

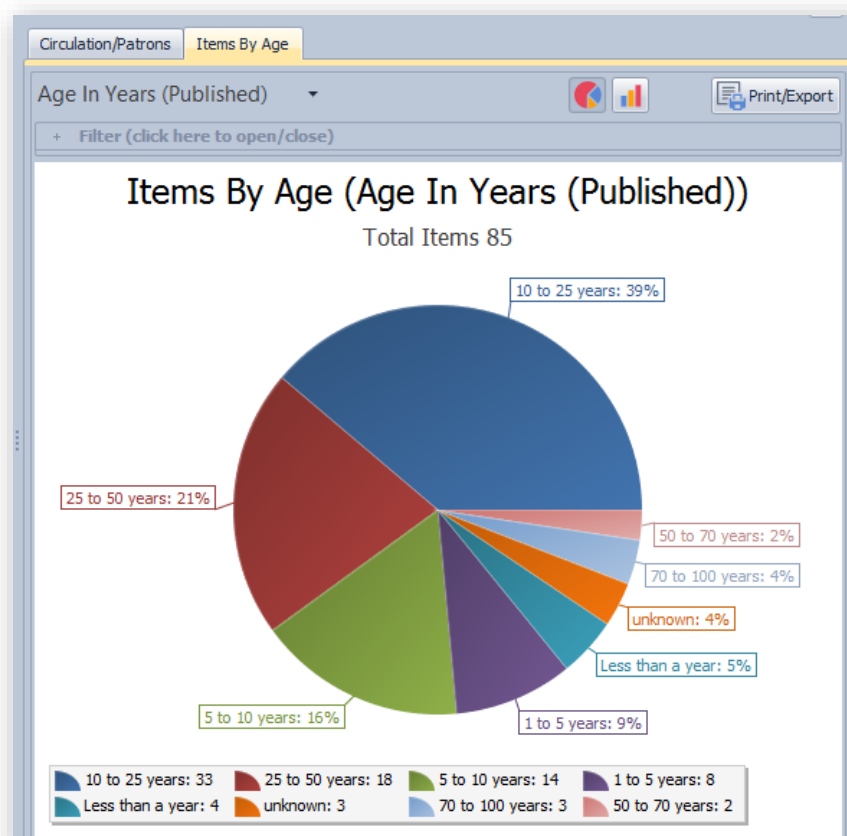
Features, Enhancements and Bug Fixes in the ResourceMate 4.1.14.0 version

Version Build Date: May 1, 2023

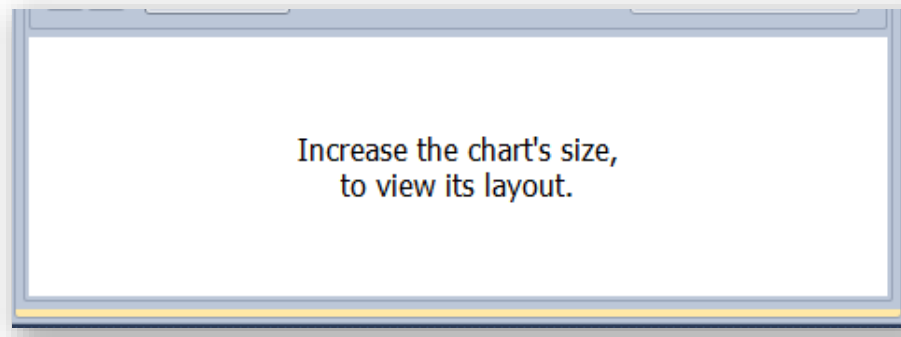
Version Release Date: May 2, 2023

Features

- The Home Screen has a new Dashboard pie chart for Items by Age. The new chart will display a statistical breakdown of your collection either date of publication or accession date. To see the new Dashboard, click on the "Items By Age" tab that now appears to the right of the tab for the original Circulation Dashboard:



