The latest version of this document is located at
Resourcemate Family of Products

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Developer of ResourceMate®
Your Library Automation Solution
Now with over 10,000 registered users across North America and around the world

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Installation Guide

Introduction

The latest version of this document is located at [www.resourcemate.com/install](http://www.resourcemate.com/install).

If you have reviewed the information below and still have questions about installation please call us at 1-800-815-8370, use our Live Chat at resourcemate.com or email info@resourcemate.com. We are ready to assist in any way we can.

Some questions may not have been answered in this document. They are covered at the end of this document in Appendix E – Frequently Asked Questions.

Existing ResourceMate 3.0 Users

The new Family of Products version of ResourceMate will be installed into a totally separate location from previous versions of ResourceMate. You do not need to be concerned about the installation of the new system interfering with previous versions of ResourceMate or its data.

After ResourceMate has been installed you will be able to import your data from ResourceMate 3.0. You can import the ResourceMate 3.0 data as often as you like. This will allow the users to become comfortable with using the new application and then you can import the most current version of the catalogue to the system before you move into production mode with it.

**NOTE:**

Any changes or additions made in the new version will be over-written when you import from ResourceMate 3.0 a second or third time.

Once you decide to move ahead with the new ResourceMate Family of Products make sure all 3.0 volunteer data has been imported first.

Once you decide to move ahead with the new ResourceMate Family of Products make sure that ResourceMate 3.0 is not used by mistake.
Configuration Types

Before installing ResourceMate, you will need to make a decision about the type of configuration that you will be using. There are two configuration types:

1. Stand-Alone Installation (Local Data)

**NOTE:**

The local database must reside on a local hard drive. It cannot be stored on a shared network drive.

If you require the data to exist on a server you will have to follow the Shared Data Installation instructions and install the ResourceMate Database Server Software (Express).

ResourceMate Lite, Lite Plus, and Volunteer must be run as a Stand-Alone Application.

For stand-alone installation instructions, please see the section Stand-Alone Installation (Local Data).

2. Shared Data Installation (Database Server)

When you need to access your data from multiple locations such as a circulation desk or Patron OPAC station, or wish to have your data on a server then you need to use the Shared Data Installation (Database Server) process.

This kind of configuration has a central computer that is accessible from multiple stations within the organization. Typically, this computer is a server, however, it can be a workstation.

ResourceMate must be run as a Shared Data Application in the following situations:

- Network versions including Premium
- If you have OPAC license(s)
Stand-Alone Installation (Local Data)

This type of installation has 3 steps:

1. Install ResourceMate application
2. Activate your copy of ResourceMate
3. Register your copy of ResourceMate

1. Install ResourceMate Application

Insert the installation CD and, from the Main Installation Menu displayed, click on the button that corresponds to the ResourceMate product that you ordered.

NOTE:

The Product Code that you enter during activation process will control activating the ResourceMate version you have purchased. The options for the product button you select from the installation menu will give you the options that match your product version. Selecting an incorrect button from the menu may only cause incorrect installation steps.
The following example shows a standalone (single user version) installation of the Essential Plus version.

From the Main installation menu, click on the button that corresponds to the ResourceMate product that you purchased.

In this example we will select [Essential Plus Options]

On the next screen select the type of installation. In this case, we will select the following:

[Single User Version]

On the next screen, select the following:

[ResourceMate and OPAC Program]

The installation process automatically installs a local database and installs the ResourceMate and OPAC programs and related shortcuts.

You can now proceed to the section Activate ResourceMate.
Shared Database Installation (Database Server)

This type of installation has the following steps:

1. Install the Database Server software on the computer or server that will store the data
2. Install the ResourceMate application:
   a. On the computer/server where the data is stored
   b. On client computer(s) that will access the data
3. Activate your copy of ResourceMate
4. Register your copy of ResourceMate
5. If you have OPAC license(s), install the OPAC application on the client computer(s) (Patron OPAC station(s)) that will access the database for searching purposes.

1. Install Database Server Software

You may want to share your ResourceMate database with users who access the database from other computers (e.g. circulation desk, administrative/cataloguing station) or with users of the live OPAC (On-line Public Access Catalogue) searching tool.

