communico
REACH • ENGAGE • GROW

STAFF AND PATRON GUIDE

# Challenge setup & management

Build a Challenge in the Control Panel, publish it with Create, manage participants as staff and see what patrons experience.


VERSION
1.1 · November 2026


AUDIENCE
Library staff who run Challenge programs, and Communico support and education teams

COVERS
Challenge · Create · Control Panel · The patron experience

# About this guide

Challenge lets your library run goal-driven programs, such as a summer reading challenge, a 1,000-books program or a wellness month, for any audience.

Patrons join as individuals, families or groups, log progress against goals and earn badges, prizes and certificates as they reach milestones. You can also enter them into prize draws.

This guide follows one Challenge from start to finish: how staff build it in the Control Panel, how it appears on your website through Create, how staff manage participants, and what patrons see when they join and log progress.

## How the guide is organized

| Part | What it covers | Chapters |
|---|---|---|
| **Before you begin** | Access, permissions, key terms and the build order | 1 |
| **Part 1.** Control Panel | Achievement items, the Challenge and its reward system, registration settings, goals, milestones and competitions | 2 to 7 |
| **Part 2.** Create | Adding, templating, editing and publishing the Challenge page on your website, plus leaderboards | 8 to 12 |
| **Part 3.** Staff tools | Adding participants and groups, logging progress, printed logs and prize claims | 13 to 16 |
| **Part 4.** Patron view | Signing up (individual, parent/child, group), logging progress, rewards and competitions | 17 to 21 |

## Conventions used

- **Bold text** is a label you will see on screen: a button, tab, field or menu item.
- “Quoted text” is a message the product shows, copied as it appears.
- `Code style` marks internal names such as permission flags.
- Framed images are screenshots from a Control Panel test account.
- Values in **Example** boxes are illustrations. Use numbers that suit your own program.

> **NOTE**
> Every label, field and message in this guide was checked against the current product code in October and November 2026, not against a live screen, so a screen may differ slightly. Appendix C lists the few details worth confirming on a live account.

# Points or Units? At a glance

The reward system is the biggest choice you make when setting up a Challenge. It decides how goals, milestones and progress behave.

| | Points | Units |
|---|---|---|
| **How progress counts** | Everything a participant logs converts into one running point total (units logged × points per unit). | Progress stays in each goal's own unit (pages, books, visits, minutes) and is tracked goal by goal. |
| **Goal fields** | **Goal name**, **Unit**, **Points Per Unit**, **Total Points** | **Goal name**, **Unit**, **Required Total** (points per unit is fixed at 1) |
| **Milestones** | **Challenge milestones**: unlock at a point total across all goals | **Goal milestones** (per goal) and **Combined milestones** (several goals together) |
| **Completion** | Reaching the challenge's maximum points (the total of all goals' points) | Completing every goal |
| **Patron logging screen** | Shows a live "pts" box while logging | No points box; progress is shown in units |
| **Best for** | Mixed activities that should add up to one score and one leaderboard | Separate targets such as "Read 10 books" and "Attend 5 events" |
| **Changing later** | Possible, but switching removes goal and combined milestones | Possible, but switching removes challenge milestones |

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CHAPTER 1

# Before you begin

Check you have access, learn the vocabulary and follow the recommended build order. Ten minutes here saves rework later.

## What you need

- **The Challenge module** switched on for your library. If **Challenge** is missing from the Control Panel menu, ask Communico support to check your account. Opening the Challenge pages without access redirects you to a “no access” page.
- **A Create website** if you want patrons to join online. The **Challenge** group in the Create editor only appears when the module is enabled.
- **The right permissions** for the tasks in this guide (next section).

## Permissions

Control Panel users at access levels 1 to 3 can do everything below. Level 4 users can do only what has been granted to them.

| Permission | What it allows |
|---|---|
| `challenge` | Opens the Challenge area. Without it you are sent to the “no access” page. |
| `challenge_manage` | Shows **New challenge**; create, edit, copy and delete Challenges. |
| `challenge_achievement_items_manage` | Create, edit and delete achievement items, and add them to milestones. |
| `challenge_participants_view` | See the **Participants** and **Groups** tabs and export them. |
| `challenge_participants_manage` | Add, edit and remove participants and groups; change roles; log and delete progress; claim milestone prizes; manage competition entrants. |
| `challenge_competitions_view` | See a competition’s **Winners** tab. |
| `challenge_winners_draw` | Draw winners; save, claim and delete competition winners. |
| `challenge_restrict_to_own` | Limits the user to Challenges they created. |
| `challenge_restrict_image_upload` | Image fields only offer previously uploaded images. Uploading new Challenge images is blocked. |

> **NOTE**
> The checkboxes in your user permission settings may be worded differently from these internal names. Ask your Control Panel administrator to match them.

## Recommended build order

Competitions must exist before a milestone can link to them, and achievement items must exist before you can attach them. Working in this order avoids going back and forth.

| Step | Task | Where | Chapter |
|---|---|---|---|
| 1 | Create the badges, certificates and prizes you plan to award | Achievement Item Assets | 2 |
| 2 | Create the Challenge, choose **Points** or **Units**, enter details and dates | **New challenge** | 3 |
| 3 | Set registration rules: library card, ages, questions, terms | **Registration settings** | 4 |
| 4 | Add goals | **Goals** | 5 or 6 |
| 5 | Create any competitions and their prizes (optional) | **Competition** | 7 |
| 6 | Add milestones, attach achievement items, link competitions | Milestones and **Completion** | 5 or 6 |
| 7 | Save. Keep **Private** on while you test | **Save** | 3 |
| 8 | Build and tailor the Challenge page, adding a leaderboard if you want one | Create editor | 8 to 11 |
| 9 | Publish the page and check the live address | Create editor | 12 |
| 10 | Turn **Private** off. Register people yourself if needed | Participants view | 13 to 16 |
| 11 | Test the patron journey from sign-up to reward | Your website | 17 to 21 |

## Key terms

| Term | Meaning |
|---|---|
| **Challenge** | The whole program, with a title, dates, registration rules, goals and rewards. |
| **Goal** | Something participants work toward, measured in a unit you choose, such as books, pages, visits or minutes. |
| **Milestone** | A threshold that unlocks one or more achievement items. Where it sits depends on the reward system. |
| **Achievement item** | A reward participants earn: a **Badge**, a **Certificate** or a **Prize**. |
| **Competition** | A prize draw. **Tickets** competitions let participants spend earned tickets on prizes. **Prize Draw** competitions set prizes to be won, such as 1st, 2nd and 3rd. |
| **Participant** | A person who has registered and can log progress. |
| **Group** | Several participants registered together, managed by one or more group admins. |

| Term | Meaning |
|---|---|
| **Parent/child registration** | A parent registers children under 13. Behind the scenes it is a group: the parent is the admin and the children are the participants. |
| **Admin** | A group role. A person can be **Participant**, **Admin** or **Participant + Admin**. |
| **Private** | A switch on the Challenge that hides it from patrons while staff keep working on it. |
| **Leaderboard** | A Create block that ranks participants or groups by points, units or tickets. Participants can opt out. See Chapter 11. |

## Planning checklist

- ☐ Choose the reward system: **Points** or **Units**.
- ☐ Confirm start and end dates, and registration opening and closing dates.
- ☐ Prepare a square Challenge image (minimum 200 × 200 pixels) and a wide banner (1440 × 580 pixels recommended), as JPEG or PNG.
- ☐ List the goals, their units and any daily, weekly, monthly or yearly limits.
- ☐ Decide which milestones earn which badges, certificates and prizes.
- ☐ Decide whether a library card is required, and any minimum or maximum age.
- ☐ Write any custom registration questions and prepare a Terms & Conditions page address.
- ☐ Plan competitions: type, prizes, draw date and how winners are notified.

PART 1

# Build the Challenge in the Control Panel

Everything staff configure behind the scenes: reward items, the Challenge itself, registration rules, goals, milestones and competitions.

IN THIS PART


| Chapter | What it covers |
|---|---|
| 2. Set up achievement items | Create the badges, certificates and prizes participants can earn. |
| 3. Create a Challenge: details and reward system | Start a new Challenge, choose Points or Units and complete the details. |
| 4. Registration settings | Library card, age limits, custom questions, terms and print version. |
| 5. Goals and milestones: Points-based Challenges | Goals that convert to points and challenge milestones. |
| 6. Goals and milestones: Units-based Challenges | Goals measured in their own units, goal milestones and combined milestones. |
| 7. Competitions | Ticket draws and prize draws, linking them to milestones and drawing winners. |


CHAPTER 2

# Set up achievement items

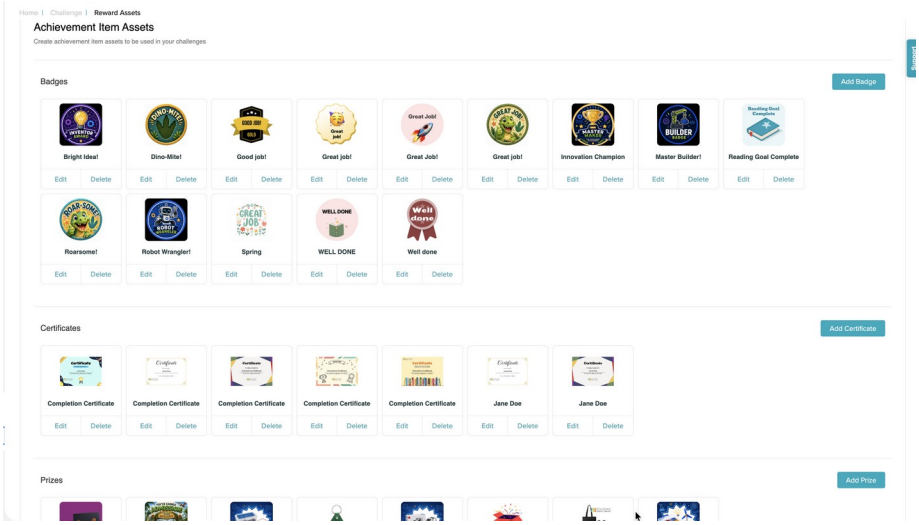
Achievement items are the rewards participants earn. You build them once in a shared library, then attach them to milestones in any Challenge.

## Open the achievement items library

1 In the Control Panel, open **Challenge** and go to the achievement items page.

The page is titled **Achievement Item Assets** with the line “Create achievement item assets to be used in your challenges”. Its breadcrumb reads Home › Challenge › Reward Assets.

2 Find the three sections: **Badges**, **Certificates** and **Prizes**. Each has its own **Add** button.




Screenshot 1 · Achievement Item Assets page

**IMPORTANT**

You need the `challenge_achievement_items_manage` permission. Without it the page shows “You do not have permission to manage challenge achievement items.”

## The three kinds of item

| Type | What participants get | How you build it |
|---|---|---|
| **Badge** | A digital badge in their **Achievements** card. The artwork stays hidden behind a placeholder until it is earned. | Pick a design template and customize it, or add a custom badge from an image. |
| **Certificate** | A certificate they can **View**, **Print** or **Download**. Their full name is added to the certificate image. | Pick a certificate template and customize it. |
| **Prize** | A real reward they collect from the library, with instructions on how to claim it. | Complete a form: description, image, sponsor and redemption instructions. |

## Add a badge

1 Under **Badges**, click **Add Badge**.

2 In **Select Badge Template**, choose a design, then click **Continue**.

To use your own artwork instead, click **Add custom badge**. A custom badge needs a **Name** and an **Image URL**, and both are required.

3 Customize the badge.

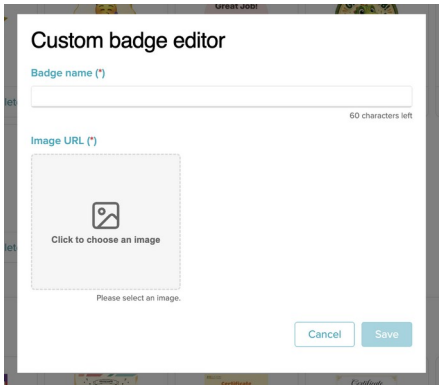
The fields come from the template. Typical options are the label, title, typography, title size, subtitle, medal, ribbon, badge and banner colors, an emoji and a logo. A preview shows the result as you work.

4 Enter the badge **name**.

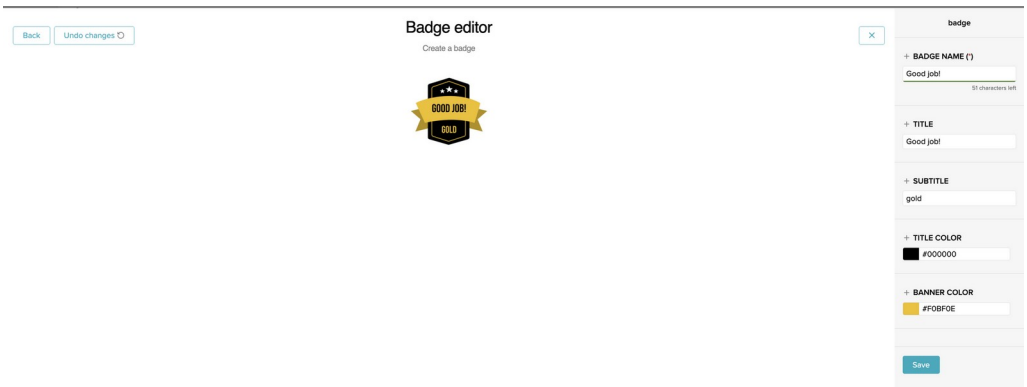
It is required and can be up to 60 characters. Add the unlock message too. It appears in the item window that participants open from their Achievements card.

5 Save the badge.

A notification confirms “Achievement Item Created”, and the badge appears under **Badges**.




Screenshot 2 · Custom badge editor



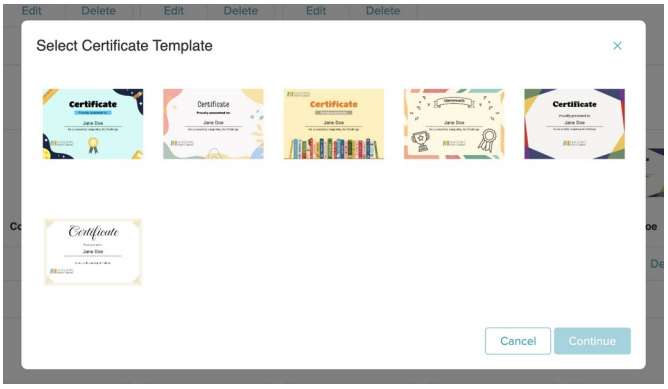

Screenshot 3 · Badge customization form with preview

## Add a certificate

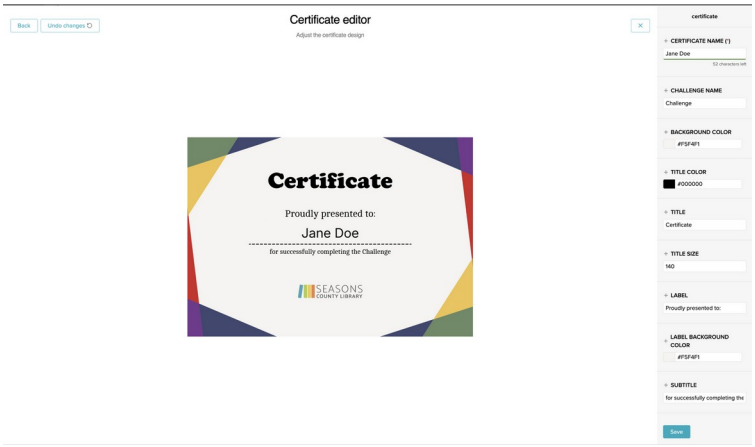
1 Under **Certificates**, click **Add Certificate**.

2 In **Select Certificate Template**, choose a design and click **Continue**.

3 Customize the fields, enter the certificate **name** (required, up to 60 characters) and the unlock message, then save.




Screenshot 4 · Select Certificate Template




Screenshot 5 · Certificate editor

> **TIP**
> A completion certificate is the usual reward for finishing the whole Challenge. Participants who finish can view and print it from their dashboard (Chapter 21).

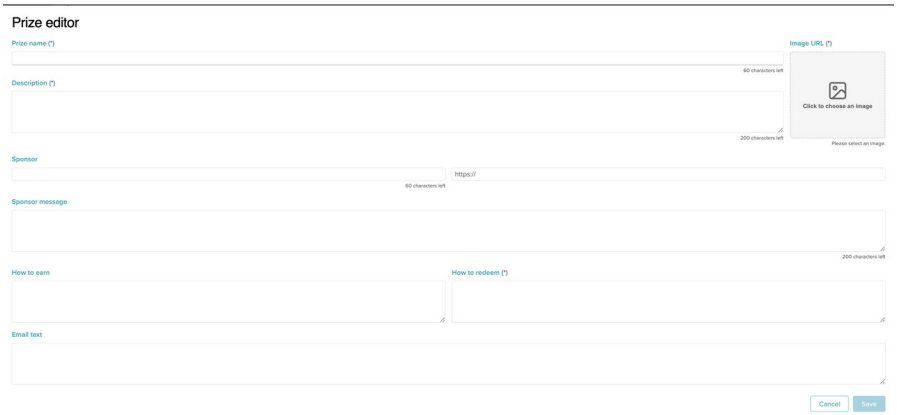
## Add a prize

Prizes skip the template step. **Add Prize** opens the form straight away.

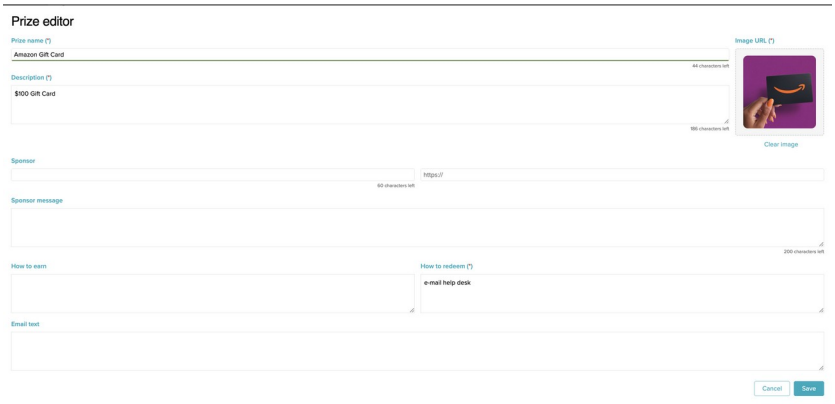
| Field | Notes |
|---|---|
| **Name** | Required. Up to 60 characters. |
| **Description** | Required. Up to 200 characters. |
| **Image URL** | Required. |

| Field | Notes |
|---|---|
| **Sponsor** | Optional. Up to 60 characters. |
| **Sponsor message** | Optional. Up to 200 characters. |
| Sponsor web address | Optional. The field shows “https://” as a hint. |
| **How to earn** | Tells participants what unlocks the prize. Shown while the prize is locked. |
| **How to redeem** | Required. Tells participants how to collect the prize. Shown once it is unlocked. |
| **Email text** | Optional. Wording for the email that goes with the prize. |

If something is missing or invalid the form shows “Missing <fields>.” or “Invalid <fields>.” and names the fields.




