

How to set up SeTLS

Congratulations on joining the SeTLS family!

Now you have your new database, please follow the steps below to get started.

If we have migrated your data

Check Three Toys

Check all toy details. Search for the toy in the 'select toy box'.

- Does the correct toy or item come up in the dropdown?
- When you click on the toy from the dropdown, does this go to the correct toy page?
- Is this toy visible in the Toys (list) (first option in the 'Toys' menu)?

Check Three Members

Check their details. Search for the member's name in the 'select member' box and press go.

- Does the member's name appear in the dropdown?
- When you click on the members' name does the link take you to this member's profile page?
- Is this member visible in the members list (main list when clicking on 'Members' under the 'Members' menu)? Are the members' profile details correct? (When on the member profile page, click on 'profile' on the left green navigation panel to check profile details).

Configure your Toy Library

- Member types (under Members Tab)
The names of your member types are automatically generated from the members data, but the specifics are not. You will need to update these fields to reflect how your toy library runs (loan length, fees, etc.)
- Categories (Toys tab)
These will come with just the codes from your data, you will need to add descriptions and any other relevant info. By default toy categories will be set with 0 renewals and non-reservable.
- Calendar

Set "usual opening hours" – these are the days and times your toy library is open regularly (ie every Saturday 9am-11am, every second Thursday 3:30pm-4:30pm). Open

hours are in 24 hour time, so for an afternoon/evening session please make sure you are using the right format (15:30-16:30 for the example above). This information is also published at the top of your public facing calendar to help people find when you are open.

- Set “usual volunteering sessions” – these are the shifts your members can nominate for. The description is a text box format, so while you can record times here it will not automatically sort them, and the calendar will populate in the order listed here. So if you have multiple sessions in one day (i.e. 9am-10am, 10-11am), make sure you add them in order, if you have different kinds of volunteer roles,
- Generate “actual opening hours” – this can be done individually, or over a period of time. There is no bulk delete function for calendar, so recommend starting small while you get used to how it all works.
- Generate “actual volunteering sessions” – also individually or bulk. CAUTION: volunteering sessions can be layered over themselves, so if you accidentally refresh after generating, you will get double ups.
- Load your library's logo into SeTLS so it shows on the home page and any labels that support the logo.
- Financials
 - Fee types and Transaction types are found in the Toy Library tab. Transaction types are the method of payment, your toy library will have CASH (please leave the capitals) and Visa prepopulated. Fee types are the reason for charge/payment, and Annual fee, Automatic duty levy, Miscellaneous, Missing piece fee, Overdue fee, Party pack/party hire, and Toy rent fee come prepopulated and are linked to automatically created charges. Add any more as needed.
 - In toy library settings you can configure the details for overdue fees, missing pieces, toy hire (including turning them on/off)
 - Also in Toy Library Settings, you can set ‘favourite transaction types’ – these are the two options that will pop up when you generate a charge and can help streamline your payment process. You can still take payments from other methods - i.e. if you have CASH and Square as your two favourite transactions, but someone pays via Bank Transfer, you can process this through the Transactions screen.
- Toy Library Settings
 - Check that your details are correct. Invoices and contract reminders, as well as any important emails from us, go to the emails listed here, so please make sure they are checked regularly.

This is also where you can configure your public facing page, using the home page text and options for displaying additional links and toy images.
 - ID style – this is how SeTLS knows how to record and interact with a toy.
 - Ttc formats include the category as part of the toy code (i.e. R123 rather than just 123), and will use the same number across categories (i.e. A1, B1 and C1).
 - 1toN allocates unique numbers to each toy, regardless of category (so A1, B2, C3).
 - Nostyle allows you to chose whatever code you want to use as long as it is not currently being used by another toy.

- Assorted settings – there are many of these! Take some time with this page and work out what best reflects how your toy library runs.
- Automatic emails - found under Toy library tab. Templates are editable, and you can turn off/on what you want to be going out

This should be enough to get you running. Additional steps to get the most from your SeTLS system:

- Data Clean
 - Data Clean Central is found under the toy library tab, but each category will also be found in its relevant page (ie Suburbs under Members has a button for Data Clean).
 - Data clean is a way to tidy up duplicates of information that often occur in other systems. For instance, you may have Vic Park, Victoria Park, and Victora Park (because we're all human and make errors!) in your suburbs table – these can all be bundled up into Victoria Park easily through the Data Clean function. Because SeTLS uses drop down lists, it is recommended to keep these as tidy as possible (and it helps with your statistics!)
- Logins
 - If you have “send welcome email on sign up” enabled, new members are automatically sent log in details when they are signed up, but members migrated from an old system will need to have these sent out. Let us know if/when you would like to send out a bulk login for your members, otherwise you can do it on a case by case basis as members come into the toy library (potentially a good opportunity to verify emails and advise your members of the new system).

Logins can be sent individually from the member's page, under the Username/Password tab, with either a short or welcome email. Note: there is the option to set the password for a member. Please only allow members to do this themselves, do not offer to set passwords for them, as this is a potential data breach.
- Login Levels
 - All members migrated across will automatically be set to “normal” login level. To change members (e.g. committee) to a higher level of access, go to their member page, profile tab, and edit. In this screen it is also called a “Security Level”. It is recommended to keep the number of people with admin level access as low as you can, and make sure you remove access from those who no longer need it.
- Suburbs/Councils
 - When signing up a new member you must select from the suburb menu, so it is worth having it populated with a reasonable number of suburbs in your area, even if you do not currently have members from that area. You can also create Councils and link Suburbs to them, so you can have a report of which councils your members are coming from (very handy for grants).
- Locking members
 - Once a member has expired, or if you decide that they need to be locked for any other reason, you can lock them via the member page, in the Membership History tab. Members can be unlocked, just make sure you have the correct membership type selected in the drop down menu. Once a member is locked, they will stop being

searchable in the member select field and in the current members list, but can still be found in Members – Other Member Lists (green button top left corner) – Locked members.

If you are starting with an empty database

Configure your Toy Library

- Search for the administrators that we have created for you and check their member details are correct. Remember: you can remove or add Administrators now you have access to the system. (When on the member profile page, click on 'profile' on the left green navigation panel to check profile details).

- Member types (under Members Tab)

Create your member types to reflect how your toy library runs (loan length, fees, etc.)

- Categories (Toys tab)

Create your toy categories. You will need to add descriptions and any other relevant info. By default toy categories will be set with 0 renewals and non-reservable.

- Calendar

Set “usual opening hours” – these are the days and times your toy library is open regularly (ie every Saturday 9am-11am, every second Thursday 3:30pm-4:30pm). Open hours are in 24 hour time, so for an afternoon/evening session please make sure you are using the right format (15:30-16:30 for the example above). This information is also published at the top of your public facing calendar to help people find when you are open.

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There is much more to do in SeTLS and we encourage you to explore and discover what you can use best for your organisation. Please also join the [SeTLS User Discussion Group](#) on Facebook to talk to other people using SeTLS and get advice and tips from them too!

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