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Elements of Web OPAC Home Screen

- Title of your site’s Web OPAC
- Display Online Help for the Product
- Patron/Admin Login
- Displays information for Site personnel
- Displays the contents of the book bin

Search

Enter search criteria here (author, title, etc)

Page title can be changed in Home Page Settings

Hey, Book Bin users!

You can Email the Book Bin to yourself for reference when you come to the library, you can post it to your mom’s Email address, you can send it to the librarian (librarian@somelibrary.org).

All you need to do is to enter the appropriate ‘To’ and ‘From’ email addresses on the Book Bin page!

Page text can be changed in Home Page Settings

Individual slides can be selected by clicking on the circles that represent them, or left to scroll by themselves

(You can set the number of seconds between slides, or the slide show can be turned off completely in Home Page Settings)
Scrolling down the site will take patrons to the “Featured Items” and “Most Checked Out” carousels...

These items are displayed on the basis of items’ settings in the Items table of the ResourceMate database. If an item has its “Featured Items” checkbox checked, it is included in that display on the Web OPAC Home page. “Most Checked Out” items are displayed based on the “# of Times Checked Out” value.
“About Us” is populated in the “About Us” field in the Library Profile.

“Our Contacts” is maintained from the “Contacts” panel under “Library Profile.”
An Outline of the Mechanics of Web OPAC

The ResourceMate Web OPAC product is, in essence, a browser-based catalog search tool that gives your library patrons the ability to search for items in your collection, transmit requests for reserves of items by adding them to a book bin for printing or Emailing to the librarian. These searches are transacted over the internet, using any internet-capable device also equipped with a web browser.

Web OPAC is best understood as a separate, but parallel, database that resides on our servers. This database exits in tandem with the on-premises or Hosted database that your site uses to maintain the disposition your catalogue. This parallel database is initially populated by a one-time upload of all data in your ResourceMate database. Although the structure of the databases is identical, their data is handled differently; Web OPAC has no ability to add or delete items from your main database and is a ‘read only’ tool. Once the initial upload of your ResourceMate database has been accomplished, all subsequent transactions processed in ResourceMate are transmitted ‘real-time’ to a holding area on our servers. The data in the holding area are processed as a batch, either once a day, or within approximately four minutes of their having been transacted in ResourceMate, depending upon which pricing tier of Web OPAC you subscribe to.

In order for your ResourceMate transactions to be uploaded to our server, a small program that runs in the background on your Windows computer must be available and in running status. All computers that have ResourceMate installed on them have this so-called Windows “service” set up by the installation process. However, if you are using a ResourceMate database that is shared on your local network, and if you have more than one computer accessing it, the background service that is set up on the database server should be used as the Web OPAC transaction broker by all ResourceMate client computers. For this reason, such multi-user sites are strongly encouraged to have ResourceMate installed, and updated as needed, on the server. If needed, please contact the ResourceMate support department for assistance in configuring common access by client computers to this service running on the database server.

The background service that acts as broker between your ResourceMate database and your Web OPAC database online is called the “ResourceMate WCF Service”. You can view it by visiting the Services panel found on the Windows Control Panel under “Administrative Tools” then “Services” [Tip: set the Control Panel’s “View By” drop-down to “Small Icons”). The following screen shot displays the Windows service, bearing the required status of “Running”:

The service is set to start by itself when your ResourceMate computers are rebooted. Should it NOT do so, your copy of ResourceMate will notify you after a short interval:
Site Architecture Terminology used in this document

A brief discussion about the terminology used throughout this document is in order. When the word “ResourceMate” is used, it is meant to refer to the actual ResourceMate Library Management Software, whether installed locally on-premises, or accessed from our Hosted ResourceMate Server. The use of “OPAC” refers to a stand-alone ResourceMate program, also installed on-premises, and used by library patrons to search the catalogue from a workstation that is bound to the on-premises local area network. By contrast, “Web OPAC” refers to a database on our servers, accessed over the internet, and used by library patrons to search the on-premises catalogue. Such searches are transacted by using a current web browser running on any internet-capable device. Discussions of the various web browsers available for use in this manner are largely outside the scope of this document. The word “patron” refers to an individual who is a member of the library and who is uses its services.

<table>
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<th>TERM</th>
<th>MEANING</th>
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<td>ResourceMate</td>
<td>Software and a database installed on a Windows computer and that functions to manage a catalogue of items</td>
</tr>
<tr>
<td>On-premises</td>
<td>Situated at your site, as opposed to on our servers</td>
</tr>
<tr>
<td>OPAC</td>
<td>A ResourceMate program installed on-premises and designed to be used by library patrons to search for items held in the collection. OPAC is installed on one or more client computers and typically connects to a ResourceMate database server over an on-premises local area network (LAN)</td>
</tr>
<tr>
<td>Web OPAC</td>
<td>A catalog search system that uses a web browser and queries a database that resides on our servers. It is identical in structure to the local on-premises ResourceMate database, and is populated by transactions processed in the latter. It is queried, or searched, by means of a web browser, is accessed over the internet, and can be accessed by any internet-capable device that can use a web browser.</td>
</tr>
<tr>
<td>Server</td>
<td>A machine on which a ResourceMate shared SQL database resides. Some installations use ResourceMate AND a SQL database on the same machine.</td>
</tr>
<tr>
<td>Client</td>
<td>Typically, a Windows computer in an on-premises LAN on which only the ResourceMate software is installed and that connects via the LAN to a ResourceMate database residing on another Windows computer in the network.</td>
</tr>
<tr>
<td>Web Browser</td>
<td>Software installed on a device (not necessarily a Windows computer) that is used to navigate to web pages over the internet. At the time of this writing, there are several web web browsers available. Examples are the Microsoft Internet Explorer, Microsoft Edge, Google Chrome, Firefox, Safari, Opera, etc. All current iterations work identically with Web OPAC.</td>
</tr>
</tbody>
</table>
Logging In and Customizing Web OPAC