Screenshot 6 · Prize form




Screenshot 7 · Prize form filled in

## Edit or delete an item

1 Open the item from its section and choose edit.

The edit window offers **Back** and **Undo changes**. A notification confirms “Achievement Item Updated” after you save.

2 To delete, choose delete on the item.

A window asks “Are you sure you want to delete “<name>”?”. Confirm with **Delete Asset**.

## Attach an item to a milestone

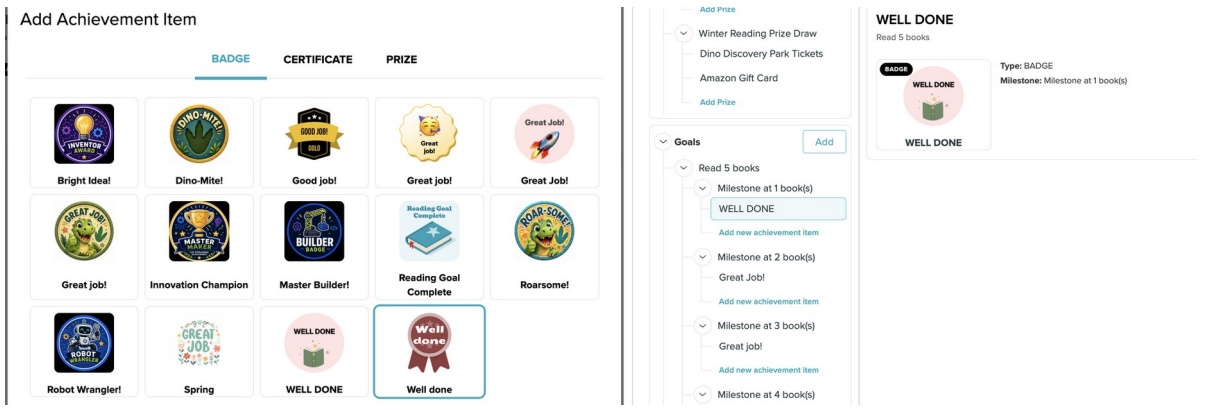
You attach items while building milestones (Chapters 5 and 6) and the **Completion** milestone.

1 Select the milestone in the Challenge tree and click **Add new achievement item** (on the Completion pane the button is **Add Achievement Item**).

2 In **Add Achievement Item**, use the **BADGE**, **CERTIFICATE** and **PRIZE** tabs to pick an item.

3 Click **Add** (or **Update** when you are changing an existing choice).

4 To remove an item from a milestone, use its **Delete achievement item** bin icon and confirm with **Delete Achievement Item**.




Screenshot 8 · Add Achievement Item picker and an attached item

## What participants see

| State | What the participant sees |
|---|---|
| **Locked** | A red **LOCKED** pill, the heading “How to earn:” and your **How to earn** text. Without your text they see “Keep logging your progress to unlock this prize.” |
| **Unlocked** | A **BADGE**, **REWARD** or **CERTIFICATE** pill, the heading “How to redeem:” and your **How to redeem** text. Without your text prizes show “Visit your library’s service desk or follow the instructions you received to redeem this prize.” |
| **Unlock message** | Your message appears in the item window in both states. |
| **Requirement** | Shown automatically as “{n} points” or “{n} {unit}”. Combined milestones list one line per goal. |

**TIP**

Always write **How to earn** and **How to redeem**. The generic fallback wording does not tell patrons which desk, branch or email to use.

**NOTE**

If your account has `challenge_restrict_image_upload`, image fields only let you choose from previously uploaded images. The tooltip reads “Choose from previously uploaded images. Uploading new challenge images is restricted for your account.”

CHAPTER 3

# Create a Challenge: details and reward system

Start a new Challenge, choose how progress is counted and complete the basic details.

## Start a new Challenge

1 Open **Challenge** in the Control Panel menu.

The page is titled **Challenges**. Each Challenge appears as a card showing its status (Active, Upcoming or Completed) and its participant count.

2 Click **New challenge** (top right, with a plus icon).

The button only appears if you have the `challenge_manage` permission.

3 Get your bearings.

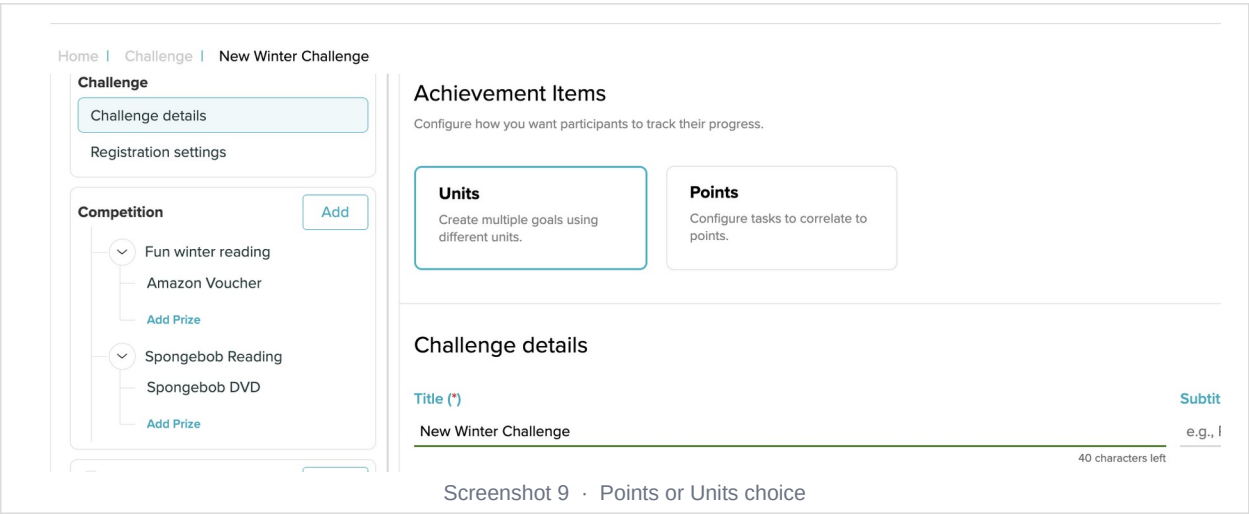
The form has a navigation tree on the left and a detail pane on the right. Selecting a node in the tree changes the pane.

| Tree section | What is inside |
|---|---|
| **Challenge** | Two nodes: **Challenge details** and **Registration settings**. |
| **Competition** | An **Add** button. Empty text: “No competitions added yet.” |
| **Goals** | An **Add** button. Empty text: “No goals added yet.” |
| **Challenge milestones** | Points Challenges only. |
| **Combined milestones** | Units Challenges only. |
| **Completion** | One node, **Completion details**, for what participants earn at the finish. |

# Choose the reward system

The first card in **Challenge details** sets how progress is counted. Its heading reads **Achievement Items** with the line “Configure how you want participants to track their progress.” Despite the heading, this card is the Points or Units choice.

| Option | Card text | Use it when |
|---|---|---|
| **Units** | “Create multiple goals using different units.” | You want separate targets such as books, events and visits. **New challenges start on Units.** |
| **Points** | “Configure tasks to correlate to points.” | You want every activity to add up to one score, for example 10 points per book and 5 points per event. |




Screenshot 9 · Points or Units choice

## Switching later

You can change the system after creating the Challenge. On a saved Challenge a confirmation window titled **Change Achievement System** appears with a **Continue** button.

| Switching to | Warning shown |
|---|---|
| **Points** | “Switching to the points system will remove all goal milestones and any combined milestones from this challenge.” |
| **Units** | “Switching to the units system will remove all challenge milestones from this challenge.” |

> **IMPORTANT**
> Both warnings end with “This action cannot be undone.” A new, unsaved Challenge switches with no warning because there is nothing to lose yet. Decide before participants start logging.

# Enter the Challenge details

| Field | What to enter | Rules |
|---|---|---|
| **Title** | The Challenge name, for example “Summer Reading Challenge”. | Required. Up to 60 characters. |
| **Subtitle** | A short line under the title. | Up to 60 characters. |
| **Description** | A longer description for patrons. | Required. Up to 200 characters. |
| **Challenge start date** | When the Challenge opens. Turn on **Add start date**. | Defaults to the next day at noon. |
| **Challenge end date** | When it closes. Turn on **Add end date**. | Defaults to one month after the start. Must be after the start. |
| **Registration start date** | Earliest time people can register. Turn on **Add registration start date**. | Optional. |
| **Registration closing date** | Last time people can register. Turn on **Add registration closing date**. | Optional. Must not be after the Challenge end date. |
| **Challenge image** | Square image used on cards and pages. | “Square format is preferred. Minimum size of 200 × 200 pixels in jpeg or PNG”. |
| **Challenge banner image** | Wide banner for the Challenge page. | “Wide banner format. Recommended minimum size of 1440 × 580 pixels in jpeg or PNG”. |
| **Private** | Hides the Challenge from patrons. Staff can still see it. | Off by default. |

## How the dates behave

- With **no start date** the Challenge is “active immediately upon creation”. With **no end date** it “will remain open indefinitely”.
- Turning on a date toggle with an empty value fills it in: the next day at noon for the start, one month after the start for the end.
- Registration dates must sit on or before the Challenge end date, and the start must be on or before the closing date.
- Once the Challenge has started, changing the start date also “will bring any earlier competition and goal start dates into line”.
- Once the Challenge has completed, the end date is locked: “End date cannot be edited after the challenge has completed.”

> **TIP**
> There is no draft or publish switch on the Challenge itself. Status comes from the dates. Turn **Private** on while you build and test, then turn it off at launch.

## Save the Challenge

1 Click **Save**.

If something is wrong a window titled **Challenge Save Error** lists the problems. If there are several it says “Multiple validation errors found”.

2 On an existing Challenge you can also use **Save as a copy**.

A confirmation window appears first. Use this to start next year’s Challenge from this year’s settings.

| Validation message | What to fix |
|---|---|
| “Challenge title is required” | Enter a **Title**. |
| “Challenge description is required” | Enter a **Description**. |
| “End date must be after start date” | Move the end date later or the start date earlier. |
| “Registration start date is required when enabled” | Fill in the date or turn the toggle off. The same applies to the closing date. |
| “Registration start date must be on or before the registration closing date” | Reorder the two registration dates. |
| “Registration closing date must be on or before the challenge end date” | Close registration no later than the Challenge ends. The start date has the same rule. |
| “Challenge image: Please enter a valid URL” | Re-upload or correct the image address. |

> **NOTE**
> **Cancel** on the form asks “You have unsaved changes. Are you sure you want to leave this page without saving?” when you have edited anything.

## Edit or delete an existing Challenge

- On the Challenges page, open a Challenge card and use **Edit** to return to this form. The card also has **Participants**, **Competition** and a **More** menu.
- To delete, open **More** and choose **Delete Challenge**.
- Everyone with `challenge_restrict_to_own` can only see and edit Challenges they created.

CHAPTER 4

# Registration settings

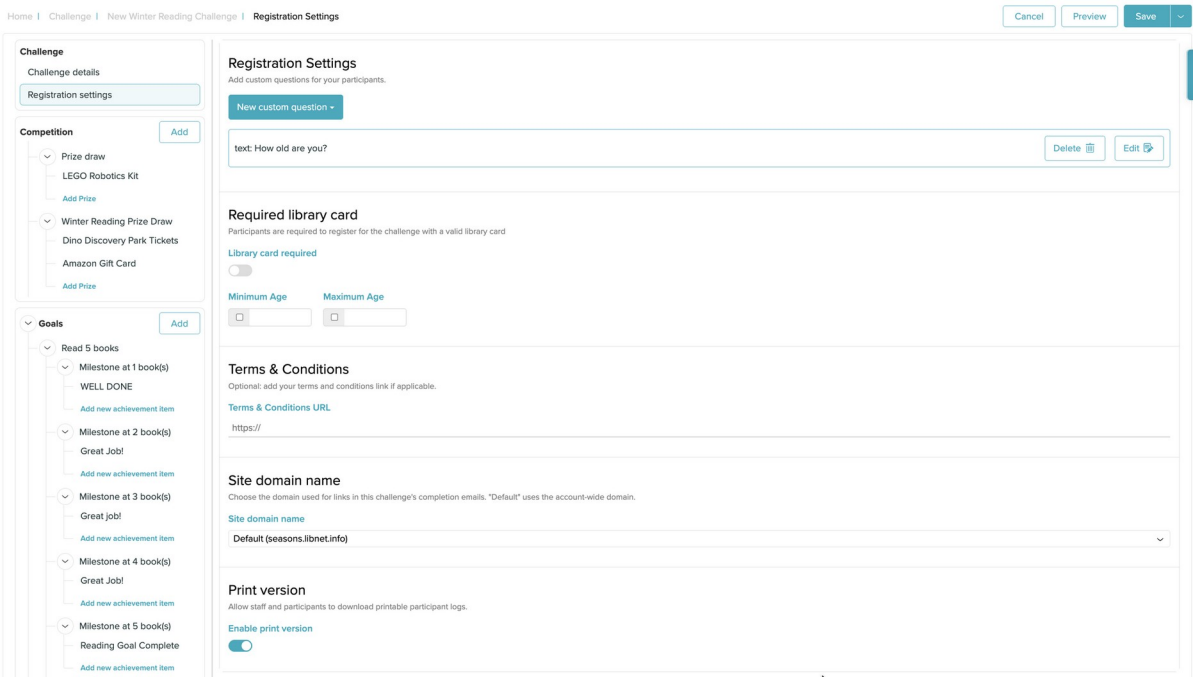
Decide who can register, what you ask them and which limits apply. These settings live in one pane of the Challenge form.

## Open registration settings

1 In the Challenge form tree, under **Challenge**, select **Registration settings**.

The pane is headed **Registration Settings**.

2 Work down the pane, then click **Save** when you finish.




Screenshot 10 · Registration Settings pane

**NOTE**

Registration **opening and closing dates** are set in **Challenge details** (Chapter 3), not here.

## How patrons choose a registration type

You do not switch registration types on or off. Patrons pick one on the sign-up screen, headed **Register** with the line “Select a type of participant”.

| Option the patron sees | Registration type | What it creates |
|---|---|---|
| “I am over 13 years of age and registering for myself” | Individual | One participant. |
| “I am registering on behalf of person(s) under 13 years of age” | Parent/Child | A group with the parent as admin and each child as a participant. The parent can also take part. |
| “I am registering a group” | Group | A group with one or more admins and any number of participants. |
| “Join an organisation” | Not available | This option is hidden in the product. |

Staff see the same three labels, **Individual**, **Parent/Child** and **Group**, in the participant export.

## Library card and age limits

1 To require a library card, turn on **Library card required** under **Required library card**.

The text reads “Participants are required to register for the challenge with a valid library card”.

2 To limit by age, turn on **Minimum Age**, **Maximum Age** or both, and enter the numbers.

- Turning on either age limit turns **Library card required** on and sets the age to 0 until you change it.
- While an age limit is active the library card switch is locked. Clicking it shows “Remove the minimum and maximum age limits before turning off the library card requirement.” Changing the switch clears both age limits.
- Validation: “Minimum age must be a non-negative number”, “Maximum age must be a non-negative number” and “Maximum age must be greater than or equal to minimum age”.

### What patrons experience

- If a library card is required and the patron is not signed in with a card, they are signed out and told “This challenge requires a library card login. Please log in with your barcode and PIN to continue.”
- If their age is outside the limits they see “You must be at least {min} years old to join this challenge.” (or “…no older than {max}…”).

- The server checks the date of birth held in your library system first, and falls back to the date of birth entered during sign-up.

## Custom questions

Ask participants anything extra, such as a school, a shirt size or a reading level. Under **Custom questions** the text reads “Add custom questions for your participants.”

1 Click **New custom question** and choose a type.

2 Complete the popup titled **Custom question** and save it.

**Name** is required. **Help text** is optional. Tick **Required** to make an answer mandatory.

3 Use **Edit** or **Delete** on any question in the list.

| Type | Extra fields |
|---|---|
| **Text input** | **Validation**: None, Email address, Phone number or Custom. Custom shows **Regular expression** (hint: “In Javascript format, for example: /^[A-Za-z0-9]*$/”). |
| **Text area** | None beyond the shared fields. |
| **Select from list** | **Options**: one choice per line. |
| **Checkbox** | An optional **Link**, for example to a policy page. |

> **IMPORTANT**
> Deleting a question warns: “Once this custom question has been deleted you will not be able to retrieve the answers in the reports, do you want to continue?”
>
> Renaming a question warns that “changing the name of a custom question may cause answers for this question to be lost.”

## Terms & Conditions, domain and print version

| Setting | What it does |
|---|---|
| **Terms & Conditions URL** | Optional link to your terms (the field shows “https://”). Participants see **I agree to the terms and conditions** on the sign-up Summary step. An invalid address shows “Terms & Conditions URL: Please enter a valid URL”. |
| **Site domain name** | Chooses the domain used for links in this Challenge’s completion emails. Options are **Default** (your account-wide domain), domains used by other Challenges, and **New…**. A new domain is entered without https:// or a path, for example challenges.library.org. |
| **Enable print version** | Allows staff and participants to download printable participant logs. It controls the **Print Log** and **Print logs** buttons for staff and **Download paper logs** for patrons. |

## Display names and the leaderboard

- Display names are checked automatically, including group names. A name with inappropriate language shows “Display name can’t contain inappropriate language”.
- Patrons choose whether they appear on the public leaderboard (**Include in leaderboard**). People who opt out are hidden from it, or shown as “Anonymous participant” if the leaderboard block allows anonymous entries (Chapter 11). When staff register someone, **Show on leaderboard** is on by default.

CHAPTER 5

# Goals and milestones: Points-based Challenges

In a Points Challenge every activity converts to points. Goals say what a unit is worth, and challenge milestones unlock rewards at point totals.

## How a Points Challenge works

- Each **goal** has a unit (books, visits, minutes) and **Points Per Unit**.
- A participant logs units. The system multiplies units by points per unit and adds the result to one running total.
- **Total Points** on a goal is the most that goal can contribute. The Challenge's maximum points is the total of all its goals' points.
- **Challenge milestones** unlock rewards when the running total reaches a number you choose.
- The **Completion** milestone is set automatically at the maximum points.

> **EXAMPLE**
> Goal "Read a book", unit "books", 10 points per unit. A participant who logs 3 books earns 30 points. While logging they see a read-only box showing "30 pts".

