

ReQuest Manager 4.0

User's Guide

www.requestmanager.org



Kirk Severtson, developer

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Overview of ReQuest Manager

ReQuest Manager is a complete catalog system for resource centers who lend materials to churches, individuals, and organizations. There are several components to the entire ReQuest Manager package:

- ReQuest Manager (RQM) – This refers to the entire software package, but specifically to the main program. See “Before You Start” and “Installing RQM” below for more information. After installation, you can start ReQuest Manager by going to the Start Menu / All Programs / ReQuest Manager and choosing “Start RQM”

Note that you must install RQM and enter your resource data into the catalog before trying to use the other parts of RQM below.

- RQMWeb – This online, searchable web catalog allows your users to browse and request resources. Your catalog data is hosted on our servers and requires almost no setup by you – just direct your users to the catalog at the link we provide. This feature is available on an annual-subscription basis; information available at: <http://www.requestmanager.org/hosting.asp>
- WebScan – This is an optional component of RQM. When you type or scan a book or video's ISBN code, WebScan automatically searches through numerous online catalogs for information about the book. Information available at: <http://www.requestmanager.org/webscan.asp>
- Barcoding – This is an optional component of RQM that allows you to print your own barcode labels for resources and/or use a barcode scanner (wand) to quickly check out or in resources. This can be a great time and keystroke saver, and reduces error.

Please contact the developer for more information about purchasing this module and the supported equipment. <http://www.requestmanager.org/barcode.asp>

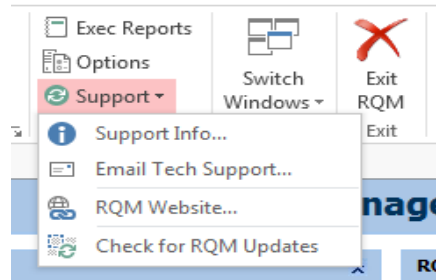
Annual Support Contract

Keep your software up to date with an annual contract. All product upgrades are included in the cost, as well as online and technical support. Information regarding support contracts can be found with your ReQuest Manager welcome package or by contacting the developer directly.

Updates to this document, product updates to ReQuest Manager, and additional modules or support files can be found at <http://www.requestmanager.org/support.asp>.

When contacting support (support@requestmanager.org), please be specific about the wording of any error messages or the issue you are encountering. Please be prepared to provide current ReQuest Manager version (found on the Main Menu of RQM). RQM

System Information can be found by clicking **Support / Support Info...** on the ribbon toolbar as shown:



From there, clicking on the "Email Support Info" button will copy information to your clipboard that will be helpful in troubleshooting problems you may encounter. You can then paste this information into an email to support.

Important note about maintenance: Please read carefully the section below entitled "Maintenance of Data File" for important steps you need to take to ensure your ReQuest Manager system continues to function properly. If you need to contact technical support, the support representative may ask you to attempt to compact your database. This will in many cases fix a program error.

Before You Start

System Requirements

ReQuest Manager 4.0

- 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>
- File-sharing network (workgroup setting only); each Windows user must have read/write permission on the server machine
- Note that RQM 4.0 uses the Access 2013 Runtime Engine licensed from Microsoft. This engine is automatically installed by RQM's setup and there is no requirement to have any Office component (such as Word or Access) previously installed in order for RQM to function. This version of the Access runtime also co-exists peacefully with other installed versions of Access on the same machine, avoiding conflicts that sometimes occurred in previous versions of ReQuest Manager.

Special Note about 64-bit Office Environments (rare)

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.

Plan your configuration

Before you begin the installation, plan how you are going to configure the computer(s) to run the system. Several possibilities are listed below:

- Standalone Mode: ReQuest Manager is installed on a single computer and the data is also stored on that computer.
- Peer Server Mode: ReQuest Manager is installed on multiple computers (clients) and the data is stored on one of those computers, designated as the data server.
- File Server Mode: ReQuest Manager is installed on one or more computers (clients), while the data is stored on a separate computer on the network (server).

Whatever the configuration you choose, be sure to make a plan to backup your data regularly to avoid data loss. The primary data file, without which your RQM catalog cannot be reconstructed in the event of data loss, is `rqm4data.accdb`. (See "Backup" under the section "Maintenance" below for essential information about safeguarding your data.

*** Please note: in previous versions of RQM (3.x), the data file was named `"rqm3data.accdb"`. In version 4.0, the data file is now named `"rqm4data.accdb"`. ***

Notes on configurations

Check the hardware and software requirements for each machine in the Technical Specifications section above before you begin.

If you have a dedicated file server available, the File Server Mode is the best option. This will usually facilitate data backup as well. If you must choose one of the clients as the data server, please be advised that performance may suffer because the data server will be used for other tasks besides its server function. If an application on the server crashes and the computer must be rebooted, the database file may be left in an unstable state and may be corrupted.

No other software is required to run the database; all required software is supplied and installed with the database application.

Installation

To install ReQuest Manager, be sure that you have reviewed the section ***Before you start*** above. Follow the steps below to install the software on each computer:

Software Installation

The preferred method of installation is to first download the installation file (approx. 250MB) from our website (<http://www.requestmanager.org/downloads.asp>). This will guarantee that you receive the most up-to-date version of the software.

It is highly recommended that before attempting to install RQM, you visit <http://update.microsoft.com> to install any recommended updates to Windows or other installed Microsoft products.

Install ReQuest Manager as follows:

- Double-click to run the downloaded file "rqmInstall40.exe" to start the installation process.
- Follow the simple installation instructions (see the next section for additional installation details).

A desktop shortcut, "Start RQM" is created, as well as a program group in the Start Menu.

