ReQuest Manager 4.0
January 2017

Contents

Release Notes

ReQuest Manager 4.0 is a major platform upgrade that requires a full installation on each computer that runs RQM. When you download and install version 4.0, RQM will automatically read and retain all of your 3.x settings, including your user information and RQM data.

If upgrading RQM from a previous 3.x version, please know that RQM will need to import your existing RQM 3.x data file (rqm3data.accdb) and convert it into the new format for 4.x (rqm4data.accdb). This is normal behavior, and the conversion of the data file may take a few minutes to complete. *Finally, you will receive a message that the data update completed successfully.*

Please note: if you have multiple workstations that use RQM, all users of RQM must switch to 4.x at the same time. The 3.x data file will no longer be available to users of the previous version of RQM once you have converted to 4.x. Simply run the installation file on each RQM workstation to update all users to the newer version.
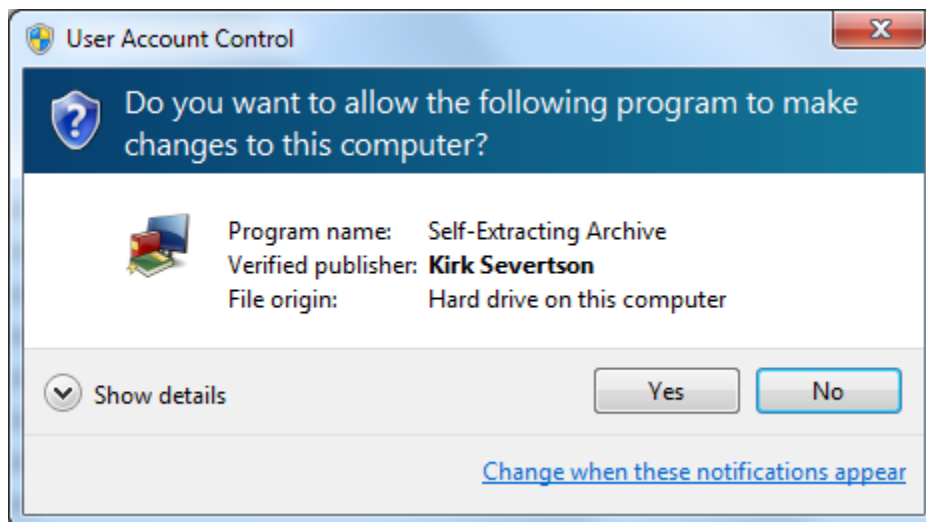
How to Install

The process of upgrading from RQM version 3 is fairly easy, but the following upgrade steps are provided here in some detail:
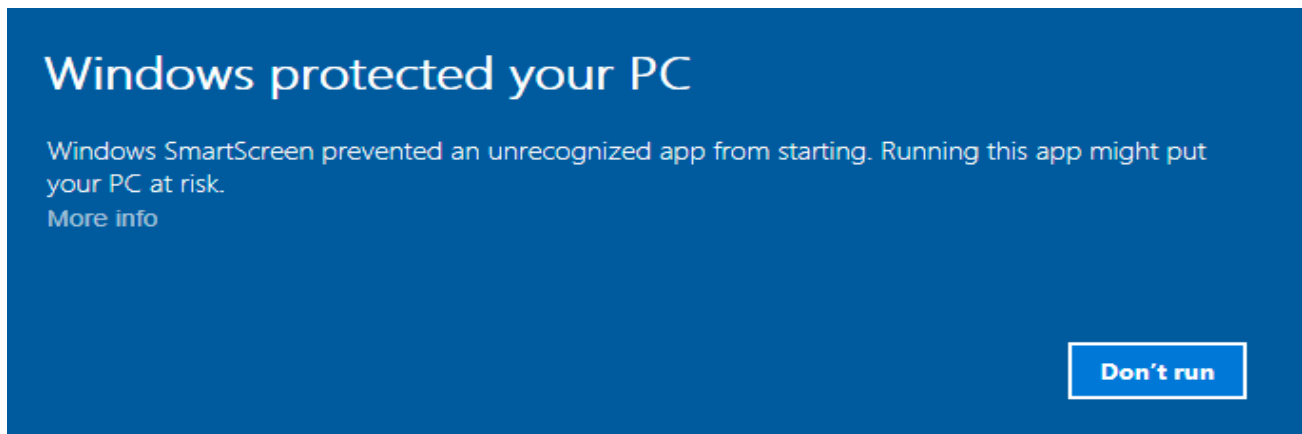
1. Locate your current data file, called **rqm3data.accdb**. You can find out where it is located by going to RQM / Admin / Data File Utilities and noting the Data File Location (within the RQM Server Folder). **Make a backup copy of this file.**

2. Make sure the version of Windows you are running is **Windows 7 or higher (8, 8.1, or 10)**. Note that Windows XP and Windows Vista are no longer supported. You can check this by going to the Control Panel (Start menu) and choosing "System".

