Web OPAC Admin Guide

Resourcemate Family of Products
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Web OPAC Admin Guide

Introduction

The latest version of this document is located:

resourcemate.com/WebOPACAdminGuide

The ResourceMate® Web OPAC allows you to make your library searchable on the web. ResourceMate® Web OPAC is a great way to increase the awareness and accessibility of your library.

The Web OPAC is a separate program. It is a hosted solution and is available on a subscription basis. All your cataloging and circulating will be done using ResourceMate. Data changes are synced to our server as long as you have an internet connection. Based on the frequency you select (pricing is based on frequency of data updates), your data changes will be applied to your Web OPAC.

The Web OPAC is hosted on our server so we look after all the installation and maintenance. Since the Web OPAC is a hosted solution, it is available on an annual subscription basis.

If you have reviewed the information in the Web OPAC Admin Guide and still have questions please call us at 1-800-815-8370 or email info@resourcemate.com. We are ready to assist in any way we can.

What do I need to make my library searchable on the web?

You need to have ResourceMate 4.0 (Build 4.0.27 or later) and internet access on your ResourceMate computers that are maintaining the database.

Note: It is not necessary for your ResourceMate computer to be on when the daily or weekly update of your data is taking place.

When your Web OPAC is set up, you will receive the URL that your website can link to so people can search your collection. You may want to ask your web site administrator to include the link on one of your web site pages. You will also receive information on how to login to your Web OPAC as the Administrator in order to customize your Web OPAC.

This manual includes information on how to customize your Web OPAC in order to enhance/maximize your patrons’ user experience with the Web OPAC with a view to increasing accessibility of your library via the web.
Accessing your Web OPAC

When your Web OPAC is set up you will receive an email which will include:

1. The URL for your Web OPAC. You may want to ask your web site administrator to include the link on one of your web site pages.
2. Login username for the Administrator.

To Login as the Administrator:

- Open a browser and go to the URL provided in the email.
- Click on [admin] (not Login) in the top left corner and login with your Admin credentials.
- The password is initially set to your full serial number (including the hyphen) but you can change it.
- In the URL Settings section, click [Edit] to customize Web OPAC.
- Help is available by clicking on the [Help] link beside the [Edit] button.

Logging in as the Admin will give you access to customize your Web OPAC.

URL Settings

In the URL Settings section, click [Edit] to customize Web OPAC.

You can then click on any of the tabs to customize the Web OPAC according to your preferences. For example:

- On the Header Settings tab you can upload your logo.
- The Home Page Settings tab has the organization name in the Page Title field. On this tab you can also include up to 4 images to be used as a slide show on the Home Page. You can also select to display a list of New Items, Most Checked Out, Featured Items and Popular Items.
- On the Patron Settings tab you can select whether you would like to allow your patrons to login to the Web OPAC and check mark the options you wish your patrons to have access to when they login.
- You may want to take a look at each of the tabs to review the settings and make any changes you would like.

Admin Users

In the Admin Users section you can change your password.

To change your password click the [Change Password] button.

You will need to enter:

- Your current password
- A new password
- Enter the new password again to confirm

Click the [Save] button to save your new password.
Initial Synchronization of your ResourceMate Data with the Web OPAC

You will need to make sure your ResourceMate data is initially synced with the Web OPAC. After this initial synchronization, your data will be automatically updated based on the frequency selected per your subscription order. Please follow the instructions below.

Enter your New ResourceMate Product Code

When you order the Web OPAC, you will be given a new Product Code. You will need to enter your new Product Code into your ResourceMate program in order to access the new Web OPAC features.

In your ResourceMate program:
- Click on the Help menu.
- Select Enter ResourceMate Update Code.
- Enter your new Product Code (please note the code is case sensitive).

Synchronize your Data with the Web OPAC

You will then need to synchronize your data in ResourceMate with the Web OPAC. To do this:

In your ResourceMate program:
- Click on Utilities.
- Select Web OPAC.
- Select Initial Data Synchronization.

If you would like to exclude your patron data, you can deselect the preference to Send Patron Information on the Web OPAC Data Sync Preferences screen.

Please note that if patron information is not sent, your patrons will not be able to log in to the Web OPAC to request reserves or renewals or to see what they currently have checked out.