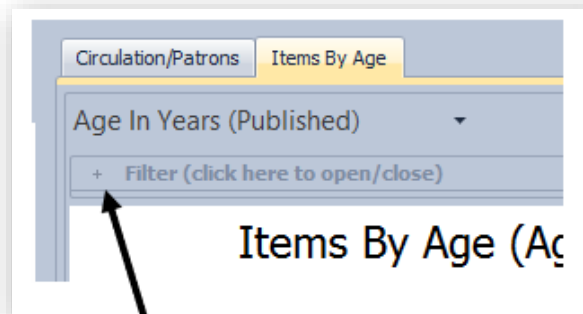
If your ResourceMate Window is too small on your monitor, the actual Dashboard panel will display the following warning:



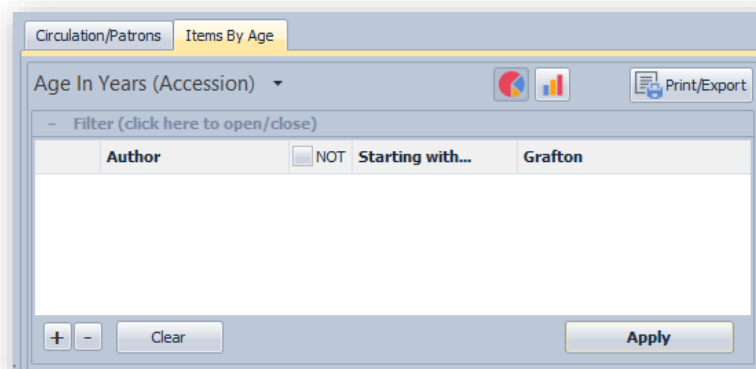
You can either use the Windows 'maximize' control to have ResourceMate fill your monitor, or left-drag the lower right hand corner of the ResourceMate window to increase its size to the point where you can see the new Dashboard's pie chart.

This new dashboard chart is a statistical breakdown of your items either by the year of their publication, or their accession date.

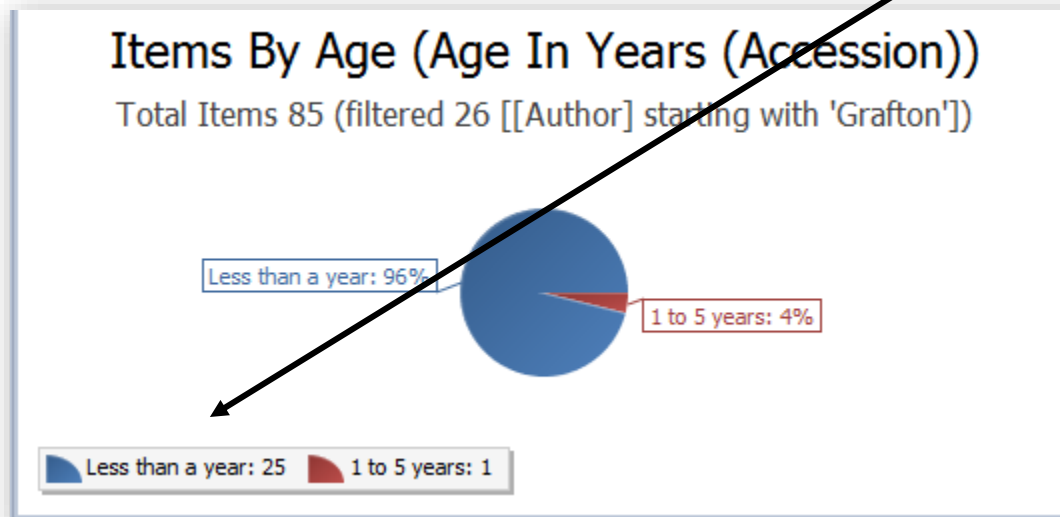
Subfiltering is supported when you click on the "+" beside the word "Filter" just above the new dashboard:



When applied, the filter will restrict the Dashboard to displaying a breakdown by Year Published or Accession Date, but only for the items selected by the filter. For example, if you would like a breakdown by accession date of all the items that bear an author's surname starting with "Grafton", you would apply the following filter after selecting the "Age In Years (Accession)" option:



When the filter has been applied, the "Items by Age (Accession)" Dashboard will display a breakdown below the resulting comprehensive pie chart:

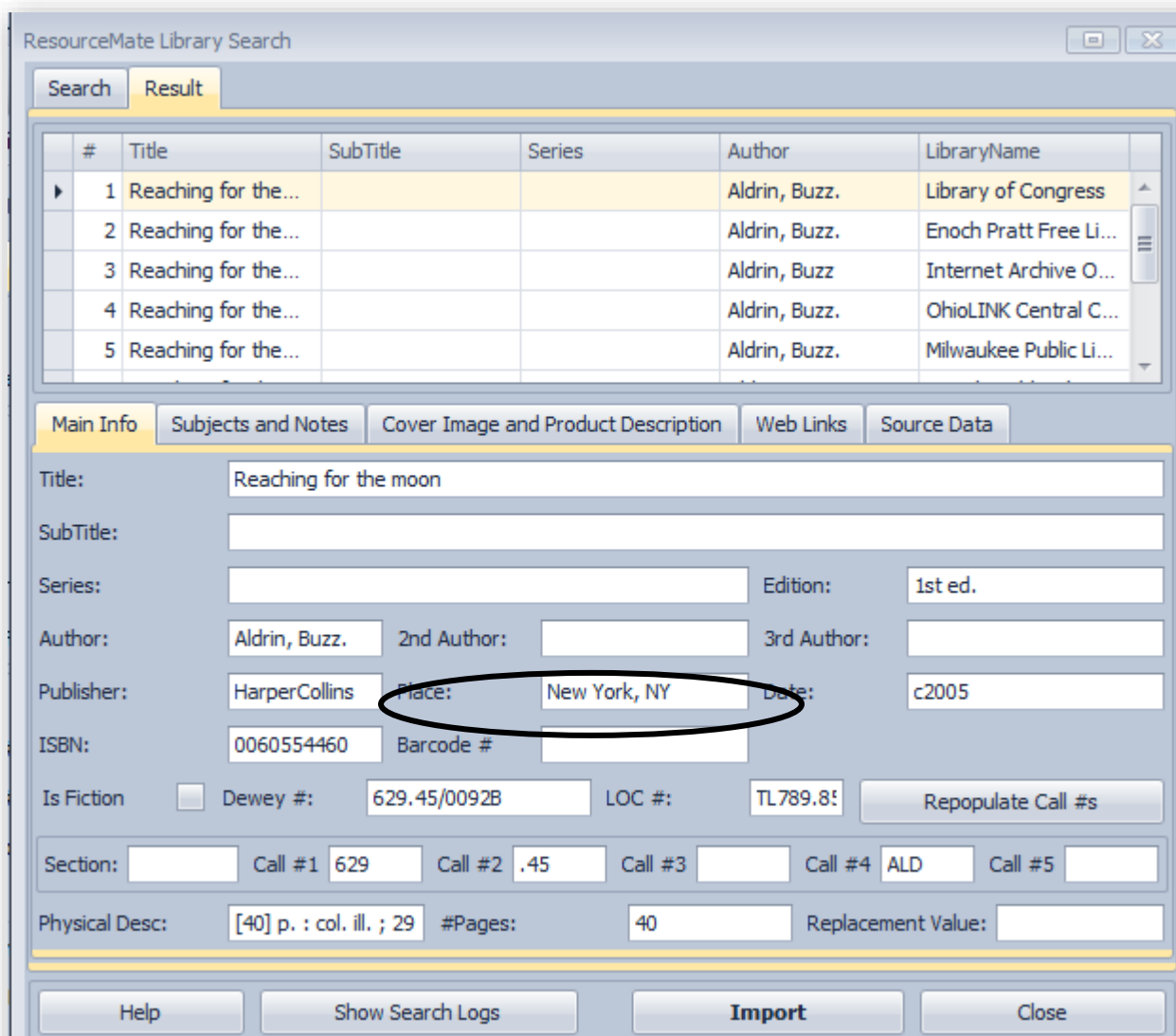


To paraphrase the above results, "Of all items bearing an author's surname of 'Grafton', twenty five were accessioned within the last year and one was accessioned between one and five years ago."