You have a choice to make regarding the type of SQL Database Server software you will be using. You can select to use one of the following options:

**Option A** – Install and use the Database Server Software (Express) provided in the installation file

**Option B** - Use an existing MS SQL server installation already installed within your organization

Option A:
Install and use the Database Server Software (Express) provided in the installation file

With this option, you need to be aware that there are pre-requisites to performing this installation. If your system does not have the pre-requisite software already installed, the process will issue a warning message and request that you perform the necessary software installations. You can then try installing the Database Server again.

For further information about pre-requisites, please see Appendix B – Pre-requisites for Database Server Installation.
Database Server Software (Express) Installation Process
Log onto the computer as an administrator where the Database Server Software (Express) is to be installed and follow the instructions below.

Insert the installation CD and, from the Main Installation Menu displayed, click on the button that corresponds to the ResourceMate product that you ordered.

The following example shows an installation of the Essential Plus Network version.

**NOTE:**
The Product Code that you enter during activation process will control activating the ResourceMate version you have purchased. The options for the product button you select from the installation menu will give you the options that match your product version. Selecting an incorrect button from the menu may only cause incorrect installation steps.

From the Main installation menu, click on the button that corresponds to the ResourceMate product that you ordered.

In this example we will select

[Essential Plus Options]

On the next screen select the type of installation. In this case, we will select the following:

[Network Version]

OR

If you have a single user version but will be sharing the database, then select

[The ResourceMate database is shared on the Network]
On the next screen, select the following:

[Database Server Software (Express)]

MSSQL Express will be installed with an instance named RMSQLDATA.

This process can take 10-20 minutes depending on the processing speeds of your computer system.

You can now proceed to the section **Install ResourceMate Application**.

**Option B:**

**Use an existing MS SQL server installation already installed within your organization**

If you will be using this option, then you will need to make note of the following information:

- Server Name
- SQL Server Instance. We recommend that you use an instance name other than RMSQLDATA as that is the default instance name used when ResourceMate Database Server Software (Express) is installed.
- Ensure that the SQL Browser service is running. ResourceMate connects to the SQL database by name rather than port number and depends on this service.
- The ResourceMate user accounts will need to be given db_owner role for the ResourceMate database.

You can create any database for use by ResourceMate using Management Studio. If you do not create a database, the first time you run ResourceMate, ResourceMate will create a database named **ResourceMate_Default** in the default directory.

You can now proceed to the section **Install ResourceMate Application**.
2. Install ResourceMate Application

We recommend that you install the ResourceMate client software:

a. First, on the computer/server where the data is stored i.e. on the computer that will run the database software (the server). This will allow you to ensure the database software is installed correctly and running without worry of firewall or other connection issues.

b. And then, on client computer(s) that will access the data. You can repeat the following process on user workstations once you have verified that it is working properly on the server.

Insert the installation CD and, from the Main Installation Menu displayed, click on the button that corresponds to the ResourceMate product that you ordered.

The following example shows an installation of the Essential Plus Network version.

NOTE:
The Product Code that you enter during activation process will control activating the ResourceMate version you have purchased. The options for the product button you select from the installation menu will give you the options that match your product version. Selecting an incorrect button from the menu may only cause incorrect installation steps.

From the Main installation menu, click on the button that corresponds to the ResourceMate product that you ordered.

In this example we will select

[Essential Plus Options]
On the next screen select the type of installation. In this case, we will select the following:

[Network Version]

OR

If you have a single user version but will be sharing the database, then select

[The ResourceMate database is shared on the Network]

On the next screen, select the following:

[ResourceMate and OPAC Program]

The installation process installs the ResourceMate and OPAC programs and related shortcuts.

You can now proceed to the section **Activate ResourceMate**.
Activate ResourceMate

When you open ResourceMate for the first time after the installation has been completed, you will be presented with a step-by-step process to Activate ResourceMate.

When you have completed the information on each screen, click the [Next] button to proceed.

Enter your ResourceMate serial number and then click the [Next] button.

Enter your ResourceMate product code and then click the [Next] button.
Select the Database Type and then click the [Next] button to proceed.

**NOTE:**

ResourceMate Lite, Lite Plus, and Volunteer must be run as a Stand-Alone Application and will not show this screen (they automatically use Local Single User Database).

Network and Premium versions will also not show this screen as they automatically use a Database Server.

