Web OPAC Admin Guide

ResourcEMATE Family of Products

ResourcEMATE Family of Products

Revised: July 28, 2020
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Subject</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title Page</td>
<td>1</td>
</tr>
<tr>
<td>Table of Contents</td>
<td>2</td>
</tr>
<tr>
<td>Elements of Web OPAC Home Screen</td>
<td>3</td>
</tr>
<tr>
<td>An Outline of the Mechanics of Web OPAC</td>
<td>6</td>
</tr>
<tr>
<td>Site Architecture Terminology</td>
<td>8</td>
</tr>
<tr>
<td>Logging in and Customizing Web OPAC</td>
<td>9</td>
</tr>
<tr>
<td>Library Profile</td>
<td>11</td>
</tr>
<tr>
<td>Appearance</td>
<td>16</td>
</tr>
<tr>
<td>Home Page Settings</td>
<td>18</td>
</tr>
<tr>
<td>Footer Settings</td>
<td>22</td>
</tr>
<tr>
<td>Item Recap Carousels</td>
<td>23</td>
</tr>
<tr>
<td>Representative diagram of the components of the four available screen “Carousels”</td>
<td>24</td>
</tr>
<tr>
<td>Patron Settings</td>
<td>25</td>
</tr>
<tr>
<td>Item Settings</td>
<td>27</td>
</tr>
<tr>
<td>Book Bin Settings</td>
<td>34</td>
</tr>
<tr>
<td>Search Settings (GENERAL)</td>
<td>36</td>
</tr>
<tr>
<td>Search Settings (LIMIT BY)</td>
<td>37</td>
</tr>
<tr>
<td>Search Settings (ADVANCED)</td>
<td>40</td>
</tr>
<tr>
<td>Search Settings (REFINE)</td>
<td>41</td>
</tr>
<tr>
<td>Customizable Application Help</td>
<td>42</td>
</tr>
<tr>
<td>Search Settings - Item Settings (Altering the Various Keyword Components)</td>
<td>44</td>
</tr>
<tr>
<td>Processing Reserves and Renewals</td>
<td>46</td>
</tr>
<tr>
<td>ResourceMate WCF Configuration</td>
<td>51</td>
</tr>
<tr>
<td>Document Changelog</td>
<td>55</td>
</tr>
</tbody>
</table>
**Elements of Web OPAC Home Screen**

- **Title of your site’s Web OPAC**
- **Displays Contact information for the Library**
- **Displays page help**
- **Patron/Admin Login**
- **Displays the book bin**

---

**Search**

- **Enter search criteria here (author, title, etc)**
- **Click here to specify what type of keyword to use**
- **Click here to bring up Limit By or Advanced Search**

---

**TEST WEB OPAC**

- **Page title can be changed in Home Page Settings**

Welcome to Web OPAC!

Please note that we are still in operation and that we will accommodate your requests using curbside pickup! Drop your books off in the bins outside the front door during library hours!

9AM - 5PM, Tuesdays and Thursdays!

- **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)

Page 3

- [https://resourcemate.com](https://resourcemate.com)
- [mailto:support@resourcemate.com](mailto:support@resourcemate.com)
- +1-800-815-8370 ext 2
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 ResourceMat\e 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 or renewal of items when logged in, or add items to a book bin for printing or Emailing to the librarian or themselves. These searches are transacted over the internet, using any internet-capable device equipped with a web browser. Web OPAC is a web page like any other and is accessed by dint of entering a URL into the address bar of whichever web browser is being used for the purpose.

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) ResourceMate database that your site uses to govern 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, the data that they contain 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 is 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 on-premises ResourceMate computers 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 must be used as the Web OPAC transaction broker by all ResourceMate client computers. For this reason, such multi-user sites that subscribe to Web OPAC must 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:
NB: As of the 4.1.9 build of ResourceMate, the product will now display in the ResourceMate Status Bar the number of transactions haven’t yet been uploaded to Web OPAC. If this number increases over a ten to fifteen minute interval, ResourceMate WCF service isn’t uploading them. Start by rebooting the database server. If the number doesn’t subsequently disappear, contact ResourceMate Support.

You can see the indicator here:

In the above example, 9 transactions are sitting in the Web OPAC synchronization queue in the database. These transactions are typically any additions, changes or deletions to or from the Items, Patrons or Circulation tables.
Site Architecture Terminology

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, but we don’t recommend the older Microsoft Internet Explorer. The word “patron” refers to an individual who is a member of the library and who is uses its services.