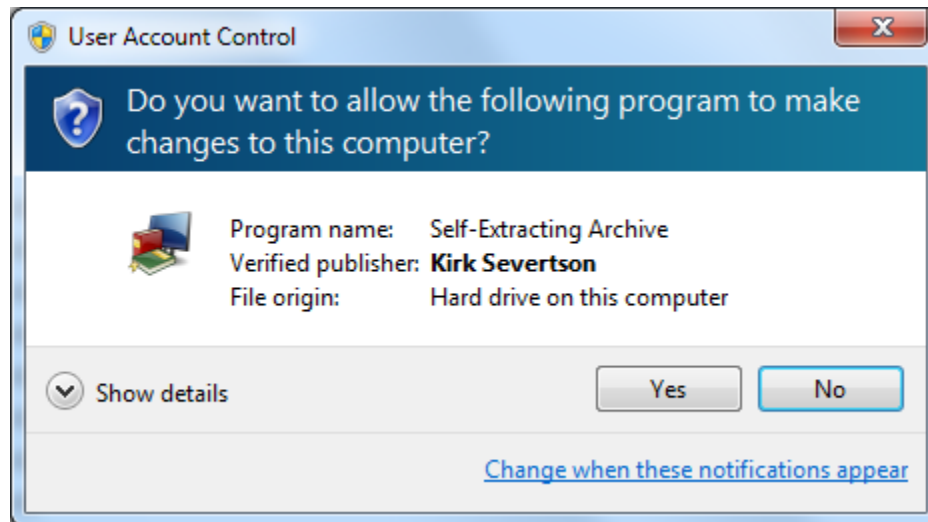
How to Upgrade from Version 3.x

The process of upgrading from RQM version 3 is fairly easy, but the following upgrade steps are provided here in some detail:

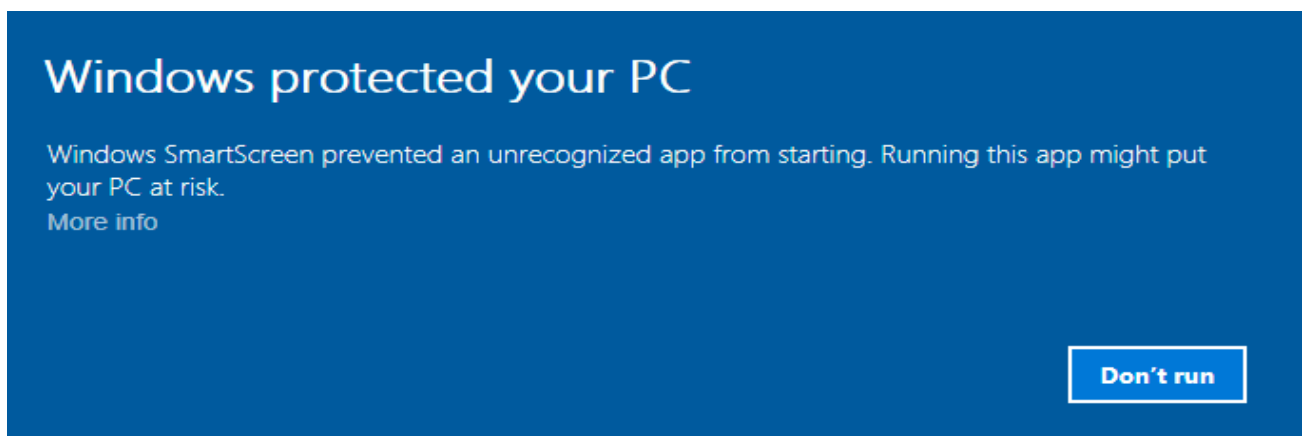
1. Locate your current data file, called **rqm3data.accdb**. You can find out where it is located by going to RQM / Admin / Data File Utilities and noting the Data File Location (within the RQM Server Folder). **Make a backup copy of this file.**
2. Make sure the version of Windows you are running is **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"**.

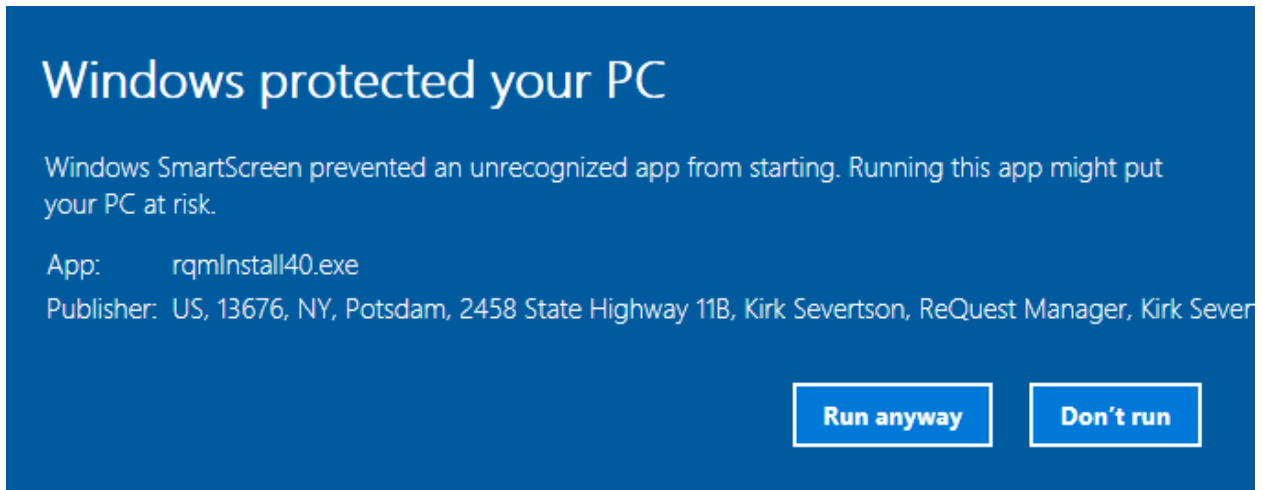
As a new security precaution, RQM's installation file has been **digitally signed** so the user can ensure the install file is from the software author (Kirk Severtson) and has not been compromised since the developer signed it. You may receive a prompt such as:



Windows 10 users may encounter this prompt:



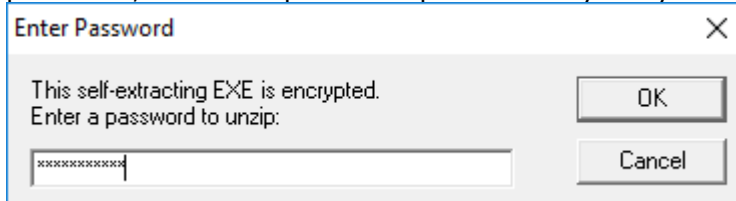
After clicking **"More info"** above, you will then see:



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! Subsequent updates to RQM 4.0, as they are released, should automatically download and install for users with a current software support contract.

Configuring your installation

Registration Key

The first time you run ReQuest Manager, it will ask you for your registration name and software key:



Enter the registration name and software key in the blanks provided. You should have received this information with your initial ReQuest Manager purchase. If you have lost this information, please contact support@requestmanager.org to request it be sent to you again.