### Activating Local Single User Database

If you are using a Local Single User Database, activation is now complete. Click the [Next] button to proceed to Product Registration.

### Activating Shared Database (Database Server)

If you are using a Shared Database, the following information screen will be displayed. Click the [Next] button to proceed to connect to the database.
The IT person may need to complete this part of the activation process to establish the database connection.

Please see the following section regarding the Database Connection.

Enter the connection information and then click [OK] to continue and proceed to Product Registration.

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**Database Connection**

**If you are using the Default Database Server Software (Express)**

To use the default Database Server Software (Express) that was installed earlier, you simply enter the server name followed by a "\" and then the instance name of the SQL service (RMSQLDATA). The remaining fields should be greyed out. Then click the [OK] button.

Note that the name of this computer will be entered as the default name. Also note that you do not need to enter the "\" before the name of the computer where the SQL service is running.

**If you are using your own MS SQL Database Server**

Enter the server name followed by a "\" and then the instance name of the SQL service. Please note that some SQL database server installations have a default instance. In these situations, you will not need to enter the instance name.

After you enter a correct server name and instance name, you can either enter the ResourceMate database name (ResourceMate_Default or the name that you created earlier using Management Studio) and subsequently you will be asked to enter a Login Name and Password.

If you wish to use Windows Authentication, leave the login user and password fields blank.

Please note that the login name or the windows account must have the db-owner role to the ResourceMate database (ResourceMate_Default or the name you used if you created a ResourceMate database using Management Studio).
Register ResourceMate

Once Product Activation is complete, the Product Registration process will automatically begin. Product Registration has the following benefits:

- You receive 3 free months of Support
- Access to ISBN Retrieval and Library Search features (available with up-to-date Support)
- Access to updates (available with up-to-date Support)

Support can be renewed on an annual basis.

The Product Registration process will ask you for the name of the library and for contact information. The library name is displayed on the Title Bar within the program as well as on all of the ResourceMate Reports. If you find that you need to verify the information that you have for this part of the process, then you can select Cancel. You will be able to access this process later through the Help menu selections or when you start ResourceMate the next time.

Product Registration information screen is displayed.

Click [Next] to proceed.

Enter your library name as you would like to see it displayed on the Title Bar and in Reports.

Click [Next] to proceed.

Select the registration options.

You can select to

- Send us your registration information using the internet
- Phone us with the information

Click [Next] to proceed.
Send Information Using the Internet

You will be presented with the Registration Info screen.

Enter your contact information. Required fields that have missing data will have an indicator displayed. Required fields must be completed in order to complete the registration process.

Click [Next] to proceed.

Click [Submit Registration Information] to send your registration information to us and complete the registration process.

You will receive confirmation that the information has been submitted.

Click [OK] to complete the registration process.

Registration is now complete.
After registration is completed, we recommend the following:

- **Check for Software Updates** that may have been issued after the installation file was created. Click on the Help menu and then select Check Internet for Updates to determine if updates are available.

- If you have been using ResourceMate 3.0, please see Appendix A - Importing Data from ResourceMate 3.0.

- If you do not have ResourceMate 3.0 data, then you should review initial setup steps for ResourceMate. Please see Appendix C - ResourceMate Setup.

**Check for ResourceMate Updates**

When Internet access is available on the computer where ResourceMate is installed, you will be able to update the software by making the following selections with ResourceMate open.

- Click on the Help menu, then select Check Internet for Updates.
- Then allow the process to install the latest version of the software. If your system is already at the latest release, then you will get an information window to confirm this.

Where Internet access is not available on the computer where ResourceMate is installed, you will need to download an update file from our web site. Find a computer that does have access to the Internet, download the update file from our web site and save it to a memory stick. Take the memory stick to the computer where ResourceMate is installed and double click on the downloaded file in order to update your ResourceMate application.

The downloadable file is generally available to you on the business day following the initial registration of ResourceMate.

To download the update file, please go to the Support page on our web site (www.resourcemate.com/support) and select Update Your ResourceMate. Enter your ResourceMate serial number and then download and Save (don’t run) the file to a memory stick.
Install Patron OPAC Application
(For use with your OPAC license(s))

We recommend that you install the Patron OPAC application only after the Database Server software is installed and the ResourceMate application is installed, activated and registered.