After this initial data synchronization, your data will be automatically updated based on the frequency selected per your subscription order.
Allowing Patron Login

You can allow your patrons to log in to the Web OPAC and you can set it up to allow them to optionally view items they have currently checked out, their circulation history (Plus/Extended/Premium) and any fines/payments (Plus/Extended/Premium) that have been applied to their account. You can also optionally allow your patrons to request holds/reserves and renewals.

There are 2 steps:
1. In the Web OPAC (logged in as admin) in the URL Settings section click [Edit] and then you will need to select the Patron Settings.
2. In your ResourceMate program you will need to maintain the Login information for each of your patrons (either manually or by using the available utilities to automatically assign user names and PINs).

Full instructions are included below.

1. In the Web OPAC

- Click on [admin] (not Login) in the top left corner and login with your Admin credentials.
- In the URL Settings section, click [Edit].
- Click on the Patron Settings tab.
- Check mark the options you wish your patrons to have access to.

![Patron Settings](image)
By selecting the Allow Login option, your patrons will be able to log in using any of the following as entered in your ResourceMate program in the Patron record:

- the barcode number (as entered in the Barcode field located on the Detail tab)
- the email address (as entered in the Email field located on the Detail tab)
- the user name (as entered in the User Name field located on the Login tab)

In conjunction with the Allow Login option, by default, a PIN is also required for Login. If you will not require your patrons to enter a PIN, you can check mark the option to Allow Login Without PIN.

Please note:
- The User Name can be manually entered into the User Name field or you can use the Assign Default User Name utility to automatically assign the user name as lastnamefirstname (please see the instructions below the heading In Your ResourceMate Program).
- The PIN can also either be manually entered into the PIN field or you can use the Assign Default PINs utility to automatically assign the PIN (please see the instructions below the heading In Your ResourceMate Program).

2. In Your ResourceMate Program

If you are going to allow your patrons to log in to the Web OPAC, you will need to maintain the login information for each of your patrons in your ResourceMate program.

When you select the Allow Login option in the Web OPAC, your patrons will be able to log in using any of the following as entered in your ResourceMate program in the Patron record:

- the barcode number (as entered in the Barcode field located on the Detail tab)
- the email address (as entered in the Email field located on the Detail tab)
- the username (as entered in the User Name field located on the Login tab)
The User Name on the Login tab can be manually entered into the User Name field or you can use the utility to automatically assign a default user name as lastnamefirstname (please see the instructions below).

The PIN can also either be manually entered into the PIN field (click on the [Change PIN] button) or you can use the utility to automatically assign a default PIN as the last 4 digits of the barcode number (please see the instructions below).

Automatically Assign User Name
(Utility, Web OPAC, Assign Default User Name...)

This utility will automatically assign a default user name as lastnamefirstname to any patron record without a user name.

Click [Yes] to proceed.

For patron records with a user name already assigned (in the User Name field), this will not overwrite any existing user names.

Click [OK] to proceed.
Automatically Assign PIN
(Utility, Web OPAC, Assign Default PINs...)

This utility will automatically assign a default PIN as the last 4 digits of the barcode number for any patron record with a barcode in the Barcode field and without a PIN already assigned.

Click [Yes] to proceed

For patron records with a PIN already assigned, this utility will not overwrite any existing assigned PINs.

Click [OK] to proceed.

Logging In As a Patron

To Login as a Patron:
- Open a browser and go to the URL provided or, if available, access the Web OPAC via a link on your web site.
- Click on Login (not [admin]) in the top left corner and login with the patron login credentials that you, as the Web OPAC Admin, have provided to your patrons (e.g. barcode, user name, PIN).
- Your patrons will be able to view only the options you have selected.
Customizing Logo and Slide Show

You can change the logo in the Header displayed on the Home page and also add images/slide show to the Home page.

- In the Web OPAC (log in as admin).
- In the URL Settings section, click [Edit].

Please note: Maximum size for each image file is 250 MB. For the slide show images, images about 514 x 384 pixels work well. Microsoft Paint can be used to resize or crop your images.

To add/change your logo in the Header displayed on the Home page

- Click on the Header Settings tab.
- Click on [Select Image].
- Then on the Image Picker screen, click [Select New Image].
- Navigate to and select the image file then click [Use this Image].
- Then back on the Header Settings tab click [Save Settings].