If you have multiple Windows users on a computer, you will be asked to enter this same information for each Windows user.

If you received a demo version of ReQuest Manager, then the key you were supplied will contain an expiration date encoded within it. ReQuest Manager will not function after this date. You will be asked to supply a new registration key (you will receive an unrestricted key upon purchase of RQM or you may request another demo key) in order to continue to use the program.

Welcome to ReQuest Manager!

After entering your registration key, you should see a screen welcoming you to ReQuest Manager:



If this is the FIRST computer you are installing RQM on and you would like to create a NEW data file, choose the second option to create a new data folder. If you have already created a data folder on another computer, choose the first option; RQM will open a window for you to browse for the location of it.

If creating a new data file/folder, RQM will ask you about your desired configuration for the new data folder:



If you choose Standalone Mode or Peer Server Mode, the data folder will be created in the path:

C:\Users\WINDOWS-USER-NAME\AppData\Roaming\ReQuest Manager

The primary data file "rqm4data.accdb" will be created in this folder.

If you choose File Server Mode, you will be asked to browse for a location of the new data file, "rqm4data.accdb".

At the bottom of the screen, you can choose whether you want your data file to be blank for a new installation or to contain sample data for demonstration/trial users.

If you choose sample data and later wish to erase it and start with blank data, just rename the primary data file "rqm4data.accdb" to another name such as "rqm4data.old". When RQM next starts, it will be unable to locate the data file and you will be returned to the "Welcome to ReQuest Manager!" sequence.

After selecting Continue you will receive a confirmation message about the data folder location and then will be prompted to login to ReQuest Manager:



Choose "admin" for the user and leave the password blank. You can change this default user and/or password in the Administrative area of RQM later.

Finally, you will then see the RQM Dashboard (see below).

You have successfully installed ReQuest Manager!

Converting your data from another program

Custom conversions are available for approximately \$200, depending on the original data format. This can be a great time and cost savings over re-entering your entire resource catalog. Please contact your software vendor or email to support@requestmanager.org for information on obtaining a price quote for this service.

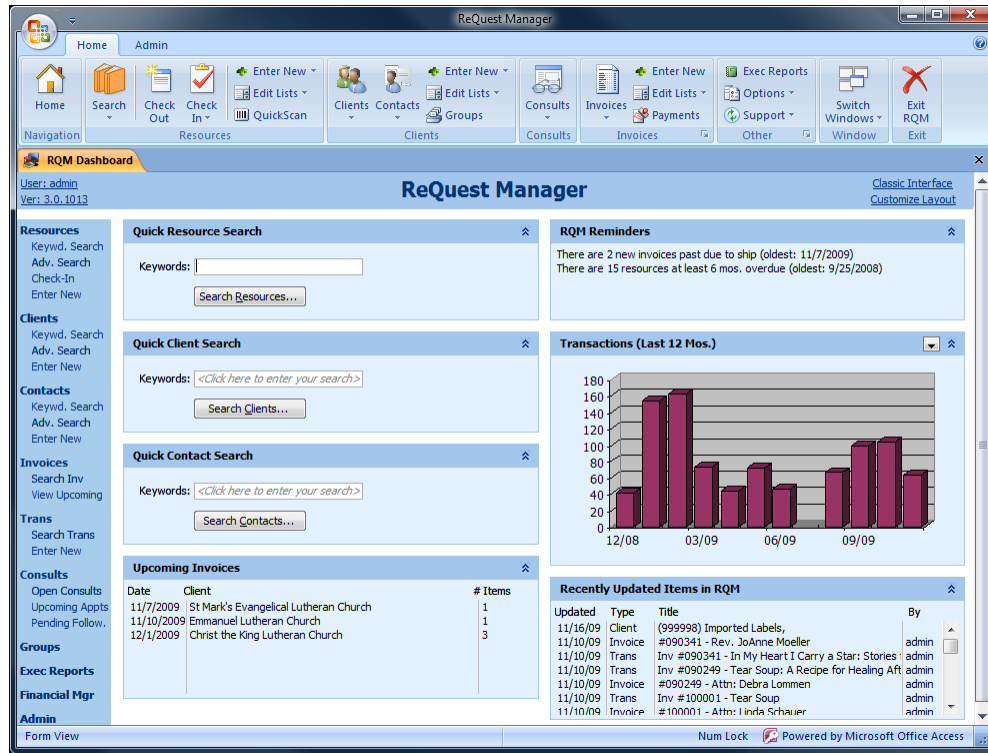
Converting a Demo Installation to Retail

If you received a demo key (with an expiration) for RQM and decide to purchase the retail version, simply go to Administration from the main menu of RQM and locate the button labeled, "Enter Registration Key". After entering the full registration key, you will be running a full, registered version of ReQuest Manager.

If you chose to install sample data and wish to erase it and start with blank data, just rename the primary data file `rqm4data.accdb` to another name such as `rqm4data.old`. When RQM next starts, it will be unable to locate the data file and you will be returned to the "Welcome to ReQuest Manager!" sequence.

Getting Around RQM

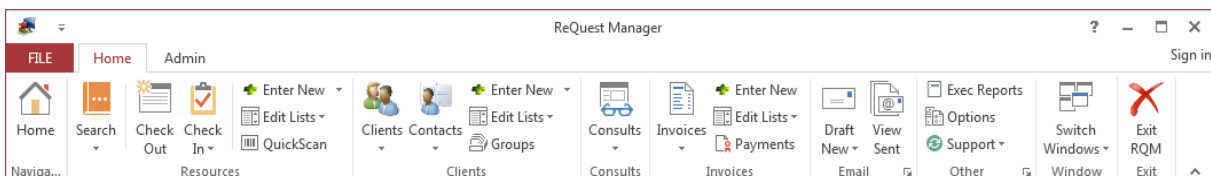
The default main menu for RQM is the “Dashboard” view, shown below:



This is the main interface for using RQM. The menu area at the top is called the “Ribbon”, and will be familiar to users of Microsoft Office. There is a navigation menu down the left-hand side of the screen to jump to other areas of RQM, and the modules in the main screen area can be customized by using the “Customize Layout” link.