The following sections cover the various settings that can be added or changed by Web OPAC site Administrators. Note that as you navigate through the various setup screens, Web OPAC reminds you of your current location at all times in the following manner:

From the above, we can determine that we are in the Library Setup portion of Web OPAC and further, that we are currently working on the Item Settings section, and further, on the Item Settings web page.

The setup function in New Web OPAC affords a gentle landing for Administrators, as any changes they may make will NOT be immediately visible to patrons using the site unless and until they are “Published” by the site Administrator. In that manner, Administrators can avoid surprises, pleasant or otherwise, by making changes and saving them first. The changes can be reviewed and their suitability gauged correspondingly before they are “Published”. Once Published though, they are immediately visible when the website is visited, or refreshed, by patrons. A preliminary “Save Changes” button allows site Administrators to preview their proposed alterations; when the “Publish” button is clicked, the changes will be applied to the production, or active, website. Note that the “Save Changes” button typically is NOT exposed until site Administrators actually leave the field they are changing.

To login as site Administrator, use the “Sign In” button. Remember, it is now one login function for both Administrators and patrons! You will need to enter a Username and a PIN [or password].

Simply click on the “Sign In” button...

...and then enter your Admin credentials. These are typically:

Username = the first five digits of your serial number followed by “-Admin”, eg 12345-Admin (case sensitive) and the FULL serial number for your ResourceMate product. (Tip: The full serial number can be found by selecting the “Help > About” menu item, again, from within ResourceMate), eg 12345-987654. As well, for those sites that don’t require a PIN to log in there is a new link below the initial signin prompt for “Library Administrator”. If you click on it, you will be presented with prompts for both a user name and PIN:
Some sites are set up to prevent patrons from logging in, usually having inherited this setting from the older iteration of Web OPAC when the data were originally migrated to this newer version. In such cases, no “Sign In” button is visible in the title bar of the site. In such a case, you can trigger the appearance of the sign in button by adding a ‘/admin’ switch at the end of your site’s URL, thus:

https://12345.rmwebopac.com/admin...

...where ‘12345’ is the appropriate portion of your site’s Web OPAC uniform resource locator.

You can then click on the Sign In button to be presented with the prompt for credentials displayed in the above facsimile.

Once you have logged into the site as Administrator, you will be able to navigate through the various site settings menus and selections that appear to the left of the screen. If you want to Save changes and then click on Home to test them prior to publishing them, you can return to the site “Settings” by selection from a drop-down menu, the appearance of which is triggered when the drop-down arrow appearing to the right of the login is clicked on:

![Settings Menu](image)

This will take you back to the Settings menus to the left and permit you to continue to make changes to the site. Don’t forget to click on “Publish” at the bottom of the settings screen so that any changes you make will be recorded for use on the site as seen and used by patrons who visit the site.
Library Profile

a. General Screen

“Library Name”: Copied from your ResourceMate database. This value can’t be changed in Web OPAC, nor is it displayed to patrons on the site.

The “Public Name” field displays in the Title Bar of your Web OPAC. **This field is required!** It can’t be left blank. Note as well that the Web OPAC Public Name is converted to upper-case letters automatically and always displays so.

![RESOURCENATE SANDBOX WEB OPAC](image)

Text entered in the “About Us:” field displays in the left hand of your Web OPAC’s Footer:

![ABOUT US](image)

b. Logo

The Logo setup screen allows you to add your own custom logo to the ResourceMate Home page. To have your own logo displayed, you must first ensure that the Show Logo slide switch is set to the “ON” Position…

![Show Logo: ON](image)

…and then either select an image file from your computer using the “Select New Image for logo…” button, or left-dragging an image file on top of the “Select new image for logo” label on the screen. If you want to remove the Logo, you can use the “Reset Logo” button to the right. Save and Publish your changes to display your logo.

![Reset Logo](image)
c. Access/Security

If you want to make your collection private such that users must enter a password to even be able to see the website, set the “Private Collection:” slide switch to the “On” position. Enter a suitable password that your patrons will need to enter in order to view the site. Apply your changes. When the site is subsequently accessed in a web browser, the following screen will appear, and users will be obliged to enter the password to proceed to the site.