Install the Patron OPAC application on the Client/patron OPAC station computer(s) that will access the database for searching purposes.

You can repeat the following process on other user workstations that will access the data on the server for searching purposes.

Insert the installation CD and, from the Main Installation Menu displayed, click on the button that corresponds to the ResourceMate product that you purchased.

The following example shows an installation for the Essential Plus Network version.

NOTE:
The Product Code that you entered during activation process will control activating the ResourceMate version you have purchased. The options for the product button you select from the installation menu will give you the options that match your product version. Selecting an incorrect button from the menu may only cause incorrect installation steps.

From the Main installation menu, click on the button that corresponds to the ResourceMate product that you purchased.

In this example we will select

[Essential Plus Options]
On the next screen select the type of installation. In this case, we will select the following:

[Network Version]

OR

If you have a single user version and are sharing the database, then select

[The ResourceMate database is shared on the Network]

On the next screen, select the following:

[Patron OPAC Program Only]

The installation process installs the OPAC program and related shortcut.

The following Database Connection screen will allow you to connect to the ResourceMate database.
The IT person may need to complete this part of the activation process to establish the database connection.

Please see the following section on Determining the Database Server Name.

Enter the connection information and then click [OK] to continue.

**Determining the Database Server Name:**

On the computer that can connect successfully to the ResourceMate database:

- Right click on the ResourceMate shortcut
- Click on Open File Location
- Run `ResourceMate.Framework.Configuration.exe`
- That will display the Database Connection screen – take note of the **Server Name**

**Entering the Database Server Name on the Database Connection screen:**

- Go back to your computer
- Enter the **Server Name** - make sure the Server Name is exactly the same on the Database Connection screen (edit if necessary) as on the other computer that can connect successfully to the database.
- You should not have to change anything else (the Database Name, Login Name or Password should be greyed out)
- Click [OK] button
Appendix

Appendix A – Importing ResourceMate 3.0 Data
Appendix B – Pre-requisites for Database Server Installation
Appendix C – ResourceMate Setup
Appendix D – Moving ResourceMate to a New Computer
Appendix E – Frequently Asked Questions
Appendix A – Importing Data from ResourceMate 3.0

If you have used ResourceMate 3.0 and wish to import your data to the newly installed system, from the ResourceMate menu select **File, Import ResourceMate 3.0 Data**. Please note that the importing of data is based on access to the live Data folder being used by ResourceMate 3.0 and is NOT from a backup file. Since the data import application replaces the existing database in the new Family of Products version of ResourceMate, you will be prompted for permission to replace the database and for permission to close the ResourceMate application. The first time through this process, the database is empty, but if you run the process a second time, then you will lose any information you have added or changed. Also ensure that all volunteer data has been imported into ResourceMate 3.0.

From the ResourceMate menu, select **File, Import ResourceMate 3.0 Data**

The Welcome screen is displayed.

If you are using Windows XP you will be prompted with a **Run As** security window. If the current user is an administrator account then

- Select **Current User**
- Clear the check box for “**Protect my computer.....**”
- Select **OK**

If the current user does not have administrative rights, then select **The Following User** and then enter the administrative password.

The “Run As” is required as the importing from ResourceMate 3.0 needs to access the system registry to temporarily install an ODBC driver to connect to this data.
Click on the browse button, navigate to and select the ResourceMate 3.0 data folder.

And then click [Next].

**TIP:** The location of the ResourceMate 3.0 data folder can be found in ResourceMate 3.0 by clicking on the Help menu and selecting About ResourceMate. The Data Path is noted on this screen.

The import process will import the data from ResourceMate 3.0 to the new ResourceMate database.

When the import process is complete, start ResourceMate. When you first start ResourceMate, you will see the Home Screen Dashboard. The Dashboard provides a graphical summary of your Items, Circulation and Patrons. See the current status of your library at a glance! To see your items, from the menu select **File, Items**. The Item count is in the lower right corner of the screen.