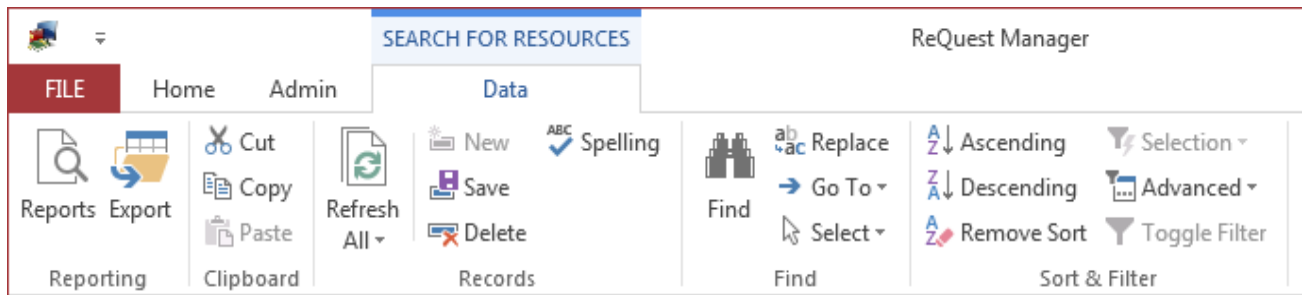
Ribbon

The **Office Ribbon** replaces the File/Edit/Resource, etc. menus from previous versions of RQM at the top of the screen:

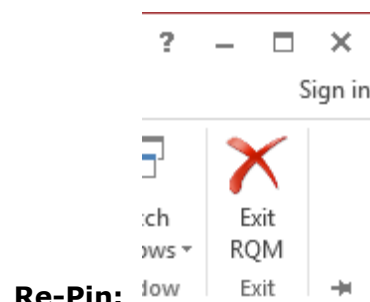
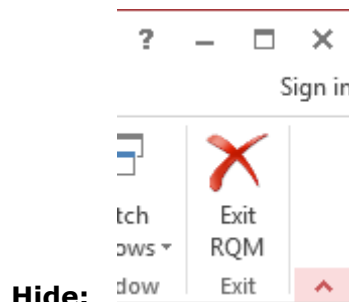


Familiar to users of Microsoft Office, the ribbon is a colorful and convenient presentation of a lot of functionality from anywhere within RQM. You should get used to looking at the

ribbon for actions you want to do. Note that the ribbon changes depending on the screen you're on:

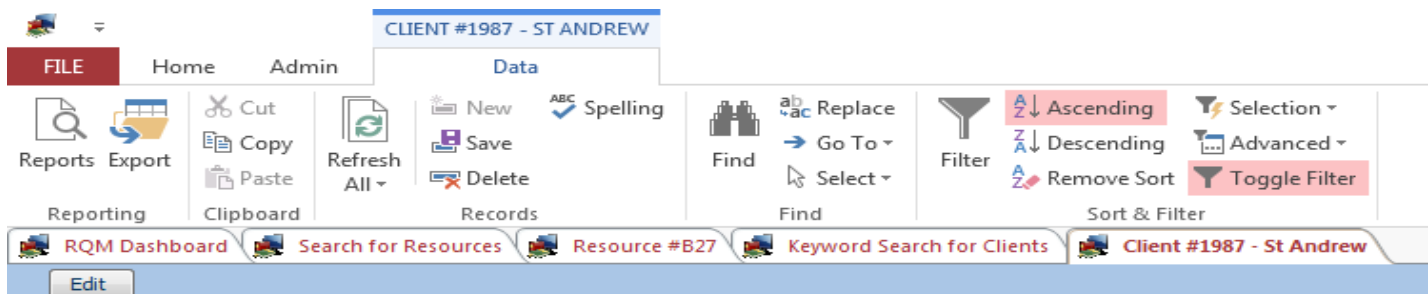


To save room on your screen, you can hide the ribbon (so it displays only when you click on it) by clicking on the up-arrow shown on the far right of the ribbon. To re-pin it, just click on one of the Ribbon bars (e.g. Home, Admin, Data, etc.), then click the pin on the far right:



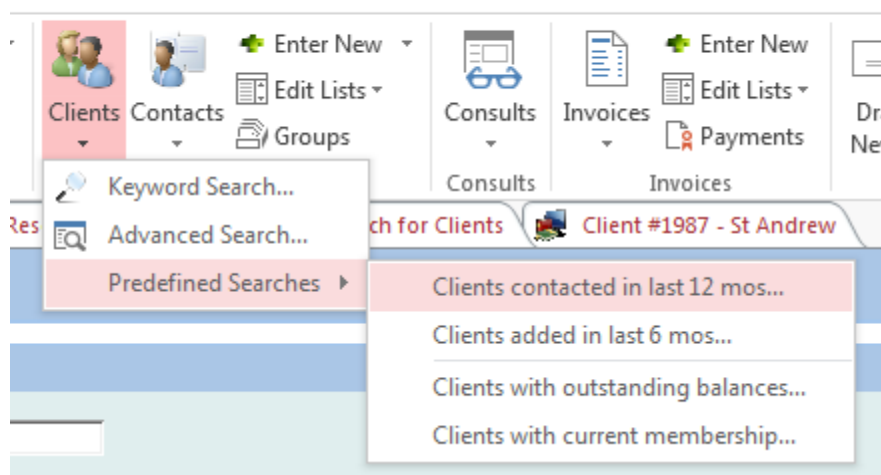
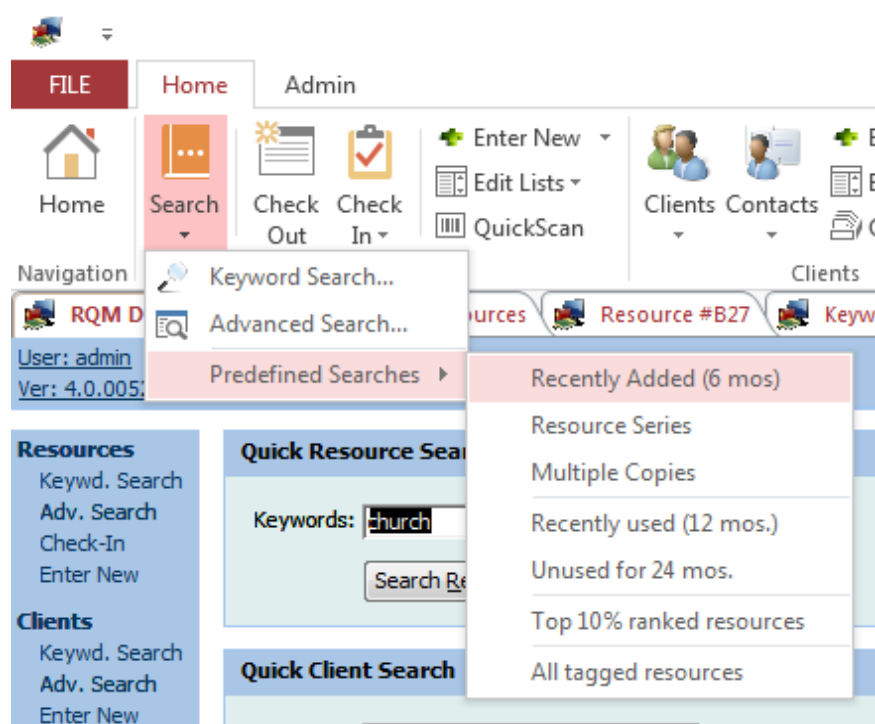
Interface

