



Staff Portal

Quick User Guide v.1.2

Sign up	1
Log out	6
Reset Password	7
Updating Your Profile	9
Claiming a Library	10
Editing a Library	11
Creating a Library	15
Creating a System	17
Editing a System	21
Creating a Region	21
Editing a Region	23
Reports	24
Orders	26

Sign up

To create your staff account, go to the [staff site](#) and click the purple **Log in** button in the top right corner.

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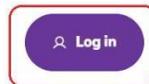


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- Home
- About
- TD SRC Brand
- Run the Program
- Resources
- News
- Contact Us

Welcome

TD Summer Reading Club is Canada's biggest, bilingual summer reading program for kids of all ages, all interests, and all abilities.

Whether you're a long-time participant or new to the program, you'll find great resources here to help you create the best kids summer reading experience ever!



If you have a smaller screen, the **Log in** button may be in a different location (see below).



- Home
- About >
- TD SRC Brand
- Run the Program >
- Resources >
- News
- Contact Us



Welcome

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Whether you're a long-time participant or new to the program, you'll find great resources here to help you create the best kids summer reading experience ever!



From the login screen, click on the **Create account** button.

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Log in

Welcome to TD Summer Reading Club.
Please log in or create a free account.

Email *

Password *

[Forgot Password?](#)

Log in

Create an account

The library management portal will allow you to register your library, system, or region in the program, as well as to view reports and place your annual supply order.

Create account

In the **Create account** window, enter your **full name**, **work email** and **password**. Your password must meet the following requirements:

- Nine or more characters
- Upper and lowercase letters
- At least one number
- At least one special character

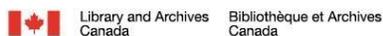
Please note that you can only have one account attached to an email. This includes staff and parent/caregiver accounts.

Check the box at the bottom of the screen confirming you have read the [Privacy Statement](#) and [Terms and Conditions](#).

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Create account

Full name *

Work Email *

Password *

Repeat password *

I have read and agree to the [Privacy Statement](#) and [Terms and Conditions](#).

< Back
Next >

Click the **Next** button to submit your request. You will be redirected to the **Confirm your email** screen. A confirmation email will be sent to you.

Confirm your email

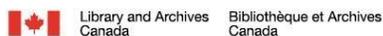
Your request to create an account was submitted. You need to confirm your email. Please check your mailbox to activate your account.

Send email again

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Click the link in your confirmation email to verify your email address and activate your account.

You will be redirected to the **Email confirmed** page. Your account still needs to be reviewed by an administrator. You will receive an email once approved, which may take 2-3 business days.

Once you receive the email, go to the [staff site](#) and click the purple **Log in** button in the top right corner to log in to your account and access the staff portal.

Email confirmed

Your account still needs to be reviewed by an administrator, you will receive an email once approved

[Go to Login](#)

These instructions are also available in a [video](#).

Log in

To log in to your staff account, go to the [staff site](#) and click the purple **Log in** button in the top right corner.

Enter your **email** and **password** and click the **Log in** button.

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You can log in to either the French or English staff site using the same credentials.

Log in

Welcome to TD Summer Reading Club.
Please login or create a free account.

Email *

Password *

[Forgot Password?](#)

[Log in](#)

Create an account

The library management portal will allow you to register your library, system, or region in the program, as well as to view reports and place your annual supply order.

[Create account](#)

Log out

To log out of your staff account, click the **Log out** button at the bottom of the left menu.

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Welcome !

My profile

Libraries

Systems

Regions

Reports

LOG OUT

My Profile

Full name *

Work Email *

Password

Repeat password

I need access to the parent/caregiver's email addresses registered under my libraries

! If you wish to delete your account, please contact us using the form on this page [Contact us](#).

Save changes

These instructions are also available in a [video](#).

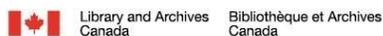
Reset Password

To reset your password, click the **Forgot Password** link in the **Log in** screen.

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Log in

Welcome to TD Summer Reading Club.
Please log in or create a free account.

Email *

Password *

[Forgot Password?](#)

Log in

Create an account

The library management portal will allow you to register your library, system, or region in the program, as well as to view reports and place your annual supply order.

Create account

Enter your **email** in the password reset screen and click **Send**. You will receive an email with further instructions to help you reset your password.