Patrons can view a text that can be customized on the Library Profile > Access / Security screen in two “Header” input fields, for lines 1 and 2:

Private Login Page

Header (line1): * The collection you are trying to view is private
Header (line2): * To view, please enter the password

Site Administrators can set an inactivity timeout, after which interval Patrons will be logged out of the site automatically. This inactivity interval in set in minutes, the number of minutes entered by means of spinner bars in the “Session” section of the screen. The default is ten minutes. The site can also display a “countdown to log out” warning. This can be set in the “Expire Countdown (seconds):” field and is increased or decreased by means of the spinner bars to the right of the number.
d. Privacy Policy

You can display your site’s Privacy Policy to your patrons by having them click on the “Privacy Policy” hyperlink displayed at the bottom of the site’s footer section:

[Copyright 2020, ResourceMate® - a division of N. Harris Computer Corp. (Privacy Policy)]

You can customize the display of the policy in the Library Profile > Privacy Policy screen. Visual effects can be added to the text entered here, to have it display in bold face, italics, underline, strikethrough, with different typefaces, font sizes or colours:

Privacy Policy

We are committed to protecting your privacy. Only authorized employees on a need-to-know basis within the company use information collected from individual customers. We constantly review our systems and data to ensure the best possible service to our customers. Congress has created specific offenses for unauthorized actions against computer systems and data. We will investigate any such actions with a view to prosecuting and/or taking civil proceedings to recover damages against those responsible.
e. Contacts

The Contacts settings page permits entry of data that is displayed in two separate parts of the site. There is an “OUR CONTACTS” area of the Footer in the Web OPAC site that contains fields maintained in the “Phone”, “Second Phone”, Email and Address fields on the left-hand side of the screen. Note that because the Second Phone field is empty on the Contacts Settings screen, it isn’t listed at all in the OUR CONTACTS section of the site footer.

Beyond this area, there is also a secondary “Contacts Screen” that not only repeats the information visible in the Footer, but also combines it with any text entered and formatted in the “Custom Area” on the right-hand side of the Contacts Settings screen:

This screen can be used to display a large amount of text, and might serve a variety of informational purposes as a result of its size and the ability to format the text.
The secondary Contacts screen is displayed when the “Contacts” link in the site title bar is clicked:

The resulting display shows the two elements of Contacts Settings brought together:

![Contacts](Image)

This link can be suppressed completely by turning off the “Show Contacts Link in Menu” switch on the Contacts Settings page:
Appearance

Themes/Colors

Web OPAC permits considerable flexibility in configuring the colors and appearance of the various elements displayed on the site using the “Appearance > Themes/Colors” option in Setup. As you make changes to the Base Color the site is using, the Theme Palette bar reflects what colors the various site elements are going to present to patrons. You can begin by selecting the “Base Color” drop-down button, then using the slider bar that appears to the right of the palette selector to move the site’s base color to various points on the spectrum:

One you are generally satisfied with the overall effect, you can refine the base color further by left-dragging the white circle around the overall base color palette selector.

Theme Palette:

...and once you have selected a new theme, you can alter any of the colors on the setup page by clicking on the drop-down arrows that appear beside each section...
A custom color for each section available on this screen can be chosen by means of dragging the circular color selector around on the screen until a suitable color is arrived at. Note that the “Reset to default” button will only restore the site to its default color scheme if a change is made (say, in the “Base Color” section). Once change has been made and the “Save” button exposed, the “Reset to Default” can be used to restore the site to its “factory default” color scheme. The reset must itself be Saved, then Published in order to take effect.
Home Page Settings

a. General

If you have set up a slide show on the “General” page in Home Page settings, you can change the layout of the page between a “Horizontal” and “Vertical” slide show display. This done by selecting the radio set option to the top left of each orientation:

![Horizontal and Vertical layouts](image)

The basic difference is seen in the above screen thumbnails – Horizontal orientation places a smaller slide show display in the right-hand side of the Home page, whereas a Vertical orientation presents the slide show as a larger carousel across the top of the page. All elements of the page are displayed separately in succession down the Vertical orientation of the webpage.

A page title can be displayed, or turned off by means of the “Show Page Title” slide switch.

In addition, page text can also be activated or turned off by means of setting the “Show Page Text” slide switch appropriately. Text typed out in the “Page Text” input field can be formatted to include a bold-faced, italicized font and or strike-through format, different typefaces, larger or smaller typeface point sizes, different justification, or bullet points. Different font colors can be assigned and hyperlinks inserted in this text.

The complete list of options may be viewed by clicking on the “More Options button in the “Page Text” header that appears above the text input box:

Elements of the Page Text format panel

- Change image orientation, if an image is inserted:
- Set the Page Text in Bold, Italic or Strikethrough type face
- Change the point size of Page Text
- Change default font
- Click here for more formatting options
b. Slide Show

On the Home Page Slide Show settings page, you can decide whether or not to display a slide show. If you would like to, ensure that the “Display Homepage Slide Show” slide switch is set to the “On” position and set the value for the number of seconds between display of up your slides. These slides can be facsimiles of upcoming events, photos of the library, staff, etc. They are typically .jpg files that are uploaded from a computer to the website. To upload a slide, click on the “Add Slide” button that appears above the list of Images in use...

** Selecting only one image will display the image on the homepage without generating a slide show.

**NB: You are no longer restricted to four slides, but it is good practice not to have too many and further, to keep their file sizes small. Otherwise, the initial load of your Web OPAC page can take longer than may be comfortable for your patrons.**
Point the resulting “File Upload” interface at the file you wish to upload, left-click to select it and then click on “Open”

The slide will be uploaded to the Web Site and will appear in the slide show carousel. To remove a slide from the display, click on the trash can icon that appears to the left of the slide in the list.

*NB: If you only establish one image in your Slide Show, it will anchor as a constant display on the Home Page.*
Footer Settings

The darker band of information that appears at the bottom of the Web OPAC site, known as the Footer...