Ever get interrupted in what you're doing? The **Tabbed Interface** helps you keep track of all your windows while you're working:



You can easily jump around to other open forms in RQM as you multitask! You won't lose open windows that get hidden behind others.

Use **Predefined Searches** to easily jump to results for some frequently-used searches:



There's a lot to be discovered within RQM. The best way is to just poke around and explore!

Customizing ReQuest Manager

There are a number of things that you must do to customize ReQuest Manager after installation. If you are having a data conversion performed, make sure that you complete the conversion process (see *Converting your data from another program* above) before entering any data or beginning any customizations, as these will be overwritten by the converted data file.

To customize your installation, open ReQuest Manager on any computer (click on Start, Programs, ReQuest Manager, ReQuest Manager) and follow the procedures outlined below:

Addresses

From the Admin Ribbon, click on "Open Admin." Fill each of the fields as appropriate for your resource center. This information will be printed as the return address on each invoice and on other reports:

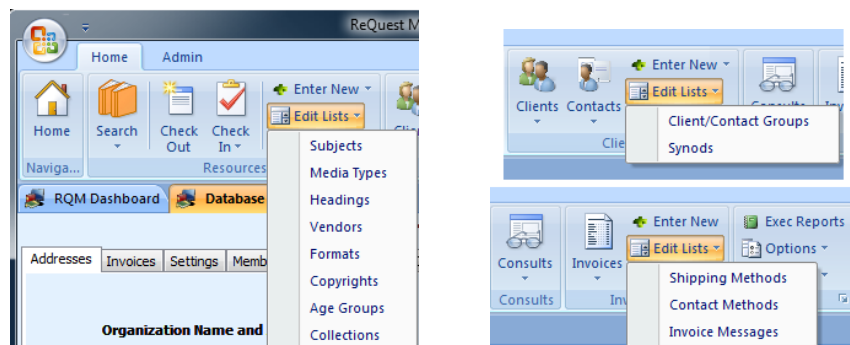
The screenshot shows the 'RQM Administration' window with the 'Addresses' tab selected. The form is titled 'Organization Name and Address' and contains the following fields:

- Name: Eastern North Dakota Synod - ELCA
- The Resource Center
- Address: 1703 32nd Avenue South
- City/State/ZIP: Fargo ND 58103-5936
- Phone: (701) 232-3381 or 1-877-895-4598
- Fax: (701) 232-3180
- Email: julie.aageson@ecunet.org
- Website: www.eandsynod.org

A note at the bottom states: "Your contact information entered here is printed on all client invoices, used in the RQC catalog and on the RQMWeb website information."

Data Lists

Much of the customization of ReQuest Manager is done by selecting lists from "Edit Lists" in sections of the ribbon:



These menus allow you to edit the lists that appear throughout ReQuest Manager. The most important ones are summarized briefly below.

Resource Subjects

Every resource in RQM can have one or more subjects listed for it. Edit the list of possible resource subjects here. For each subject you can choose whether it is included

in the catalog (printed or exported) or not – uncheck the box to hide less important subjects from the printed catalogs.

Resource Subjects

Subjects are terms of classification for resources. Each resource can have one or more subjects associated with it and you can search for resources by subject keyword.

Search: ☒ Show only catalog subjects

Subject	# Res	Include for catalog
Abigail	4	<input checked="" type="checkbox"/>
Adult Education	230	<input checked="" type="checkbox"/>
Advent	143	<input checked="" type="checkbox"/>
Advent/Christmas	96	<input checked="" type="checkbox"/>
Africa	33	<input checked="" type="checkbox"/>
Aging	86	<input checked="" type="checkbox"/>
AIDS	20	<input checked="" type="checkbox"/>
Allegory	3	<input checked="" type="checkbox"/>
American Indians	1	<input checked="" type="checkbox"/>
American religion	1	<input checked="" type="checkbox"/>

Subjects: 1 of 301

Resource Headings

Headings are similar to resource subjects, but each resource can only be listed under a single heading. Many resource centers use headings as part of their ResCode or as a method of locating resources on the shelf.

Resource Headings

Headings are a classification system used by some centers to organize their resources. Each resource can be assigned to exactly one heading and subheading. Use the buttons below to create or edit a two-level outline of headings and subheadings

Key	Name	# Resources
CH	Church Holidays	6
CH1	Advent	0
CH10	Thanksgiving	0
CH11	Reformation	0
CH2	Christmas	2
CH3	Epiphany	0
CH4	Ash Wednesday	0
CH5	Lent	2
CH6	Holy Week	0
CH7	Easter	0
CH8	Ascension	0
CH9	Pentecost	0
CR	Church Renewal	19
CR10	Volunteerism	0
CR11	Leadership	1

Key: Heading:

You can think of headings and sub-headings as a two-level outline. Each heading can have multiple sub-headings underneath it. The keys are used to refer to the headings in a short format. For example, C02 in the example above refers to Children / Bible Stories.

Use the buttons "Delete", "New Key", and "New Subkey" to edit your list of headings.