Forgot your password?

Please enter your email address below and we'll help you reset your password.

Email *

You will receive an email with further instructions on resetting your password.

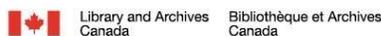
Send

These instructions are also available in a [video](#).

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Updating Your Profile

To update your profile, log in to your account and click on **My profile** in the left-hand menu.

Enter your updated information and click the **Save changes** button. This function can be helpful to transfer the account to a new person due to staff changes.

Check the box at the bottom of your profile to opt in to accessing parent/caregiver emails. If you do not want to access parent/caregiver emails, you can uncheck this box. (You can find the parent/caregiver emails under the **Child Statistics** tab in **Reports**.)

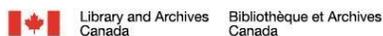
Contact us.'"/>

These instructions are also available in a [video](#).

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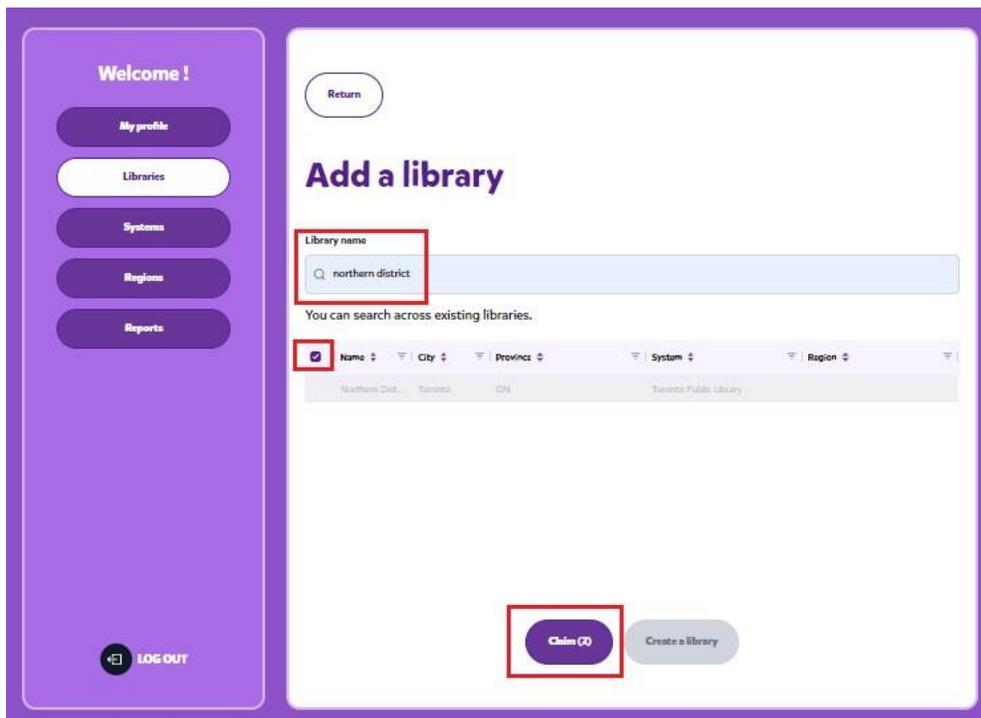


Claiming a Library

Under **Libraries** in the left-hand menu, click the **Add a library** button.



A form will open where you can enter the name of your library in the **Library name** field to search existing libraries.



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In the list of results, check the box next to your library and click the **Claim** button at the bottom of the screen.

Once you have completed claiming your library or libraries, check the box at the bottom of your **Libraries** page to confirm that you have read and accepted the Terms of Agreement. The box will remain checked and the text greyed out until the following year. You will have to check it again each year.

Click the **Submit** button at the bottom of the screen to submit all library records with the status **Unsubmitted Changes** for approval. Once approved, the account owner will receive a confirmation email and the library status will change to **Active**. Please allow 2–3 business days for approval.

To change a library's information, follow the steps for **Editing a Library** to review and update the information in each library record before submitting **all** changes for approval.

These instructions are also available in a [video](#).

Editing a Library

To edit a library record, go to the **Libraries** page. In the drop-down menu under **Actions**, click on **Edit**. Note that you cannot edit a library that is pending approval.

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FR

This will open the library's record and allow you to edit the information listed below.

