Hours & Locations Administration Notes

This is a summary of how to use the admin interface, including:

- an overview of the administrative options available to you
- a glossary of terms used in entering hours and locations
- examples of how to complete core hours tasks
- what to consider in handling new hours requests

Administrative Options

1) Edit Locations

From the Dashboard, click on the Edit Locations button. On this page, you will see an overview of the locations currently listed on the hours portal. To change the table's display order, click the column heading you wish to sort by.

You can **edit any location by clicking on it**. Editable fields for each location include:

- Description (affects the portal)
- Address (affects the portal)
- Phone (affects the portal)
- Building Construction/Emergency Closure Notices (affects the portal and the location's widget)
- Widget Note (affects the location's widget)

Note: **To add or delete a location, please contact Systems.** As these changes require updates to the code itself, we will need to handle this process internally.

2) Edit Date Ranges

From the Dashboard, click on the Edit Date Ranges button. On this page, you will see an overview of the date ranges that have been set to indicate when an hours change occurs for one or more locations. To change the table's display order, click the column heading you wish to sort by.

You can **edit any range by clicking on it**. Editable fields for each range include:

- Description (for admin use only, does not affect the portal)
- From (start date, affects the portal)
- To (end date, affects the portal)

From the Edit Date Ranges page, **you can also add and delete ranges**. Click Add Date Range to add a range; select a range, then click Delete Date Range to delete it.

Remember to only delete a date range if it is in the past (the yellow background indicates when a range's end date has passed) or you are sure no hours are currently depending on it. **Deleting a range will delete all hours associated with it.**

Note: When you do edit a range's start or end date, please double-check all the hours associated with that range to ensure they have updated in the way you expected.

3) Edit Hours

The Dashboard itself is the main launching point for editing the hours. On this page, you will see all the sets of hours that have been entered for each location. To change the table's display order, click the column heading you wish to sort by.

You can **edit any set of hours by clicking on it**. You can also filter by any combination of location name, library/reference hours type, hours category or specific date range to pinpoint the hours you need to find. Simply click Clear to remove the filters.

Once selected, depending on the category of the hours you are editing, you'll either see hours for individual dates or for Monday-Sunday days of the week. In both cases, hours can be set as an opening/closing time pair, as "Closed" or as "TBD" (To Be Determined).

From the Dashboard, **you can also add and delete hours**. Click Add Hours to add new hours; select a set of hours, then click Delete Hours to delete them.

Note: We have built in some auto-assistance with adding new hours. Please **fill out the Add Hours form left-to-right and top-to-bottom** to ensure this is triggered correctly.

Glossary of Terms

When using this interface, there are some term definitions to know.

Location: The location refers to the location name. The listing for "Library" means the Library (ASRS, AArP, SciEng) area of IKBLC.

Type: The type refers to either Library or Reference hours. Most hours entered from this administrative level will be the Library type. Library hours appear on the portal and signage/bookmark, whereas Reference hours only appear in the hours widgets.

Category: The category refers to how the hours will appear on the portal (i.e. how they are colour-coded for the monthly calendar). Please note that this is *not* meant to be identical to how the University labels these ranges, as we are trying to keep the categories flexible and minimize the number used for the sake of our users and administrators. The categories currently available are:

- **Regular**: intended for weekly regular hours during fall/winter

- **Intersession**: intended for weekly regular hours during official intersession periods in spring and summer

- **Summer**: intended for weekly regular hours in either summer term (alternating with Summer Alternate category when a weekly hours change should be noted, as explained in the "Handling Hours Requests" section below)

- **Summer Alternate**: intended for weekly regular hours in either summer term (alternating with Summer category when a weekly hours change should be noted, as explained in the "Handling Hours Requests" section below)

- **Exam**: intended for weekly exam hours in December and April

- **Holiday**: intended for individual holiday dates such as Thanksgiving, Remembrance Day, Victoria Day, Canada Day, BC Day and Labour Day and special, longer holiday date ranges (i.e. those included in December and Easter breaks)

- **Exception**: intended for hours changes that occur during a Regular, Intersession, Summer, Summer Alternate or Exam hours period (e.g. non-weekly exam hours, mid-term/reading break hours, special closures)

Date Range: A date range is a start/end date that has been set to indicate when an hours change occurs for one or more locations. Please use applicable keywords in the date range description to indicate what the range is for (e.g. location name, category name).

Hours Widget: The hours widgets pull in information from the database to be shown on other pages (e.g. branch websites). If you click on Hours Widget in the navigation, then select a location, you will see the views currently available for displaying hours outside the portal.

Administrative Examples

Here are a few examples of ways you might use the interface to make changes.

Example Task #1: Updating existing hours
e.g. future Easter hours initially entered as TBD have now been set

When a date range and hours for a location already exist:

1. From the Dashboard, filter for the location, type, category and/or date range you need.
2. Click on the hours result you want to edit.
3. Update the times for the dates or days of the week affected.
4. Click Save Changes.
5. Double-check that these hours are now reflected on the portal by opening the location's panel and navigating to the appropriate month/year. (You may also want to double-check the hours in the corresponding print view.)