Resource Media Types

Clicking the Media Types shows you a list of media types and abbreviations (for example, B for book, V for video, etc.) On this screen you may set default borrowing lengths and fees for different membership levels:

Abbr./ Full Name	# Res	Unit Len.	Acct Num for fees	# Days to loan (def.)	Lev N	Lev B	Lev O	Lev P	Lev 4	Lev 5	Lev 6	Lev 7	Lev 8	Lev 9	Full Name
B Books	3531	Pages	1111	30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Books
C Cassettes	336	Mins	1111	14	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Cassettes
CD Compact Disc	56	mins	1111	30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Compact Disc
CDR CD Rom	28	mins	1111	28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	CD Rom
CR Curriculum	89	Pages	1111	30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Curriculum
DVD Digital Video Device	291	Mins	1111	14	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Digital Video Device

The Media Type should be a short abbreviation for the type, and will appear in lists to select from types. Additionally, if you selected the Default ResCode format (see *Preferences* above), this abbreviation will be the first part of your ResCode (e.g. "VT" -> VT109, VT5284, etc.).

You may give the media type a longer name that is more human-readable under "Full Name".

Under "Length Units", you may set the units by which length is measured for this kind of resource (e.g. "minutes" or "pages" or "slides").

By default, only four levels of membership are defined. The others can be enabled (up to ten) using the "Edit Mbr Levels" button.

See the section on *Fees* below under *Resources* for further information.

Synods and Conferences

The default labeling for identifying regions is "Synod" and "Conference." Under the General tab in Administration, you can change these appellations to whatever terms you use. The labels will be changed throughout ReQuest Manager. To edit the list of "Synods" and "Conferences," click the Synods (or whatever you termed it) button on the Data Lists tab.

Account Numbers

If you will be using a financial package to track account numbers, edit your list of account numbers from the Accounts tab. See the section *Financial Manager* under *Using ReQuest Manager* below for details in setting this up.

Contact and Shipping Methods

Click the Contact/Shipping tab to edit the list of methods by which people contact your center and methods by which you can ship resources.

ResCode Format

IMPORTANT: Before entering any resources, make sure you choose the format you will use for resource code numbers (ResCodes). In the Administrative area, choose the Settings tab:

The four choices in ReQuest Manager 3 are:

- **Choice 1: Default (Media Type + Number)**

The default format for RQM has the pattern of:

XX#### (e.g. B120)

- where XX is a one or two letter prefix that stands for the media type (e.g. B = Book)
- and #### is a number that is incremented for each new resource (e.g. 120 = the 120th book entered)

The media type prefixes are completely customizable (see *Media Types* under *Data Lists* above).

The advantage of this format is that RQM will calculate the next available number automatically when entering a new resource.

- **Choice 2: Headings (Media Type + Heading Code + Number)**

This format has the pattern of:

XXHH#### (e.g. VTC020001)

- where XX is a one or two letter prefix that stands for the media type (e.g. VT = Videotape)

- HH is the heading key (e.g. C02 = Children / Bible Stories – see *Resource Headings* under *Data Lists* above),
- and #### is a number that is incremented for each new resource (e.g. 0001 = the first resource of this type)

ReQuest Manager will calculate the next available number for each Media Type / Heading combination automatically.

- **Choice 3: Free Form**

This allows each center the flexibility of choosing their own numbering format. RQM will allow any unique value to be entered for a resource code. The disadvantage is that RQM cannot check to ensure that your entry conforms to your particular system of numbering, and it cannot calculate the next available number because it has not been programmed for your specific numbering format. Nonetheless, many resource centers find this is a useful way of doing things “their own way.”

- **Choice 4: Numeric Only**

All resource codes will be numeric only (no letters allowed).

Memberships

ReQuest Manager supports up to ten levels of membership (by default, None, Basic, Bonus, and Patron are defined, while the remaining six are left undefined). You may customize these membership levels by clicking on the Membership tab. Set single-letter codes and full names for each level.

While in the Administrative section, select the Memberships tab:

Level	Code	Memb. Level	Charge Usage Custom Fees?	Charge Postage Custom Fees?
0	N	None	Always	Always
1	B	Basic	Ask	Ask
2	O	Bonus	Ask	Ask
3	P	Patron	Ask	Ask
4	4	Unused	Ask	Ask

You can give each level a code and name. In addition, you can choose whether a client with a given membership level gets charged usage or postage fees. The choices are:

- **Always:** the fee is always applied to a transaction for this membership level
- **Ask:** you will be asked each time whether or not to apply a fee
- **Never:** the fee is never applied

For more information, see *Fees* under *Resources* below.

Using ReQuest Manager

The interface of ReQuest Manager was designed to be as easy to use as possible. We have avoided using cryptic icons (pictures) without accompanying text wherever possible. We have also attempted to maintain a uniform look and feel throughout, so that once you are familiar with one area of the database, the other areas will be easily learned.

This section will first discuss general procedures for using ReQuest Manager, followed by overviews of each area. It is recommended that you read the general section carefully, as it pertains to every area of the database. You may wish to consult this section again after working with the program a while, since it contains tips and tricks for using ReQuest Manager efficiently.

General

From the Main Menu, the first thing you will see when you select the Resources, Clients, Invoices, or Transactions area is a search screen. To work with any of these things, you must first tell ReQuest Manager what set or specific items you wish to view, edit, or print. After searching for these items, you will see a results list. From there, you may view a report of the results (select File/Print Preview... or the Print Preview toolbar icon while viewing the results) or select a specific item and view its details.

Searching

The search screens in every area of the database all function the same way. You can search for a particular record or set of records using specific words or phrases on many different fields.

There are quick keyword searches available on the Dashboard for easy searching of resources, clients, and contacts:



Sometimes, you will want to perform more advanced searches by area. Click on the "Search" button in the ribbon for the area you wish to search, or use the link to "Adv. Search" in the Dashboard's navigation menu.