Status Change

You can click the radio buttons at the top of the form to change the status of your library to one of the following:

ACTIVE

Select this status if your library is registered for the program and actively participating in the Club this upcoming summer.

INACTIVE

Select this status if your library is not actively participating in the Club this year. This will remove your library as an option for kids to register under. Note that a library can be registered in the program and also be inactive for all or part of the summer.

RELEASE

Select this status if you want to unlink the library from your account. The library record will remain in our database for another user to claim.

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DELETE

Select this status to have the library record removed from our database.

Once you have completed your updates, click the **Save** button at the bottom of the form. You must complete all mandatory fields before saving.

Statistics contact *

Same as program contact

Name *

Work email *

Work phone *

Save

You can click **Return** to exit the form at any time without saving your changes.

Welcome !

My profile

Libraries

Systems

Regions

Reports

Return

Edit a library

Status change request :

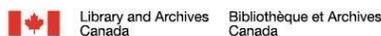
- ACTIVE: I want to participate in the club
- INACTIVE: I want to set this library as not actively participating temporarily (this can be changed during the program year)
- RELEASE: I want to release this library (unlink it from my account), in doing so, it can be claimed by someone else and will become inactive until it is claimed. Must be done between September and May.
- DELETE: I want to delete this library.

Confirm that you have read and accepted the Terms of Agreement by checking off the box at the bottom of your **Libraries** page. The box will remain checked and the text greyed out until the following year. You will have to check it again each year.

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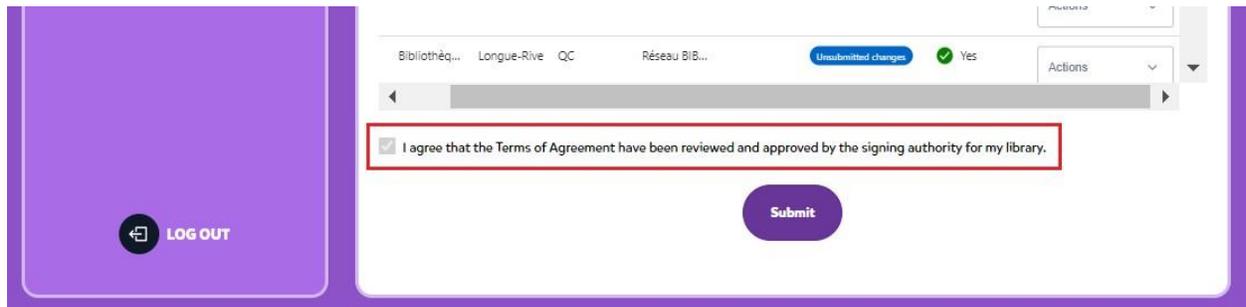