<table>
<thead>
<tr>
<th>TERM</th>
<th>MEANING</th>
</tr>
</thead>
<tbody>
<tr>
<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 searched by means of a web browser, is accessed over the internet 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 on 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 browsers available. Examples are the Microsoft Internet Explorer, Microsoft Edge, Google Chrome, Firefox, Safari, Opera, etc. The older Internet Explorer isn’t recommended for this use.</td>
</tr>
</tbody>
</table>
Sign 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 in the Item Settings section, on the Item Settings page.

The setup function in New Web OPAC affords a gentle landing for Administrators, as any changes they may make will NOT immediately be 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 correspondingly evaluated 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 is typically NOT exposed until site Administrators actually leave the field they are changing.

To login as site Administrator, use the “Sign In” button. Remember, there is now only one login 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 link below the initial sign in prompt for “Library Administrator”. If you click on it, you will be presented with prompts for both a user name and a PIN. For Administrators, the PIN is actually a password.
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 was 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.

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

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...

...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.
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:

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 either by means of spinner bars in the “Session” section of the screen, or typing in a value. 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 its text formatting capabilities.
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:

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:

Once 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...

...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 is done by selecting the radio set option to the top left of each orientation:

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 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. Our first recommendation is to keep the file size to a maximum of 500 KB and further, to ensure landscape orientation of the slide. Slides in portrait orientation do not render well. Insofar as image manipulation is concerned, the newer Windows 10 ‘Snip and Sketch’ app is an excellent tool. There is a lot of discussion of the use of this tool online.
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.

**Adding a hyperlink on the Home Screen to redirect visitors to another website**

You can also add a hyperlink to your home page that will, when clicked on, redirect your patrons to an outside web site of your choosing. To do so, click in the Home Page Settings > General > Page Text block on the right hand side of the screen, position the cursor to an appropriate open area, click on the hyperlink symbol above the text block...
...and complete the two fields on the resulting hyperlink screen:

![Hyperlink screen](image)

Click on “OK”, then “Save” your changes, and have a look at the home page to ensure the link’s where you want it and that it performs the correct redirect for any potential patrons.

Note: You can install a hyperlink wherever on the site the edit Text box and controls appear.
**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 to be displayed in this particular carousel in 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 “Carousels”

Although the following diagram deals specifically with the “New Items” carousel 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.

<table>
<thead>
<tr>
<th>Section name</th>
<th>Display of section on/off</th>
<th>Title of Section</th>
<th>Section Comment (Appears below Title)</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Items</td>
<td>ON</td>
<td>New Items</td>
<td>New to the library within the last three months..!</td>
</tr>
<tr>
<td>Show Section:</td>
<td>ON</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Header:</td>
<td>New Items</td>
<td>New Items</td>
<td>New to the library within the last three months..!</td>
</tr>
<tr>
<td>Header Comment:</td>
<td>New Items</td>
<td>New Items</td>
<td>New to the library within the last three months..!</td>
</tr>
<tr>
<td>Within last X days:</td>
<td>90</td>
<td>Items count: 30</td>
<td>New to the library within the last three months..!</td>
</tr>
</tbody>
</table>

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:

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

Items that you’d like in the Featured and Popular carousels are added there by dint of checking one or both of two checkboxes on the “Additional” tab of each item in ResourceMate. You can edit the actual Field label of, say, “Featured Items” to, say, “Book Club”, then edit the Web OPAC field label and change “Featured Items” to “Book Club” to use this carousel as a reading list, if you wish.
**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 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 when using “Modify Mode”:

If the “Send Patron Data” checkbox was checked during initial synchronization, when such changes are made in ResourceMate, they are transmitted to Web OPAC within a few minutes and updated using the Update Frequency subscribed to, either once a day (Daily Update) or within a few minutes (Instant Update).
**Item Settings – Item Information 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:

![Screenshot of Item Information Settings]

Similarly, patrons can switch 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 Information Settings screen...

...on three separate tabs:

1. **SEARCH RESULT**
2. **ITEM DETAILS**
3. **COPY INFORMATION GRID**

**Initial Search Results Item Recap**

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

![Illustration of the book “The Boys in the Boat”]

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 establishing them as rows on the SEARCH RESULT screen. Note that there are certain snap-in data constructs that assemble two or more fields from the relevant ResourceMate item and present them as a single object for display here. The first row in the illustration below is a construct that joins subtitle to title, the former following the latter and delimited by a full colon (‘:’).

![Search Result Illustration](image)

Elements in this 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:

![Edit Interface](image)

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:

![Field Picker List](image)

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:

**Item Information Settings - 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”:

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:

By way of example, should the requirement exist to add Illustrator to the Item Details section, it’s easy to do 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:

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:

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.

Note the “Illustrator” field label followed by a colon as selected in the Item Details screen.
### Item Information Settings – Copy Information Grid

The Copy Information Grid 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 back dates. These elements, which are fields in the ResourceMate database, can be added or removed at will on the “Copy Information Grid” tab.