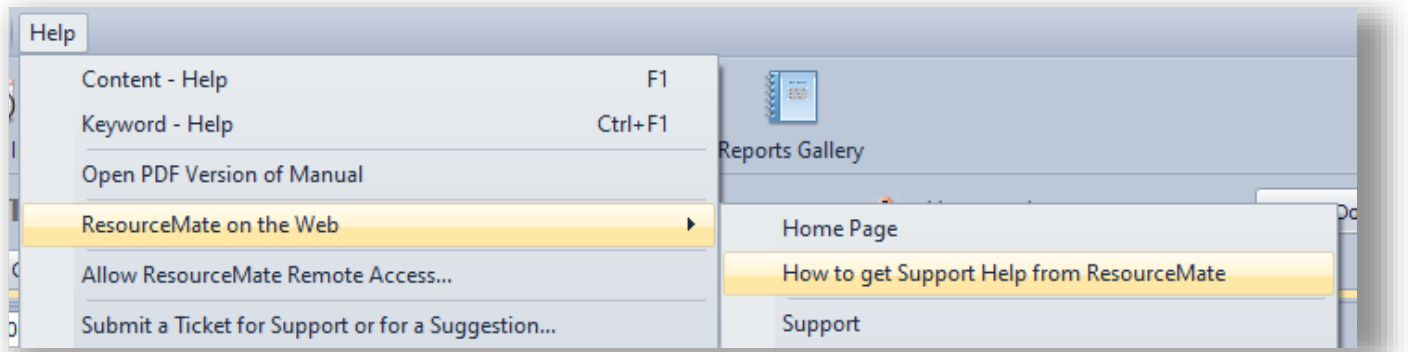
This is the first change made to the Dashboards on the Home Screen in quite some time. Other Dashboards are being planned for future releases. We are looking for suggestions as to what other Dashboards might be of use to you. Feel free to send any suggestions along to support@resourcemate.com!

Enhancements

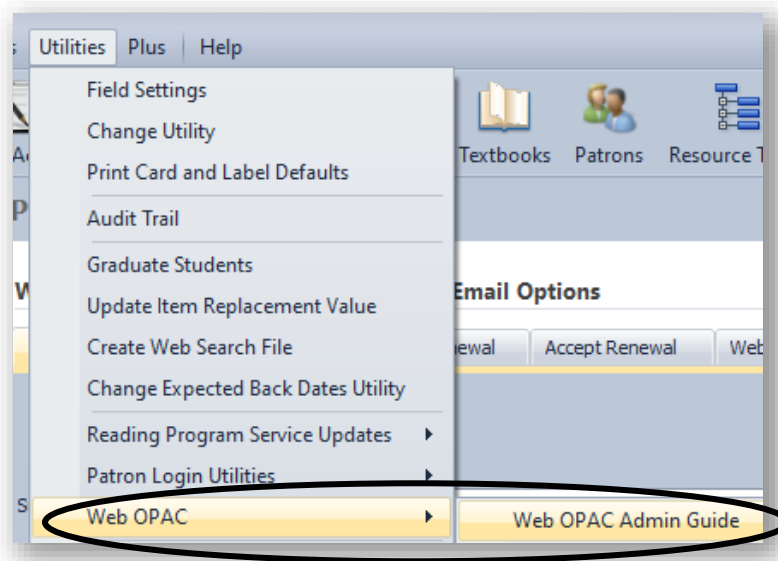
- Web OPAC now has the ability for signed in patrons to change the status of Reserves. Pending Reserves can be cancelled or put on hold. Reserves that have been put on hold can be changed to Pending. Any such changes will be transmitted immediately to your copy of ResourceMate. Consult the [Web OPAC Admin Guide](#) for more information.
- ISBN Retrieval now has a Barcode field that can be populated prior to pressing Import, thus allowing operators to scan the image from a barcode label and affix it to the new item at that time:



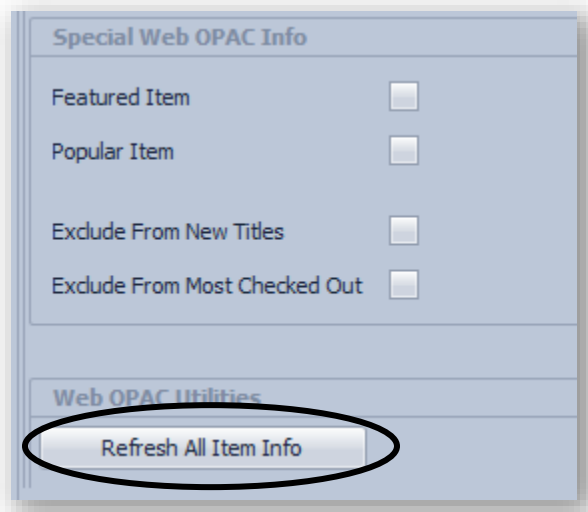
- A new selection has been added to the "Help > ResourceMate on the Web" menu; "How to get Support Help from ResourceMate". When selected, a PDF document will be displayed that provides the relevant details about this subject



- Web OPAC a new cover image component will now ensure that a Cover Image in ResourceMate is compressed to a useable file size in Web OPAC to prevent slowness of loading these images. ***This will only affect newly-added Cover Images.***
- A new "Utilities > System Utilities > Cover Images Reduce Size Utility" menu selection is available, used to reduce existing the file sizes of existing Cover Images. It will reduce the size of existing Cover Images, just as described in the enhancement outlined immediately above
- Access to the online "Web OPAC Admin Guide" can now be had from the "Utilities > Web OPAC" menu:

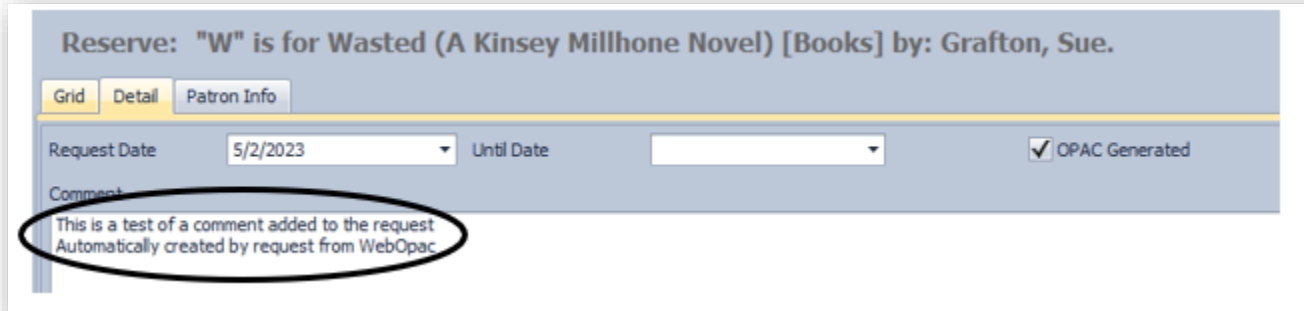


- Mail Out Reminders can now have the associated items' Cover Image added to their templates. Consult [this online document](#) for a discussion of how to edit Mail Out Reminder templates. If your site subscribes to Web OPAC, you can add the "Cover Image" field from the list of fields on the Template Edit > Item Details tab. If the site does not subscribe to Web OPAC, add the Default Multimedia field instead. If the edition in use is Essential and the site subscribes to Web OPAC, this feature is available; otherwise, the feature's limited to Essential Plus and Extended.
- Mail Out Reminders will now also be sent to the Family Library Contact if one has been defined. No other preferences need to be set – Emailing the Family Contact will be automatic when Special Mail Out Processing is invoked. If the patron with overdue items doesn't have an Email address defined but their Family Contact does, the patron will be included in the Email to the Family Contact.
- A new "Utilities > Web OPAC > Web OPAC Admin Guide" menu item has been added to make it easier to call up the online Web OPAC Admin Guide
- You can now 'resynchronize' item and/or patron records with their counterparts in Web OPAC if you make any changes to them in ResourceMate . Basically, the entire record data can now be resynchronized as though it were added to the catalogue for the first time during an initial data synchronization, an initial sync of one item, if you will. The existing Web Opac refresh mechanism will function unchanged. To trigger the resync, click on the "Refresh All Item Info" at the bottom of an item's "Web OPAC" tab:

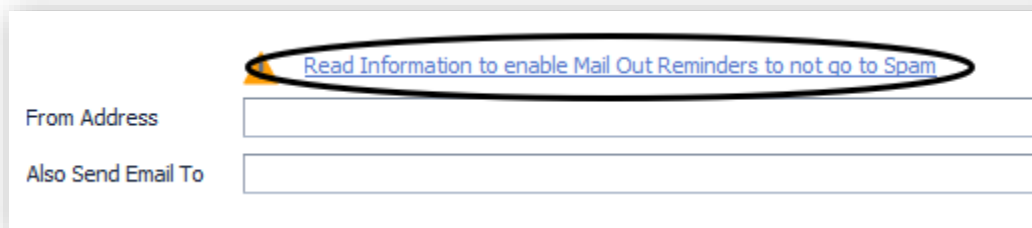


- The Fine and Payment form will now display any new balance automatically as you are making Adjustments, allowing you to see the net effect of your adjustments immediately as they are being transacted. The new balance will also be displayed on the confirmation dialog for acknowledgement that you really do wish to apply your changes.
- On the Utilities > Preferences - Email Settings - Link to PDF for information on how to use a 'DoNotReply@sentex.ca' Email address set in the "From Address:" field to ensure better success of your patrons receiving Mail Out Reminders.
- The "Utilities > Utility to Update Items by Barcode" program now has a confirmation dialogue box for both the Updating and Deleting options. Further, the program will now accept and handle leading Zeros for Type 1 and Type 2 formats.
- The Self Circulation Module now returns control to the Startup Options that display after signin when the Check Out button is clicked, rather than returning to the main Sign-In screen.
- When invalid patron data has been entered into the Sign-In field of the Self Circulation Module, the warning dialog box will stay onscreen for five seconds to ensure that patrons are able to read it before it disappears. Patrons will no longer have to click on "OK".

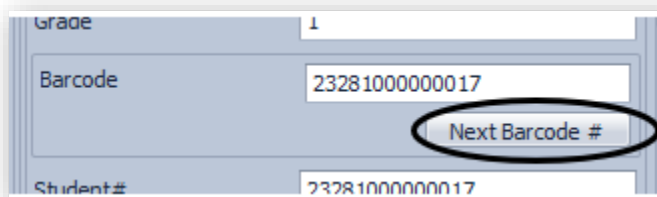
- Web OPAC Patron Request downloads will display a comment when they are automatically processed. Prior to this, no summary was displayed after being processed



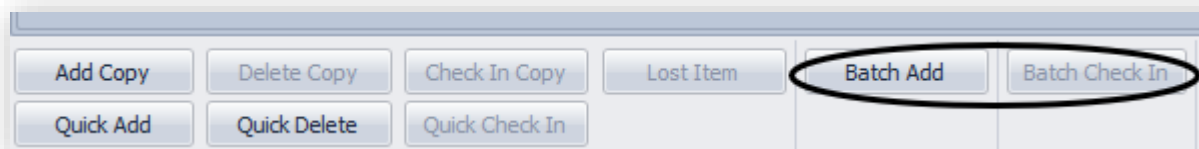
- In the "Utilities > Preferences > Email Settings" form, a new hyperlink just above the "From Address" field will direct the operator to an online document that discusses how to improve delivery success rates of Mail Out Reminders