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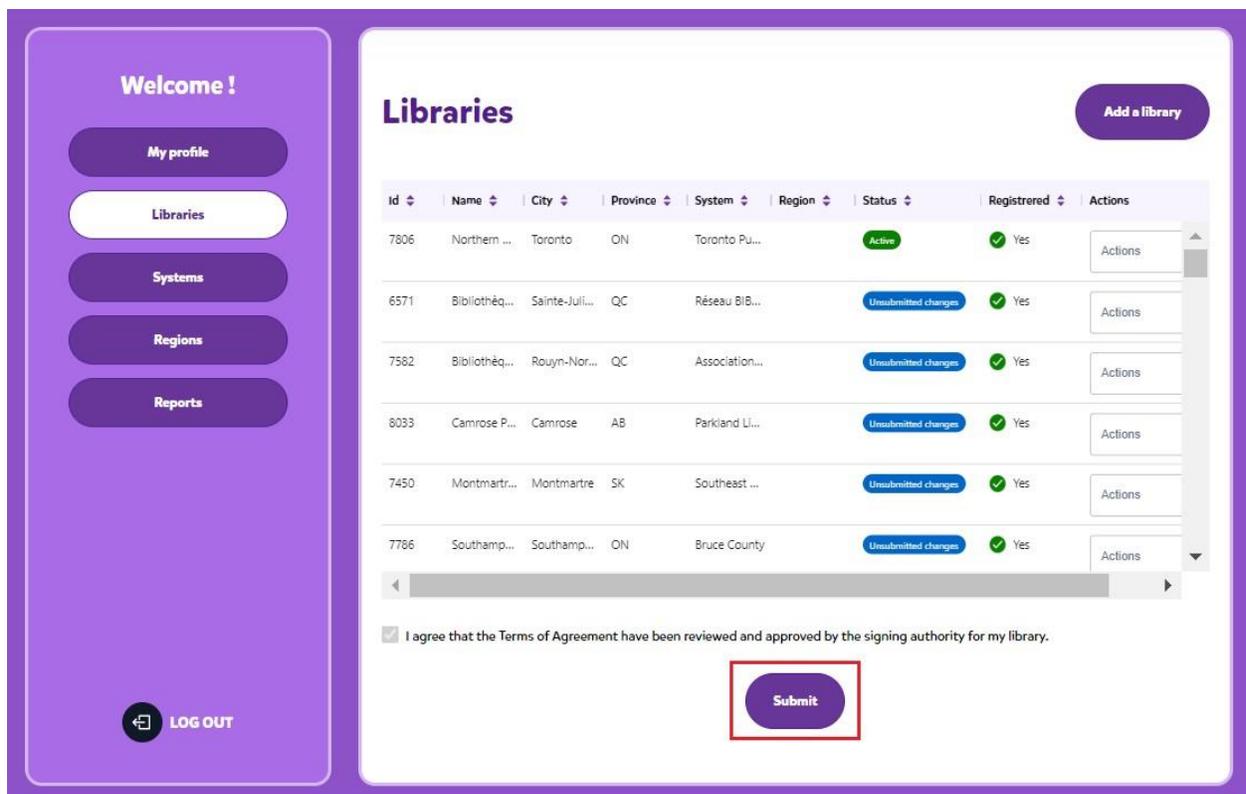


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Once you have completed all your updates, click the **Submit** button at the bottom of the screen to submit all library records with the status **Unsubmitted Changes** for approval. Once approved, the account owner will receive a confirmation email and the library status will change to **Active**. Please allow 2-3 business days for approval.



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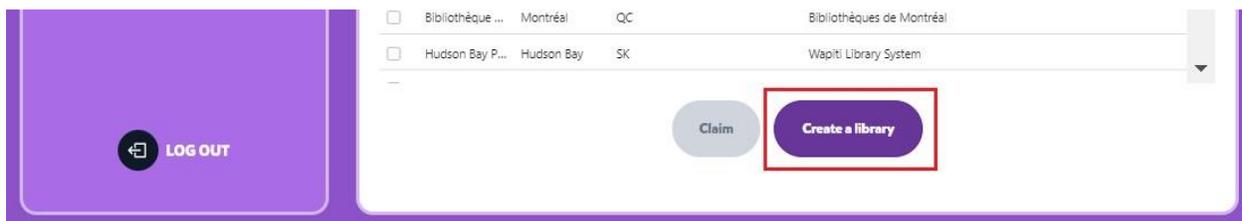




These instructions are also available in a [video](#).

Creating a Library

To create a record for a library that does not currently exist in the database, click on the **Libraries** button in the left-hand menu. Click on **Add a Library** in the top right corner and then on **Create a Library** at the bottom of the screen.



This will open the **Create a Library** form.

Enter your library's official name.

Use the **Alternate name** field to provide an additional name for your library (e.g., your library's official French name).

In the drop-down menu below the field, select the language of the alternate name you entered.

Library Address

Enter the library address, including street name and number, unit number (if applicable), city and postal code. Select your province or territory from the drop-down menu.

Library Phone

Enter the library phone number, including area code and extension (if applicable), in the following format: (999) 999-9999 x999

Library Email

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Enter the library email in the following format: name@domain.tld

Library Site

Enter the URL for your library website. If you do not have a website, you can leave this field blank.

Catalogue URL

Enter the direct link to your online catalogue). Kids will be able to link to your catalogue from the kids' site to search for books. If you do not have an online catalogue, you can leave this field blank.

Program Contact

Enter the information for the person responsible for the program at your library:

Name

Enter the first and last name of the library contact.

Work Email

Enter the contact email using the following format: name@domain.tld

Work Phone

Enter the contact phone number, including area code and extension, using the following format: (999) 999-9999 x999

Region

Select your **region** from the drop-down list. If your region does not appear, [contact the TDSRC team](#) through the staff site. If you are not part of a region, you can leave this field blank. If your **regional coordinator** is responsible for responding to the end-of-year survey for the program statistics the statistics contact information will automatically populate.