Note that if security has been set in ResourceMate 3.0, the user names and passwords are NOT imported into the new installation of ResourceMate. You will need to re-create these in the new installation of ResourceMate. Also note that you will be prompted to login with a user name of **Super** and a password of **Orange**.
Appendix B – Pre-requisites for Database Server Installation

To install a new instance of the SQL Database server software you should first know that there are some pre-requisites to performing this installation. Because of the wide variety of file / database servers that are available it is difficult to know which of the pre-requisite pieces of software are already installed on your server. The database server installation provided by Jaywil does NOT automatically install these pre-requisites. The server must have the following already installed:

- Windows Installer 4.5 or greater
- Windows PowerShell 2.0
- .Net Framework 3.5

You will need to plan the timing of these software installations because you may need to re-boot your server in order to complete the pre-requisite installation process.

Please visit our web site for further information about these software requirements: http://www.backupresourcemate.info/ikm/questions.php?questionid=69
Appendix C – ResourceMate Setup

If you are a new ResourceMate user, then you will want to review the information below.

**Call Number Preferences**

When using the ISBN Retrieval and Library Search features, the call numbers can be automatically imported into the call number fields (on the Library Card tab). Call numbers provide shelving information and are used when printing spine, sign out and pocket labels as well as catalogue cards.

From the ResourceMate menu select **Utilities, Call Number Preferences**. You can select whether you would like to use the Dewey Decimal or Library of Congress classification system; or select **None** if you will be using your own call numbering system.

**Print Card and Label Defaults**

When printing labels (and cards), you can select the items that you would like to print labels and cards for by using **Advanced Search** or by setting the print switches located on the **Print Switches** tab. Print switches can be set to specify what you want to print for each item.

These values can be entered automatically each time a new item is entered! From the ResourceMate menu, select **Utilities, Print Cards and Labels Defaults**, and set the Default Value to 1 or more for each card and/or label you would like to print for each item. In the Plus/Extended/Premium versions, the default value for cards and labels to print can be set per Resource Type.

**Barcode Setup**

If you purchased a version of ResourceMate that includes the Plus features (Plus/Extended/Premium versions) then you will be able to use Barcodes (for your items and/or patrons) for circulation and inventory purposes. There are three types of barcodes supported by ResourceMate. To select the type of barcodes your library is using, from the ResourceMate menu, select **Plus, Barcode Setup**.
Appendix D – Moving ResourceMate to a New Computer

Determining the Type of Installation
With ResourceMate open, take a look at the Bottom left corner of the screen

You will see the Date, Time and ....

If the next word is

- **Compact** then ResourceMate is installed as a **Stand Alone installation (Local Data)**
- A **Computer Name**, then ResourceMate is installed as a **Shared Data Installation (Database Server)**

![Image of Date and Time with Compact on ResourceMate_Default]

To Move ResourceMate to a New Computer
The following instructions can be used when the installation type on the old computer is the same type as on the new computer (e.g. both installations are Stand-Alone (Local Data) installations or both are Shared Database (Database Server) installations.) Please contact us for assistance if you will be moving your database from a Stand-Alone (Local Data) type of installation to a Shared Database (Database Server) type of installation.

1. Backup your current ResourceMate database (**File, Backup**). Please see the instructions below.

2. Install ResourceMate on the new computer following the instructions in the **ResourceMate Family of Products Installation Guide** [www.resourcemate.com/install](http://www.resourcemate.com/install) for your specific type of installation. Don’t forget to Activate, Register and apply any available updates.

   If you are installing as a **Shared Data Installation (Database Server)**, after installing ResourceMate (application) on the computer where the database server is installed, it will then be necessary to restart the SQL Server (RMSQLData) service or reboot the computer before proceeding to Step 3.

3. In ResourceMate on the new computer, restore the backup that you created in Step 1 (**File, Restore**). Please note that the restore process will **completely replace the existing information with the data in the RMBACKUP file**. Please see the instructions below.
To Backup the ResourceMate Database

In ResourceMate:

- Click on File, then
- Backup
- Click the file folder button to select the location you would like to save the backup to (see the screen image below).
- After selecting the location, click the [Start Backup] button to start the backup

Click the File Folder button and navigate to/select the location you would like to save the backup to.

The backup file name is automatically created for you. The backup file name will include the date it was created. A new file is created each time you do a backup.

If ResourceMate is installed as:
- Standalone Installation (Local Data) the filename will be e.g.: rm2015_04_12.rmcebackup
- Shared Data Installation (Database Server) the filename will be e.g.: rm2015_04_12.rmbackup

Then click [Save].

