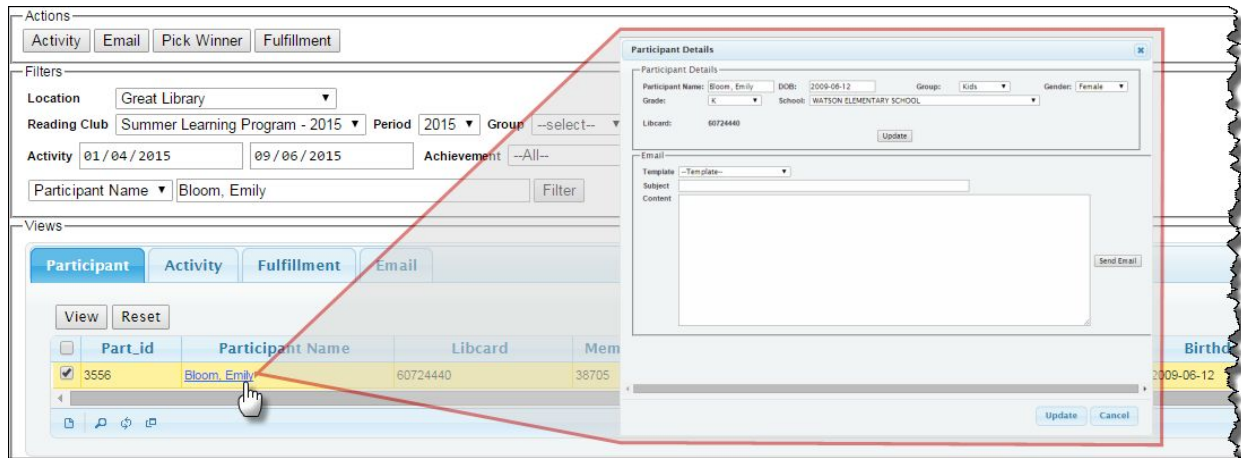
Other than the Participant's name, all the participant details can be updated in the Participant Details view including the Group assignment determined at the time of Registration. Note: if information related to the Grouping of participants is updated (e.g., Date of Birth, Grade, and/or Gender), the Group is not automatically updated in this view and must be manually changed to correspond with the new information provided. This enables group assignments that are exceptions to the normal "rules" defining participation in a group.

Reset Password

In those configurations where Username and Password are required for Login, the Participant Details view enables a lookup and/or change to the participant's password. The account can also be set to enforce a reset upon the next login attempt by the user. If changing a password on behalf of a user request, we recommend that the identity of the user is verified (e.g., have them show ID or confirm their last book title read/recorded). before making any changes. Otherwise we recommend setting the account for an automatic reset upon next login.
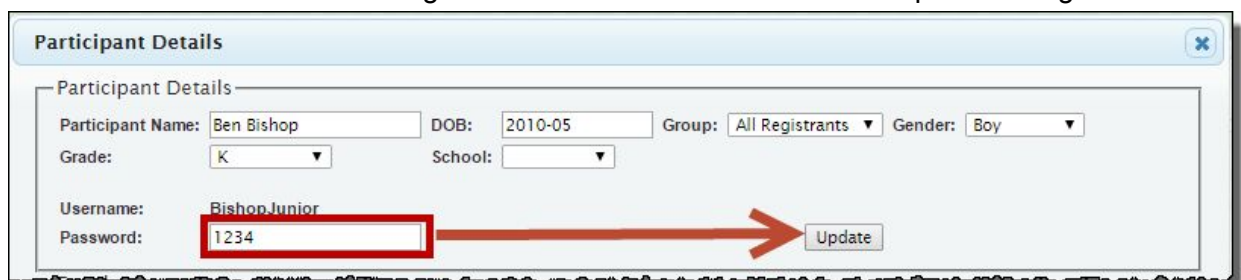
Actions

Activity

Add Activity

Activity can be added for one or more filtered/selected participants using the Activity action.