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System

Select your **system** from the drop-down list. If your system does not appear, [contact the TDSRC team](#) through the staff site. If you are not part of a system, you can leave this field blank. If your **system coordinator** is responsible for responding to the end-of-year survey for the program statistics the statistics contact information will automatically populate.

Statistics contact

If the statistics contact information is the same as the program contact, check the appropriate box.

If not, enter the information for the person responsible for responding to the end-of-year survey for program statistics.

You must complete all mandatory fields before saving. Once completed, click the **Save** button at the bottom of the screen. You will automatically return to your Libraries list.

Note that your library will have the status **Unsubmitted Changes**.

Click the **Submit** button at the bottom of the screen to submit your changes. Once approved by the system admin, the library status will change to Active. Please allow 2–3 business days for approval.

These instructions are also available in a [video](#).

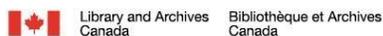
Creating a System

To create a system, click on the **Systems** button in the left-hand menu and then click on the **Add a system** button in the top right. Before adding a system, please check

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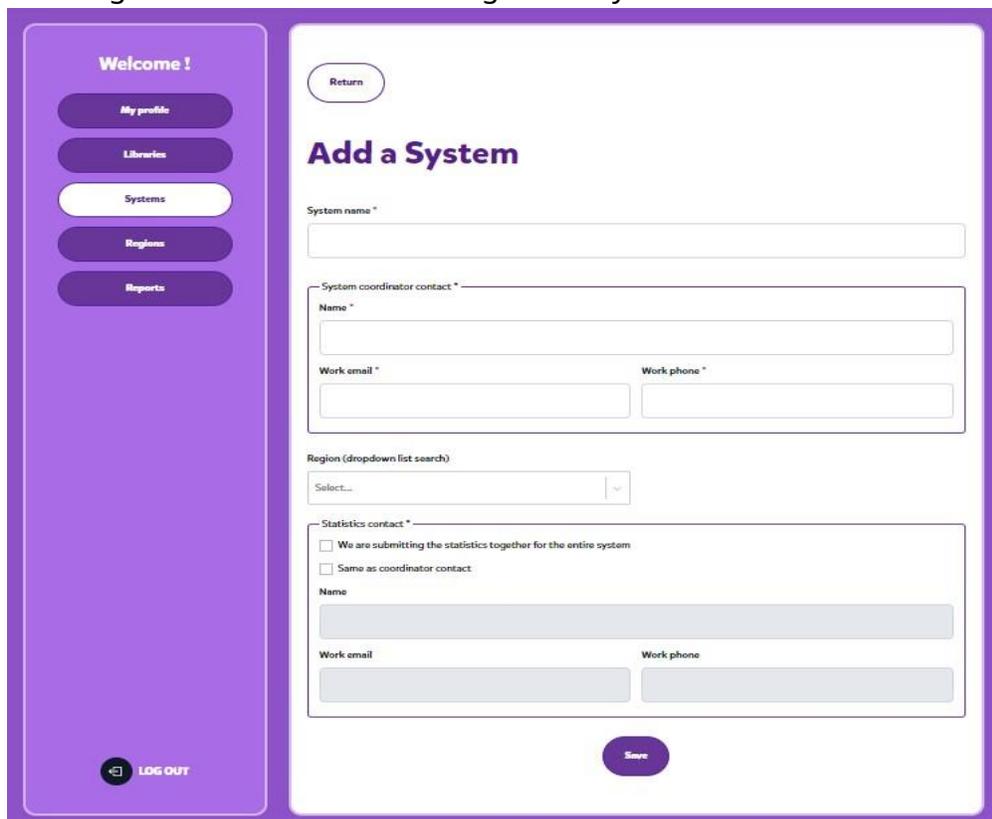


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This will open the **Add a System** form. Enter your library information into the fields following the instructions for Editing a Library.



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System Name

Enter the name of your library system.

System Coordinator Contact

Name

Enter the first and last name of the system contact.

Work Email

Enter the work email for the system contact using the following format:
name@domain.tld.

Work Phone

Enter the work phone number for the system contact, including the area code and extension (if applicable), using the following format: (999) 999-9999 x999

Region

Select your region from the drop-down list. If your region does not appear, contact the TDSRC team using the **contact us** section. If you are not part of a region, you can leave this field blank.