To add images/slide show on the Home page

- Click on the Home Page Settings tab.
- Check mark Show Homepage slide Show.
- You can add up to 4 images.
- Click on each of the Image 1 through Image 4 tabs and on each tab click [Select Image].
- On the Image Picker screen click [Select New Image].
- Navigate to and select the image file then click [Use this Image].
- Then back on the Home Page Settings tab scroll down to the bottom and click [Save Settings].

You can make access to your Web OPAC search private. If a Password is entered here, anyone wanting to search your library will be prompted for the password when accessing your Web OPAC URL.

You can also change the organization name in the Page Title field.

Use the Page Text field to add notes to the Home Page. Some organizations like to include instructions on how to use features in the Web OPAC.
Display Special Items on the Home Page

You can optionally display list(s) of selected items at the bottom of the Home page. Your patrons will be able to optionally scroll through the following:

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

There are 2 Steps:

1. In the Web OPAC configure the preference settings on the Home Page Settings tab.
2. In your ResourceMate program, on the Additional tab, mark selected items using the Special Web OPAC Info options.
1. In the Web OPAC

- Click on [admin] (not Login) in the top left corner and login with **your Admin credentials**
- in the **URL Settings** section, click [Edit]
- click on the **Home Page Settings** tab

Select and configure the lists you would like to be available.

The **Heading** for each list can be changed.

Don’t forget to click [Save Settings] to save the configuration.

2. In your ResourceMate Program

On the **Additional** tab, mark selected items using the options available in the **Special Web OPAC Info** section.
Customizing Item Detail Settings

The item details that are displayed on the results screen can be customized.

- In the Web OPAC (log in as admin).
- In the URL Settings section, click [Edit].
- Click on the Item Detail Settings tab

You can customize the item details that are displayed on the results screen. Here you can select item detail preferences and fields displayed in the results screen.

You can start by check marking the preferences of your choice. Then to select the information you would like displayed on the results screen, click on [Item Details – Left Column] or any other button.

After you make your changes, don’t forget to click the [Save Settings] button to save your changes.
You can manage the information displayed for each Item Location on the website. For example, if you would like to edit what information is displayed for the Home Page - Most Checked Out location, for the Item Location, click on the drop down arrow and select that location.

If you would like to customize the settings, uncheck “Use Default Settings” option. To select the fields you would like displayed, select (or highlight) the field in the Property List column and click the single arrow pointing to the right so that the field is moved to the Selected Properties list.

To remove a field from the Selected Properties list, select (or highlight) the field and click the single arrow pointing to the left so that the field is moved back to the Property List column.

The fields can be reordered on the Selected Properties list. Select/highlight the field and use the arrows to the right to reposition the field up or down in the list.

Do this for each location. Don’t forget to SAVE. Click the [Save] button.
Customizing Search Settings

The search options available for your patrons can be customized.

- In the Web OPAC (log in as admin).
- In the URL Settings section, click [Edit]
- Click on the Search Settings tab

You can customize the search experience for your patrons. Here you can select search preferences as well as the grid columns displayed (in grid view) and fields available for searching.

Select search preferences as well as the grid columns displayed (in grid view) and fields available for searching.

If you make any changes on this screen don’t forget to Save. Click the [Save Settings] button.

Search Fields with Drop Down Lists preference works with the Advanced Search feature only. Select the fields you would like to have a drop down list available for searching purposes.

Title Group, Author Group, Keyword Group preference settings – when changes are made to the field selections for these groups, it will also be necessary to check mark the Force Update option for the group in order for the changes to be updated.
Working with Multimedia
(Plus/Extended/Premium versions)

Book Cover/Item Images
If the data in your ResourceMate program (Plus, Extended, Premium versions) includes the Amazon book cover image (or other type of image) for the item on the Multimedia tab (and it has the printer icon beside it), then the image will be displayed with your item record in the Web OPAC. For all versions of ResourceMate, if the item record does not include the book cover image, and we have the book cover image for that ISBN number in our database, then the book cover image will be displayed for that item in the Web OPAC.

Please see the information below on working with multimedia.