3. (Optional step): If you wish to **change the current location of the data file** at this time, you may do so by creating a new folder in the desired location. This folder must be accessible to any/all RQM users, and those users must have full Windows read/write access to that folder. For multiple-user scenarios, a network (shared folder) location on a file server with automated backups is recommended. A shared folder may be created on a local computer, with appropriate permissions created for any users from other computers. **Copy the data file rqm3data.accdb into this folder** and note its location. **Rename the copy in the old location** to rqm3data.old so that RQM does not accidentally discover and use the file in the old location.

4. On each computer where you will use RQM: **Download and run the file** http://s3.amazonaws.com/requestmanager/rqmInstall40.exe (approx. 250MB).

   Users with limited Windows accounts should install the file by right-clicking on it in Explorer and choosing the option to **"Run as Administrator"**.
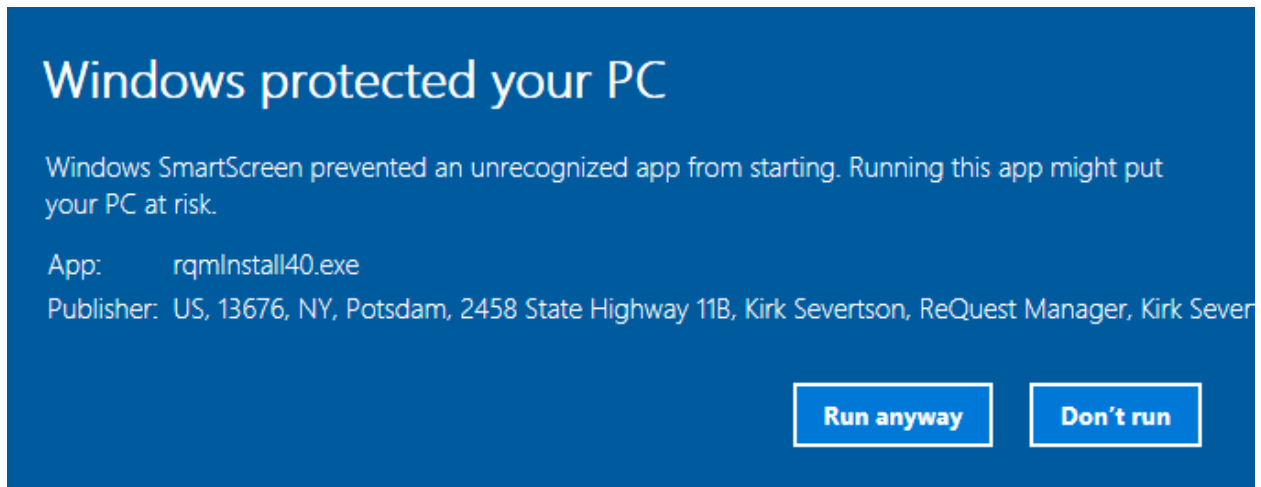
   As a new security precaution, RQM's installation file has been **digitally signed** so the user can ensure the install file is from the software author (Kirk Severtson) and has not been compromised since the developer signed it. You may receive a prompt such as:

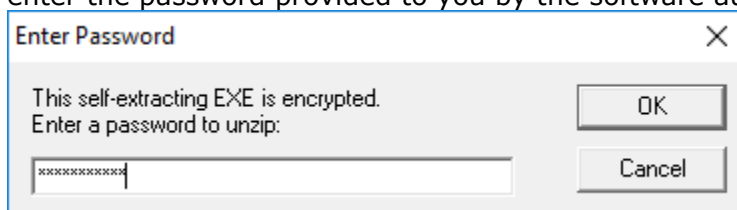**Windows 10** users may encounter this prompt:

After clicking **"More info"** above, you will then see:

You can then click **Run anyway**. This information (Publisher: Kirk Severtson) confirms it is authentic and signed by the software author. Windows 10 flags this as "unrecognized" because not many people have downloaded and run RQM compared to other more popular software programs.