To return 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>3328000000437</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)” element currently displayed, we can remove the “Call # (Inc. Section)” field by clicking on the grey ‘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:
**Item Settings - 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. Further, use of the book bin can be turned off altogether by use of the “Allow Book Bin” slide switch on the Book Bin Settings screen.

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:

![Book Bin Button with Count](image)

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

![Book Bin Button](image)

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

![Book Bin List](image)

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:

![Field Selection Screen]

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...

![Print Preview]

...and if acceptable, can then be printed, or the print preview cancelled:
Search Settings – Search (GENERAL)

Search Settings are controlled by changing values on four tabs in the Search Settings – Search screen GENERAL, LIMIT BY, ADVANCED and Refined.

**GENERAL**

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

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 - Search – LIMIT BY**

The LIMIT BY function is a means of enhancing a basic search. It is designed to allow patrons to narrow down the breadth of an initial search. It is presented to patrons as a “point-and-shoot” element selection, possibly requiring inputting a LIMIT BY search term.

The first point to note is that the feature can be turned off completely by use of the Show LIMIT BY slide switch. If patrons deem being presented by both the LIMIT BY and ADVANCED searches too confusing, simply either.

<table>
<thead>
<tr>
<th>GENERAL</th>
<th>LIMIT BY</th>
<th>ADVANCED</th>
<th>REFINED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show LIMIT By Search Button:</td>
<td>ON</td>
<td>Limit By</td>
<td></td>
</tr>
<tr>
<td>Limit By Search Button Text:</td>
<td>Limit By</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limit By Search Fields:</td>
<td>Resource Type</td>
<td>Large Print</td>
<td>Difficulty Level</td>
</tr>
<tr>
<td>Sort Fields Alphabetical:</td>
<td>OFF</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allow Limit By Search without search text:</td>
<td>ON</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The initial label suggested to patrons on the Home Page is, as you might have guessed, “LIMIT BY”, but the “Limit By Search Button Text” field can be altered by you to reflect any label you like to identify this function to patrons.

When the Limit By function is actually invoked by means of clicking on the “Limit By” button to the right of the Basic Search field, the following interface presents itself:

Note that the default “Resource Type” can be easily change simply by left clicking on that button and selecting an element in the resulting list to replace it, for example, “Difficulty Level”: 
To the right of the Limit By search field is the condition that must hold true for the search against the field to yield any results:

And finally, if required, some text to use as a search criterion can be either input, or selected:

Note that in the case of the above example, the Difficulty Level values displayed are pulled by Web OPAC from the possible range entered into the Difficulty Level field in the various Items in the ResourceMate database itself.

Other criteria can be added to the Limit By search to make it even more restrictive:

When the desired Limit By criteria have been entered, patrons can click on the “Search” button on the Limit By screen to trigger Web OPAC to apply the limits when searching.

Finally, when done, the Limit By screen can be closed by clicking on the “Close X” button to the right of the initial condition.

Either / Or searches are permitted, as well. For example, the following Limit By criteria will query the Web OPAC database for all items in Spanish at a Difficulty Level of 4 or 5:
The item fields that are presented to patrons building a Limit By search are completely customizable by the librarian. Again, this is a fairly simple point and shoot interface. For example, if we want to add “Category” as a LIMIT BY search criterion, we need only click to the right of the last element in the row of existing fields to bring up a selection list, then check the box to the left of the Items field that we want to add:

Once the field has been added to the list, the selection list can be closed by clicking to the right of the (now last) Category field, and the change Saved and Published as usual.
In contrast with LIMIT BY searches, ADVANCED searches are designed to create very precise searches and do not require the use of the basic Search input field at all.

As with the LIMIT BY interface, the ADVANCED criteria can be selected by means of a “point-and-shoot” selection process.

It’s to be hoped that Advanced Searches require less introduction and should be fairly self-explanatory to patrons using them. Criteria are selected in an identical manner to those on the Limit By screen. The following Advanced Search will retrieve all Items written in Spanish about Hong Kong:

![Advanced Search Interface]

As with LIMIT BY, the various fields that patrons can choose from when building an Advanced Search can be added to in the Search Settings – Search – ADVANCED tab. The following illustrates the addition of the Category field as an Element that patrons can select when building an Advanced Search. Again, just left click to the right of the last element in the existing row, scroll down until you find Category in the Field Selection List, check the box to the left of it, then click to the right of the new element Category to close the selection list:

![Category Addition]

As with the Limit By button, Advanced Search can also be deactivated to prevent it from appearing in the Search Row by means of the “Show Advanced Search Button:” slide switch. You can also label it something other than “Advanced Search”. Finally, the “Sort Fields Alphabetical” slide switch, when set to “On”, will present patrons with a list of alphabetized search criteria to use to build their search.
A feature of this new version of Web OPAC since its initial release is the Refine Search bar that appears to the left of the Initial Search results, and that patrons can use to add more precision to the items listed in the initial search results.