The Activity (button) is used to add/update activities for all selected/filtered participants, and if none were selected/filtered, then all those that match the current filter settings. If the target participants can be defined effectively by the filters alone, this is a quick way to add activity for multiple participants in one action.

Before adding Activity to a selected participants you can review existing activities, by selecting the View button in the Activity tab. View will fetch the activity records for the selected participant(s) and gives an opportunity to confirm already added activity. If the activity has been already added, then the participant can be deselected in the participant view.

Deselected participants are not included in any further actions.

When finished with the target participant(s) list, select the "Activity" action button. This opens the "Add/Update Activity" dialog (as shown below). The fields displayed correspond to the configuration for the Reading Club selected in the filters section. Proceed through the form, then select "Add" to add the activity for the selected participants.

Note: The Add/Update Activity dialog shows a count of the selected Participants. Confirm that this is accurate compared to your selections/expectations. Note: results are paginated if there are more than 30 records, expand the number of results that appear on one page or paginate through to review selected participants.

A group of four participants attended a group story time event. They all listened to the story "The Giving Tree" by Shel Silverstein. The book has 64 pages and was read aloud to the group in 30 minutes.

Select the "Activity" action button. The Add/Update Activity Dialog opens, as shown.

Add/Update Activity

4 Participants

Each of the selected participants will have the activity input here added to their activity record. Select Add to complete the process.

Add Activity   Update Activity

Title: The Giving Tree

From date: 2015-06-01

To date: 2015-06-01

Books read: 1

Pages read: 64

Minutes read: 30

Reviews:

Achv code: --Select--

Add   Close

Achievements are awarded to participants according to the requirements of the achievement(s) and whether the participant has met/surpassed the requirements of the achievement(s). When the participant logs in next time to view their activity they will find the activity and achievements have been added and awarded on their behalf.

After adding/updating activities the results can be viewed/confirmed in the Activity view.
For example, Activities can be retrieved by Filtering based on the Activity date or the "To date" indicating the date that the activity was completed. As shown, the activity added in the preceding example for the four participants is viewed in the Activity view and the achievement(s) awarded to the participants are also shown with these new records.

Regular and Test Data

In the filter settings, if the Show setting is not Test (Show = Regular) then the data shown is Regular data (i.e., not Test data) otherwise when Test is enabled (Show = Test), then any data captured while in "Test Mode" is available for Filtering/Viewing and Actions. This feature enables data to be created for testing purposes. "Test" data is flagged in the database and can be accessed separate from "Regular" data.

Update Activity

Participant activity records can be Updated by filtering/selecting the target participant/activity data and selecting the Activity action button. In the Activity dialog, choose the Update tab and then set the matching records to/from Regular to Test (as shown). Activity records marked as Test arel not be included in Admin and Report views, unless specifically selected. Test data is not included in the calculation of Regular achievements.

If activity data has been incorrectly input, it can either be offset by adding a value (to offset the original mistake) -- this value may be negative or positive. Also, activity records can be changed to "Test", thereby removing this record from the participant's regular activity.

Using the Show "Test" setting, Test data (Activity records marked as Test) can be found in the Batch Admin and updated to Regular, except when the participant/registrant are marked as test.

Email

Email can only be sent to account holders providing an email address and confirming agreement to receiving email communications. Often participants are not asked to provide their email address so their Registrant can receive email communication on their behalf (with appropriate permissions and an email address). Registrants will receive one email for each appropropriate participant associated with their account and selected in Batch Admin.

When the action Email is selected, the Email to Participant dialog box will open. The Email action first checks the active View (Participants, Activity, Fulfillment or Email) if any records are being viewed and what, if any, selections have been made in the View. Email check will use these selections to determine the Registrant(s) and Registrant Email address(es) for sending the email(s). If records are being viewed and no records are selected in the View, then no Registrant will be found to send an email to. If Filters are set and the Filter results have not been loaded into the view, the Email action will use the scope of the Filter settings to determine which Registrant(s) and Email address(es) are to be used for sending the emails.

As shown below, the Participant view shows details about the Participant including the Registrant related to their record and the email address for that Registrant, if an email address was provided.