In a similar vein, some anti-virus programs may flag RQM as unknown, despite it being digitally signed. If this happens, disable the proactive anti-virus feature for a short time while you install RQM (consult your anti-virus documentation for this).

5. The **install file requires a password** to begin. When prompted for the password, enter the password provided to you by the software author:

6. After entering the password, it will take a few moments for the install process to re-appear. Follow the prompts to install. You may see an installation process for **"Access Runtime 2013"** – this is the engine that runs RQM and is part of the install process.

    Should you receive any error messages or indications that setup was not successful, please make note of the exact wording of the error and contact support@requestmanager.org. Please note that Windows users with limited permission accounts should re-try the install by right-clicking on the install file in Explorer and choosing the option **"Run as Administrator"** which will run the install with the elevated privileges necessary to succeed.

7. When the install completes, use the shortcut created on the desktop called "ReQuest Manager 4" to start RQM. RQM 4.0 should launch and automatically import your settings from 3.x.

    If you changed the data file location (Step 2 above), you will be prompted with some choices on a "First Things First" screen. Choose the option to **browse for the location** of your data file (do not create a new data file!) and point RQM to this new location to proceed.

    Note that your new data in RQM 4 will be called **rqm4data.accdb**. This is the file that should be backed up regularly.

8. **Install RQM 4 on any other computers** running RQM (Steps 4 through 7). Note that RQM 3.x will no longer open because the data file rqm3data.accdb has been converted to rqm4data.accdb. You may safely uninstall RQM 3 if you wish after the upgrade to 4.0.

9. Note: on some (brand new) computers, when you start RQM, you may see a message about an additional needed component, called "VC++ Redist 2013". Click Yes to allow RQM to install this additional component to allow full functionality.

10. Note: on rare occasions, when a user starts RQM using the desktop shortcut, it may appear to start and then nothing will occur (RQM is not launched). This problem may be corrected by downloading and installing the Access 2013 Runtime manually at: https://www.microsoft.com/en-us/download/details.aspx?id=39358 Make sure to select the file named "AccessRuntime_x86_en-us.exe" when given the choice.

11. Once in RQM 4.0, it is recommended that you set up an email account for sending email within RQM. See **"Send Email from RQM"** below.

12. That's it! Enjoy the new features and let us know at support@requestmanager.org if you have any problems or ideas for improvements to RQM! Subsequent updates to RQM 4.0, as they are released, should automatically download and install for users with a current software support contract.

Technical Specs

Version 4.0 includes an upgrade to the database engine that powers everything behind the scenes, the Access 2013 Runtime (32-bit version), with a new set of system requirements:

- Requires at least Windows 7 or Server 2008 R2 (including Windows 8, 8.1, and Windows 10). **Note that Windows Vista and XP are no longer supported.**

- Recommended screen resolution of 1024x768 (minimum).

- Further specific system requirements for Office 2013 can be found here: https://technet.microsoft.com/en-us/library/ee624351.aspx

- Note: Office 2013 client installations are either 32-bit (Microsoft-recommended and by far the most common) or 64-bit (more rare). (This 32-bit vs. 64-bit does NOT necessarily correspond to the bitness of your Windows version, which is entirely separate). The Access 2013 Runtime (32-bit) included with RQM cannot be installed on a system that has a 64-bit version of Office 2013 installed. RQM can be installed alongside a 64-bit version of Office 2010 or 2016 without difficulty. How to determine if you are running 32-bit Office or 64-bit Office: https://support.office.com/en-us/article/What-version-of-Office-am-I-using-932788b8-a3ce-44bf-bb09-e334518b8b19
Please contact RQM support for more information if you encounter this issue.

What's New in This Version

In short, **lots of new features** and **significant program modernization**. Although many of the improvements to ReQuest Manager 4.0 are technical in nature, designed to improve the user experience, simplify installation and configuration of RQM, and help RQM to work well on more recent versions of Windows (such as Windows 10), you'll notice changes in the following areas:

Bulk Editing of Resources

Feature by popular request! Search for a set of resources (use either Keyword search OR Advanced search), then click the "Bulk Edit…" at the bottom of the screen. Then select from any of the choices of bulk actions to take for your selected resources, such as marking Active/Inactive, setting field values, even bulk deleting of resources from the database.

Note: we recommend that if you have purged your center of resources (e.g. all VHS tapes) and want to remove them from RQM, that you mark the resource copies as "Archived" or "Deleted", which will set the resources to Inactive so they no longer appear when searching. This will retain all past transaction history for them.