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Statistics Contact

Statistics contact *

We are submitting the statistics together for the entire system

Same as coordinator contact

Name

Work email **Work phone**

Save

Check the first box if you are submitting programs statistics for the entire system. This will automatically populate the Statistics Contact Information section in the records of all libraries under this system.

If the coordinator contact is also the survey contact, check the second box. If not, enter the information for the survey contact below, including **name**, **work email** and **work phone**.

Once you have completed the form click the **Save** button at the bottom of the screen.

Note that your system will have the status **New Record in Progress**.

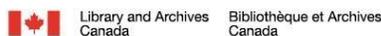
Click the **Submit** button at the bottom of the screen to submit your changes for approval. You will receive a confirmation email once your system is approved and the system status will change to **Active**. Please allow 2-3 business days for approval.

These instructions are also available in a [video](#).

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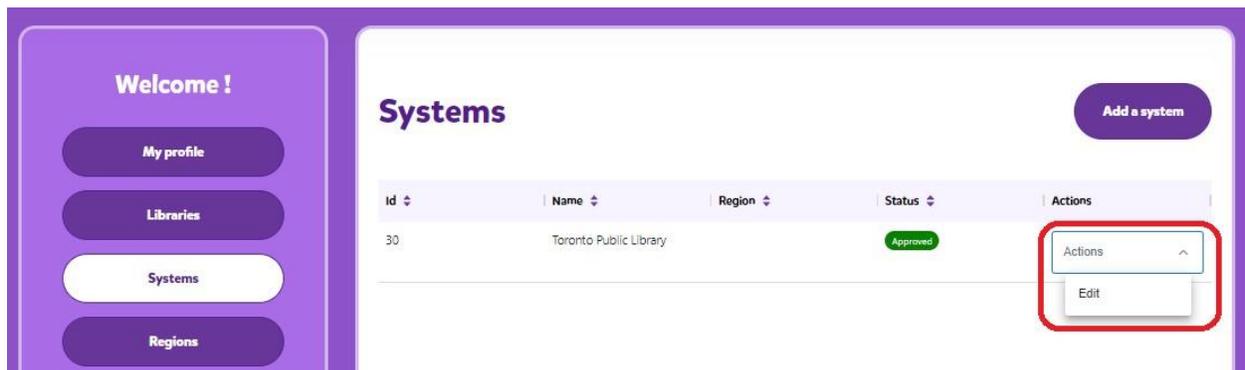




Editing a System

To edit a system, click on **Edit** in the **Actions** drop-down menu to open the **Edit a System** form.

Only the designated system coordinator responsible for all the libraries listed at the end of the form, or someone who has permission from the system coordinator, may make changes to this form.



Edit the system information in the form. If you need help, you can refer to the steps in the **Creating a System** process as both forms contain the same fields.

Click the **Save** button at the bottom of the screen. You will automatically return to your Systems list. Note that the system status has changed to **Unsubmitted Changes**.

Click the **Submit** button at the bottom of the screen to submit your changes. Once approved by the system admin, the system status will change to **Active**. Please allow 2-3 business days for approval.

Video link: Coming soon.

Creating a Region

To create a region, click on the **Regions** button in the left-hand menu and then click on the **Add a Region** button in the top right corner.

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Enter the information for your library region:

Region

Enter the name of your region.

Regional Coordinator Contact

Name

Enter the first and last name of the region contact.

Work Email

Enter the work email for the region contact using the following format:
name@domain.tld.

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Work Phone

Enter the work phone number for the regional coordinator contact, including the area code and extension, using the following format: (999) 999-9999 x999

Statistics Contact

Check the first box if you are submitting programs statistics for the entire region. This will automatically populate the Statistics Contact Information in the records of all libraries under this region.

Check the second box if the survey contact person is the same as the regional coordinator contact. If not, enter the survey contact information including **name, work email** and **work phone**.

Once you've completed the form click the **Save** button at the bottom of the screen. Note that your region will have the status **New Record in Progress**.

Click the **Submit** button at the bottom of the screen to submit your changes for approval. You will receive a confirmation email once your region is approved and the region status will change to **Active**. Please allow 2-3 business days for approval.

Video link: Coming soon.