Example

Two participants (Brenda and Brandon Walsh) are selected, as shown in the above screen capture. These participants are related to one Registrant (Jim Walsh). As shown below, when selecting the Email action the Email dialog opens. Here the email to be sent to the Registrant is crafted and sent. Registrants will receive an email for each participant within the scope of their account and/or the selections made in the Batch Admin active view.

An existing email template can be selected or a custom email can be crafted including the addition of Placeholders that fill information directly from the RC App database relevant to the details of the Reading Club, Period, Registrant(s) and Participant(s) that the outgoing email applies to.

Placeholders

The following is a list of Placeholders that can be added in the body of the email to fill information directly from the database and provide custom content per participant/registrant details and/or club details per the selected period.

| Placeholder	Refers to:	Notes:
[ORGNAME]	Organization name	Name of the Library Location that manages the Reading Club
[ORG_EMAIL]	Organization email	General email for the Library Location that manages the Reading Club
[LOCATION]	Library Location Name	Library Location (Branch) selected at the time of Registration
[SP_HOURS]	Library Location Hours Open	Library Location (Branch) times of day open each day (e.g., M,Tu,W, 9am-6pm; Th 9am-10pm; F 9-12am; Sa, Su 10-6)
[ACHV_DESC]	Achievement description	Description of the Achievement set in RC Config and related to the filter settings and selected participant record(s) and achievements therein
[ACHV_MESSAGE]	Achievement message	Achievement message set in the RC Config and related to the selected filter settings and participant record(s) and achievements therein
[ACHV_NAME]	Achievement name	Achievement name set in the RC Config and related to the selected filter settings, participant record(s) and achievements therein
[RC_DESC]	Description of Reading Club	Description of the Reading Club set in RC Config and related to the selected filter settings
[RC_NAME]	Reading Club name	Name of the Reading Club set in RC Config and related to the selected filter settings
[PERIOD_NAME]	Period	Period name set in the RC Config and related to the selected filter settings
[RC_START_DATE]	Reading club start date	Reading club start date pertaining to the Period selected in the filter settings
[RC_END_DATE]	Reading club end date	Reading club end date pertaining to the Period selected in the filter settings
[REG_START_DATE]	Registration start date	Registration start date pertaining to the Period selected in the filter settings
[REG_END_DATE]	Registration end date	Registration end date pertaining to the Period selected in the filter settings
[ACL_START_DATE]	Activity start date	Activity start date pertaining to the Period selected in the filter settings
[ACL_END_DATE]	Activity end date	Activity end date pertaining to the Period selected in the filter settings
[PART_NAME]	Participant Name	Participant name provided at the time of registration
[REG_NAME]	Registrant Name	Registrant name provided at the time of registration
[REG_EMAIL]	Registrants email	Registrant email provided at the time of registration

Notes:

Placeholders added in the email must be bound by the square brackets as listed above.

If a record is missing data for the chosen placeholder, the email will still be sent but the placeholder will be removed rather than filled.

Sent Emails

On send, the Email to Participant dialog box summarizes the emails sent to the Registrant and shows a "View Emails" button.
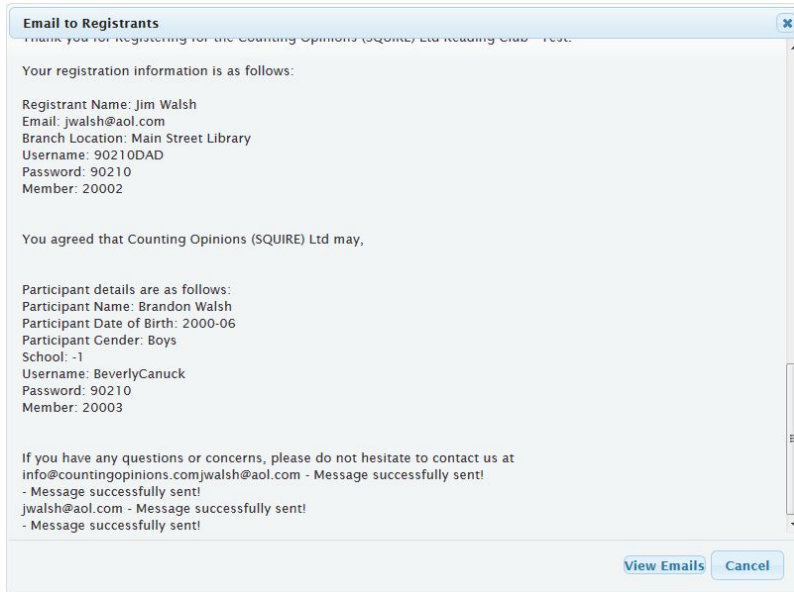
The "View Emails" button on select closes the Email to Participant dialog and makes the Email view active in the Batch Admin and lists the email records for the each participant.