...can be configured using the “Footer > General” selection on the configuration menu:

The following screen shot lists the footer configuration options that are on the page:

The data displayed in both the “About Us” and “Contacts” sections of the Footer are set in the “Quick Info” field of the “Library Profile > General” and “Library Profile > Contacts” screens, respectively. Both of the remaining slide switches, “Latest News” and “Useful Links” are currently inactive.
Item Recap Carousels

The Home Page can also display four different types of Items that are held in the ResourceMate Items table.

These are:

- New Items
- Most Checked Out Items
- Popular Items
- Featured Items

Each of these types can be displayed, or have their display disabled by the use of a slide-switch that appears in the relevant type’s section of the Setup screen. When these switches are in the “On” position...

...such items will be presented to patrons in four rotating carousels.

“New Items” refers to items that have been added to the ResourceMate database within a given number of days. This value is determined automatically by comparing the Accession Date in ResourceMate to today’s date. The comparison is made with a value expressed on the New Items section setup. By default, this value is ninety days. In other words, if an Item has been accessioned in the ResourceMate database within ninety days of the current date, it will be included and presented to Patrons as a New Item.

“Most Checked Out” Items refers to the value of the “# Times Checked Out” field in each ResourceMate item. For libraries that use ResourceMate to govern the circulation of their catalogue, this field is automatically incremented by a value of 1 each time an item’s checked out in ResourceMate. Again, this is a system-maintained value that can only be incremented by dint of using ResourceMate to check out an item. The display of items in the “Most Checked Out” section is also date-sensitive. Web OPAC Administrators can establish a date range in this section of the Setup screen such that only those items that have circulated within that date range will be displayed to patrons in this Section.

“Featured Items” are also flagged in the same way, and therefore included in the Featured Items section of the Web OPAC screen.

“Popular Items” refers to a flag that can be set by the librarian in each item in the ResourceMate database. It is found on the “Additional” tab of each item and is manually checked to flag the item as popular and therefore displayed in this section of the Web OPAC:

Similarly, items can be excluded from being displayed as a New Item or as part of the Most Checked Out section should those check boxes be checked on the items’ “Additional” tab in ResourceMate.
**Representative diagram of the components of the four screen “Sections”**

Although the following diagram deals specifically with the “New Items” section of the Home Page Settings screen, its components also apply in a similar manner to the “Most Checked Out Items”, “Featured Items” and “Popular Items” sections, as well.

Section name | Display of section on/off | Title of Section | Section Comment (Appears below Title)
---|---|---|---
New Items | ON | New Items | New to the library within the last three months..!

**Section Comment:**

Note:
The Header Comment that displays immediately below the Header. Currently, the point size of the section title and Header Comment cannot be changed.

**Number of days less than ‘today’ since added to the library**

**Number of items to display in Section**

(The values in the “Within last X days:” and “Items Count:” fields can be typed over, or incremented or decremented by the use of the up/down “spinners” seen to the right of the input fields.)

The Header of a section is displayed as follows:

New Items

New to the library within the last three months..!
Patron Settings

The Patron Settings > General screen consists of a series of features that can be activated or deactivated by means of slide switches. These are:

- **Allow Login:** ON - Allows patrons to log into Web OPAC
- **Can Reserve:** OFF - Allows patrons to place reserves when logged in
- **Can Renew:** OFF - Allows patrons to renew items on loan when logged in
- **Can View Fines and Payments:** ON - Allows patrons to view all their fines and payments
- **Can View Checked Out:** ON - Allows patrons to view items they have on loan
- **Can View Circulation History:** ON - Allows patrons to review their circulation history
- **Show Reserve End Date:** OFF - Displays the expiration of a reserve request

Two additional items deny or permit patrons additional Book Bin functionality:

- **Allow Email Circulation Info:** ON - Allow Patrons to Email Book Bin contents
- **Allow Print Circulation Info:** ON - Allow Patrons to Book Bin contents

If the “Allow Login” setting is On, patrons must login using credentials that are tied to their ResourceMate Patron records. These are established by means of populating a user name and PIN on the “Login” tab of each patron record:

The user name can be any valid combination of alphanumeric characters, up to a maximum of 80, but must be unique; two or more patron records may not bear the same User Name.

The PIN can be any valid combination of alphanumeric characters, up to a maximum of 20.

There are two utility programs that can be used to populate all patrons with a PIN and a user name en masse. They are listed on the ResourceMate Utilities->Web OPAC menu as “Assign default PINs...” and “Assign Default Usernames..”, respectively. By default, the “Assign Default Usernames” program adds a username of combination Lastname + Firstname to every patron record in the database. Optionally, the

https://resourcemate.com  mailto:support@resourcemate.com  +1-800-815-8370 ext 2
program also supports a Firstname + Lastname combination, and the name components can be separated by “.”, or “_”, or “ “ [a space]. If no first name has been entered, the username will be the patron’s surname. (Patron Surname is a required field in the ResourceMate database.) When the “Assign Default PINs” program is run, a PIN is created by using the last four digits of patrons’ barcodes (including the check digit). Therefore, you must have assigned barcode values to those of your patrons that you want to assign PINs to by means of this utility program.