## Before you start

- ☐ The Challenge is saved, or you are still in the new, unsaved form.
- ☐ The achievement items you want to award exist (Chapter 2).
- ☐ Any competition you want to link has been created (Chapter 7).

## Step 1. Select Points

1 Select **Challenge details** in the tree.

2 Click the **Points** card ("Configure tasks to correlate to points.").

On a saved Challenge, confirm the **Change Achievement System** warning if it appears (Chapter 3). The tree now shows **Challenge milestones** and hides **Combined milestones**.

## Step 2. Add goals

1 Under **Goals**, click **Add**.

2 Complete the goal pane. The subtitle reads **Points goal**.

Fields are described in the table below.

3 Repeat for each goal. To remove one, click the bin icon titled **Delete Goal**.

| Field | What to enter | Rules |
|---|---|---|
| **Goal name** | What participants do, for example “Read 10 books”. | Required. Up to 60 characters. |
| **Description** | Optional detail shown to participants. | Up to 200 characters. |
| **Unit** | The thing counted: “pages”, “visits”, “hours”. | Required. |
| **Points Per Unit** | Points each logged unit is worth. | Zero or more. |
| **Total Points** | The most points this goal can contribute. | Must be greater than 0. |
| **Restriction type** | None, Daily, Weekly, Monthly or Yearly. Limits how much someone can log in a period. | Default None. |
| **Max points per day** (or week, month, year) | Appears once a period is chosen. The limit for that period. | At least 1. |
| **Goal dates** | Switch on to give this goal its own **Start Date** and **End Date**. | Off by default: “Uses challenge start and end date by default.” Must sit inside the Challenge dates. |

**TIP**
Use a restriction for daily activities such as “read 20 minutes” so one marathon session does not finish the goal in a day. Patrons who hit the limit see “Maximum reached for this period”.

## Step 3. Add challenge milestones

1 Under **Challenge milestones**, click **Add**.

When nothing exists yet the section reads “No challenge milestones yet.”

2 In **Unlock milestone at: (Points)**, enter the point total that unlocks this milestone.

It must be more than 0 and cannot exceed the total of all goals’ points.

3 Click **Add new achievement item**, choose a badge, certificate or prize, then click **Add**.

Repeat to give one milestone several items.

4 Optional: switch on **Competition** to reward participants with tickets or a prize entry.

Choose a competition under **Select competition**. For a Tickets competition enter **Number of tickets** (at least 1). A Prize Draw competition needs no number.

5 Add more milestones as needed, then click **Save**.

## Step 4. Set the Completion rewards

Every Challenge has an automatic completion milestone. In Points mode it sits at the Challenge's maximum points.

1 Select **Completion details** in the tree.

The pane is headed **Completion** with the line "Unlock achievement items when the entire challenge is finished."

2 Click **Add Achievement Item** and choose what finishers earn, usually a certificate.

Items already added are listed with **Edit** and a bin icon (**Delete Achievement Item**). With none it reads "No achievement items yet."

3 Optional: use the **Competition** switch to award tickets or an entry when someone completes the whole Challenge.

> **NOTE**
> The Competition switch on **Completion** is separate from a competition's **Complete Challenge requirement**, which only controls whether ticket allocation is allowed (Chapter 7).

## Worked example

> **EXAMPLE · SUMMER READING (POINTS)**
> Illustration only. Substitute your own goals and thresholds.

| Goal | Unit | Points per unit | Total points |
|---|---|---|---|
| Read a book | books | 10 | 200 |
| Attend an event | events | 25 | 100 |
| Visit a branch | visits | 5 | 50 |

Maximum points: **350**. Milestones:

| Unlock at | Achievement items | Competition |
|---|---|---|
| 50 points | Badge "Getting Started" | – |
| 150 points | Badge "Page Turner" | – |
| 250 points | Prize "Library tote bag" | 2 tickets to "Summer Prize Draw" |
| 350 points (Completion) | Certificate "Summer Reading Champion" | – |

## Edit or delete goals and milestones

Select the item in the tree, change the values in the pane and click **Save**. To remove something, use its bin icon:

| Where you click | What opens | Button |
|---|---|---|
| Bin icon on the milestone pane | **Delete Milestone** (combined milestones: **Delete Challenge Achievement Item**). It warns that the milestone, its settings, its achievement items and any participant progress toward it are permanently removed. | **Delete Milestone** |
| Bin icon beside a milestone in the tree | A confirmation for that milestone. | **Delete Combined Milestone** for combined milestones |
| Bin icon beside a goal or competition in the tree | A confirmation for that item. | **Delete Goal** or **Delete Competition** |
| Bin icon beside an achievement item in the tree | A confirmation to remove just that item from the milestone. | **Delete Achievement Item** |

## Messages you may see when saving

Messages name goals as “Target” followed by your goal’s name.

| Message | What to fix |
|---|---|
| Target “<name>”: Title is required | Enter a **Goal name**. |
| Target “<name>”: Unit is required | Enter a **Unit**. |
| Target “<name>”: Total points must be greater than 0 | Enter a **Total Points** above zero. |
| …Restriction period must be selected when a per-period limit is set | Choose Daily, Weekly, Monthly or Yearly, or remove the limit. |
| …Restriction amount must be greater than 0 when a period is selected | Enter a limit of 1 or more. |
| Target “<name>” start date must be on or after challenge start date | Bring goal dates inside the Challenge dates. |
| Milestone rewarded at must be greater than 0 | Enter a threshold above zero. |
| Milestone reward value (X) cannot exceed total target max points (Y) | Lower the threshold to the maximum points or less. |
| Milestone N: Number of tickets is required and must be greater than 0 when using a ticket system competition | Enter **Number of tickets**. |

CHAPTER 6

# Goals and milestones: Units-based Challenges

In a Units Challenge each goal keeps its own unit. Goal milestones reward progress on one goal, and combined milestones reward progress across several.

## How a Units Challenge works

- Each **goal** is measured in its own unit and has a **Required Total**, the amount needed to complete it.
- **Goal milestones** unlock rewards partway through one goal.
- **Combined milestones** unlock rewards when thresholds on two or more goals are met together, or when any one of them is met.
- The **Completion** milestone is a combined milestone that requires every goal.
- Points per unit is fixed at 1, so no points box appears while participants log.

## Before you start

- ☐ **Units** is selected on **Challenge details**. It is the default for new Challenges.
- ☐ The achievement items you want to award exist (Chapter 2).
- ☐ Any competition you want to link has been created (Chapter 7).

## Step 1. Add goals

1. Under **Goals**, click **Add**.
2. Complete the goal pane. The subtitle reads **Units goal**.
3. Repeat for each goal. Remove one with **Delete Goal**.

| Field | What to enter | Rules |
|---|---|---|
| **Goal name** | For example “Read 10 books”. | Required. Up to 60 characters. |
| **Description** | Optional detail shown to participants. | Up to 200 characters. |
| **Unit** | What is counted: books, events, visits, minutes. | Required. |
| **Required Total** | How many units complete the goal. Helper text: “Measured in <unit>”. | At least 1. |
| **Restriction type** | None, Daily, Weekly, Monthly or Yearly. | Default None. |
| **Logs allowed per day** (or week, month, year) | Appears once a period is chosen. The limit for that period. | At least 1. |
| **Goal dates** | Switch on for a separate **Start Date** and **End Date**. | Off by default. Must sit inside the Challenge dates. |

## Step 2. Add goal milestones

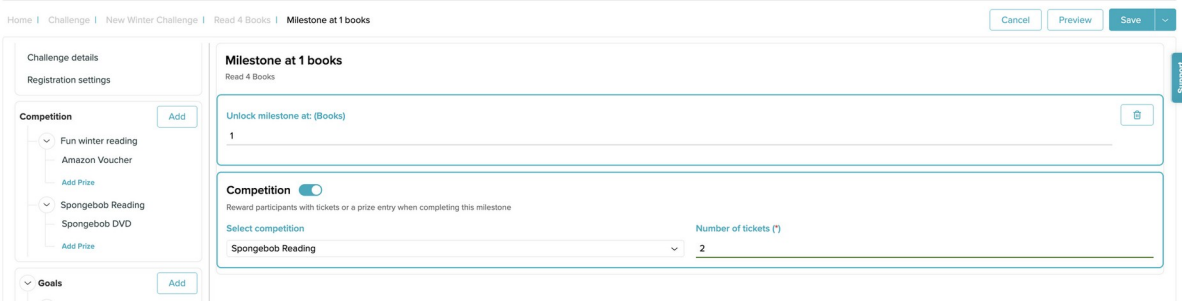
1 In the tree, find the goal and click **New milestone** beneath it.

2 In **Unlock milestone at: (<Unit>)**, enter how far through the goal unlocks the milestone.

It must be more than 0 and cannot exceed that goal’s **Required Total**.

3 Click **Add new achievement item**, choose an item and click **Add**.

4 Optional: switch on **Competition**, pick one under **Select competition** and, for Tickets, enter **Number of tickets**.




Screenshot 11 · Goal milestone pane

## Step 3. Add combined milestones

Use a combined milestone to reward balanced progress, for example “read 5 books and attend 3 events”.

1 Under **Combined milestones**, click **Add**.

When nothing exists yet it reads “No combined milestones added yet.”

2 Choose the logic with **Require all goals to achieve milestone**.

Tooltip: “All goals must be met to receive the milestone award(s).”

3 Tick each goal that counts toward the milestone.

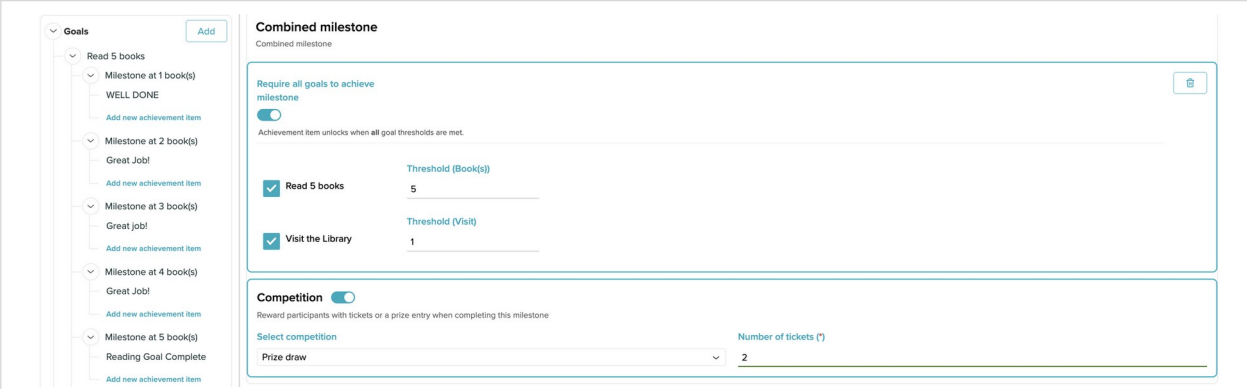
Ticking a goal turns on its **Threshold (<Unit>)** field. The threshold defaults to that goal’s Required Total and cannot exceed it.

4 Add achievement items and, if you like, a competition, as for any milestone.

5 Click **Save**.

| Switch | Hint shown beside it |
|---|---|
| On | “Achievement item unlocks when all goal thresholds are met.” |
| Off | “Achievement item unlocks when any single goal threshold is met.” |

**IMPORTANT**
A combined milestone must include at least two goals: “Combined milestones must have at least two target thresholds”.




Screenshot 12 · Combined milestone pane

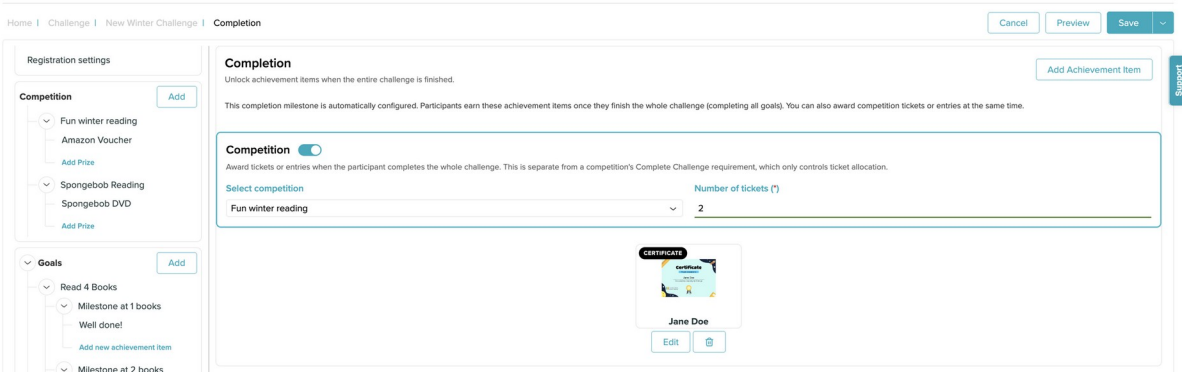
## Step 4. Set the Completion rewards

1 Select **Completion details** in the tree.

This milestone is configured automatically as a combined milestone that requires all goals.

2 Click **Add Achievement Item** and choose what finishers earn.

3 Optional: use the **Competition** switch to award tickets or an entry for completing the whole Challenge.




Screenshot 13 · Completion pane

## Worked example

**EXAMPLE · SUMMER READING (UNITS)**
Illustration only. Substitute your own goals and thresholds.

| Goal | Unit | Required Total | Goal milestone |
|---|---|---|---|
| Read books | books | 10 | At 5 books: Badge “Halfway Reader” |
| Attend events | events | 5 | At 3 events: Badge “Event Explorer” |
| Visit branches | visits | 3 | – |

| Combined milestone | Logic | Thresholds | Reward |
|---|---|---|---|
| Balanced reader | All goals | Read books 5 and Attend events 3 | Prize “Library tote bag” |
| Completion | All goals (automatic) | Every goal at its Required Total | Certificate “Summer Reading Champion” |

## Edit or delete goals and milestones

Select the item in the tree, change the values and click **Save**. To remove an item, use its bin icon. The delete options and what each one removes are listed in Chapter 5.

## Messages you may see when saving

| Message | What to fix |
|---|---|
| Target “<name>”: Total unit must be greater than 0 | Enter a **Required Total** of 1 or more. |
| Milestone rewarded at must be greater than 0 | Enter a threshold above zero. |
| Target milestone “<goal>” cannot be rewarded at X <unit>, which exceeds the target’s total of Y <unit> | Lower the milestone to the goal’s Required Total or less. |
| Combined milestones must have at least two target thresholds | Tick at least two goals. |
| Combined milestone target threshold reward value must be greater than 0 | Give every ticked goal a threshold above zero. |

Messages about competition tickets are listed in Chapter 5.

CHAPTER 7

# Competitions

A competition turns milestones into entries in a prize draw. You set it up in the Challenge form and manage entries, draws and winners afterwards.

## Choose a competition type

| Type | Card text | How it works |
|---|---|---|
| **Tickets** | “Award tickets that participants can enter into prize buckets” | Milestones award tickets. Participants spend tickets on the prizes they want, or you can **Auto allocate** unused tickets evenly. |
| **Prize Draw** | “Set of prizes to be won eg 1st, 2nd, 3rd prize” | Participants who earn an entry are in one draw for the listed prizes. No ticket numbers. |

## Create a competition

1 In the Challenge form tree, under **Competition**, click **Add**.

2 Choose **Tickets** or **Prize Draw**.

3 Complete **Competition details** (table below).

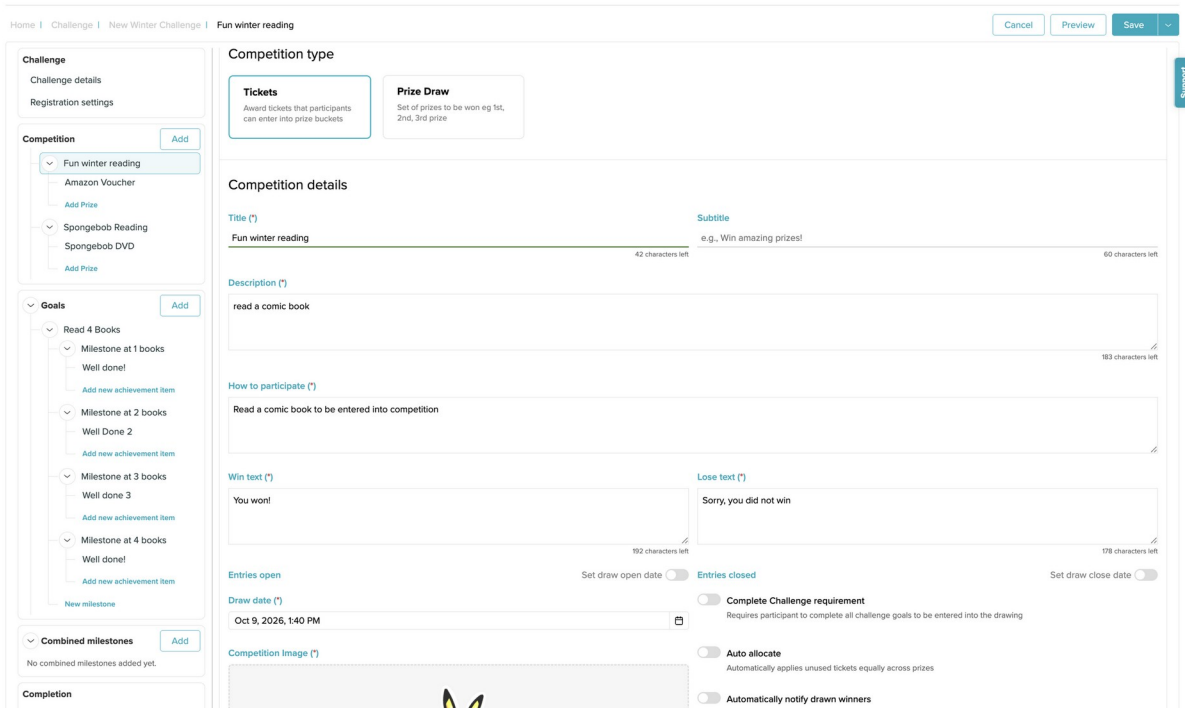
4 Under the new competition, click **Add Prize** and set each prize’s **Quantity**.

Quantity is how many winners are drawn for that prize (at least 1). Prize details use the same fields as a prize in the achievement items library (Chapter 2). Use **Edit** to change a prize or the bin icon titled **Delete prize** to remove it.