Pick Winners

The Pick Winners action enables the selection of Winning Participants based on Contest achievements, contest entries defined by activity thresholds that must be met/surpassed to be awarded a chance to win the contest. Alternatively, Winning Participants can be selected ad hoc using any combination of filters, e.g., Activity completed during the past week (i.e., based on the activity "To Date"), selection of any achievement(s), or selection of a group of participants that participated in an event at the Library.

To Pick Winners from participants that have been awarded a contest achievement, with the Participant or Activity view active select the "Achievement" by name in the Filter options, then select filter. All participants or participant activity records that have the selected Achievement will be returned. The scope of participant records that are returned can be refined by Group, if the reading club has more than one group. Or it may be sufficient to select an Achievement by name since that achievement may only be awarded to members of one group. Activity dates (the date the activity was completed, the "To date") can also be used to refine the Winners that are selected. For example daily, weekly or monthly draws can be managed by setting the required date range (e.g., June 1 - June 7, 2015). Again, if achievements have been configured to be awarded during a specific range of dates (e.g., June 1 - June 7, 2015) then it is sufficient to select the achievement by name to return only those participants awarded that achievement.

Example

For example, a weekly contest drawing is needed for those participants that have received Contest achievements for the "Read it and Reap it" reading contest. The Activity View is selected and the Filters are set to return those participants that have completed activity between June 1 and June 7, 2015 (From: 2015-06-01, To: 2015-06-07) and the Achievement, "Read it and Reap it" is selected. To view the participants and activity records that fulfill the filter settings, select Filter to display these records to the "Activity" view.

To exclude participant records from inclusion in further actions, deselect the record in the View.

The scope of records that winners may be picked from is determined by the Filter Settings and the Records Selected in the corresponding View.

Proceed and select the Pick Winners action button. The Pick Winners dialog box will open, as shown.
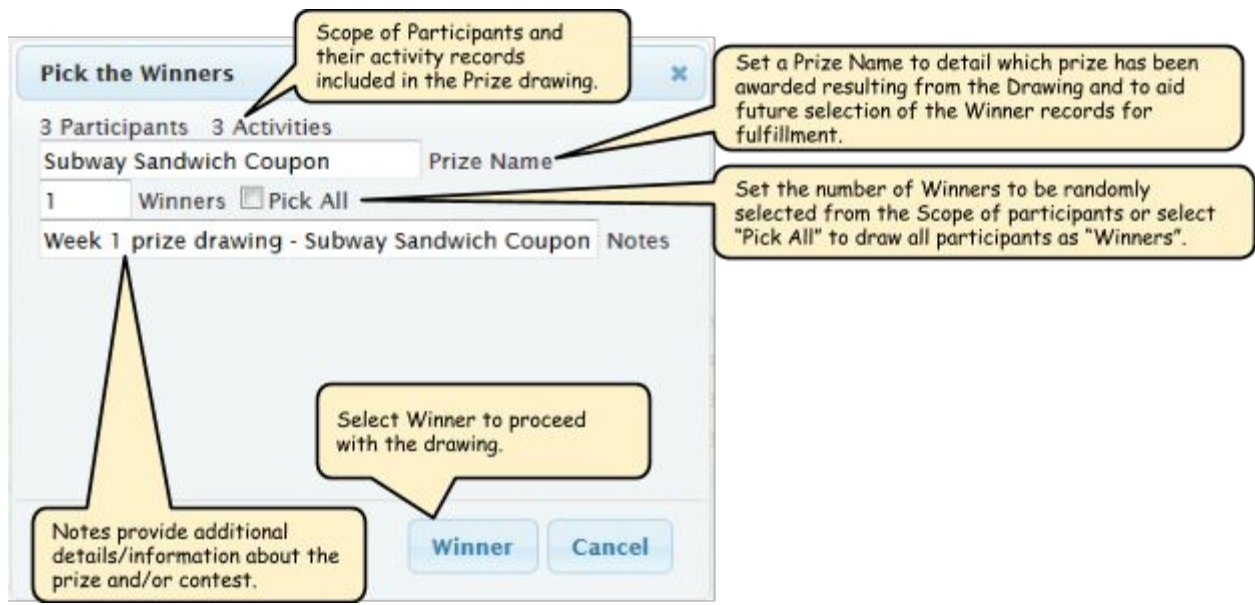
Set a Prize Name to detail the prize awarded to the Winners. This information aids future record selection in Batch Admin and provides a reference for staff to deliver the correct prize to the Winners when they visit the Library to pick-up their prize.