Note: When the ResourceMate Utilities > Web OPAC > Initial Data synchronization is first performed, a decision must be taken whether to include patron data as part of the upload. This is done by checking or unchecking the “Send Patron Information” check box on the primary Initial Data Synchronization screen:

If this flag is not checked during the Initial Data synchronization, Patron data will never be sent to our Web OPAC site. If you change policies and subsequently wish have patrons log in when previously you had decided against it, you must contact the ResourceMate support department and arrange with them to perform another Initial Data Synchronization. The process usually takes about half an hour to complete.

_Tip: Both the Patron User Name and PIN can be added as columns to the Patron Grid in ResourceMate, making it very easy to allow the librarian to make and save changes to both or either in Grid Modify Mode:_

If the “Send Patron Data” checkbox was checked during initial synchronization, such changes are transmitted to Web OPAC and updated using the Update Frequency subscribed to, Daily or Instant.
**Item Detail Settings**

Item details are presented to patrons following a successful search. Initial search results are displayed in either a List or a Grid view; either can be chosen by patrons using the site. By default, search results are displayed in List View. Grid view can be selected by left-clicking on the “Grid” button displayed in the top right of the search results screen:

![Grid View Button](image)

Similarly, patrons can switch by to List view by left-clicking on the button to its left.

The information that is displayed to patrons as the results of a search can be customized. This customization is performed in the Item Detail Settings screen...

...on three separate tabs:

1. Search Item [Results] Template
2. Item Details
3. Availability Details

**Initial Search Item Recap**

The following illustration shows details of a book in the ResourceMate catalogue titled “The Boys in the Boat”:

![Book Details](image)

This information is displayed on the initial Search Results screen.

In the example above, the title of the book is immediately to the right of the front cover illustration, followed by the sub-title of the book; the two are separated by “:”. Below that appear the details that are contained in the item’s “Author” field in ResourceMate. Below that are listed the item’s Resource Type, Published Date, and Large Print (as flagged in ResourceMate on the Item’s “Additional” tab), and again, the Author.
These elements are selected to be included in the Search Results Display by using the Item Information Settings screen, seen in the following illustration:

Elements in this in template can be edited. Suppose, for example, that instead of the default “Title : Subtitle” construct, you want to have just the title appear as the first element of the initial Search Results display. Navigate to the Item Settings > Item Information Settings > Search Result tab and click on the “Edit” icon that appears at the end of the fourth row on display:

On the resulting “Edit” interface, you can delete the “@[Title : Subtitle (Series)]” data element, and as soon as you type in another @ symbol, a field picker list appears:

You can scroll down the list and left-click on the Title field in the list to select it and lock it into the editor.

This interface is a bit different, in that you must save these changes by clicking on the “Save” button in the lower right-hand corner of the Editor.
...and then commit your changes by saving the page, and then publishing it, as usual with other areas of site administration. The same process can be used to allow you to customize the data elements that of each item that will be selected by the search and displayed in the Initial Search Results.

These elements are in turn reflected in subsequent search for the item used in the example:

![Boys in the Boat](image)

**Item Details**

Should a patron wish to view more details about an item returned in the initial search results, they may click on the underlined title of an item and view further information on the Item Details page.

To continue with the above example, the following illustration shows the Item Details of “The Boys in the Boat”:

![Boys in the Boat Details](image)

The rows identified by the oval in the illustration are maintained on the Item Details tab of the Item Settings selection:
New rows can be added by clicking on the “Add Row” button on the Item Details screen:

![Add Row button]

By way of example, should the requirement exist to add Illustrator to the Item Details section, it can easily be done by clicking on Add Row, and then beginning to type in “Illustrator” in the resulting Data Field selector. “Illustrator” can be added by scrolling down the list of possible fields that display when the Data Field selector is clicked on and selecting it from the list, or by beginning to type in “Illustrator” in the Data Field selector and allowing the system to “pattern-match” from the list of possible fields and present a likely match, as in the following illustration:

![Data Field selector with Illustrator selected]

The Item Details section can preface the desired field with a field label followed optionally by a colon, if those options are selected in the Item Details interface:

![Data Field selector with Illustrator field label]

Be sure to click on “Save” in the editor, then “Save” again to view them first as site Administrator, and finally, “Publish”, to push them into production for use by patrons.

The result of our sample change can again be seen on the Item Details section of the Item Details screen, accessed by clicking on the title of an item displayed in the initial search results:

![Date Published: [2015] Volume: 1 Publisher: Viking Author: Brown, Daniel; 1951 - Illustrator: Pablo Picasso]

Note the “Illustrator” field label followed by a colon as selected in the Item Details screen.
Tip: Rather than delete items and add them again to reorder them, fields listed in the Item Details grid, field names can be edited. In the above example, if we wished to switch the Illustrator and Author fields by deleting their rows in the Item Details grid, their names can be individually edited to switch their positions. Begin by editing the first row that should be changed...

...then simply type the new field name over the existing one:

Don't forget..."Save" your edits, and the “Save” and/or “Publish" the changes to disseminate them!
Availability Details

The Availability Details list is meant to provide patrons with information concerning the current status of an Item in the collection. If an item is on loan, patrons can be advised of its checkout and expected dates. These elements, which are fields in the ResourceMate database, can be added or removed at will on the “Copy Information Grid” tab.