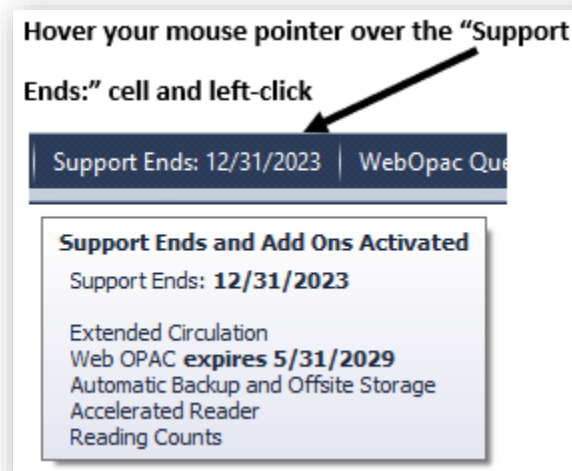
- The Patron Detail form was changed to place the "Next Barcode" button underneath the input field. Its previous position adjacent to the field was suppressing the correct display of the button label. If you have customized this form in any way, you will have to reset it to default layout in order to see this change



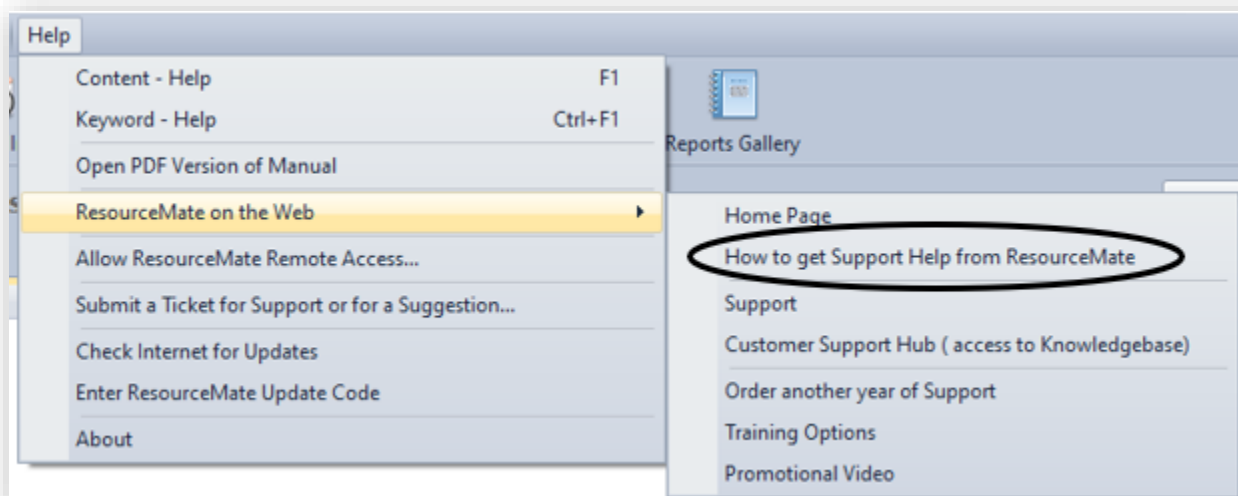
On the Textbooks Grid in the Extended Edition, the "Batch Add" and "Batch Check In" buttons have been moved over to the left so that they are less likely to be overlooked:



- The "Support Ends:" cell on your ResourceMate status bar can now be made to display a popup detailing all the add-ons and subscription expiry dates for your site. To view it, hover your mouse pointer over the "Support Ends:" cell on the ResourceMate Status Bar and left-click.