Send Email from RQM

This often-requested feature promises to speed up your communication with clients by generating emails from various places in RQM:

- Automatically generate notification emails when an invoice is shipped
- Quickly send an account statement to a client
- Generate overdue notices to clients in bulk
- Easily send any report (PDF) or resource on-screen to a client

RQM generates an email draft and allow you to review and customize the message before sending.

You can edit the built-in email templates or create your own custom messages in the template editor (see below).

Email Account

Please note that in order to enable emailing from within RQM, you must set up an email account for it to use:

Because clients will likely respond to the emails you send from RQM, make sure to use an account that you can access and regularly check to send the emails. (Send-only accounts are not recommended for this reason.)

You can choose to save the email password (stored encrypted in the RQM data file rqm4data.accdb), or enter it every time when sending email.

Gmail accounts:

If you have enabled 2-Step Verification on your Google account (highly recommended!), Gmail has a feature allowing for application-specific passwords which allows you to create a special access code for ReQuest Manager instead of using your Google credentials to send email. Visit this URL to create a new app-specific password for RQM:

https://security.google.com/settings/security/apppasswords

At the bottom of the screen, select "Other (Custom)" and enter "ReQuest Manager" as the name, then click "Generate". Enter this 16-digit code as your email password in RQM's email account settings. You can revoke this password at any time you choose.

Ways of Sending Emails

- From the Ribbon, click **"Draft New"** in the Email section to begin an email at any time. If you are currently on a screen for a client or contact, RQM will automatically begin a draft to that selected entity (if they have an email address entered).

- Click the **email icon** next to a client's or contact's email address field to draft a new email to that recipient.

- Send **updates to clients for invoices-in-progress** by using the button "Email Inv." at the bottom of the Invoice Details page. Use this to send confirmation of advance reservations, send again when you have shipped the item(s), or any time you'd like to update them on the status of the invoice.

- Send a **one-year Account Statement** for a client using the button "Email Acct. Statement" at the bottom of the Client Details screen.

- When **viewing any report in Print Preview**, click "Email as PDF" to create a new email with that report as an attachment.

- Bulk-send **overdue notices** by going to Admin / Email tab and clicking "Run Overdue Notices Now". You can select how far overdue resources need to be to receive a notice, and clients to ignore if they were recently emailed overdue notices. Note that all currently checked-out resources will be listed in the overdue notice as a courtesy to the user.

Can you think of other ways to incorporate sending emails into RQM or ways to streamline your business processes (maybe bulk actions)? Let us know how to further enhance this feature by sending your suggestions to support@requestmanager.org!

Templates

You can create or edit the templates to use for various email options (Admin / Email / Edit Email Templates). A template is the basic message body, with fields (such as client name, client address, resource information, etc.) that will be filled in with the actual data for each email RQM prepares for you. Fields are indicated with a $ (such as $ClientLName or $ResCode).

When you edit a template, the list of all the possible fields you can insert will be shown on the left side of the screen.

Note that templates can also be used for exporting resource information to HTML files, for publishing to a website (e.g. "New Resources in June" or "Resources for the Easter Season"). The editor is the same and the format is very similar. To export resource information, begin a search for your desired resources, then choose "Export" from the Ribbon, then choose "Export Data to HTML or Other Format."

Data File Backups

You can automate creation of local backups of the data file (go to Admin / Data File Utilities, then "Backup Settings"). RQM will automatically make copies of your data file to a folder of your choice every few days (you choose how often), and will retain a number of versions of the file (you choose how many) in a "backup" folder within the folder containing your data file (rqm4data.accdb).

Please note that this is not a replacement for a reliable, secure off-site backup plan, which we strongly recommend. If you do maintain a backup plan, we recommend that you add this new backup folder to that backup plan to ensure these additional backups are backed up securely.

Improved Barcode Support

EAN/UPC

RQM 4.0 adds a new field for resources, "EAN/UPC," which is a field for barcode information in addition to the ISBN13 field. Some non-book resources, such as DVDs or others, do not have ISBN codes, but instead have EAN or UPC codes printed on them. If you store this information in the field, then when you scan a UPC barcode, RQM can locate the item just as it can for ISBN codes.

WebScan support

The sites that are searched for WebScan information have been updated as better sources of data become available. RQM 4.0 now has broader support for locating items by EAN or UPC codes (especially DVDs). This area will continue to be updated periodically as may be needed.