Set the number of winners to determine the number of winners to be drawn from among the eligible participants or select "Pick All" to draw all participants as Winners.

Add notes that provide additional details about the contest, prizes and/or instructions for fulfillment of the prize.

Note: if the View is changed (e.g., Activity View selected, then Participant View selected) this can change the scope of Participant records that are used to Pick Winners from, as shown.
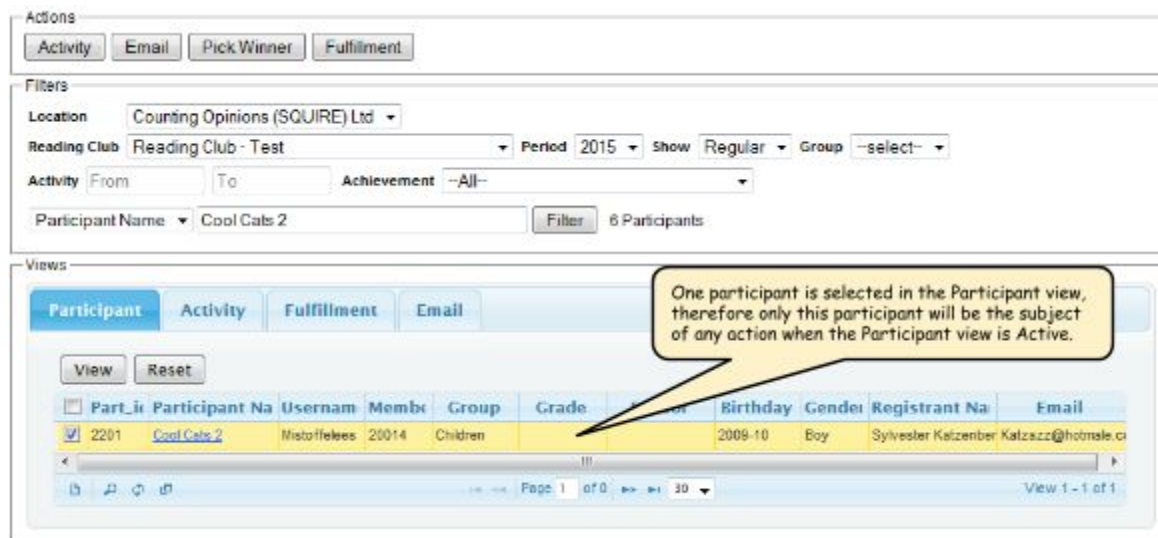
On select of "Winner" in the "Pick the Winners" dialog box, the winner(s) are generated and a summary of results are provided, as shown, Franklin Turtle is selected randomly as the winner for this week's contest.

<u>View Winners</u>

Selection of "View Winners" after picking winners, shows the Fulfillment view and the resulting selected winners. Winners are automatically set with Fulfillment "Pending".