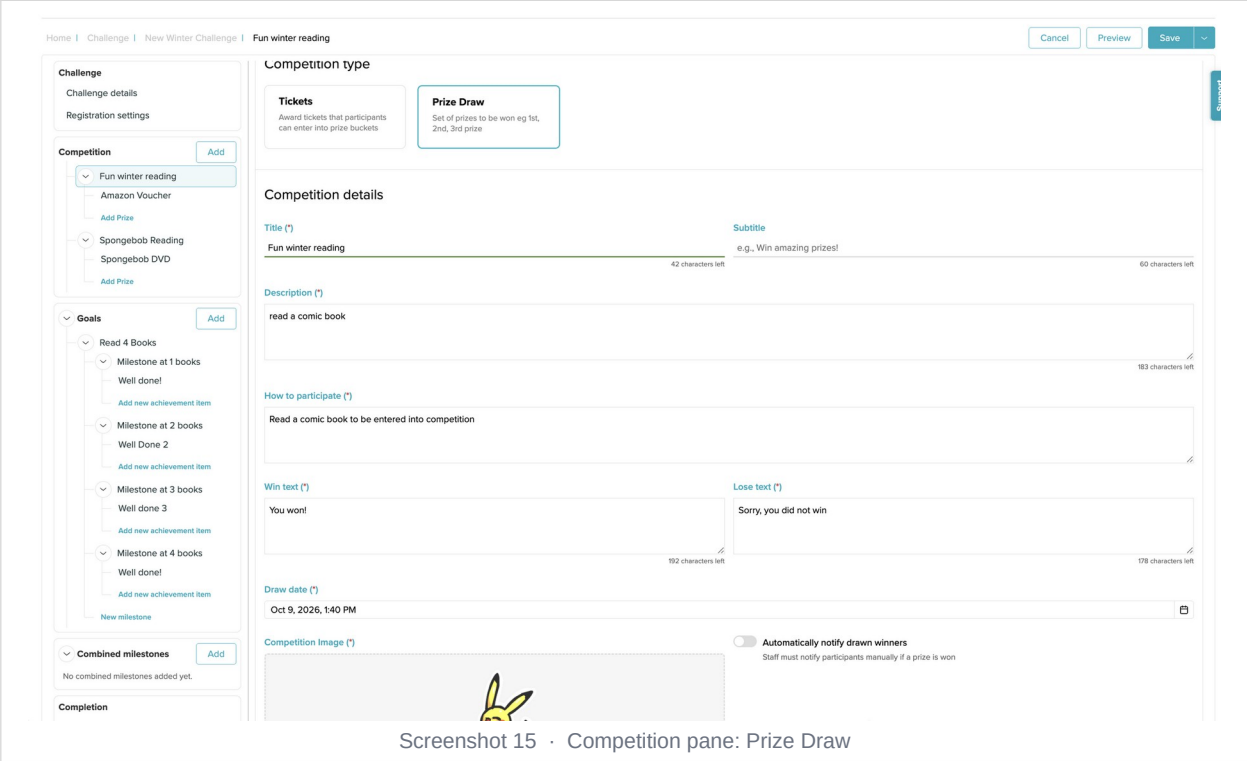
5 Click **Save**.

| Field | Notes |
|---|---|
| **Title** | Required. Up to 60 characters. Example: “Summer Reading Prize Draw”. |
| **Subtitle** | Up to 60 characters. |
| **Description** | Required. |
| **How to participate** | Instructions shown to participants. |
| **Win text** | Required. The message shown on screen when a participant wins. |
| **Lose text** | Required. The message shown on screen when a participant does not win. |
| **Entries open** (Tickets only) | Switch on **Set draw open date** to choose when entries open. |
| **Entries closed** (Tickets only) | Switch on **Set draw close date** to choose when entries close. |

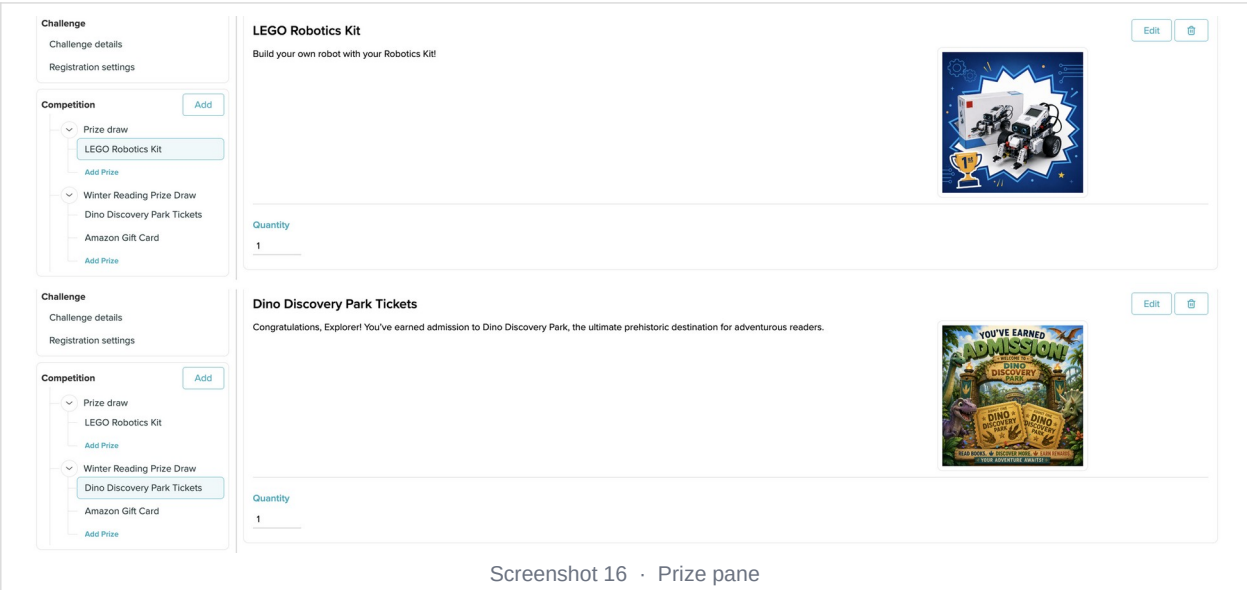
| Field | Notes |
|---|---|
| **Draw date** | Required. Winners can only be drawn on or after this date. |
| **Complete Challenge requirement** (Tickets only) | “Requires participant to complete all challenge goals to be entered into the drawing.” |
| **Competition Image** | Required. Square, at least 200 × 200 pixels, JPEG or PNG. |
| **Auto allocate** (Tickets only) | “Automatically applies unused tickets equally across prizes.” |
| **Automatically notify drawn winners** | On: “Winners will automatically be notified if a prize is won.” Off: “Staff must notify participants manually if a prize is won.” |




Screenshot 14 · Competition pane: Tickets




Screenshot 15 · Competition pane: Prize Draw




Screenshot 16 · Prize pane

## Date rules

Entry dates must fall inside the Challenge dates and cannot be later than the draw date. “Error: Entries open date must be earlier than entries close date.” appears if the two are reversed. Messages such as “<name>: Win message is required” and “<name>: Competition image is required” name any missing field.

## Link a competition to a milestone

A competition only gives out entries when a milestone is linked to it. Any milestone pane, and the **Completion** pane, has the same box.

1 Select the milestone and switch on **Competition**.

The text reads “Reward participants with tickets or a prize entry when completing this milestone”.

2 Under **Select competition**, choose it from the list.

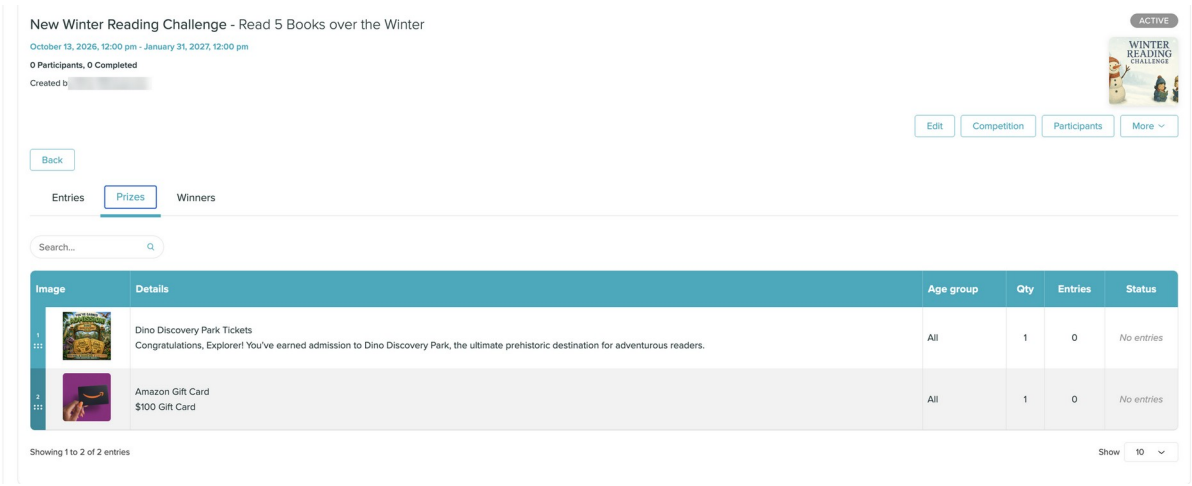
3 For a **Tickets** competition, enter **Number of tickets** (at least 1). A **Prize Draw** competition needs no number.

> **TIP**
> Create the competition first, or it will not appear in the list. Switching **Competition** off clears the link and the ticket number.

## Manage a competition after launch

On the Challenges page, open the Challenge card and click **Competition**. The competition detail view has three tabs: **Entries**, **Prizes** and **Winners**. **Winners** appears only if you can view or draw winners.

| Tab | What it shows | What you can do |
|---|---|---|
| **Entries** | Name, Display Name, Tickets, Allocated, **Auto allocated** (when that option is on) and Action. Empty text: “No entries yet for this competition.” | Remove or restore an entrant. Allocate tickets for them. A banner warns if the entrant has not completed the Challenge. |
| **Prizes** | Image, Details, Age group (All unless limited), Qty, Entries (Tickets) and Status. | Reorder prizes (“Prize order has been saved successfully.”) and draw winners. |
| **Winners** | Prize, Details, Winner name, Status (**Unclaimed** or **Prize claimed**) and Action. Search with **Search name**. | Notify, claim or delete a winner. Notify non-winners. |




Screenshot 17 · Competition detail: Prizes tab

### Allocate tickets for an entrant

1 On **Entries**, choose the allocate action for the participant.

2 Assign tickets to prizes, or click **Distribute Remaining Evenly**.

3 Click **Save Allocation** (it becomes **Allocate Anyway** if the entrant has not finished the Challenge), or **Cancel**.

## Draw winners

1 Open the **Prizes** tab.

The **Status** cell shows “No entries”, “Draw date:” with the date until it arrives, or “You don’t have permission to draw winners.” if you lack `challenge_winners_draw`.

2 Click **Draw winner** on a prize.

A window titled **Draw a Winner** (or **Draw Winners**) shows “N winner(s) required” and how many entrants are eligible, based on age groups and ticket allocations.

3 Click **Draw winner** (or **Draw winners**) in the window.

An animation reads “Selecting Random Winner”. Remove an unwanted result with its bin icon and draw again.

4 Click **Confirm** to save. A notification says “Winners confirmed”.

With automatic notification on, the footer says “Confirming the winner will notify the participant when possible, and any relevant group admin”.

## Notify winners and everyone else

- **Automatic off:** after confirming, use **Notify winner** on the **Winners** tab. The button changes to “Winner notified”. The draw message reminds you: “Winner has been selected. Use Notify winner to send the email.”
- **Notify losing participants** appears only if you can draw winners and automatic notification is off. Every prize must be drawn first: “All prizes must be drawn before losing participants can be notified.” Success reads “N losing participants have been notified.”
- Errors read “Unable to notify winner” and “Unable to notify losing participants”.

## Record that a prize was handed over

1 On the **Winners** tab, click **Claim** beside the winner.

The **Claim Prizes** window opens: “Select the prizes that need to be claimed and who distributed the prize”.

2 Tick the prizes (or **Select all**) and click **Claim Prize**.

3 On **Staff details**, enter **Staff name**, **Branch name (where applicable)** and **Position**, then click **Save**.

A notification says “Prize claimed”. The row’s button becomes **Log** and its status **Prize claimed**.

> **NOTE**
> Claims, draws, winner removals and ticket allocations are recorded in the audit log. Use **Delete** on a winner row to remove a winner. People without `challenge_winners_draw` see a **Contact** column and the text “You don’t have permission to manage winners.”

PART 2

# Put the Challenge on your website with Create

Generate a Challenge page from a template, tailor it in the Create editor, add a leaderboard and publish it.

IN THIS PART


| Chapter | What it covers |
|---|---|
| **8.** Add a Challenge page with the wizard | The two-step wizard that builds a page for one Challenge. |
| **9.** Use a Challenge template or build from blocks | The eight templates and the Challenge blocks behind them. |
| **10.** Edit a Challenge page in Create | What you can change in Create and what stays in the Control Panel. |
| **11.** Leaderboards: set up and use | Add a ranked leaderboard for people or groups, choose what it counts and manage who appears on it. |
| **12.** Publish a Challenge page | Publish, schedule, unpublish and confirm the live address. |


CHAPTER 8

# Add a Challenge page with the wizard

The wizard builds a ready-made page for one Challenge in two steps: choose the Challenge, then choose a template.

## Before you start

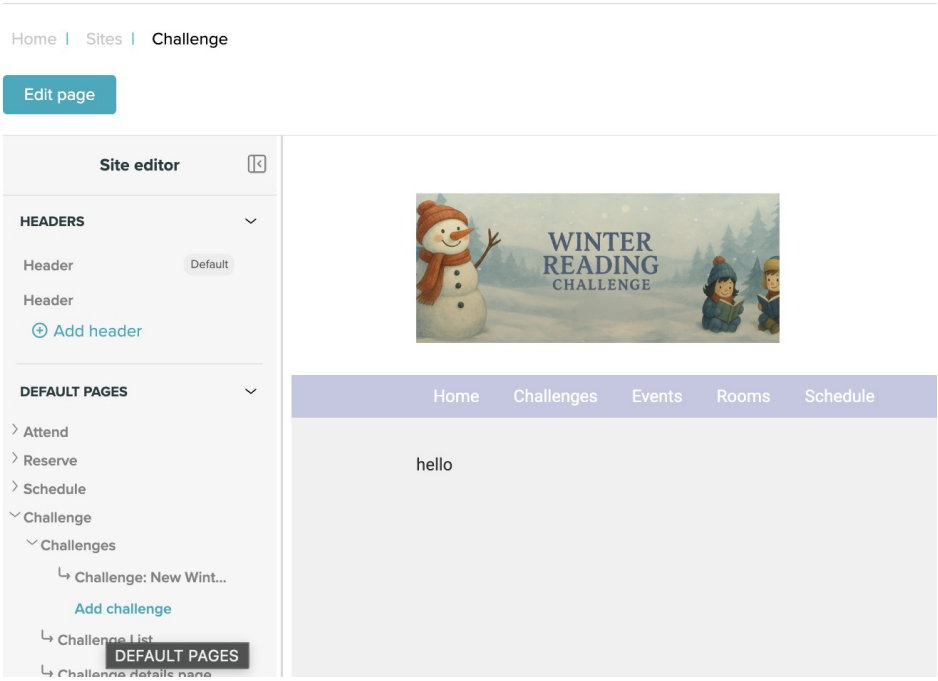
- ☐ The Challenge is saved in the Control Panel (Part 1). The wizard lists saved Challenges only.
- ☐ You can edit your site in Create, and the Challenge module is enabled for your library.
- ☐ You have the Create permissions to add pages (`create.pages`) and, later, to publish (`create.publish`).

## Start the wizard

1 In the Control Panel, open **Create** and edit your site from the sites list.

2 In the left rail, under **DEFAULT PAGES**, open **Challenge**, then **Challenges**, and click **Add challenge**.

The **Challenge** group only appears when the Challenge module is enabled. The **Challenges** sub-group also lists every Challenge page you have already created.




Screenshot 18 · Create editor left rail

> **NOTE**
> If you have no saved Challenges, a warning appears: “No challenges found. Create a challenge first, then try again.” If the list cannot load you see “Unable to load challenges”.

## Step 1. Select a challenge

The window is titled **Select a challenge**. The wizard steps are **Select challenge** and **Select template**.

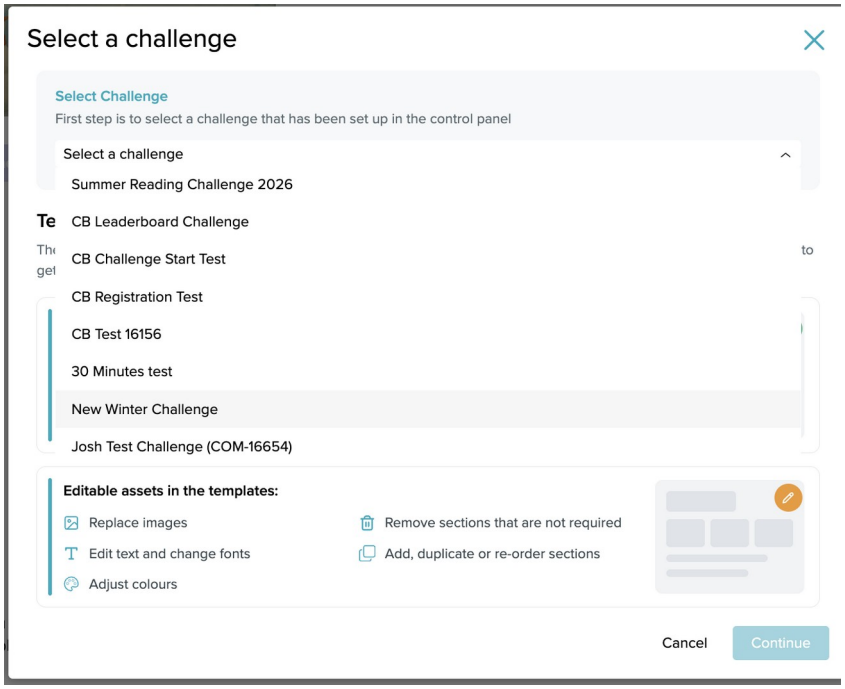
1 In the **Select Challenge** box, open the drop-down (placeholder “Select a challenge”) and choose your Challenge.

The box reads “First step is to select a challenge that has been set up in the control panel”.