There are 2 steps:
1. In your Web OPAC (logged in as admin), you will need to select the option to View Multimedia on the Item Details Settings tab (this option displays multimedia in the Item Details and is not related to displaying the book cover images).
2. In your ResourceMate program the Multimedia object(s) will need to be included in the Item record on the Multimedia tab.

1. In the Web OPAC

In your Web OPAC (logged in as admin), you will need to select the option to View Multimedia on the Item Detail Settings tab.
2. In your ResourceMate Program

Include Multimedia Images/Objects in the Item Record (Plus/Extended/Premium)

In your ResourceMate program, in the Item record, click on the Multimedia tab and [Add..] the multimedia you would like patrons to see images of or be able to click on links to (e.g. .doc, .xls, .pdf). When you are using ISBN Retrieval, you can configure the ISBN Retrieval Configuration to automatically obtain the Amazon book cover image (if available).

ISBN Retrieval Library Configuration

You can select the option to Always get Amazon Image. The image will appear on the Multimedia tab in the Item record.
Note: Multimedia records with the “printer” icon will be displayed as the primary item image in the Web OPAC.

Click on the “printer” button to set the Multimedia to use as the primary item image.

The printer icon is used to identify the primary image for items without an ISBN and without an Amazon book cover image.

Adding Images/Multimedia (Plus/Extended/Premium versions)

If your book does not have an ISBN number or if you are cataloging an item that is not a book (e.g. magazine), you may be able to find the image using a google image search, then right click on the image and choose Copy, then go into the item record, click on the Multimedia tab and click [Add ...], and then on the Add New Multimedia Resource form click [From Clipboard].

If you have a scanner another option would be to scan the cover.

If the item you are cataloging is a toy, or a kit or another type of object another option would be to take a picture of the item and include the picture on the Multimedia tab.

Please note: Maximum size for each multimedia file is 250 MB.
Working with Reserves

In order for the Reserve feature to function in the Web OPAC, the Patron who would like to reserve item(s) will need to Log in to the Web OPAC so you, as the Administrator, will need to Allow Patron Login to the Web OPAC and you will also need to select the options that you want your patrons to have access to. Please see the instructions below. As you can see, you will need to do some setup on both the Web OPAC side as well as the ResourceMate side.

Patron Login

Your patrons will need to log in to the Web OPAC in order to request reserves and renewals. You can allow your patrons to log in to the Web OPAC and you can set it up to allow them to optionally view items they have currently checked out, their circulation history (Plus/Extended/Premium) and any fines/payments (Plus/Extended/Premium) that have been applied to their account. You can also optionally allow your patrons to request holds/reserves and renewals. Please refer to the section titled Allowing Patron Login for instructions on how to allow your patrons to log in to the Web OPAC.

Working with Reserve Requests

Your patrons will request reserves when they are logged in to the Web OPAC. The reserve requests will be sent to your ResourceMate program and you will then need to process the reserve requests in your ResourceMate program. To see the Patron Requests, open your ResourceMate program and go to Circulation, Web OPAC Patron Requests. As you click on each request to review it, you can select whether you would like to [Process Request] or [Deny Request] using the corresponding buttons at the bottom of the screen.
Reserve/Renewal Emails
You can have emails automatically sent to your patrons when the Reserves and Renewals are processed or denied. In order to do this, you will need to set up the following options in your ResourceMate program:

- **Emails Settings** preferences
- **Web OPAC Preferences**
- **Email address** for your patrons in their patron record

Please see further details below.

Email Settings in your ResourceMate Program
(Utilities, Preferences, Email Settings)

- For **Email client**, select **SMTP Email – Jaywil Supplied Parameters**
- Enter your **From Address** (email address)
- When you use the Jaywil Supplied Parameters option, a copy of the sent email is not automatically kept. If you would like to keep a copy of the email, you can enter your email address in the **Also Send Email To** parameter.
Web OPAC Preferences in your ResourceMate Program
(Under Utilities, Preferences, Web OPAC Preferences)

You can choose to send a confirmation email and also select whether you would like to be prompted to edit the email before sending.

You can customize each of the Web OPAC Patron Request emails that are sent to your patrons.

Email Address in the Patron Record
(File, Patrons, Detail tab)

Make sure your patrons have an email address entered in the Email field in their patron record.
Frequently Asked Questions

What if something happens to my ResourceMate database or computer and it becomes necessary to restore the ResourceMate database from a previous backup?