To hearken back to our sample item, “The Boys in the Boat”, here are the details of its availability:

<table>
<thead>
<tr>
<th>Location</th>
<th>Call #</th>
<th>Expected Back</th>
<th>Check Out</th>
<th>Barcode</th>
<th>Call # (Inc. Section)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>797.12 Bro</td>
<td></td>
<td></td>
<td>33289000000437</td>
<td>797.12 Bro</td>
</tr>
</tbody>
</table>

The column captions displayed above correspond with the item’s fields in ResourceMate. A subset of ResourceMate Fields are available to be displayed as columns in the Availability Details, and these columns can be removed or added to suit the requirements of the librarian or library patrons. In the above illustration, we have a bit of redundancy in that the call number is displayed twice. If we want to add, say, the Circulation Status to the display in place of the “Call # (Inc. Section)” currently installed, we can remove the “Call # (Inc. Section) field by clicking on the gray ‘X’ that appears at the right-hand end of the column caption...

... and by clicking in the vacant space at the end of the row of display fields, bring up a list of possible columns to add, then select the desired “Circulation Status” field for display by checking the checkbox that appears to the left of the field in the list:
Again, be sure to Save and Publish your changes. You can check the results as Site Administrator by triggering another search for the “Boys in the Boat” and viewing the results:

The section caption can also be edited in the Availability Details screen.

Tip: If you don’t use ResourceMate to track circulation, all items in your ResourceMate database will appear to be available. Should you wish to remove circulation information from the display, simply remove those fields from the Availability Details Data Field selector. You can also disable the Details completely by setting the slide switch to the OFF position on the Item Details section:
Book Bin Settings

The book bin is analogous to an online ‘shopping cart’ of sorts. As Web OPAC displays the results of searches transacted by patrons, individual items can be selected from the search results and added to the book bin. The Book Bin’s contents can then be Emailed to the librarian for requested action, Emailed to patrons themselves as a reference list for their use in the library stacks, or printed.

Patrons do not need to log in to the site in order to use the book bin.

To add an item to the Book Bin, click on the Title of an Item as displayed in the Initial Search Results to view the Item Details, then click on the “Book Bin” button that appears to the left of the resulting Item Details screen:

When items have been so added to the Book Bin, a small counter appears to the right of the Book Bin button on the home page:

![Image](https://example.com/book-bin-counter.png)

This counter indicates the current number of items in the bin. To access the bin, patrons can click on the book bin button:

![Image](https://example.com/book-bin-access.png)

Administrators can turn on or turn off access to the Book Bin, but it is an all-or-nothing setting and cannot be turned on or off for specific patrons.

When accessed, the book bin contains a shorter list of details about the items in the bin:

![Image](https://example.com/book-bin-content.png)

Note that patrons can clear the contents of their Book Bin by using the icon resembling a circled letter ‘X’ that appears above and to the right of the book bin list:
The fields from each item that can be displayed in the bin are controlled by navigating to the Library Setup > Item Settings > Book Bin settings page:

Site administrators can decide whether to allow the use of the Book Bin at all. Item fields can either be removed from the “Display Fields:” list by clicking on the small ‘X’ to their right. New fields can be added to this area first by clicking open space to the right of the last entry in the list, then further by clicking in the checkbox appearing to the left of the desired fields:
The field selection screen may be closed by clicking in an open area to the right of the last field in the list:

Allow Book Bin: ON

Display Fields:
- Resource Type
- Title
- Expected Back
- Call # (Inc. Section)
- Location

Finally, options can be set to allow patrons to (or prevent them from) Emailing the book bin or printing it:

Allow Email: ON
Uncheck this box to disable emailing in the book bin

Allow Print: ON
Uncheck this box to disable printing the book bin

When a patron chooses the option to print, a preview of their bin appears first...

...and if acceptable, can then be printed, or the print preview cancelled:
**Search Settings - Search screen**

The first three fields in the Search Settings screen relate to labels positioned on the Home Page designed to indicate to patrons where they can enter data related to searches.

*Note: As of this writing, Advanced Search is a reserved function and is not currently active. The illustrations of the Search Bar in this document have been preserved against the triumphal return of the Advanced Search function.*

Three slide switches below the “Advanced Search Button Text” indicate whether or not items classified in ResourceMate as “Textbooks” should be included in searches, whether to include items that have been flagged not to be included in searches and whether searches should include inflectional forms of words.

Note that the ResourceMate Textbook Module is only included as part of the Extended and Premium editions of the product.

Items are typically flagged not to be included in searches on the basis of their Resource Type and/or their status in the ResourceMate database. Please consult the Online Help feature of your ResourceMate product for further information.

Inflectional forms of words are plurals (“watches” for “watch”), gerunds (“running” for “run”), etc.
Search Settings - Item Settings (Keyword Component Assembly)

The Item Search Settings screen is used to build the constructs used by the four broad types of search that can be transacted from the Home screen. These are Keyword Search, Title Search, Author Search and Subject search. Any of them may be selected from the Search drop-down that appears at the right hand end of the Search input field.

Three types of search in the drop-down can be changed to: Title Group, Author Group and Keyword Group. Subjects are a search group of their own because and it is counter-intuitive to mix a search by subject with any other element. By contrast, when searching for Authors, we might want Web OPAC to include primary Author, second author, third author, Illustrator and/or Editor. The second row in the figure below shows how this is can be accomplished by combining the various related fields in ResourceMate into one over-arching construct in a keyword search.