However, these elements can now be changed. Previously, they were fixed. Although currently site administrators are limited to permitting or denying the display of the following Refine Search criteria...

...other elements will be added in future roll outs.

Finally, the order in which these Refine Search elements are displayed in search results can be altered. In the above facsimile, if we want Author as the first element of the Refine Search panel to appear, as noted in the instruction, left-drag it to the top of the list:

Notice how the item in the setup screen becomes a separate bar that can be moved up or down to reposition it.
Along with the advent of the Limit By and Advanced Search capabilities, Web OPAC now incorporates customizable help screens that you can edit as Librarian. ResourceMate recognizes that libraries can have different types of patrons transacting searches against different types of collections, and therefore, that librarians may want to build their own set of instructions to better coach their patrons as to how to search.

There are currently seven different help screens, presented in three main areas of the product to steer patrons in the right direction. You may opt to include examples of your own in these screens. The current text represents suggestions from us and you’re free to translate them or replace them entirely.

The main screens are:

- How Do I - Getting Started
- How Do I – Basic Search
- How Do I – Basic Search with Limit By
- How Do I – Advanced Search
- Basic Search – Limit By [on] Page Help
- Advanced Search – Limit By [on] Page Help

The primary Help screens are displayed by left clicking on the ? HELP button on the Logo Bar:

We’ve titled this Help Group “How Do I…” and the topics are presented as hyperlinks to trigger display of online help related to “Getting Started”, “Basic Searching”, “Basic Searching with Limit By” and “Advanced Search”. As of this writing, the labels of these hyperlinks can’t be changed.

The General section of Application Help permits turning off the Help display entirely as well as the Getting Started hyperlinks.

Text on the various help screens can be edited as described earlier in this document relating the Home Page Text.

The final two sections of the Application Help setup relate to page specific help that’s invoked on the Limit By screen by left clicking on the large question mark to the right end of the Limit By interface...

The display of Online Help is a bit different in the Advanced Search screen; the Help text displays when a down arrow trigger is clicked. This appears at the right hand end of the row beginning with “Search Tips” below the Advanced Search selection criteria:
In our suggested Online Help sections, we kept the text identical between the “Getting Started” and the On Page help screens for the Limit By and Advanced Search screens. Of course, by using the last two items in the Application Help section, you can render any text you wish in the various sections and thereby present a different Online Help experience to your patrons at different points in the Web OPAC interface.
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 Dialog Box](image)

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.

Ok

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:

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 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:

![ResourceMate Service Checker Utility](image)

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:

![Framework Configuration.png](image)

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
<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:

```
Tuesday, April 14, 2020 | 3:17 PM | LOCALHOST\RM\SQLData | ResourceMate_Default | Super
```

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
<!-- 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 4.1.9 (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:

![Tool tip example]

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:

![Database connection information]

In the above example, ResourceMate is connecting to physical file “ResourceMate_Default” running on a machine bearing the IP address of 127.0.0.1 (so-called 'localhost') under a SQL Server instance name of RMSQLData.

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>
<tr>
<td>May 22, 2020</td>
<td>Added description of new RM status bar indicator, “Web OPAC Queue”. Some small cosmetic changes, as well.</td>
</tr>
<tr>
<td>June 5 2020</td>
<td>Added instructions for setting up a hyperlink on the Home Page Text Box</td>
</tr>
<tr>
<td>July 28 2020</td>
<td>Substantial changes to add new sections documenting Limit By and Advanced Searches, the customization of the Refine search bar that appears to the left of the Initial Search Results and the general organization of Application Help. Re-worked the TOC to accommodate the new sections.</td>
</tr>
<tr>
<td>July 28 2020</td>
<td>Yes AC, we’ve corrected all those solecisms that you kindly brought to our attention. We think. Thanks for proofing!</td>
</tr>
<tr>
<td>July 28 2020</td>
<td>Changed grammar to render ‘data’ as a singular noun where applicable. Although grammatically correct when treated as a plural, popular wisdom considers it snotty and elitist (ie a bit like using an accented ‘é’ in ‘élitist’) and therefore not in keeping with the current zeitgeist.</td>
</tr>
<tr>
<td>July 29 2020</td>
<td>Amended recommended file size and orientation of images destined for the Slide Show</td>
</tr>
</tbody>
</table>

*BACK TO TABLE OF CONTENTS*