<u>Notify</u>

Selection of Notify opens the Email to Participant dialog and automatically identifies the Registrants that provided their email address and opted-in for email communication relative to the Winning participant(s). An email template can be selected or a new message can be crafted to be sent to the Registrant for each of the winning participants. See Email for more information.

Fulfillment

Fulfillment is the action related to delivery of Loot and/or Prizes to patrons awarded by Achievements or Pick Winners.

Example

For example, Franklin Turtle, was picked earlier ("Pick Winners" example) as a Winner of the "Read it and Reap it" contest for the week, June 1st to June 7th, 20015. The winner was selected on June 14, 2015. To find the record for this activity, the Activity date range is set to include the June 14th date, the winner for the "Read it and Reap it" contest is drawn, and the

Participant name is searched. These filter parameters return the specific participant that should receive the loot/prize. This is often the type of search to be conducted when the participant has arrived to pick up their loot/prize (as shown).

Otherwise, the appropriate activity record can be selected among other activity records that are returned as a results of searching by name only, or achievement name, for example.

To mark the record as "Fulfilled" when the participant(s) is(are) given the loot/prize, the "Fulfillment" action is selected. This opens the Fulfillment dialog.
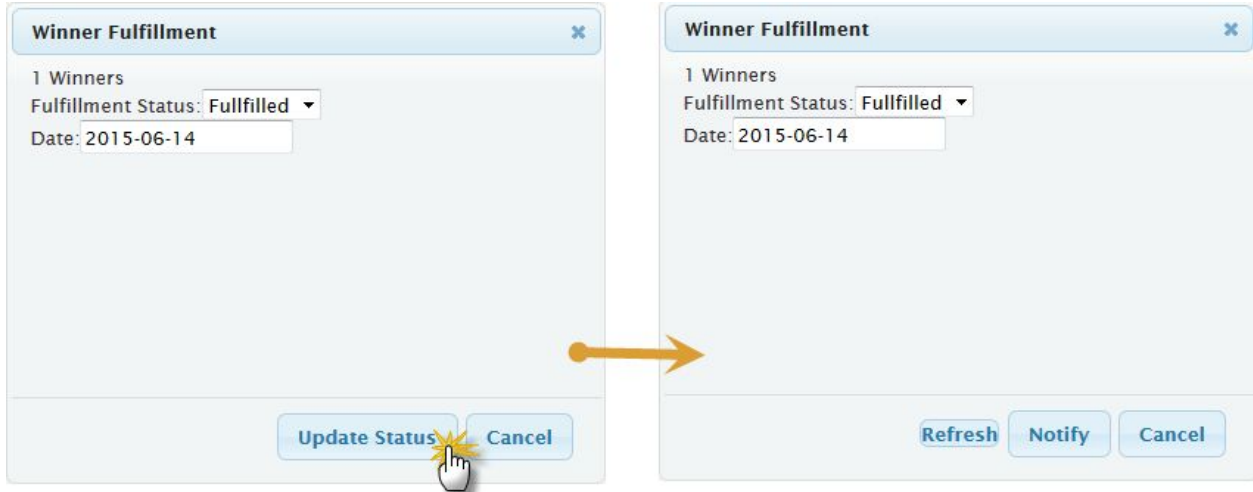

Set the Fulfillment Status to "Fulfilled" and select the fulfillment date (this date can be in the past). Select Update Status (as shown)

After selection of "Update Status", the Winner Fulfillment dialog offer the options to "Refresh" or "Notify" or Cancel.

Refresh

Select Refresh to review the activity record and confirm that the Fulfillment Status has been updated to "Fulfilled" and the "Fulfillment Date" has been set. As shown, the activity record is updated.

Notify

Selection of Notify opens the Email to Participant dialog and automatically identifies the Registrants that provided their email address and opted-in for email communication relative to the Participant(s) which have had their loot/prize fulfilled. An email template can be selected or a new message can be crafted to be sent to the Registrant for each of the participants to confirm delivery/receipt of their loot/prize. See Email for more information.