The advanced resource search screen looks like this:

Advanced Search for Resources [Keyword Search](#)

Res Code: Begins with Use **AND** for multiple fields

Media Type: Equals

Title: Contains

Subject: Equals

Heading: Equals

Description: All keywords

Author: Begins with

Publisher: Begins with

Vendor: Begins with

Format: Equals

ISBN13: Begins with

Copies: At Least

Copy Status: Equals

Pub. Yr.: Between and

Length: Between and

Create Date: Between and

Usage Count: At Least

Location: Begins with

Collection: Equals

Rank: Among top

Tagged: ☐

Active: ☒

Needs return: ☐

Parent resources: ☐

Resources in a series: ☐

Ages: ☐ P ☐ e ☐ E ☐ M ☐ H ☐ Y ☐ A ☐ S

Sort by: ResCode

To search for a resource or resources, decide what criteria you will use. Each line of the search screen constitutes a separate field criteria. Choose how the search will be performed and a search value. Some common choices are explained below:

- Begins with: field should begin with your word(s)
- Contains: field should contain your search word(s) exactly, but not necessarily at the beginning. Note that if you specify multiple words, those words must occur exactly in order as you typed them.
- Between: fields values should fall between (or equal to) your values. **NOTE:** If you omit the right field's value, then you will see all fields greater than or equal to your value. If you omit the left field's value, then you will see all fields less than or equal to your value.
- Not contains: field should not contain your search word(s) anywhere
- Equals: field should exactly match your search criteria
- All keywords: field must contain all words you entered, but not necessarily exactly consecutive or in the order you entered them

- Any keywords: field must contain at least one of the words you entered, but not necessarily all of them

Second, you must enter the search value for that field. All searches are case-insensitive (that is, the case of a letter is ignored when searching). You may enter as much in the search field as you wish. If your search doesn't turn up what you would like, try shortening the entry. For example, if you enter a search for a field containing "child," you will also receive results containing "childlike," "children," etc.

If you enter search criteria in two or more fields, you can choose to "AND" your search fields together (all the criteria must be met) or "OR" (any of the criteria can be met).

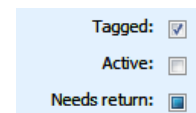
To view all resources, do not enter any search criteria.

Click on "Search" to perform your search. When the results list comes up, you can click on "Change Search" to go back and re-enter your search criteria.

Check Boxes

Check boxes on search forms have one of three values:

- True (shown for "Tagged"): Searches for all items which are marked True for this field.
- False (shown for "Active"): Searches for all items which are marked False for this field.
- Don't search (shown for "Needs Return"): Ignore the value for this field; don't search on this field.



Tagged: ☒
 Active: ☐
 Needs return: ☒

Clicking the check box multiple times will toggle among the three values.

Combo Boxes

Some search fields have lists of values already entered that you can choose from. Most of these boxes will not limit your choice to only those in the list – you still can enter your own values if they are not in the list.

As you type in a combo box, ReQuest Manager may attempt to save you keystrokes by guessing what you are typing:



Charismatics

If the suggestion is correct, do nothing. If the suggestion is not what you want, just ignore the highlighted part and continue typing as normal:



Church Administration

If you have finished typing your criteria and there is still a suggested completion, just press backspace once to delete the highlighted part:



Church

Date Fields

Whenever you are entering a date in ReQuest Manager, you can double-click on the text field to display an on-screen calendar which you can use to choose the date. You can also double-click if you simply want to see the day of the week or the surrounding days in the calendar without making changes.

Results Lists

After you click "Search," a list of selected records should appear on screen. To change your search, click "Change Search."

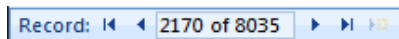
You may also sort the returned records by clicking on the field you wish to sort and choosing the "Sort Ascending" or "Sort Descending" from the Sort & Filter ribbon area:



You can either click anywhere on a record and then select "View Details," or simply double-click to bring up the details screen for that record.

Details Screens

The details screens show you the most complete information of a record. These are also the screens in which you can edit data (unless it is not allowed for a particular record). You can use the navigation buttons at the bottom of the screen to move to different records within your current search result set.




The buttons, from left to right, will move you to the first record, previous record, next record, and last record. You may also type a record number in the box to move directly to that record.

Editing Records

You can always tell if you are in edit mode by looking at the Edit button in the upper left corner or the title bar of the screen. If the caption is red or the edit button is depressed, then you are in edit mode and can make changes.



The edit button on the left indicates edit mode is turned off; the depressed edit button on the right indicates edit mode is turned on.

 If you begin to edit a record, then a pencil shape will appear along the left side of the record, indicating that you are making changes. To cancel your changes, press ESC once to undo the current field, and once more to undo the entire record. The pencil shape will return to an arrow, indicating that you are no longer changing the record.

Changes are always saved automatically when you move from one record to another or when you close a window. Therefore, there is no need to save your document frequently as you might in a word processor. Changes are saved as you go, ensuring that your data is safe in case of a power outage or other problem.

If you are given a drop-down list when editing a field and your choice is not in the list, one of two things may happen, depending on the list. First, ReQuest Manager may tell you that your choice is not acceptable and that you must select a choice in the list. In this case, you may be able to go to the administrative area and add your choice to the list, then return to the record and make your choice. Second, ReQuest Manager may ask you if you would like to add your choice to the list. If you choose not to, then you still must make a choice from the given list.

Any time you are viewing or editing a date field, double-clicking on the field will cause an on-screen calendar to appear. You may select a date from the calendar or just use it for reference.

Refreshing Records



Sometimes you may make a change to a record while it is displayed on a form somewhere else. After doing this, you may return to the other form to find that the data has not changed to reflect your editing. If this occurs, you can press F9 or click on the toolbar icon "Requery." This will refresh the data on screen.

Occasionally, refreshing a search results set will cause records to disappear from the list if you changed them so they no longer meet the search criteria. For example, if you search for all New/Unsent invoices and then print and ship one of them, requerying the search results will cause the newly sent invoice to no longer show in the list, since it is no longer New/Unsent.

Resources

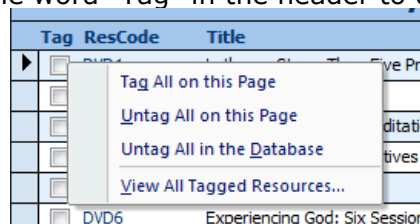
To work with resources, choose the Resources button from the Main Menu. This will bring up the "Search for Resources" screen (see above under Searching).

Here is the result of a search for all DVDs:



From this list, you can choose an item and click "View Details" to see more information about the item. You can also "Tag" a resource by clicking in the checkbox by each item's ResCode. This is useful for printing reports that contain only certain resources.

Right-click on a Tag box or the word "Tag" in the header to display the tag menu:



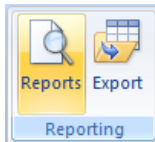
Bulk Editing of Resources

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.