Example Task #2: Updating an existing date range
e.g. last year's Remembrance Day holiday date needs updating to this year

When a date range already exists:

1. From the Dashboard, click Edit Date Ranges.
2. Filter for any relevant description keywords or simply scroll to the range you want to edit.
3. Click on the desired date range.
4. Update the Description and the From and/or To dates (from left to right) as needed.
5. Click Save Changes.

6. Navigate back to the Dashboard and filter for the date range you have just updated.
7. Check the results (by clicking on the hours sets) to ensure the update has been applied correctly.
6. Double-check that these dates are now reflected on the portal by opening the location's panel and navigating to the appropriate month/year. (You may also want to double-check the hours in the corresponding print view.)

Note: **We anticipate this is how most new hours will be entered**. For example, last year's spring intersession range will be *updated* instead of entering a new spring intersession range. The benefit of this approach is that new hours will not have to be created for each location; rather, existing hours will only need to be updated.

Example Task #3: Adding a new range and new hours
e.g. a special 1-day closure has been requested for a location

When both a new date range and new hours for a location are needed:

1. From the Dashboard, click Edit Date Ranges.
2. Click Add Date Range.
3. Enter a Description using applicable keywords (e.g. location name, category name) and set the From and To dates (from left to right).
4. Click Save Date Range.
5. Navigate back to the Dashboard and click Add Hours.
6. First, select the appropriate Location, Category and Type.
7. Now select the new Hour Date Range you just created.
8. Add in the new hours for each date or day of the week.
9. Click Save Hours.
10. Double-check that these dates and times are now reflected on the portal by opening the location's panel and navigating to the appropriate month/year. (You may also want to double-check the hours in the corresponding print view.)

Handling Hours Requests

When a new hours request comes in, these are some questions you can ask to determine how they should be entered.

Are the hours an update that happens yearly or an all-new request?

If this is a regular update - with data already entered for the previous year - you'll want to go through the process of *updating* the existing range and the existing related hours (Example Task #2 above).

If the request is completely new, you'll probably want to *create* a new range and new associated hours (Example Task #3 above). But first, determine:

If the request is all-new, does it fall during an existing Holiday or Exception range?

If the request falls during an existing Holiday or Exception range, this means hours already exist for this particular date (or dates). Simply go to the existing set of hours and *update* the times that have changed (Example Task #1 above).

If the request falls during a non-Holiday and non-Exception range, go ahead with *creating* the new range and new associated hours (Example Task #3 above). Finally:

When creating an all-new request, what category should be applied?

If the request falls during a Regular hours period, you will likely use:

- *Exam*: if the request is for new weekly exam hours
- *Exception*: if the request is for less than a week of hours changes (e.g. non-weekly exam hours, mid-term/reading break hours, special closures)

If the request falls during an Intersession or Exam hours period, you will likely use:

- *Exception*

If the request falls during a Summer/Summer Alternate hours period, you will likely use:

- *Exception*: if the request is for less than a week of hours changes
- *Summer* or *Summer Alternate*: if the request is for a weekly hours change (see note below)

***Note*: Summer hours come with an important additional consideration of which category (Summer or Summer Alternate) should be applied for a location during a particular date range.**

Because summer hours may change multiple times for a location, each subsequent range of summer hours for a location needs a different category (to create the alternating colour effect on the portal's monthly calendar, as demonstrated below for June).
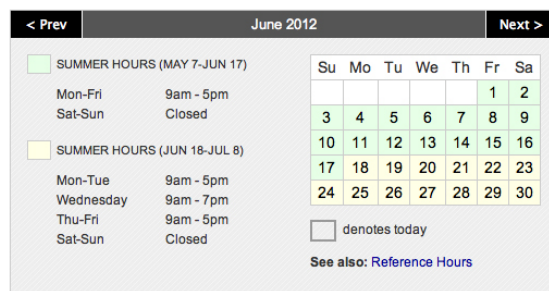
For example, in 2011 the Music Library had 4 unique sets of hours between May 9th and August 19th (i.e. Summer Session Term 1 & 2).

Set 1: May 9-June 19 = Summer (no previous category to consider, so start with Summer)
Set 2: June 20-July 10 = Summer Alternate (b/c previous category was Summer)
Set 3: July 11-July 31 = Summer (b/c previous category was Summer Alternate)
Set 4: August 1-August 19 = Summer Alternate (b/c previous category was Summer)

So the key to entering summer hours is to consider *if* previous summer hours have been entered for a specific location for the year and, if so, what category was used. Then apply the *opposite* category to the next range of hours for that location.

To illustrate, here are some diagrams of summer scenarios you may encounter and how to set up the correct colour coding with categories.

When a location follows the official Term 1 & Term 2 dates:

Summer Session Term 1	Summer Session Term 2
Category: Summer	Category: Summer Alternate

When a location has two sets of weekly hours during Term 1:

Summer Session Term 1	Summer Session Term 2
Hours Set 1: Summer	Category: Summer
Hours Set 2: Summer Alternate	

When a location has two sets of weekly hours during Term 2:

Summer Session Term 1	Summer Session Term 2
Category: Summer	Hours Set 1: Summer Alternate
	Hours Set 2: Summer

When a location has two sets of weekly hours during Term 1 AND Term 2:

Summer Session Term 1	Summer Session Term 2
Hours Set 1: Summer	Hours Set 1: Summer
Hours Set 2: Summer Alternate	Hours Set 2: Summer Alternate