Editing a Region

To edit a region, click on **Edit** in the **Actions** drop-down menu to open the **Edit a Region** form.

Edit the region information in the form. If you need help, you can refer to the **Creating a Region** process, since both forms contain the same fields.

Click the **Save** button at the bottom of the screen. You will automatically return to your Regions list. Note that the region status has changed to **Unsubmitted Changes**.

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Click the **Submit** button at the bottom of the screen to submit your changes. You will receive a confirmation email once your region changes are approved and the region status will change to **Active**. Please allow 2-3 business days for approval.

Video link: Coming soon.

Reports

To access data reports for your library or your system, click on the **Reports** button in the left-hand menu.

Click on the calendar icon and select a **Start Date** and **End Date** to filter the data to a specific period. For the most accurate data, select the date of the website launch (typically the second Monday in June) as the start date, and for the end date use either the present day (if the program is ongoing) or the program end date (Labour Day).

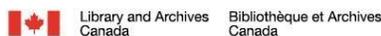
The screenshot shows the 'Reports' page with a left-hand navigation menu containing 'Welcome!', 'My profile', 'Libraries', 'Systems', 'Regions', and 'Reports'. The main content area is titled 'Reports' and includes a 'Select dates period' section with 'Start date' and 'End date' fields. A calendar icon next to the 'End date' field is highlighted with a red box, and a calendar popup is open, showing the date '18' selected. Below the date fields is a 'Select libraries' section with two selections: 'Toronto Refer...' and 'Northern Dist...'. To the right, there are filters for 'System' and 'Region', both set to 'Toronto Public Library'.

All of your libraries will be automatically be selected under the **Select Libraries** section when you open reports. Uncheck those libraries that you do not want to see represented in the data report.

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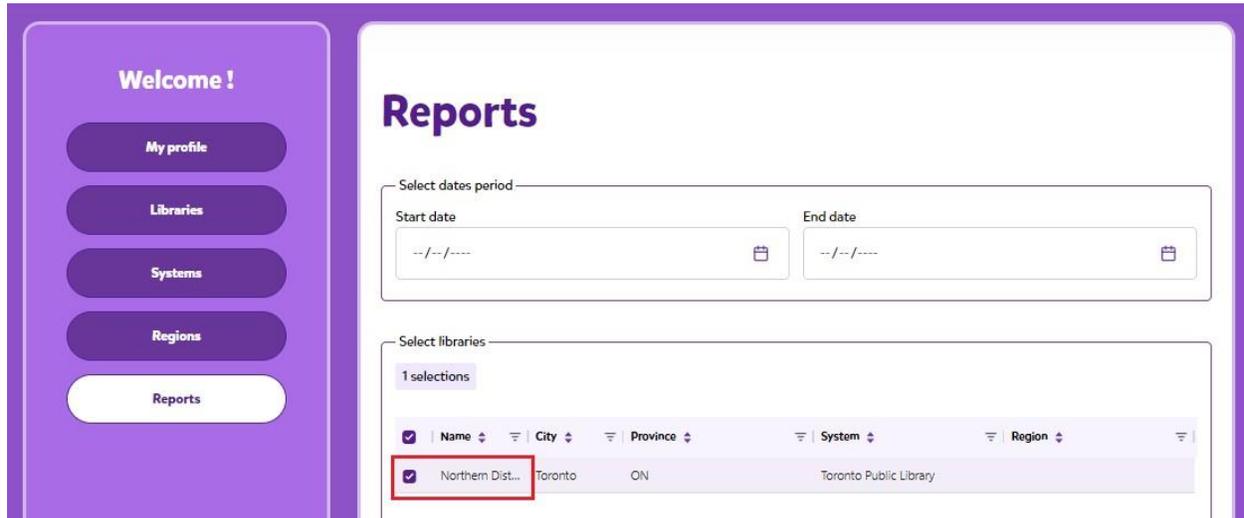


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There are three types of reports:

Survey Report

This tab shows the results of the Parent/Caregiver and Kids surveys, in English and French.

Under **Select survey**, select one of the four survey options from the drop-down menu to see the results displayed as a graph below. You can mouse over the graph to see the results in percentages. Survey responses will appear in the language in which they were submitted.