These groupings are used when patrons search for items in the catalog. For example, if Title and Subtitle are included in the Title Group field, Web OPAC will search both fields for the search string when a Title search is transacted. These groups can have added combinations of fields. Any element within these combinations will be included when searching for items. For example, if two authors have been added to an item in ResourceMate, in the “Author” and “Second Author” fields, either will be used in a search, per the elements in the “Author Group” construct illustrated below.

Currently, the default group combinations are as follows:

<table>
<thead>
<tr>
<th>Title Group:</th>
<th>Title</th>
<th>Subtitle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author Group:</td>
<td>Author</td>
<td>2nd Author</td>
</tr>
<tr>
<td>Keyword Group:</td>
<td>Title</td>
<td>Subtitle</td>
</tr>
<tr>
<td></td>
<td>Call Number 1</td>
<td>Call Number 2</td>
</tr>
<tr>
<td></td>
<td>ISSN</td>
<td>Librarian Comments</td>
</tr>
<tr>
<td></td>
<td>Category</td>
<td></td>
</tr>
</tbody>
</table>

*Note: Changes in these fields will initiate rebuilding indexes after Publishing.*

The interface supports an easy-to-use checkbox mechanism that will allow you to add any of a list of ResourceMate fields to your keyword elements.
For example, suppose that we want the “Varying Form of Title” field added as a component of the “Title” group in Web OPAC. To do so, we need only click in an open area of the line to the right of “Subtitle X” appearing at the end of the Title Group Field. This will trigger the appearance of the Items table field checklist and we just need to click in the checkbox appearing to the left of the field to be added:

Click here to trigger the appearance of the list...

...then check the box to the left of the “VaryingFormOfTitle” field in the list to add it to the Title Group.

Click again in an open area to the right of the newly-added “VaryingFormOfTitle” component to close the checklist.

If any item needs to be removed from the three groups, it is possible to do so by clicking on the large X that appears at the right-hand end of the component box in the group...

Please note the warning that an index rebuild will occur following any change to the various elements in the groups. This can take a bit to complete, but a progress wheel will appear as the process is working.
**Processing Reserves and Renewals**

If you wish to permit patrons to place requests for items, or renew items that they currently have on loan, you must first permit them to log in to the site.

1. Log in to the Web OPAC as site administrator
2. Be sure to set the Patron Login slide switch options appropriately (consult the Patron Settings section above) to permit patron login and further, to allow Reserves and Renewals.

Once patrons have logged in to the site, they will be permitted to “Reserve” an item retrieved from a search for it. Once an item has been retrieved by the search, patrons can view the Item Details by clicking on the title of the item in the Search Results screen, then clicking on the “Reserve” button on the Item Detail.

A dialog box appears to prompt for the duration of the reserve request – patrons can indicate any beginning and ending dates they like, then click on “Send”:

```
Reserve Request

Start Date: 5/5/2020
End Date: 5/13/2020

[Cancel] [Send]
```

This feature allows patrons to indicate that after the end date expressed in the Reserve Request dialogue box, they will no longer be interested in borrowing the item in question.
A final notification appears to patrons placing requests to indicate that the request has been sent, but that it could take some time for it to reach the librarian:

**Your Reserve Request was successfully created**

Currently a Reserve Request is not granted immediately. It will require some time to process.

Your reserve request has been sent to the library. It will be reviewed and then a decision made to Grant or Deny it.

You will be contacted once this has been processed.

---

On the ResourceMate side, when the product is launched, it notifies operators by means of a dialogue box if there are unprocessed patron requests that require attention...

...as well as a displaying a notification “tool tip” along with an indicator that appears on the ResourceMate status bar:
Such requests can be reviewed by the librarian and then further Processed (ie accepted) or Denied as they arrive from patron submissions transacted on the Web OPAC site. This is done by use of the “Circulation > Web OPAC Patron Requests” selection:

When the program is selected, a grid appears that displays the various unprocessed patron Requests:

Note the radio set option to the left of the Patron Request grid that permits all requests, or only Renewal or Reserve requests to be displayed. If the requested item is available for circulation, the librarian can set it aside for the relevant patron, and use the “Process Request” button at the bottom of the grid to so notify the patron:
When the request is selected from the grid and processed, a dialogue box appears that displays the default information received from the request:

![Add Reservation Dialogue Box]

When the “Create” button is clicked, another dialogue appears suggesting a default message assembled from the components put together in the “Accept Reserve” tab of the Utilities > Preferences > Web OPAC Preferences screen (please see the Online Help of their ResourceMate product itself for more information about this program):
A confirmation Email will be sent to patrons whose requests have been approved and the incoming Web OPAC requests will be converted into pending reservations in the database. Note that patrons can also submit renewal requests. These are handled in an identical manner to reserve requests.
In the above simple diagram, all ResourceMate client machines are represented as using a common ResourceMate WCF service situated on the database server. The clear implication is that the ResourceMate software, not just the database server software, must be installed and kept updated on the database server as well as the clients, because the ResourceMate WCF Service is actually part of the suite of ResourceMate programs that is installed on a Windows computer. However, it is configured by the installation program to run in the background as what is known as a “service” in Windows. You can see this if you run the “Services” program from the Administrative Tools icon on the Windows Control Panel:

This service must be running, and further, for those customers using SQL databases shared with other computers that run ResourceMate, this service is the one that all client computers should use when processing those ResourceMate transactions that make use of it. The two primary uses of this service are to transmit ResourceMate transactions to ResourceMate, and to control the ResourceMate backup in a shared SQL database topography.
ResourceMate now includes a utility that, when run from a client computer, will report which machine’s ResourceMate WCF service it has been configured to use, and also, whether it is capable of communicating with that service. Here is a facsimile of the Utilities > System Utilities > RM Services Checker utility screen:

In the above screen shot, the WCF service is located on a machine called “localhost” and the client computer is communicating with it correctly, as seen by the “Active” status indication.