After restoring, it will be necessary to re-sync your newly restored ResourceMate database with the Web OPAC so that your data is accurately synced to reflect the current status of your data. You will need to contact us so your Web OPAC can be reset to allow the data synchronization.

If we have certain items in our library that we do not want to be available in the Web OPAC for searching, how can we accomplish this?

In your ResourceMate program, you can specify that certain items “Cannot be Searched” based on the Resource Type or an entry in a specific field.

Cannot Search Options

Resource Types
You can catalog any type of resource in your collection. You may have some Resource Types in your catalog that it does not make sense for your patrons to be able to search. Go to File, Resource Types, select the specific Resource Type that you would like to exclude from the Web OPAC then click on the Detail tab. Check mark the option Do Not Show in OPAC.
Lookup Lists
(File, Lookup Lists)

You can specify that an item **Cannot be Searched** (in the OPAC and Web OPAC) and/or **Cannot be Checked out** based on the entry in that field.

For example, you can specify that anything with the status of **Withdrawn Can Not be Searched** and/or **Cannot be Checked Out** (you can also do this for items that have a "Lost" or "Missing" status). To do this, from the ResourceMate menu click on **File**, then **Lookup Lists**. Then, on the left in the list of Tables, click on the **Status** table (to select the Status list). On the right, click on the "Withdrawn" status (you can add a new Status if necessary - click on the [New] button at the bottom of the screen) and place a checkmark in the **Can Not Search** and/or **Can Not Check Out**.
**Tips**

We hope you are enjoying your new Web OPAC! Here are some tips regarding your new Web OPAC. If you find that some of your items do not have images being displayed, here are some tips on how to make sure images are included for your items in your Web OPAC. There is also information below on how to specify which items you would like to be included in the list of “New Items” displayed on the Home Screen.

**Book Cover/Item Images**

If the data in your ResourceMate program (Plus, Extended, Premium versions) includes the Amazon book cover image (or other type of image) for the item on the Multimedia tab (and it has the printer icon beside it), then the image will be displayed with your item record in the Web OPAC. For all versions of ResourceMate, if the item record does not include the book cover image, and we have the book cover image for that ISBN number in our database, then the book cover image will be displayed for that item in the Web OPAC.

**Adding Images/Multimedia**

(Plus/Extended/Premium versions)

If your book does not have an ISBN number or if you are cataloging an item that is not a book (e.g. magazine), you may be able to find the image using a google image search, then **right click** on the image and choose **Copy**, then go into the item record, click on the Multimedia tab and click **[Add ...]**, and then on the Add New Multimedia Resource form click **[From Clipboard]**.

If you have a scanner another option would be to scan the cover.

If the item you are cataloging is a toy, or a kit or another type of object another option would be to take a picture of the item and include the picture on the Multimedia tab.
With the **Plus/Extended/Premium** versions, you can configure the **ISBN Retrieval Configuration** to automatically obtain the Amazon book cover image (if available).

### ISBN Retrieval Library Configuration

You can select the option to **Always get Amazon Image**. The image will appear on the **Multimedia** tab in the **Item** record.

### Setting # Days and Item Count for New items

In the **Web OPAC** configure the preference settings on the **Home Page Settings** tab.

- Click on [admin](not Login) in the top left corner and login with your **Admin credentials**
- In the **URL Settings** section, click [Edit]
- Click on the **Home Page Settings** tab

Select and configure the lists you would like to be available. The **Heading** for each list can be changed.

You can set the **# Days** as well as the **number of items** that will be displayed for **New Items**.

Don’t forget to click [Save Settings] to save the configuration.
Excluding Specific Items from the New Items List and Other Display Options

In your ResourceMate program, on the Additional tab, you can mark selected items using the Special Web OPAC Info options.

For example,

- When adding new items, for any item that you do not want to showcase in the New Items list displayed on the Home Page, check mark the option to Exclude from New Titles.

- For any item that you do not want to showcase in the Most Checked Out Items list displayed on the Home Page, check mark the option to Exclude from Most Checked Out.

- For items that you would like to showcase in the Featured Items list displayed on the Home Page, check mark the Featured Item option.

- For items that you would like to showcase in the Popular Items list displayed on the Home Page, check mark the Popular Item option.