Select survey

Parent's Survey English 2024

Engagement Over Time

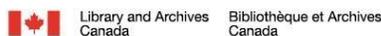
This tab visually displays high-level user engagement over the summer, including registration, submissions, likes, books read and time spent reading.

Note that some entries for books read and book recommendations are missing. Books read totals can be viewed in the Child Statistics report.

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Child Statistics

This report shows statistics for online activity for each user registered under your library, including logins, survey clicks, username, likes, books read, other reads, comments, time spent reading and caregiver emails.

Viewing and Saving Reports

You can adjust your table view by changing the column width or dragging and dropping a column to change the order.

If no data is attached to your library, the reports will be blank.

You can export your data in CSV format.

Please note that for reasons of safety and security, we purge the system of all user data before the next program launch. This means that libraries will have access to past survey responses but not to child statistics or engagement from previous summers.



Video link: Coming soon.

Orders

To submit an order for free program materials, click on the **Orders** button in the left-hand menu and then click on the **Add a new order** button in the top right.

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Welcome!

- My profile
- Libraries
- Systems
- Regions
- Reports
- Orders

LOG OUT

Orders

Add new order

ID	Date	Recipient	Depot	Status	Actions
123456	2024-05-21	Schreiber Library	Lorem ipsum dolor sit	Pending approval	Actions ▾
123456	2024-05-21	Schreiber Library	Lorem ipsum dolor sit	Pending approval	Actions ▾
123456	2024-05-21	Schreiber Library	Lorem ipsum dolor sit	Approved	Actions ▾
123456	2024-05-21	Schreiber Library	Lorem ipsum dolor sit	Approved	Actions ▾
123456	2024-05-21	Schreiber Library	Lorem ipsum dolor sit	Cancelled	Actions ▾
123456	2024-05-21	Schreiber Library	Lorem ipsum dolor sit	Cancelled	Actions ▾

Export CSV

In the order form, select whether your order is for an individual library, a system or a region.

Enter the library name.

Select your distribution location from the drop-down menu. If you don't see your distribution location listed, please [contact us](#) through the staff site.

Enter the information for the distribution contact, including the contact name, work email and work phone number.

Click the box if this location has a loading dock and add any delivery instructions you may have for this location.

Read the item name, description and ordering tips carefully before entering the quantity of items you wish to order.

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Review your order information before clicking **Submit**. You will be returned to the **Orders** page, where you can see the list of your past and present orders and their statuses.

Welcome!

My profile

Libraries

Systems

Regions

Reports

Orders

[Return](#)

Create new order

Status

New ▼

Recipient *

Region
 System
 Individual library / branch

Library name *

Select library ▼

Distribution location *

▼
If you don't see your distribution address listed please contact clubtd-tdclub@bac-lac.gc.ca

Contact *

Name *

Christopher Marsh

Work email *
Work phone *
Extension

This location has a loading dock

Delivery instructions

Lorem ipsum dolor sit amet consectetur. Pulvinar tempus maecenas tortor augue vitae sagittis morbi erat. At nam est nec dui sed tortor scelerisque ac volutpat. Id tempor vel ullamcorper nunc sollicitudin mus aliquam. In ac euismod sed dolor turpis. Lorem ipsum dolor sit amet consectetur. Pulvinar tempus maecenas tortor augue vitae sagittis morbi erat. At nam est nec dui sed tortor scelerisque ac volutpat. Id tempor vel ullamcorper nunc sollicitudin mus aliquam.

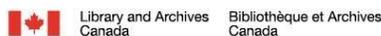
Items:

Name	Description and Ordering Tips	Quantity (editable)
School age notebooks	<small>Lorem ipsum dolor sit amet consectetur. Tortor et diam convallis turpis lacinia. Facilisi turpis id id urna turpis. Proin ipsum aenean nulla faucibus molestie ullamcorper convallis sed consectetur.</small>	0 ▲▼
Pre-reader notebooks	<small>Lorem ipsum dolor sit amet consectetur. Tortor et diam convallis turpis lacinia. Facilisi turpis id id urna turpis. Proin ipsum aenean nulla faucibus molestie ullamcorper convallis sed consectetur.</small>	0 ▲▼

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To edit an order, select **Orders** from the left-hand menu, open the **Actions** drop-down menu next to the order you wish to modify, and select **Edit**. Once the order has been approved, you will no longer be able to edit it and will need to [contact us](#) for any changes.

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