To ensure that your client computers are set correctly to use the WCF service on the database server, perform the following actions: Right-click on the ResourceMate icon on a client computer’s Windows Desktop and select “Open File Location” from the resulting context menu.

When the Windows File Explorer opens the ResourceMate installation folder, look for the ResourceMate Framework Configuration utility, represented by an orange icon on which is superimposed a white wrench:

Double left-click on that icon to launch the Framework Configuration program.

On the Framework Configuration interface, click on the RM Services tab...

...then click on “Test Connection”, and finally, “Save”
You can also use Windows Notepad text editor to make and save the following change to a ‘key’ in the c:\program files (x86)\Jaywil Software Development Inc\ResourceMate\app-settings.config file and set the value to be the Windows Computer name of your database server:

```xml
<wft:WCF service settings -->
<add key="ServiceBindingType" value="NetTcp" />
<add key="ServiceHostName" value="YOUR_SERVER_COMPUTER_NAME" />  
<add key="ServicePort" value="52773" />
```

Save the change and if prompted by Windows, save to your Desktop, then use the Windows File Explorer to copy the app-settings.config file from the Desktop and overwrite the copy in the ResourceMate folder. (You may need to do this because Windows makes a fairly feckless attempt to protect the files in the \Program Files (x86) folder and by default, will usually prevent Notepad from writing the changes directly back to the file in that folder. As you can see, using the Framework Configuration program is quite a bit easier, with fewer steps involved).

Close ResourceMate after making the change, then run the Services Checker Utility again to test that your client is set to use the ResourceMate WCF on the database server.

Remember that if you do not actually know what it is, ResourceMate will display the Windows Computer name of your database server in its Status Bar, per the following example:

In the above facsimile, “LOCALHOST” is the Windows Computer Name of the database server, and any client machines that run ResourceMate and connect to the SQL database on LOCALHOST should have their WCF Key settings changed in the app-settings.config file thus:

```xml
<wft:WCF service settings -->
<add key="ServiceBindingType" value="NetTcp" />
<add key="ServiceHostName" value="LOCALHOST" />
```

These configuration details also govern the ability to run a backup of the ResourceMate Database from a client computer – the client copy of ResourceMate must be directed to use the ResourceMate WCF service on the database server to broker a successful backup, regardless of the destination it is written to.
If you are unsure about the topography of your local area network and whether you are connecting to a local single user database on the ResourceMate machine or connecting to a database that is elsewhere on the local area network, ResourceMate itself can tell you, as of the 4.1.7 release.

First, verify the build you are running by select “About” from the drop-down “Help” menu, located near the top or the ResourceMate window. (As of this writing, the build should be at 4.1.8 (if you have been maintaining your ResourceMate Support subscription and have kept your current by applying the latest updates. TIP: You can press the ESC key on your keyboard to close the About screen.)

If you are running 4.1.7 or higher, you can determine several things about your ResourceMate database architecture by hovering your mouse pointer over the Windows computer name/SQL instance on the status bar:

In the tool tip that should appear, you can identify the Windows computer name of the machine that is running ResourceMate, and you can also determine the Windows computer name of the machine that is hosting the database server.

Only client computers connecting to the database elsewhere in the Local Area Network need to have their app-settings.config file WCF key changed to ensure that they use the WCF service that is running on the database server. Again, that is why we highly recommend that you install ResourceMate on the machine acting as database server, particularly if the site at issue subscribes to Web OPAC.
## DOCUMENT CHANGELOG

<table>
<thead>
<tr>
<th>DATE</th>
<th>DESCRIPTION OF CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 24 2020</td>
<td>Added document change log for tracking purposes</td>
</tr>
<tr>
<td>April 24 2020</td>
<td>Added description of WCF configuration in a shared SQL topography</td>
</tr>
<tr>
<td>April 25 2020</td>
<td>Clarified which component of Site Admin credentials go in which field in Sign In</td>
</tr>
<tr>
<td>May 6 2020</td>
<td>Added clarification for those sites with no Sign In button on their site’s Title Bar</td>
</tr>
<tr>
<td>May 6 2020</td>
<td>Added instruction for clearing the entire contents of the book bin</td>
</tr>
<tr>
<td>May 6 2020</td>
<td>Documented new prompt for Site Admin login for those sites that don’t use a PIN</td>
</tr>
<tr>
<td>May 7 2020</td>
<td>Added a section on processing patron requests as transacted on the Web OPAC site</td>
</tr>
<tr>
<td>May 7 2020</td>
<td>Added a section to document modification of the Keyword Groups</td>
</tr>
<tr>
<td>May 7 2020</td>
<td>Added new sections and tightened up redirection to them in Table of Contents</td>
</tr>
<tr>
<td>May 8 2020</td>
<td>Minor changes and reworked some illustrations and screen names and locations in menus</td>
</tr>
<tr>
<td>May 14, 2020</td>
<td>Added new Footer Settings section, repaginated TOC and made minor corrections in spelling</td>
</tr>
</tbody>
</table>

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