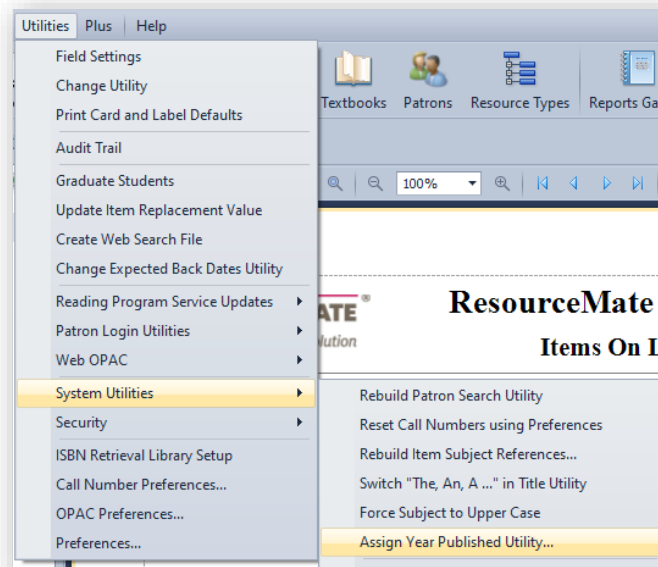


- A new menu item has been added to the "Help > ResourceMate on the Web" menu. When selected, it will trigger the display of a pdf document that describes the different methods of obtaining support help from ResourceMate



- The "Plus > Utility to Update Items by Barcode" program will now prompt for confirmation before executing when either the "Delete" or "Update Field" choices are made
- The "Plus > Utility to Update Items by Barcode" program will now properly handle leading zeroes for Types 1 and 2 barcode numbers

- A new "Utilities > System Utilities > Assign Year Published" utility can be run to convert the year portion of the Date Published alphanumeric field (if available) to a new "Year Published" number field:



- The "To" date on the Mail Out Reminders form no longer defaults to Today's date; instead, it's left blank in order to permit the operator to include all items, including those checked out today. The date fields can be populated to suit the requirements of any given Mail Out Reminders run.

A screenshot of the 'Items On Loan Reminder' form. The form has several sections: 'Expected Back Date', 'From:' (a dropdown menu), 'To:' (a dropdown menu), 'Textbooks Filter', and 'Exclude Textbooks' (a dropdown menu). The 'To:' field is circled in black, indicating that it is now blank instead of defaulting to today's date.

Bug Fixes

- The "Resource Type" column on the Circulation Grid will now sort by name correctly
- ISBN Retrieval in local single user databases would sometimes trigger an exception if pulling in too much data from the Accelerated Reading Program
- The data transfer from Volunteer to Main Computer databases will now properly transmit item cover images
- Items catalogued in the Volunteer database would sometimes have an extra blank Subject in the complete list of All Subjects that was displayed in the corresponding Item Detail page in Web OPAC
- The Import Process MARC Data Analyzer will now allow new Field Mappings for data that is not being imported. There was an issue with User Defined Fields not being available to assign
- Operators attempting to use the "Utilities > Web OPAC > Email All Patrons Their Web OPAC Sign In Info" program as a broadcast tool would cause exceptions to be thrown when their proposed message contained too many characters
- In the Extended and Premium Editions, Patron Group information can now be displayed properly on the Circulation Grid
- The "Utilities > Change Utility" will now correctly apply any of the options selected in Step 4 when the "Change All Values" option is chosen in Step 3

The screenshot shows a two-pane interface for the 'Change Utility' tool. The left pane, titled 'Step 3', contains the instruction 'Select Values you want to change.' and two radio button options: 'Change Only Selected Values' and 'Change All Values'. The 'Change All Values' option is selected and circled in black. Below these options is a dropdown menu and three buttons: 'Add Value', 'Delete Value', and 'Clear All'. The right pane, titled 'Step 4', contains the instruction 'Select or type a new value. Leave blank to change values to blank.' and a dropdown menu for 'Change value to'. Below this are four radio button options: 'Uppercase', 'Upper Case on first word only', and 'Upper Case on first character of each word'. The 'Upper Case on first character of each word' option is selected and circled in black.

- A spelling mistake that appeared in the summary message at the end of a run of the "Utilities > Change Utility" has been corrected