2 Read the **Template guides** panel beside it.

3 Click **Continue**. It stays disabled until you choose a Challenge. **Cancel** closes the wizard.

| Added automatically to templates | Editable afterwards |
|---|---|
| • Banner image (1440 × 580 px)<br>• Challenge description text<br>• Square image (600 × 600 px)<br>• Challenge start and end date<br>• Challenge header title<br>• Registration start and end date | • Replace images<br>• Remove sections that are not required<br>• Edit text and change fonts<br>• Add, duplicate or re-order sections<br>• Adjust colours |




Screenshot 19 · Select a challenge window

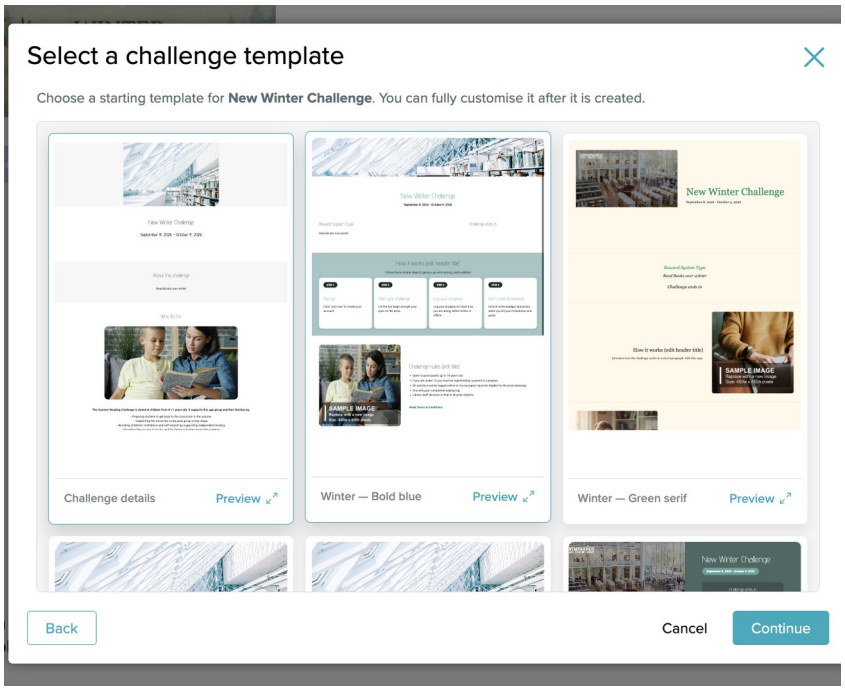
## Step 2. Select a template

1 In **Select a challenge template**, browse the live previews.

The text reads “Choose a starting template for {challenge title}. You can fully customise it after it is created.” Each preview uses your Challenge’s real title, dates and images. The first template is preselected.

2 Click a template, then **Continue**.

The button changes to “Creating page…” while the page is saved. Use the previous-step control to go back and choose a different Challenge.

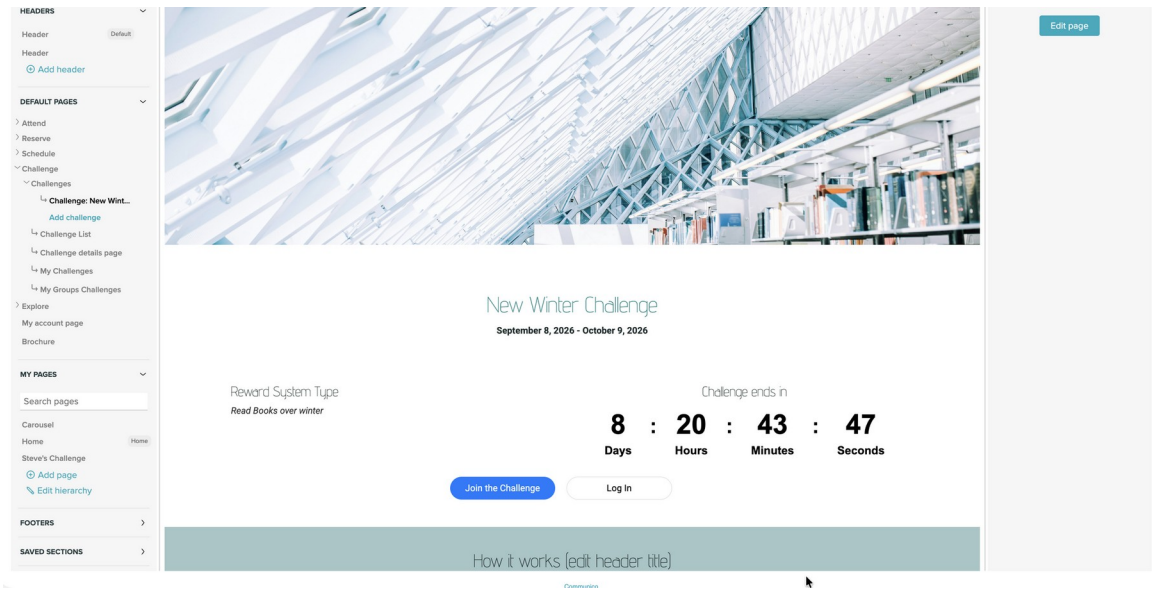



Screenshot 20 · Select a challenge template window

The eight templates are described in Chapter 9.

## What the wizard creates

- A page titled **Challenge: {your Challenge title}**, saved as a **draft**. It is not live until you publish it (Chapter 12).
- The standard **Header** and **Footer** blocks, a **Challenge Header** (countdown) block and a **Join Challenge** block, both already pointed at your Challenge, plus the sections of the template you chose.
- The editor opens on the new page so you can start tailoring it.
- If saving fails you see “Unable to create page. Please try again.”




Screenshot 21 · New Challenge page in the editor

### The page address

The address is built from the Challenge title.

| Situation | Address | Example |
|---|---|---|
| Normal | `challenge/{title}` with the title trimmed to 80 characters, lower-cased, and runs of other characters turned into hyphens | “Summer Reading Challenge” becomes `challenge/summer-reading-challenge` |
| Another page already uses it | `challenge/{title}-{id}`, then `-2`, `-3` and so on | `challenge/summer-reading-challenge-12` |
| The title has no letters or digits | `challenge-{id}` | `challenge-12` |

## Other Challenge pages in the same group

The **DEFAULT PAGES** group also lets you create these ordinary pages:

| Page | Path | Purpose |
|---|---|---|
| **Challenge List** | `challenge-list` | Lists every public Challenge using the **Challenges** block. |
| **My Challenges** | `challenges` | The patron’s dashboard: Challenges they have joined, with logging and rewards. Create it before launch so patrons have somewhere to go after they register. |
| **My Groups Challenges** | `challenges-group` | Challenges joined through a group. |
| Challenge detail (default) | `challenge/detail` | The generic fallback page used when a Challenge has no page of its own. |

CHAPTER 9

# Use a Challenge template or build from blocks

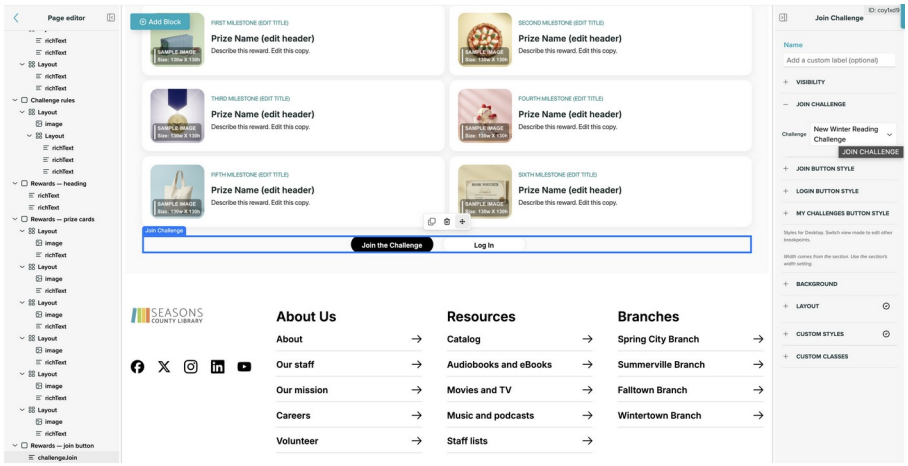
Templates give you a designed starting page. You can also assemble a page yourself from individual Challenge blocks.

## The eight templates

| Template | Look and layout |
|---|---|
| **Challenge details** (default) | Banner, description, countdown and join: the standard Challenge layout. |
| **Winter — Bold blue** | Full banner hero, blocky step cards and a milestone reward grid. |
| **Winter — Green serif** | Editorial serif layout with a split square hero. |
| **Winter — Playful yellow** | Bright banner hero, image step cards and milestone reward rows. |
| **Winter — Bold condensed** | Condensed uppercase headings with an overlaid countdown hero. |
| **Winter — Split panel** | Square hero beside a dark-green panel with a countdown card. |
| **Summer — Warm illustrated** | Peach palette, eyebrow labels and a centered illustrated hero. |
| **Summer — Left hero** | Two-column hero with illustration, About and Rewards sections. |

## What each template contains

The **Challenge details** template is made of six named sections, each editable on its own: **Hero & countdown**, **About the challenge**, **Who it's for**, **How it works** (heading, then steps), **Rewards** (heading, then prize cards) and **Sign up & join**. The seasonal templates use similar sections under names such as **About & countdown**, **Challenge rules** and **Join the challenge**. They vary by design.




Screenshot 22 · Rewards section of a template

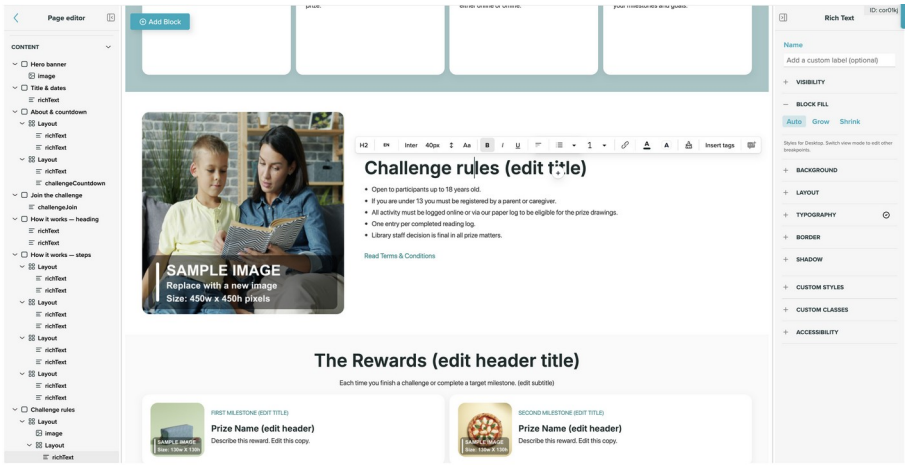
## Text that updates itself

Template text that comes from your Challenge is stored as a tag, not typed in. When you change the Challenge in the Control Panel, the page updates automatically. In the editor, tag-bound text appears as read-only chips.

| Group | Tags |
|---|---|
| Names and text | `challenge_title`, `challenge_subtitle`, `challenge_description` |
| Dates | `challenge_start_date`, `challenge_end_date`, `challenge_date_range`, `challenge_registration_start_date`, `challenge_registration_end_date` |
| Images | `challenge_image`, `challenge_image_url`, `challenge_banner_image`, `challenge_banner_image_url`. With no image set, the page shows an instructional placeholder; add the image in Chapter 3. |
| Other | `challenge_reward_system`, `challenge_terms_url`, `challenge_participant_count`, `challenge_url`, `challenge_id` |

## After the page is created

- ☐ Replace any placeholder images in the template.
- ☐ Rewrite the **How it works** and **Rewards** text. It is plain text, not tag-bound.
- ☐ Delete sections you do not need.
- ☐ Adjust colors and fonts, then check desktop, tablet and mobile views (Chapter 10).



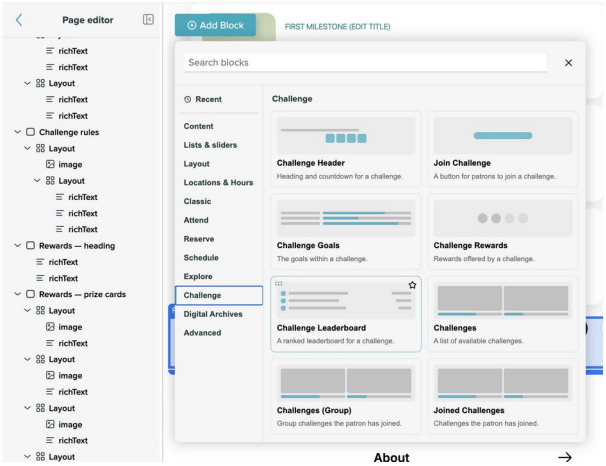

Screenshot 23 · Replacing placeholder images and text

## Build from blocks instead

You do not have to use the wizard. Any page can carry Challenge blocks.

1. Open or create a page in the Create editor.
2. Choose **Add Block** and open the **Challenge** category of the block picker.
3. Pick a block and place it on the page. Chapter 10 lists all eight.
4. Select the block and choose your Challenge in its settings panel.

   A block with no Challenge chosen shows “No challenge selected” in the editor.




Screenshot 24 · Block picker: Challenge category

CHAPTER 10

# Edit a Challenge page in Create

Create controls how the Challenge page looks. The Challenge itself, its dates, goals and rewards, stays in the Control Panel.

## What you change where

| Change it in Create | Change it in the Control Panel |
|---|---|
| • Layout, section order and which sections appear<br>• Colors, fonts, spacing and button styles<br>• Plain text that is not tag-bound (steps, rules, rewards copy)<br>• Images you added to the template<br>• Which Challenge each block displays<br>• Leaderboard options | • Title, subtitle and description<br>• Challenge start and end dates, registration dates<br>• Goals, milestones, rewards and competitions<br>• Challenge image and banner image<br>• Terms & Conditions address<br>• Points or Units |

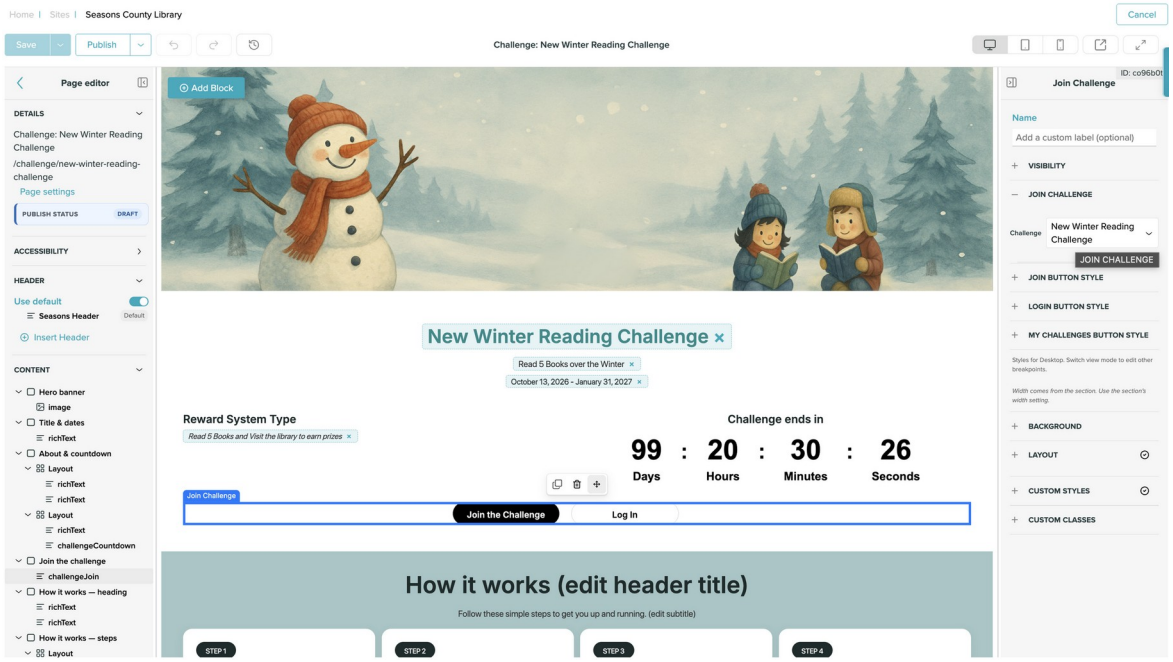
## Open the page in the editor

1 Edit your site in Create.

2 In the left rail, open **DEFAULT PAGES**, then **Challenge**, then **Challenges**, and click the page.

3 Click a block on the page to select it.

A coach mark may read “Select a challenge: Choose which challenge to show for this block.” The settings panel opens on the right.




Screenshot 25 · Join Challenge block selected in the editor

# The Challenge blocks

| Block | What it does | Settings panel |
|---|---|---|
| **Challenge Header** | “Heading and countdown for a challenge.” | **CHALLENGE COUNTDOWN**: the **Challenge** drop-down. A **Search…** box appears when you have more than 20 Challenges. |
| **Join Challenge** | “A button for patrons to join a challenge.” | **Challenge**, plus three style panels: **JOIN BUTTON STYLE**, **LOGIN BUTTON STYLE** and **MY CHALLENGES BUTTON STYLE**. Each sets background color, text color, border color, border style, border width and border radius. |
| **Challenge Goals** | “The goals within a challenge.” | **CHALLENGE GOALS**: the **Challenge** drop-down. |
| **Challenge Rewards** | “Rewards offered by a challenge.” | **CHALLENGE REWARDS**: the **Challenge** drop-down. Earned rewards read “Claimed at {N} point(s)”. |
| **Challenge Leaderboard** | “A ranked leaderboard for a challenge.” | **CHALLENGE LEADERBOARD**: the **Challenge** drop-down and the ranking options in Chapter 11. |
| **Challenges** | “A list of available challenges.” | Width and style settings. Hides private and ended Challenges; each card has a **Go to Challenge** button. Empty text: “There are no challenges.” |
| **Joined Challenges** | “Challenges the patron has joined.” | **HEADER STYLE** and **CONTENT STYLE**, each with maximum width, padding and margin. No Challenge picker, because it shows the signed-in patron’s own Challenges. |

| Block | What it does | Settings panel |
|---|---|---|
| **Challenges (Group)** | “Group challenges the patron has joined.” | Restricted block: only offered to certain accounts. |

> **NOTE**
> Every Challenge block begins with the shared **width** controls. The countdown block’s title and date toggles are not exposed in Create.

## Style settings

- Fields sit in collapsible groups (**Background**, **Layout**, **Typography**, **Border**, **Object**, **Align**, **Position**). Color fields include a contrast checker.
- Which fields a block offers depends on the block. **Challenge Header**, **Join Challenge** and **Joined Challenges** allow background color only. **Goals**, **Rewards**, **Leaderboard** and **Challenges** allow padding, margin, color and background color.
- Use **Add custom style** under **Custom styles** for anything else (a key and a value).

## Editor tools

| Tool | Notes |
|---|---|
| Reorder or delete blocks | Deleting asks “Delete block?” first. |
| Desktop, Tablet, Mobile views | Switch to check each layout. Styles are set per view, and Tablet and Mobile inherit Desktop unless you override them. |
| Undo, Redo, Timeline | Step backward or forward, or review earlier states of the page. |
| **Preview site** | Opens a preview of the page. Check all three views before publishing: the countdown and leaderboard are the blocks most likely to need spacing tweaks on mobile. |
| **Save** | A split button. Its menu offers **Save as copy…** and **Save as template…**. Saving stores a draft only. |

CHAPTER 11

# Leaderboards: set up and use

The **Challenge Leaderboard** block ranks participants or groups on your Challenge page. It keeps itself up to date, and each participant decides whether their name appears.