Click the [Start Backup] button to start the backup.

The Backup process log will indicate when the backup is completed.
To Restore the ResourceMate Database

1. In ResourceMate, click File, Restore. The Restore from Backup screen appears.

2. In the Backup File Name field click the folder icon and browse to select the folder location.

3. Open the most recent RMBACKUP file.
   - The statistics for the current database appear on the right side of the Restore From Backup screen in the Current Data Statistics section.
   - The statistics from the RMBACKUP file are displayed in the Select Backup File section. Before you complete the restore, examine this information to confirm that you want to restore from this backup file.

4. Click [Start Restore] and then click [Yes] to confirm. The system completely replaces the existing information with the data in the RMBACKUP file.

5. At the final prompt, click [Yes] to restart. ResourceMate restarts with the data from your backup.

Connecting to the New Database Location

If ResourceMate is installed as a Shared Data Installation (Database Server) and if you will be accessing ResourceMate from other client computers, it will be necessary to make sure the client computer(s) are connected to the ResourceMate database on the new computer.

On the client computers, run the ResourceMate.Framework.Configuration.exe (to locate this file, right click on the ResourceMate shortcut on your desktop and select Open File Location).

The IT person may need to complete this Database Connection screen in order to establish the database connection.

You will need to make sure the Server Name is correct. You can verify this by opening up ResourceMate on the main (new) computer.

Look at the Bottom left corner of the screen....

You will see the Date, Time and ....

The next word is .... The Server Name

Make sure this new Server Name is entered on the Database Connection screen on the client computer(s).
Appendix E – Frequently Asked Questions

How do I Import my ResourceMate 2.0 Data?
If you are upgrading from ResourceMate 2.0 then you should email a copy of your backup file (RM.SQZ) to info@resourcemate.com so that we can assist in migrating your data.

Does this installation process affect Web OPAC?
Web OPAC is not part of the ResourceMate application and is designed to run independently on a web server. Therefore access to the live catalogue through Web OPAC is not an issue. ResourceMate still has the tools used to create the necessary files used by Web OPAC.

How do I import ResourceMate 3.0 Data?
If you already have data in ResourceMate 3.0, then you can import that data into your new ResourceMate application by selecting File, Import ResourceMate 3.0 Data. See Appendix A.

I am the IT person and I want to install the database and program and make sure ResourceMate® knows where the data is, but not actually run ResourceMate®.

- Install the “Database server software” if necessary.
- Install the ResourceMate® software on the computer.
- In the folder where the resourcemate.win.exe is located, run the resourcemate.framework.configuration.exe file.
  - Choose the database type then indicate the location (or server and database name) of the ResourceMate® database.
  - Click [Close].

How do I change the database that ResourceMate® is using?

- In the folder where the resourcemate.win.exe is located, run the resourcemate.framework.configuration.exe file.
- Choose the database type then indicate the location (or server and database name) of the ResourceMate® database you are switching to.
- Click [Close].
How do I transition from the single user database to the multi-user or corporate database?

1. See the section Shared Database Installation (Database Server).
2. Choose whether you are using your existing SQL Server or the Database Server Software (Express).
3. Install and run ResourceMate to confirm the database connection
4. Open ResourceMate on the stand-alone computer
   a. Select Utilities / System Utilities / Move Local Data to Database Server
      i. Enter the connection information that you used in step 3 above
      ii. Click [Next]
   b. Your data will be transferred to the server

Note: If that menu option is not available contact Jaywil Software via our live chat at http://www.resourcemate.com/support/live-chat.aspx from the computer with the single user data.

I now want to share my local ResourceMate® single user database with another computer

See the instructions above on How do I transition from the single user database to the multi-user or corporate database.

If you have any questions about installation please call us at 1-800-815-8370, use our Live Chat at www.resourcemate.com/support or e-mail us at info@resourcemate.com. We are ready to assist in any way we can.

Definitions

ResourceMate
The software application that has all of the tools required to automate your library and can be thought of as the application that is primarily used for administrative and circulation activities.

OPAC (On-Line Public Access Catalogue)
The software application that provides library users with the ability to search the live catalogue that is created in ResourceMate.

Volunteer Application
This is the software application that allows librarian assistants to enter new items and patrons independently. This data may then be imported into Plus, Extended, or Premium versions.