Other Updates

You'll notice a lot of smaller changes to RQM, including:

- Advanced Resource Search: new option for **sort order** on the search screen.

- New feature: **Tag multiple resources** from search results and click "New Trans…" to create a **new invoice** for all of them at once.

- **New resource field for Materials** – use this to list the specific materials included with a resource, one per line (e.g. "Leader's Guide"; "CD-ROM"; "Study Guide", etc.). Use the "…" builder button (while in edit mode for a resource) to easily build this list from a picklist of commonly used materials (you can edit the common list of materials from the builder form).

- **New field: ClientUsageCount** to track how many transactions a client has had since the calculation period. Search on this field in Advanced Client Search. (The calculation can be reset by going to Admin / Settings and choosing a new date to start the count from.)

- **Check-in of resources with multiple copies**: when scanning these items in, RQM will show you the name of the client that has each copy checked out so you can more accurately select the right copy.

- New **Executive Report: Clients with Open or Future Transactions** will report all clients who have outstanding transactions or invoices, along with a count of how many resource transactions are open.

- Admin area displays your **RQM account status** (annual support contract and online hosting accounts)

- General display: choose from **tabbed document windows** (3.x style) or **free-floating overlapping windows**. Go to Ribbon / Options / Options and experiment to see which you prefer. Users with larger monitors may find the overlapping window option a better use of screen real estate.

- Better tab management: middle-click button on the mouse will **close a tab** (similar to behavior of common browser windows).

- New **ResRank field**: this is an auto-calculated field for resources that computes the relative popularity of a resource based on usage (giving more weight to recent usage). You can use this to search for or sort by top resources (e.g. in advanced resource search: select a resource subject, then select Rank = Among Top 25% to see only resources that are among the most popular 25% overall). The actual numerical value of this field is not important, only its value relative to other resources.

  There is a new predefined search for resources that uses this field: on the Ribbon Home tab, in the Resources section, choose the drop-down under "Search", then "Predefined Searches" to find "Top 10% Ranked Resources" search.

- When searching for Resources for a new transaction or Clients for a new invoice, payment, or check-in, you can now choose to **search by keyword** instead of only advanced search.

- New: **"Incomplete" status for transactions**. Use this status to indicate when only a portion of a resource has been returned, and you are still awaiting return of the rest of the resource. "Incomplete" transactions will appear in the check-in lists

along with the usual "Open" transactions so that you can check-in "incomplete" transactions once the resources have been completely received.

- **Resource vendor reports:** when editing the list of Vendors, click on "Reports" in the ribbon to display reports for Vendors.

- Program location: RQM's files are now located in a couple of new locations on your computer, to follow the standard security recommendations of Microsoft, and to hopefully prevent interference by anti-virus programs. The RQM helper application, called RQMStart.exe, is now located in the **Program Files (x86)** folder, while the RQM files, including the main RQM file rqmForms4.accdr, is now located in the Windows user's Roaming AppData folder (e.g. **C:\Users\kirk\AppData\Roaming\ReQuest Manager**).

- **Digitally-signed code**: the RQM installation files and helper application are now signed with a digital code certificate. Previously, Windows warned users when installing RQM that the publisher was unknown. With this change, Windows recognizes and confirms the validity of the file prior to installation or running. Users may notice that the publisher is shown as "Kirk Severtson" and no longer "Unknown". This is a security feature for users as well, because it indicates that the file was not tampered with during the download process or since publication.

- Many other **"under-the-hood" changes to RQM** that users will not notice, but which will keep RQM running smoothly and reliably.

Deprecated

There are a few older features of RQM that are no longer supported as of this new release:

- RQC (ReQuest Consultant) was a re-distributable catalog program that resource centers could send to clients for installation on their computers. Unsupported since version 3.0, removed from version 4.0.

- RQMWeb CGI or ASP: older versions of the web catalog, code not maintained since version 2.8 and support for data file updates for these versions is removed in version 4.0. Online catalog support is only available through our hosted catalog service at this time (requires subscription).

- Ability to import data files from 2.x versions of RQM is no longer directly possible in RQM. Clients using RQM version 3.0 or higher do not need to worry about this.

- External template files (*.tpl): the functionality to export HTML files using the built-in or customized template files has been migrated to occur within RQM. Users who had customized template files (*.tpl) can create new templates within RQM by pasting in the contents of their template files into new RQM templates.