## What the leaderboard shows

A leaderboard is a block you place on a Create page. It is not part of the patron dashboard and there is no leaderboard screen in the Control Panel. One block ranks one Challenge, so add a second block when you want a second view, such as one board for individuals and one for groups.

| Scope | Ranks | Where the score comes from |
|---|---|---|
| **Individual** | Each participant | The participant's own logged progress. Members of a group also appear here, ranked on what they logged themselves. |
| **Group** | Each group, including parent/child families | The combined progress of the group's participant members. Members who are admins only do not add to the total. |

> **NOTE**
> None of the templates in Chapter 9 lists a leaderboard section, so you add the block yourself. Place it on the Challenge page, or on a landing page or display page of its own.

## Before you add the block

- ☐ The Challenge is saved, with its goals and milestones (Chapter 5 or 6).
- ☐ You know which number should decide the ranking: points, units or tickets (see **Choose what to count**).
- ☐ A Create page exists for the Challenge (Chapter 8) or you have another page to place the block on.
- ☐ If you want a **TICKETS** board, the Challenge has a **Tickets** competition (Chapter 7).

## Add the leaderboard to a page

1 Open the page in the Create editor.

Use the same route as in Chapter 10: your site, then **DEFAULT PAGES**, **Challenge**, **Challenges**.

2 Add the block from the block picker.

Open the **Challenge** category and choose **Challenge Leaderboard** (“A ranked leaderboard for a challenge.”). Place it where you want it on the page.

3 Select the block and, in **CHALLENGE LEADERBOARD**, choose the **Challenge**.

A **Search…** box appears when you have more than 20 Challenges. Changing the Challenge resets **Goal** to **All goals combined**, and resets **Metric** to **POINTS** if **TICKETS** is no longer available.

4 Choose the **Metric**, **Goal** and **Scope**.

The next two sections explain which combination to use.

5 Set **Order**, **Limit** and **Display limit**.

Leave **Order** on **DESC** for a normal “top scores first” board.

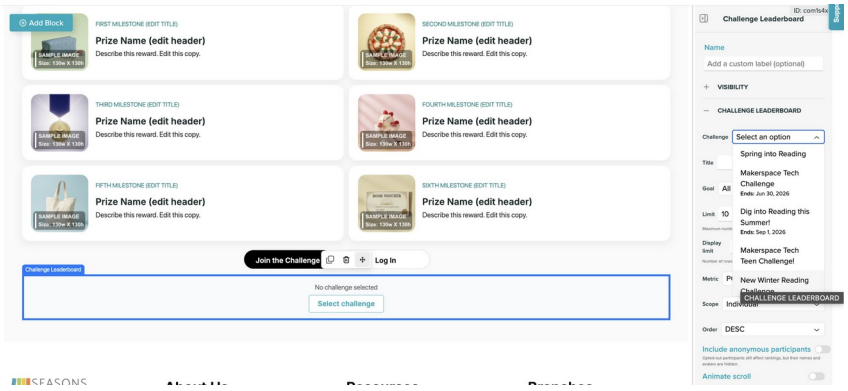
6 Decide on **Include anonymous participants** and **Animate scroll**.

Both are optional and both are off by default.

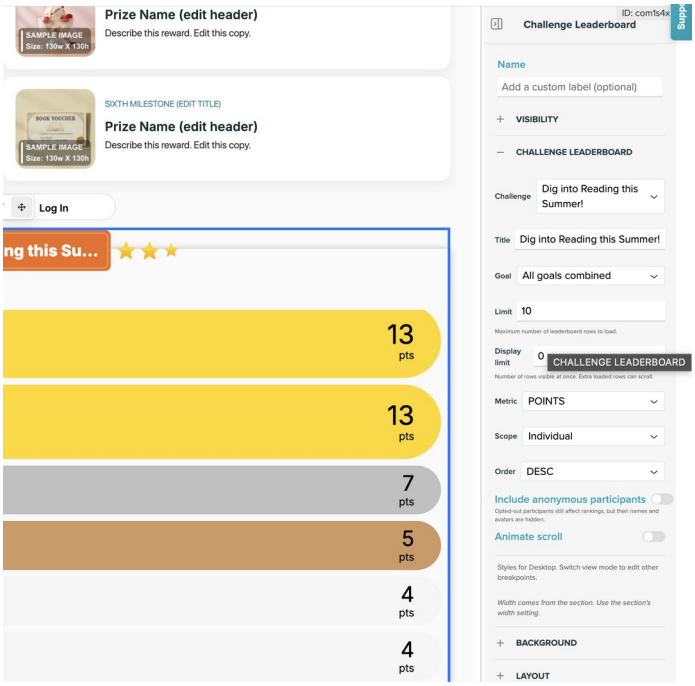
7 Adjust spacing and colors under the style settings, then check Desktop, Tablet and Mobile views.

8 Click **Save**, then preview the page.

The board stays empty until someone has signed up. Test with a participant of your own (see **Test before you announce**).




Screenshot 26 · Choose the Challenge for the leaderboard




Screenshot 27 · Challenge Leaderboard settings panel

## Leaderboard options

| Option | What it does | Default |
|---|---|---|
| **Challenge** | The Challenge to rank. | None. Choose one. |
| **Title** | The heading above the board. Leave it blank to use the Challenge title. | Blank |
| **Goal** | **All goals combined**, or a single goal. Each goal is listed with its unit in brackets. | All goals combined |
| **Limit** | The most rows to load, at least 1. “Maximum number of leaderboard rows to load.” | 10 |
| **Display limit** | How many rows are visible at once, 0 or more. “Number of rows visible at once. Extra loaded rows can scroll.” With 0, every loaded row shows. | 0 |
| **Metric** | **POINTS**, **QUANTITY**, or **TICKETS**. **TICKETS** is offered only when the Challenge has a Tickets competition. | POINTS |
| **Scope** | **Individual** ranks people. **Group** ranks groups. | Individual |
| **Order** | **DESC** puts the highest score first. **ASC** puts the lowest first. | DESC |
| **Include anonymous participants** | Keeps participants who opted out on the board as “Anonymous participant”. See **Who appears on the board**. “Opted-out participants still affect rankings, but their names and avatars are hidden.” | Off |

| Option | What it does | Default |
|---|---|---|
| **Animate scroll** | Scrolls the rows automatically. When on, **Scroll direction** (**BOUNCE**, **UP**, **DOWN** or **NONE**) and **Scroll duration** appear. Duration is seconds per row. | Off. Direction BOUNCE, duration 0.75 |

> **NOTE**
> There is no setting for how often the board refreshes. It reloads by itself every 30 seconds.

## Choose what to count

The **Metric** decides both the ranking and the label shown beside each score.

| Metric | Counts | Label on the board | Best for |
|---|---|---|---|
| **POINTS** | Amount logged × points per unit, added across goals. | “pts” | Points-based Challenges. In a Units Challenge points equal units, so it counts units logged. |
| **QUANTITY** | The amounts logged, added together. | The goal’s unit, or “units” when several units are mixed | Units-based Challenges, ideally with one **Goal** chosen so the unit makes sense. |
| **TICKETS** | Tickets each participant or group has collected. | “tickets” | Challenges with a Tickets competition. The **Goal** setting does not apply. |

> **TIP**
> In a Units Challenge with goals in different units (books and minutes, say), do not combine them. Add one board per goal and pick the goal in each block.

## Common setups

| You want | Settings |
|---|---|
| A top 10 of readers for the Challenge page | **Scope** Individual, **Metric** POINTS, **Goal** All goals combined, **Limit** 10, **Display limit** 0. |
| A “most books read” board in a Units Challenge | **Metric** QUANTITY, **Goal** the books goal, **Limit** 10. |
| A race between classes, families or clubs | **Scope** Group, **Metric** POINTS (or QUANTITY with a goal), **Limit** 10. |
| Standings for a ticket draw | **Metric** TICKETS, **Scope** Individual. |
| A scrolling board for a lobby screen | **Limit** 50, **Display limit** 8, **Animate scroll** on with **Scroll direction** UP or BOUNCE. |

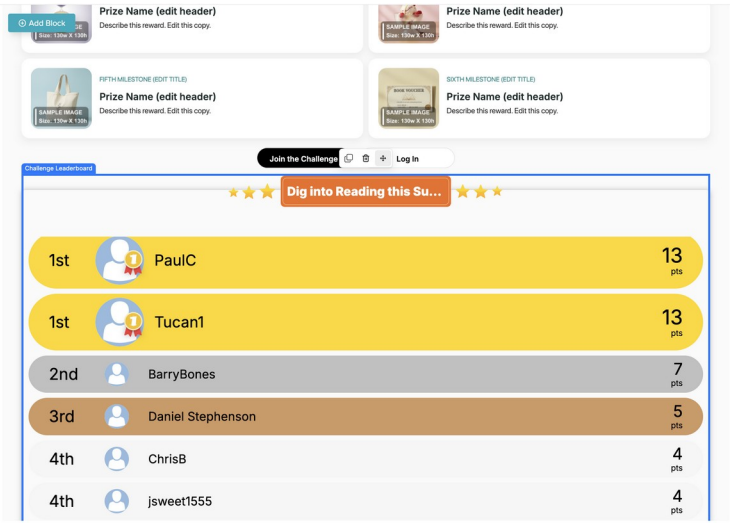
**EXAMPLE · LOBBY DISPLAY**

A 50-row board with **Display limit** 8 shows eight rows at a time and scrolls through the rest. Use **Limit** and **Display limit** together for screens that cannot show everyone at once.

The board waits about two seconds before it starts to move. **UP** scrolls from the first row to the last, **DOWN** starts at the last row and scrolls back to the first, and **BOUNCE** scrolls and then returns to the top. Scrolling only happens when more rows are loaded than are visible.

## How the board ranks

- **Places are ordinal**: 1st, 2nd, 3rd, 11th, 12th, 13th, 21st and so on.
- **Ties share a place.** If two people tie for 1st, the next score is 2nd, not 3rd. People with the same score are listed in the order they signed up.
- **The top three stand out.** First place (ties included) is gold with a badge, second is silver and third is bronze.
- **Everyone with a sign-up is ranked**, including people who have logged nothing, who show with a score of 0.
- **ASC reverses the board.** Lowest scores come first, so participants with 0 lead. Use it only when a low score is the goal.
- **Group totals** are the sum of the group's participant members. A group member also appears on an Individual board.
- **While the board loads** it reads "Loading…". With no data it reads "Results will be available soon".




Screenshot 28 · Leaderboard on the live page

## Who appears on the board

Participants are shown by their **display name** and avatar. Each person has an opt-in setting, **on by default**, that staff or patrons can change in these places:

| Where | Control | Who sets it |
|---|---|---|
| Individual sign-up, **Summary** step | **Include in leaderboard** | The patron |
| Individual sign-up, **Additional information** | **Use my display name on the public leaderboard** | The patron |
| Group sign-up, members table | **Leaderboard display**: Yes or No for each member. In the Excel template the column accepts **Hidden** or **Shown**. | The group admin |
| Patron dashboard, **Edit Profile** | The switch **Use my display name on the public leaderboard** | The patron |
| Control Panel, **Add participant** | **Show on leaderboard** | Staff |
| Control Panel, **Edit** on a participant | **Show on leaderboard**. Offered only for members who have a sign-up. | Staff |

### What happens when someone opts out

What patrons see depends on the **Include anonymous participants** setting of the block.

| Block setting | Individual board | Group board |
|---|---|---|
| **Off** (default) | The person is hidden and does not take a place. | The person's progress is left out of their group's total. |
| **On** | The person stays on the board as "Anonymous participant" with a placeholder avatar and keeps their place. | The person's progress still counts toward their group's total. Group names are always shown. |

> **IMPORTANT**
> An anonymous entry hides the name, avatar and details, but its place and score are still visible to anyone who views the board.

## Test before you announce

1. Publish the page (Chapter 12), or preview it, and open the leaderboard.

   With no sign-ups it reads "Results will be available soon".

2. Sign up two test participants from the patron side (Chapter 17).

   Leave **Include in leaderboard** on for the first and switch it off for the second.

3 Log progress for both (Chapter 20) and wait up to 30 seconds.

The first appears with the score you logged. The second is hidden, or shows as "Anonymous participant" if you turned that option on.

4 Check the labels and order.

The label should read "pts", your unit or "tickets", and the top score should be first.

5 View the page on Tablet and Mobile and delete the test participants.

## Troubleshooting

| What you see | Likely cause | What to do |
|---|---|---|
| "Results will be available soon" | Nobody has signed up yet, or everyone has opted out while anonymous entries are off. | Sign up a test participant. Turn on **Include anonymous participants** if opted-out people should still count. |
| A participant is missing | They opted out, or they rank below your **Limit**. | Switch on **Show on leaderboard** in the Control Panel, or raise **Limit**. |
| Only 10 people appear | **Limit** is 10 by default. | Raise **Limit**, and set **Display limit** if the board is too tall. |
| **TICKETS** is not in the **Metric** list | The Challenge has no Tickets competition. | Create one (Chapter 7), then reselect the Challenge in the block. |
| Scores read "units", not "books" | The goals use different units. | Choose a single **Goal**. |
| Goal or Metric changed by itself | Changing the **Challenge** resets them. | Set **Goal** and **Metric** after you choose the Challenge. |
| People with 0 are at the top | **Order** is **ASC**. | Set **Order** to **DESC**. |
| A group's total looks low | Admin-only members do not count, and opted-out members are left out while anonymous entries are off. | Check member roles, or turn on **Include anonymous participants**. |
| A new score has not appeared | The board refreshes every 30 seconds. | Wait, or reload the page. |

CHAPTER 12

# Publish a Challenge page

Saving a page stores a draft. Visitors only see it once you publish.

## Publish the page

1 Click **Save** to store your latest edits as a draft.

2 In the toolbar, open the **Publish** split button.

Its menu offers **Publish now**, **Publish later** and **Unpublish**.

3 Choose **Publish now** to go live straight away.

### Schedule a publish

1 Choose **Publish later**.

2 In the dialog titled **Schedule publish**, set the **Publish Date**.

3 Click **Schedule Publish**.

### Take a page down

Once a page is published and saved, the button reads **Unpublish**. Choosing it asks “Unpublish page?” before the page goes offline.

## Find the live address

The live address is your site’s domain plus the page path, for example `/challenge/summer-reading-challenge`. The path is shown in the editor and was set when the wizard created the page (Chapter 8).

> **IMPORTANT**
> The **Preview** button on a saved Challenge in the Control Panel, and the **Go to Challenge** button patrons see, only point to your Create page once it is **published**. Before then they fall back to the generic address `/challenge/detail/{id}`.
>
> A published page does not make a **Private** Challenge visible. Turn **Private** off in the Control Panel when you are ready to launch.

## Add the page to your navigation

Publishing does not add the page to your site menu automatically. Add links yourself, typically to the Challenge page and to **My Challenges**, in your header navigation or on a landing page.

## Final checks before you announce

- ☐ The page is published and the live address opens.
- ☐ **Private** is off, and today falls inside the registration window.
- ☐ The **Join Challenge** block shows a working **Join the Challenge** button.
- ☐ **My Challenges** is published and linked.
- ☐ You have signed up as a test participant and logged progress (Chapters 17 to 20).

PART 3

# Manage participants as staff

Register people and groups on a patron's behalf, log progress for them and handle prizes.

IN THIS PART


| Chapter | What it covers |
|---|---|
| **13.** The Participants view | Tabs, columns, search and export. |
| **14.** Add individual participants | New and existing users, barcode lookup and validation. |
| **15.** Add groups and parent/child registrations | Create groups, add members and manage roles. |
| **16.** Log progress as staff | Log for one participant or a whole group, print logs and claim prizes. |


CHAPTER 13

# The Participants view

The Participants view is where staff see who has joined a Challenge, as individuals or groups, and where every other staff task in this part begins.

## Open the Participants view

1 In the Control Panel, open **Challenge** and find the Challenge on the **Challenges** page.

Each card shows a summary such as "{n} Participants, {n} Completed".

2 On the card, click **Participants**.

The card's other buttons are **Edit**, **Competition** and a **More** menu (which holds **Delete Challenge**).

3 Choose the **Participants** tab for individuals or the **Groups** tab for groups.

> **NOTE**
> You need `challenge_participants_view` to see this page and `challenge_participants_manage` to add, change or remove anything on it.

## The two tabs

| Tab | Columns | Row actions |
|---|---|---|
| **Participants** | First Name, Last Name, Display Name, Groups | **Print Log** (printed log book) and **Activity Log** (view, log or delete progress). |
| **Groups** | Group, Participants, Admins | **Group details**, **Print Logs** and **Log Group Progress**. |

## Table tools

- A search box filters the table. Click a column heading to sort.
- Choose how many rows to show: 10, 25, 50 or 100 (25 by default). The footer reads “Showing X to Y of Z entries”.
- When selection is on, a **Select** column lets you pick rows for bulk actions such as **Print logs**. Where deleting is allowed, a bin icon titled “Delete item” ends the row.

## Export participants or groups

1 On the tab you want, click **Export**.

The window is titled **Export Participants** (or **Export Groups**) and asks “Would you like to download the participants as a .CSV file?”

2 Confirm to download the file.

It is a CSV with a UTF-8 byte-order mark, so Excel opens accented characters correctly.

| Export | Columns |
|---|---|
| Participants | User ID, Participant ID, First Name, Last Name, Display Name, Email, Registration Type (Individual, Group or Parent/Child), Group Names, Group Roles, Barcode, then one column for each custom question |
| Groups | Group ID, Group Name, Participant Count, Admin Count, Admins, Admin Emails |

> **IMPORTANT**
> The participant export contains emails and library barcodes. Store and share it according to your library’s privacy policy. Each export is recorded in the audit log.

CHAPTER 14

# Add individual participants

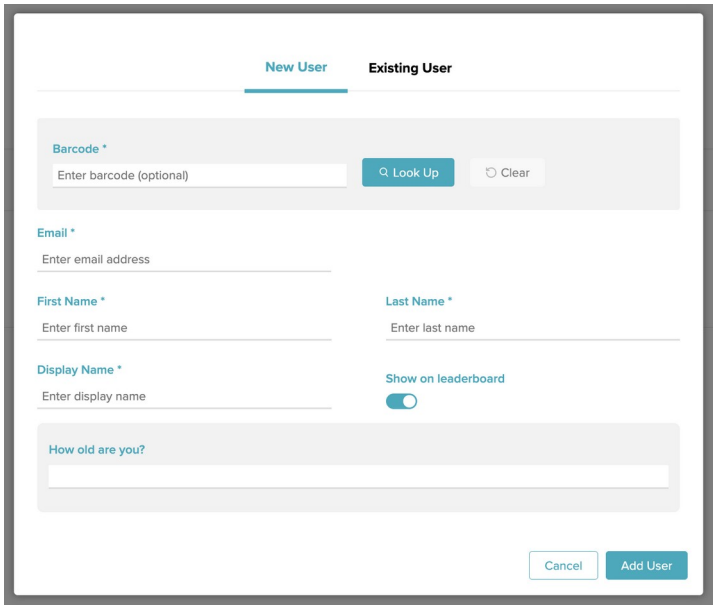
Register someone yourself when they cannot sign up online, for example at the desk. You can create a brand-new participant or add someone who already has an account.

## Open the add window

1 In the **Participants** view, stay on the **Participants** tab.

2 Click **Add participant**.

A window opens with two tabs, **New User** and **Existing User**. Its confirm button is **Add User**.




Screenshot 29 · Add participant window: New User tab

## Add a new user

1 Enter the **Barcode** and click **Look Up**.

The placeholder reads “Enter barcode (optional)”, or just “Enter barcode” if the Challenge requires a library card. A match fills **First Name**, **Last Name** and **Email** and locks the barcode. **Clear** resets the lookup.

2 No barcode? Type the **Email** instead.

After a valid-looking address is entered the form checks for an existing account automatically. If it finds one, the names fill in and lock.

3 Check or enter **First Name**, **Last Name** and **Display Name**. All three are required.

4 Leave **Show on leaderboard** on, or switch it off.

Tooltip: “When enabled, this participant appears on the challenge’s public leaderboard.” It is on by default. Chapter 11 explains what opting out does.

5 Answer any custom questions. Required ones are marked with an asterisk.

6 Click **Add User**.

| Banner | Meaning |
|---|---|
| “We found an existing user for this email. Please check the details below before adding them.” | An account exists. Confirm the person before continuing. |
| “We found an existing participant with this email. Please check the details below.” | That person is already registered. Adding them again will be blocked. |
| “No existing account matched this email. A new account will be created and an onboarding email will be sent to this user.” | You are creating a new account, and the person will receive an email. |

## Add an existing user

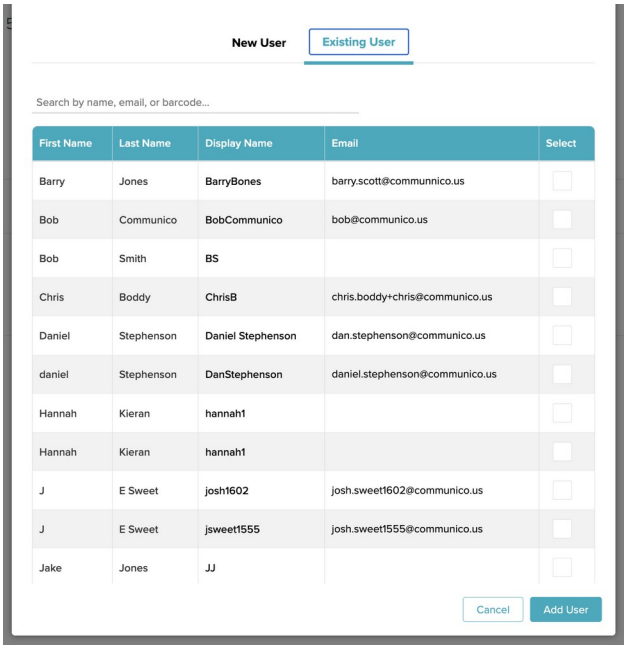
1 Switch to the **Existing User** tab.

A table lists users not yet in this Challenge, with First Name, Last Name, Display Name and Email. While it loads you see “Loading available users…”, and with none available “No users available to add to this challenge.”

2 Search with “Search by name, email, or barcode…” if needed.

3 Tick one or more people and click **Add User**.

If some cannot be added the window says “Some entries could not be processed.” and tags those rows **Failed**.




Screenshot 30 · Add participant window: Existing User tab

## Messages and checks

| Message | What to do |
|---|---|
| This challenge requires a library card. Please enter a barcode. | Enter and look up a barcode. |
| Please complete a successful barcode lookup or clear the barcode field. | Click **Look Up** again, or **Clear**. |
| No patron found with the provided barcode. | Check the number, or register by email if a card is not required. |
| Please fill in the required fields (First Name, Last Name, Display Name and Email) | Complete every starred field. |
| A participant with this email is already registered for this challenge. | The person is already in. Find them in the table. |
| A participant with this barcode is already registered for this challenge. | The same. |
| Please answer the required question: “{title}” | Complete the custom question. |
| Patron does not meet the minimum age requirement of {n} years. / Patron exceeds the maximum age limit of {n} years. | The Challenge age limits apply. See below. |

> **IMPORTANT**
> On the staff form, the library card rule is enforced in the form only, and the age check runs only at barcode lookup and only if the patron record includes a date of birth.
>
> Registering by email skips the age check. Apply your Challenge’s age limits yourself when adding people by email.

## After the person is added

- They appear in the **Participants** table straight away, and you can log progress for them (Chapter 16).
- A participant who registered with an email address rather than a library card can link that account from **My Challenges** (Chapter 21).

CHAPTER 15

# Add groups and parent/child registrations

Groups cover classrooms, clubs and families. Staff can create a group, register an existing one, manage members and roles, and remove a group.

## How groups and roles work

| Role | What it means |
|---|---|
| **Participant** | Takes part, logs progress and counts toward milestones and rankings. |
| **Admin** | Manages the group and its members. An admin-only person has no sign-up or progress of their own. |
| **Participant + Admin** | Does both. The admin you enter when you create a group starts with this role. |

> **NOTE**
> Only people who are **Participants** in at least one group, or who registered individually, have a Challenge sign-up. Changing someone to **Admin** only deletes their sign-up and progress, so you are asked to confirm.

## Add a new group

1. In the **Participants** view, open the **Groups** tab and click **Add group**.

   The window's confirm button is **Add Group**.

2. Keep **New Group** selected.

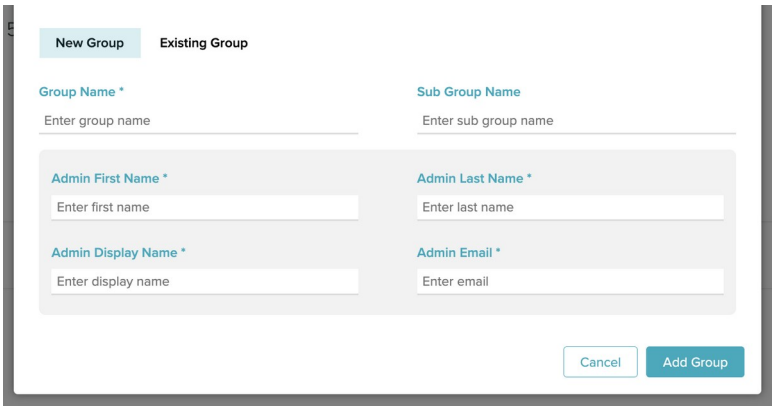
3. Enter **Group Name** (required) and, if you use one, **Sub Group Name**.

4. Enter the group admin: **Admin First Name**, **Admin Last Name**, **Admin Display Name** and **Admin Email**. All four are required.

   The admin is created as **Participant + Admin**, so they take part as well as manage the group.

5. Click **Add Group**.

   If a required field is empty you see "Please fill in all required fields (First Name, Last Name, Display Name, Email, Group Name)". If the admin email already belongs to someone in Challenge, a message or choice window appears first (see the next section).




Screenshot 31 · Add group window: New Group tab

> **NOTE**
> This window creates the group and its admin only. It does not list existing users. Add the other members afterwards from **Group details** (see “Add members to a group”).

## When the admin email is already in use

When you click **Add Group**, Challenge checks the **Admin Email** against people already in Challenge. What happens depends on who owns that email. An **individual** signed up on their own and has their own login. A **dependent member** was added to a group by name by a parent or admin and has no login of their own.

| The email belongs to | What you see | Your options |
|---|---|---|
| Nobody in Challenge yet | Nothing. The group is created. | – |
| A dependent member, or an individual who is a member (not the admin) of another group in this Challenge | An alert: “This email address is already in use. Please use a different email address.” | Use a different email. No group is created. |
| An individual who is already the admin of a group, in this or another Challenge | **Email in use** window: “Would you like to make this participant admin? They cannot be added to this group as a participant, because they are already in another group: {group names}.” | **Cancel** or **Make admin** |
| An individual who joined a different Challenge on their own | **Email in use** window: “Would you like to make this participant admin? They cannot be added to the group, because they have already joined another challenge as an independent participant: {Challenge names}.” | **Cancel** or **Make admin** |
| An individual in this Challenge (the usual case), or an individual member of a group in a different Challenge | **Email in use** window: “Would you like to make this participant the admin of the new group or add them to the group as a participant?” It warns that the group admin will need to log progress on their behalf, and that the participant will no longer be able to log in themselves. | **Cancel**, **Add to group** or **Make admin** |

Every **Email in use** window opens with “A participant is already registered with this email address.” and lists that person’s **Name**, **Display name** and **Email**, so you can check it is who you expect.

- **Cancel** closes the window. Nothing is created and you go back to the **New Group** form.
- **Make admin** creates the group with the existing participant as its admin. They are also listed as a participant, and their name and details stay as they were.
- **Add to group** (when offered) creates the group with a new admin, using the name and email you typed. The existing participant becomes a participant in the group and keeps any progress already logged. They can no longer log in to log progress themselves. The new admin logs it for them from the public Challenge site.

> **IMPORTANT**
> Treat the choice as final for that Challenge. Someone you add to a group cannot go back to signing up on their own in the same Challenge, although they can take part independently in a different one.
>
> After **Add to group**, the person’s old login may still work on the public site, but their own participation no longer shows as an active Challenge. Signing in with the email you entered for the admin shows the group, as its admin. Signing in another way, for example with a library card, shows no Challenge. Their progress stays in the group.

## Register an existing group

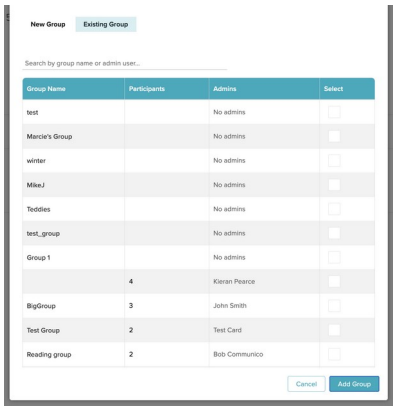
Use this when a group already exists, for example from last year’s Challenge, and you want to enter it here.

1 In the **Add group** window, choose **Existing Group**.

   The table lists groups not yet in this Challenge: Group Name, Participants and Admins (“No admins” if none). With none available it reads “No groups available to add to this challenge.”

2 Search with “Search by group name or admin user…” if needed, tick the groups and click **Add Group**.

   Without a selection you see “Please select at least one group to add”.




Screenshot 32 · Add group window: Existing Group tab

## Register a parent and children

Parent/child registration has no separate staff form. A family is a group: the parent is the admin and each child is a participant.

1 Click **Add group**, keep **New Group** selected and enter a family name as the **Group Name**.

2 Enter the parent as the admin and click **Add Group**.

The parent is created as **Participant + Admin**. If the parent's email already belongs to a registered participant, the **Email in use** window opens first (see "When the admin email is already in use").

3 On the **Groups** tab, open **Group details** for the new group.

4 Add each child as a participant (see "Add members to a group" below).

5 If the parent should only manage the group and not take part, change their role to **Admin**.

You are asked to confirm, because this deletes their own sign-up and progress.

> **IMPORTANT**
> The staff **New User** form requires an email address for every person. Children often do not have one. If that is a problem, ask the parent to register the children online instead (Chapter 18). A group with no name is shown as "Parent/Child group".

## View a group

1 On the **Groups** tab, click **Group details** on the row.

The **Group Details** window shows **Group Name:**, **Admins:** (click a name to manage that person's role) and a table of members, each with a **View** button. A summary reads "{n} Participants, {n} Completed". An empty group says "No participants in this group yet."

2 The footer has **Print logs** (when print version is on) and **Close**.

## Add members to a group

1 In **Group Details**, click **Add participants**.

A window titled **Add participants to {group name}** opens with the same **New User** and **Existing User** tabs as in Chapter 14. Its buttons are **Cancel** and **Add User**.

2 Add new or existing people and click **Add User**.

Everyone added joins this group as a participant, and **Group Details** reopens with the updated member list.

## Change a role, edit or remove a member

1 In **Group Details**, click **View** beside the member, or click an admin's name.

2 To change role, use the **Role** select: **Participant**, **Admin** or **Participant + Admin**.

Moving someone to **Admin** only asks you to confirm, because it deletes their sign-up and progress.

3 To edit details, use **Edit** on the member header.

Fields: First Name, Last Name, Display Name, Email, Barcode and **Show on leaderboard**.

4 To take someone out, use **Delete** on the member header.

The window is titled **Remove from group**. For individuals the window is **Delete Participant**.

## Remove a whole group

1 On the **Groups** tab, use the delete icon on the group row.

2 In **Remove Group from Challenge**, read the warning and confirm.

It reads "Are you sure you want to remove group {name} from this challenge? This will remove all {n} group participants from the challenge and delete all their activities. This action cannot be undone." Removing members and groups is recorded in the audit log.

CHAPTER 16

# Log progress as staff

Staff can log progress for people who cannot do it themselves, correct mistakes, print paper logs and record prizes handed over.

## Log progress for one participant

1 In the **Participants** view, click **Activity Log** on the participant's row.

The participant window shows their details, a form for logging progress and their activity log.

2 Choose the **Goal**, enter the **Amount** and the **Date**, and add a **Description** if useful.

3 Click **Log Progress**. **Reset** clears the form.

### The activity log

Below the form, a table lists every entry with these columns: Date, Activity, Amount, Total, Achievement Item, Progress, Prize and Delete. When the participant finishes, a panel reads **Challenge Complete!**

- There is no edit for a logged entry. To correct a mistake, delete it and log it again.
- Deleting asks for confirmation in **Delete Activity**. Milestones, competition tickets and emails are re-evaluated, and tickets earned by that entry are revoked.
- A member who is **Admin** only has no progress, so the log area is greyed out with a note.

## Log progress for a whole group

1 On the **Groups** tab, click **Log Group Progress** on the group's row.

2 In **Select Participants**, tick the members who did the activity and continue.

3 In **Log Group Progress**, choose the goal and enter the progress.

Use **Back** to change members, **Close** to cancel and **Log Progress** to save. A confirmation window then summarises what was logged.

## Rules that apply when logging

| Rule | What happens |
|---|---|
| Goal dates | A goal must be inside its own active window. A goal that has not started or has ended cannot be logged to. |
| Future dates | Not allowed. |
| Remaining total | You cannot log more than the goal has left to give. |
| Daily, weekly, monthly or yearly limit | You cannot log more than the period allows. |

When a limit blocks an entry the message reads “Cannot log this activity. The value exceeds the available limit for the configured period. Available: X, Requested: Y”. You need `challenge_participants_manage` to log or delete progress.

## Print log books

Printed log books let participants record progress on paper. Switch on **Enable print version** first (Chapter 4).

1. Click **Print Log** on a person’s row or **Print Logs** on a group’s row. For several, use the **Select** column and click **Print logs**.

   The log book is generated as a PDF. If nothing is chosen you see “At least one participant or group is required.”

## Claim milestone prizes

When a participant earns a prize at a milestone, record that you handed it over.

1. Open the participant window and click **Claim prize status**.
2. In **Claim Prizes**, choose the prizes that were handed over and continue.
3. On **Admin Details**, enter your **Name**, **Library Branch** and **Position**, then save.

The prize status then reads **Claimed** (every prize handed over), **Part claimed** (some handed over) or **Unclaimed** (nothing handed over yet). Claims are recorded in the audit log. Prizes from competition draws are claimed on the competition’s **Winners** tab (Chapter 7).

PART 4

# The patron experience

What patrons see on your website: signing up as an individual, with children or as a group, then logging progress and collecting rewards.

IN THIS PART


| Chapter | What it covers |
|---|---|
| **17.** Find a Challenge and sign up as an individual | Entry points, sign-in and the individual registration steps. |
| **18.** Sign up as a parent with children | Register children under 13, with or without the parent taking part. |
| **19.** Register a group | Group registration, Excel import and joining later. |
| **20.** Log progress as a participant | Individual and group logging, limits and messages. |
| **21.** Dashboard, achievements and competitions | My Challenges, rewards, certificates, prize draws and leaving a Challenge. |


CHAPTER 17

# Find a Challenge and sign up as an individual

This part shows what patrons see on your website. Use it to test your own Challenge and to train front-desk staff.

## Find a Challenge

- The **Challenges** list shows one card per Challenge: image, title, dates and a status pill reading **ACTIVE**, **UPCOMING** or **ENDED**. Private and ended Challenges are left out. Each card has a **Go to Challenge** button. With nothing to show it reads “There are no challenges.”
- On a Challenge page the countdown reads “Challenge ends in:” with Days, Hours, Minutes and Seconds. Before the start it says “Challenge has not started yet” and after the end “Challenge has now finished”.

## Join buttons and registration windows

| Button or text | When it appears |
|---|---|
| **Join the Challenge** / **Join this challenge** | The patron has not joined yet and registration is open. Hidden once the Challenge ends. |
| **Log In** / **Log Out** | Shown according to whether the patron is signed in. |
| **My Challenges** | The patron wants their dashboard. |
| **Register a group** | Registration is open. Hidden once registration has closed. |
| "Registration opens/closes/closed {date}" | Always shown as a hint, based on the registration dates you set (Chapter 3). |

## Sign in and choose a registration type

1 The patron clicks **Join the Challenge** and signs in if asked.

If you require a library card (Chapter 4) and they are not signed in with one, they are signed out and told "This challenge requires a library card login. Please log in with your barcode and PIN to continue."

2 The router checks their status and may show a message.

- "You are logged in as…" with **Continue registration** or **Logout**
- "You are already registered to this challenge" with **View dashboard**
- "You are already an admin on this challenge"
- "There was a problem checking your registration status"

3 On **Register**, the patron picks "Select a type of participant".

The first option is "I am over 13 years of age and registering for myself". Then **Continue**, or **Cancel registration**.

The header on every sign-up screen reads "Challenge: {description}", with "Challenge not available" if the Challenge cannot be found.

## Sign up as an individual

1 On **Your details**, enter a **Display name (This will be public)**, the **Barcode** and the **Email address**.

The display name must be at least 5 characters and cannot contain inappropriate language. Names containing "69" or "420" are also rejected.

2 On **Additional information**, answer your custom questions and choose **Use my display name on the public leaderboard** if wanted.

3 On **Summary**, review, set **Include in leaderboard**, tick **I agree to the terms and conditions** and click **Join Challenge**.

4 The confirmation reads **Registration complete** with a **View Dashboard** button.

| Message | Cause |
|---|---|
| Display name can’t contain inappropriate language | The name failed the language check. |
| You must be at least {min} years old to join this challenge. (or “…no older than {max}…”) | The patron’s age is outside your limits. |
| This challenge requires a library card login… | A card is required and the patron is not signed in with one. |

> **NOTE**
> A profile picture is not part of sign-up. Participants choose an avatar later by editing their profile on the dashboard (Chapter 21).

CHAPTER 18

# Sign up as a parent with children

A parent or carer registers children under 13. Behind the scenes the family becomes a group, with the parent as admin and each child as a participant.

## Register children

1 Sign in, click **Join the Challenge** and choose “I am registering on behalf of person(s) under 13 years of age”. Click **Continue**.

2 Enter the parent’s own details and decide whether to take part.

A switch reads “I will also participate in the challenge”. Leave it off if the parent only manages the children.

3 Complete **Child 1 details**.

Fields: **Child first name**, **Child last name**, **Display name**, **Date of birth** and **Barcode**.

4 Click **+ Add another child** for each additional child.

Your custom questions are asked for each child.

5 On **Summary**, check **Parent Name** and each **Child {n} name**. Use **Delete user** to remove anyone entered by mistake.

6 Submit the registration. The confirmation offers **View Dashboard**.

- There is no Excel import for parent/child registration. Use the group flow for large lists (Chapter 19).
- The age rules in Chapter 4 apply. Each child’s date of birth is checked against your minimum and maximum age.
- On the staff side the family appears as a group, shown as “Parent/Child group” when it has no name, and exports as **Parent/Child** (Chapter 13).

## Add a child later

A parent who registered children can add more from the dashboard. On the group card the button reads **+ Add child** (for other groups it reads **+ Add member**). Success shows “Members added successfully.” and failure “Failed to add members.”

Parents who registered themselves and now want to add children can click **Register a group** on their dashboard. The first option, registering for themselves, is hidden in that flow.

CHAPTER 19

# Register a group

Teachers, club leaders and organizers register a whole group at once, then manage it from their dashboard.

## Register a group

1. Sign in, click **Join the Challenge** (or **Register a group**) and choose “I am registering a group”. Click **Continue**.
2. Enter the **Group name (e.g., School name)**.
3. Decide whether you take part yourself.

   The admin switch reads **Add me to this group**.
4. Add members one at a time with **Add member**, or in bulk with Excel (next section).
5. Review the **Summary** and submit.

   The confirmation reads “Group has been registered”.

### Bulk-add members with Excel

1. Click **Download Excel Template** and fill it in.

   The template has no date-of-birth column. Its leaderboard column accepts **Hidden** or **Shown**.
2. Click **Import template** and choose your file.
3. Check the members that appear and fix any errors before submitting.

## Join or add people later

- **Register a group** on the dashboard reopens the same flow. The “registering for myself” option is hidden there.
- A group admin who is not yet taking part sees **+ Participate myself** on the group page. If your Challenge has custom questions they are asked first. Success reads “You’re now participating in this group.” and failure “We couldn’t add you to this group. Please try again.”
- **+ Add member** adds people to an existing group.

## Manage the group

- The group page offers **Sort participants** (**A to Z**, **Completed tasks**, **Badges**), a filter (**View all**, **Completed**, **Not completed**) and a **Search name** box.
- Each member has a menu with **Remove from group**. The dialog is “Remove from this group?” with **Cancel** and **Remove**. For a member who has no login of their own, progress is deleted unless they belong to another group. For a member who can sign in, “Their progress and any other groups they belong to are kept.”
- **More group options** holds **Leave challenge**. It asks “Leave this challenge?” and, on success, returns the patron to the Challenges page.
- The member count reads “N members”, “You and N other members” or “Just you”.

CHAPTER 20

# Log progress as a participant

Participants log activity on their dashboard. Group admins can log for several members at once.

## Log progress as an individual

1 Open **My Challenges** and find your Challenge card.

2 Click **Log Activity**.

It is disabled until the Challenge starts. Once the Challenge is completed or ended the button reads **View Activity** instead.

3 In the **Log Progress** window, choose the goal.

Each option shows the goal title, its unit and “Target N”. The goal’s description and date window appear underneath.

4 Enter the **Description** (optional), the date under **When** and the amount.

The amount is a whole number of at least 1 and is labeled with the goal’s unit.

5 In a Points Challenge, check the read-only box showing “{n} pts”, then click **Log progress**.

The button changes to “Logging…” while saving. Success reads “Activity logged successfully”.

### Messages that can appear

| Message | Meaning |
|---|---|
| Future dates not allowed | The chosen date is after today. |
| Min date: / Max date: | The date is outside the goal’s window. |
| This goal hasn’t started yet / This goal has ended | The goal’s own dates (Chapters 5 and 6) block logging. |
| Maximum reached for this period / Max allowed: N | A daily, weekly, monthly or yearly limit has been used up. |
| Cannot log this activity. The value exceeds the available limit for the configured period. Available: X, Requested: Y | The server refused an amount larger than what is left. |
| This challenge has ended, so new activity can no longer be logged. | The Challenge is over. |

## Review and delete activity

1 Open the **Activity Log** on the Challenge card.

Use the filter (“View all activities”, first option “View all Tasks”) to narrow by goal. Columns are **Log date**, **Activity**, **Description**, **Units**, **Points**, **Total** (Points Challenges only) and **Reward**. On narrow screens it becomes a list of cards.

2 To remove a mistake, click the trash button (label “Delete activity entry”).

The dialog reads “Delete item?” and “Are you sure you want to delete this item?” with **Cancel** and **Delete**. Success reads “Activity log deleted”, and any competition entries that log earned are revoked.

> **NOTE**
> Entries cannot be edited, only deleted and logged again. If a delete fails the patron sees “Failed to delete log. Please try again.” or “We couldn’t delete this entry. Please reload and try again.”

## Celebrating milestones

The **Reward** column names the reward earned by the entry that crossed a threshold. Finishing a goal or the whole Challenge shows a celebration that closes after three seconds: “Well Done! Target Completed” or “Congrats! Challenge Completed”, with confetti.

## Log progress for a group

On the group page, the admin clicks **Log progress** (disabled before the Challenge starts and after it ends). Other buttons are **Details**, **+ Add member** (or **+ Add child**) and **+ Participate myself**.

1 **Log Group Progress**: “Select members to log progress for”.

Pick the goal, description, date and amount as for an individual. Choose members from the **Member** list or use **Select all (N)**, then click **Log Progress**. With nobody chosen: “Select at least one member”.

2 **Check and edit progress for members**.

A table lists Member, Task, Details, When, Minutes and Points. The trash icon (label “Delete entry”) removes that member from this batch. With nothing left: “At least one progress entry is required”.

3 **All logged!** confirms success.

Failures read “Sorry, an error occurred”, with “Error updating activity logs for {first} {last}. {message}” for each member. Completion cards read “Target completed by” or “Challenge completed by” followed by names.

> **NOTE**
> The group log table's header says **Minutes** for the amount column even when the goal uses another unit.

> **TIP**
> If your Challenge has a printable version, patrons see **Download paper logs** on their card or group page (Chapter 4).

CHAPTER 21

# Dashboard, achievements and competitions

After joining, participants spend their time on the My Challenges page: tracking progress, collecting rewards, entering draws and managing their profile.

## My Challenges

- The page shows “Challenges — N joined” and “Groups you manage”. A group header shows “Admin:” with the admin’s name.
- Each Challenge card shows progress rings or a bar, an **Achievements** card and a strip of rewards.
- Card actions are **Details**, **Register a group**, the paper log download (when print version is on) and the option to leave.
- **Details** opens a window with the title, description (or “No description has been provided for this challenge.”) and a **Goals** list with each goal’s dates.
- Full-screen states read “Looks like you’re logged out”, “Looks like you’re not in a challenge yet” or “Looks like we have a problem”.

## Edit profile and link an account

- In the header, **Edit** switches on editing (it then reads **Save**). Participants can choose an avatar and a background with the pickers (**Browse Images**), and change their display name in **Edit Profile**.
- Patrons who signed up with an email address instead of a library card see **Link your account**: “Signed up for a challenge with an email address instead of your library card? Link that account to see your challenges here.”
- A wrong email or password shows “We couldn’t verify that email and password. Please check them and try again.” If the linked account has no Challenges: “We linked that account, but it hadn’t joined any challenges yet.”

## Achievements

The **Achievements** card is titled “Track badges, rewards, and certificates in one place.” It has four tabs with counts: **Badges** (the default), **Rewards**, **Certificates** and **Competitions**. If Competitions has items and the patron has not chosen a tab, it opens there.

| Tab | Empty message |
|---|---|
| Badges | Badges you can earn will appear here. |
| Rewards | Rewards will unlock as you progress. |
| Certificates | Certificates will be listed once earned. |
| Competitions | Competitions will appear here when available. |

- Locked items show a red **LOCKED** pill. Unlocked ones show **BADGE**, **REWARD** or **CERTIFICATE**.
- Clicking an item opens a window with **How to earn:** while locked and **How to redeem:** once unlocked (Chapter 2).
- Prizes and certificates also appear in a rewards strip. Unlocked certificates offer **View** and **Print**. The preview adds **Print Certificate** and **Download**, and puts the patron’s full name on the certificate.

## Competitions

The **Competitions** tab shows a summary card: **Tickets** and **Allocated** for ticket competitions, or **Competition entry** for prize draws, plus the draw date or “To be announced”. The info window shows a **LOCKED** or **UNLOCKED** badge and your **How to participate** text. It is locked when completing the Challenge is required and the patron has no entry.

| Status card | What the patron can do |
|---|---|
| Allocate your tickets — “Select prizes to win.” | **Allocate tickets**. |
| You are in the draw! (automatic allocation) | **Choose prizes** if they want control. |
| Tickets allocated | **Edit allocation**. |
| Entries open soon / Entries are closed / This draw has ended | Wait, or nothing further. |
| Prize draw in progress | Wait for the result. |
| Congrats, you won! / Sorry you lost this time around | Shows your **Win text** or **Lose text** outcome. |

In the allocation window the counters read **TICKETS EARNED**, **TICKETS ALLOCATED** and **TICKETS REMAINING**. Buttons are **Clear**, **Split equally** and **Submit** (or **Save changes**).

When locked the button reads **Allocations locked**, **Entries closed** or **Challenge incomplete**. Success reads “Your entries have been saved!”

## Leaderboard

The leaderboard is a block you place on a page (Chapter 11), not part of the dashboard. It ranks with ordinal places (1st, 2nd…), shares a place between tied scores and labels scores “pts”, the goal’s unit or “tickets”. Patrons choose whether to appear when they sign up and can change it from **Edit Profile**. If you allow anonymous entries, people who opt out show as “Anonymous participant”.

## Leaving a Challenge

1. On the Challenge card, choose the option to leave.
2. Read “Leave this challenge?” and confirm with **Leave challenge**, or choose **Cancel**.

   The warning reads “You’ll be removed from this challenge and your logged progress will be permanently deleted. This can’t be undone.”

APPENDIX A

# Go-live checklist

Tick through this list before you announce a Challenge.

## Control Panel

- ☐ Achievement items created with **How to earn** and **How to redeem** text.
- ☐ Challenge saved with the right reward system, dates and images.
- ☐ Registration rules set: library card, ages, custom questions, terms address.
- ☐ Every goal has a unit and a total. Per-period limits are set where needed.
- ☐ Milestones sit at sensible thresholds and have items attached. **Completion** has a reward.
- ☐ Competitions created, with prizes, quantities, a draw date and **Win text** and **Lose text**, and linked to milestones.
- ☐ **Enable print version** on if you offer paper logs.
- ☐ Everyone who needs it has the right permissions (Chapter 1).

## Create

- ☐ Challenge page built from the wizard or blocks and tailored.
- ☐ Checked on Desktop, Tablet and Mobile views.
- ☐ Page published and the live address opens.
- ☐ **My Challenges** page created, published and linked in your menu.
- ☐ Challenge page linked from your site navigation or landing page.
- ☐ If you added a **Challenge Leaderboard**, its **Metric**, **Goal**, **Scope** and **Limit** are set and a test participant appears on it (Chapter 11).

## Launch

- ☐ **Private** switched off.
- ☐ Today falls inside the registration window.
- ☐ A test participant has signed up as an individual, with children and as a group.
- ☐ Progress was logged, a milestone was crossed and the reward appeared.
- ☐ Staff know where to find **Participants**, **Activity Log** and **Competition**.
- ☐ The draw date, notification and prize collection process are agreed.

APPENDIX B

# Troubleshooting

Common symptoms, their likely causes and what to do.

| Symptom | Likely cause | What to do |
|---|---|---|
| **Challenge** is missing from the menu | Module not enabled, or no `challenge` permission | Ask Communico support to check the module and your permissions. |
| No **New challenge** button | Missing `challenge_manage` | Ask an administrator to grant it. |
| Achievement items page says you do not have permission | Missing `challenge_achievement_items_manage` | Ask an administrator to grant it. |
| Create wizard says “No challenges found” | No Challenge is saved yet | Create and save a Challenge first (Chapter 3). |
| **Preview** or **Go to Challenge** opens a generic page | The Create page is not published, or its address does not match the Challenge | Publish the Create page (Chapter 12). |
| Patrons cannot see the Challenge | **Private** is on, the Challenge has ended, or the page is unpublished | Check all three. Ended Challenges are hidden from the list. |
| No **Join the Challenge** button | Registration has closed or the Challenge has ended | Check **Registration closing date** and the end date. |
| Patron told to log in with a library card | **Library card required** is on | Sign in with barcode and PIN, or turn the requirement off if no age limit is set. |
| Cannot turn off **Library card required** | A minimum or maximum age is active | Remove both age limits first. |
| Cannot change the end date | The Challenge has completed | Copy the Challenge with **Save as a copy** instead. |
| Milestones disappeared | The reward system was switched | Switching to Points removes goal and combined milestones; switching to Units removes challenge milestones. Re-create them. |
| Competition missing from the milestone list | It has not been created yet | Add it under **Competition**, then reopen the milestone. |
| **Log Activity** is disabled | The Challenge has not started | Wait for the start date, or check the date you entered. |
| “This goal hasn’t started yet” or “has ended” | The goal has its own dates | Adjust **Goal dates** on the goal. |
| “Maximum reached for this period” | A per-period limit is used up | Wait for the next period, or raise the limit on the goal. |
| Staff cannot log for a group member | The member is **Admin** only | Change their role to **Participant + Admin**. |

| Symptom | Likely cause | What to do |
|---|---|---|
| “This email address is already in use” when adding a group | The admin email belongs to a dependent group member, or to a member of another group in this Challenge | Use a different admin email (Chapter 15). |
| An **Email in use** window opens when adding a group | The admin email already belongs to a registered participant | Choose **Make admin**, or **Add to group** if it is offered. It is not offered when the person is already in another group or another Challenge (Chapter 15). |
| A participant says their Challenge has gone after staff grouped them | They were added to a group with **Add to group**, so they no longer have their own sign-up | This is expected. The group admin logs progress for them (Chapter 15). |
| No **Draw winner** button | Draw date is in the future, there are no entries, or you lack `challenge_winners_draw` | Check the **Status** cell on the **Prizes** tab. |
| No **Notify losing participants** button | Automatic notification is on, or not every prize is drawn, or you cannot draw | Draw every prize first, and check **Automatically notify drawn winners**. |
| Cannot add a child without an email | The staff **New User** form requires an email | Ask the parent to register the child online (Chapter 18). |
| Display name rejected | Language check or fewer than 5 characters | Choose another name. |
| Leaderboard says “Results will be available soon” | Nobody has signed up, or everyone has opted out and anonymous entries are off | Sign up a test participant, or turn on **Include anonymous participants** (Chapter 11). |
| A participant is missing from the leaderboard | They opted out, or rank below the block’s **Limit** | Switch on **Show on leaderboard** for them, or raise **Limit** (Chapter 11). |
| No print buttons | **Enable print version** is off | Switch it on in **Registration settings**. |

APPENDIX C

# Accuracy notes for reviewers

This guide was written from the product's current source code in October and November 2026. These points could not be settled from code alone. Confirm them on a live account before sharing the guide outside the team, and remove this appendix from any customer-facing copy.

## Details to confirm

| Topic | What to check |
|---|---|
| Menu path to Achievement Items | The page exists at the Challenge area (breadcrumb Home › Challenge › Reward Assets, title **Achievement Item Assets**) but the menu label that opens it was not found in code. |
| Unlock message field | The label of the unlock message field on badge, certificate and prize forms. |
| Image guidance | Recommended image sizes for badges, certificates and prizes. None was found. |
| Competition prize age groups | Where age groups are set. The **Prizes** tab shows an **Age group** column ("All" by default). |
| Competition prize pane | The exact fields and buttons on **Add Prize**, and how prizes are picked from the library. |
| Email in use choices | Written from the Control Panel code and the COM-16190 test notes. Confirm on a live account that the choice cannot be changed afterwards in the same Challenge, and what a person who was added to a group sees when they sign in with a library card. |
| Staff registration limits | Whether staff can register people outside the registration window or after any capacity is reached. |
| Per-period limits in Points mode | The label reads **Max points per day**. Confirm it limits points rather than units logged. |
| Total Points | Confirm it caps the points a goal can contribute, as described in Chapter 5. |
| Print version | Whether every staff print button is hidden when **Enable print version** is off. |
| Challenge status words | The staff list shows Active, Upcoming and Completed. Patron cards show ACTIVE, UPCOMING and ENDED. |
| Delete Challenge | The wording of the **Delete Challenge** confirmation. |
| Staff New User and children | Whether children can be added without an email address on the staff form. |
| Permission labels | The wording of the permission checkboxes that map to the flags in Chapter 1. |

| Topic | What to check |
|---|---|
| Leaderboard in templates | Whether any seasonal template places a leaderboard block. None was found in code, so the guide tells authors to add the block. |
| Leaderboard opt-in switches | Whether **Include in leaderboard** (sign-up **Summary**) and **Use my display name on the public leaderboard** (sign-up **Additional information** and **Edit Profile**) change the same setting. |
| Group board and opt-outs | How a group's total changes when a member has opted out. The guide follows the code: left out unless **Include anonymous participants** is on. |
| Leaderboard scroll fields | The on-screen wording and units of **Scroll direction** and **Scroll duration**, and how the scroll looks on a large display. |

## Product wording worth reviewing

These did not block the guide but may confuse users.

- The reward system card is headed **Achievement Items** although it chooses Points or Units.
- The goal milestone tooltip appears to say "points" when a unit is set and "units" otherwise, which looks reversed.
- The "points per unit must be greater than 0" check appears to run in Units mode rather than Points mode, and the Points Per Unit input allows 0.
- The group log table header is hard-coded as **Minutes**.
- Help pages for Create (`docs/help/create`) are stubs, and the Challenge Header help mentions countdown options that the settings panel does not offer.