Reports



From the Search Results screen, you can print the selected resources by choosing the Reports icon in the Data ribbon. This will give you a list of possible reports for the area:

Resource Reports

Selected Resources Tagged Resources

(ResCode) Title	Author	Pub Yr	Publisher
(DVD1) Lutheran Story, The - Five Programs that Celebrate Our L	ELCA		ELCA, Department for
(DVD2) Shining Witnesses		2003	ELCA
(DVD3) Depression - Healing Meditations with Dr. Kenneth L. Bak	Bakken, Kenneth	2003	Seraphim Communicator
(DVD4) Homosexuality: Perspectives for the Church	Strommen, Merton	2003	New Creation
(DVD5) Davey and Goliath		1968	PSI/ELCA
(DVD6) Experiencing God: Six Sessions in Faith Basics for the Con		2003	Luther Productions/Ser
(DVD7) Wall, The		1999	Paradete Press

Record: 1 of 291 No Filter Search

Select Report:

- Simple list
- Simple list w/Children
- Simple list w/Descriptions
- Headings Report
- Resource Details (no Children)
- Resource Details (w/Children)
- Transaction History
- Inventory Report

Sorting

Sort by: [] Ascending []

then by: [] Ascending []

then by: [] Ascending []

Report title: Resources Report **Page #**

Report subtitle: **Offset:** 0

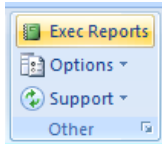
Print! Print Preview... Cancel

Report Description:
Simple list of resources showing ResCode, Title, Number of Copies, Author, Publisher, and Publication Year.

The list of reports you can choose is under "Select Report:" Note that in the example above, there will be 291 resources in the report. You can also choose how you would like

the report sorted, and for some reports, additional parameters can be specified (for example, the date range for the Transaction History report).

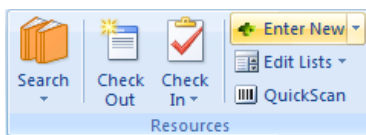
Click on the "Print Preview" button to view the report before printing, or the "Print!" button to print directly to the default printer.



Additional reports related to resources are available from the Home ribbon "Exec Reports" button. These include other transaction summaries, overdue reports, most-often and least-often used resources, etc.

See also "Exporting Resources" below for additional methods of exporting your resource data. This includes mail merge and HTML export.

Entering New Resources

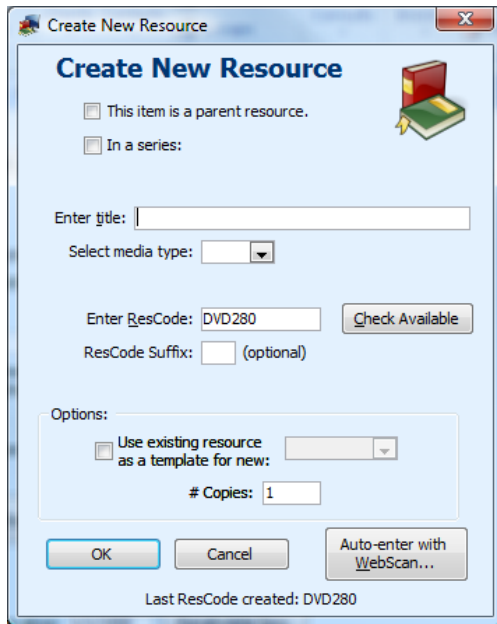


To enter a new resource, select "Enter New" from the Resources area of the ribbon, or select Resources: "Enter New" from the Dashboard navigation menu.

This will bring up one of the following screens (depending on the format you chose to use under "Customizing ReQuest Manager" above):

Default numbering

Resource Heading numbering



Create New Resource

☐ This item is a parent resource.

☐ In a series:

Enter title:

Select media type:

Enter ResCode:

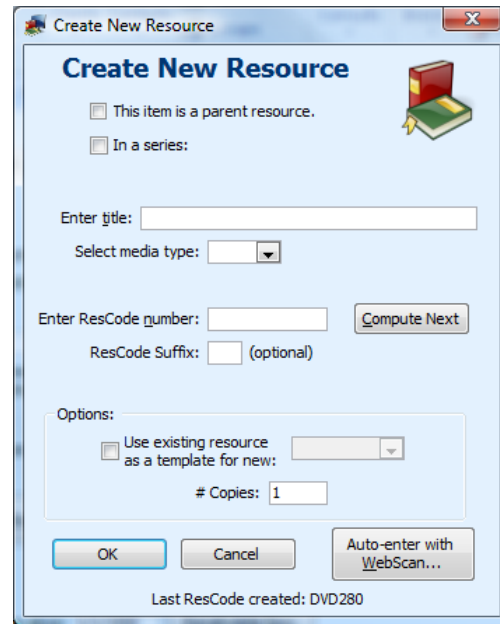
ResCode Suffix: (optional)

Options:

☐ Use existing resource as a template for new:

Copies:

Last ResCode created: DVD280

Free-format numbering


Create New Resource

☐ This item is a parent resource.

☐ In a series:

Enter title:

Select media type:

Enter ResCode number:

ResCode Suffix: (optional)

Options:

☐ Use existing resource as a template for new:

Copies:

Last ResCode created: DVD280

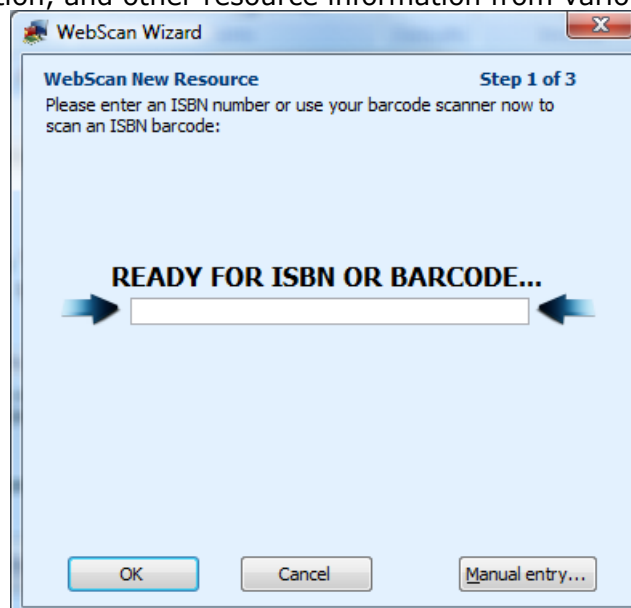
Numeric Only

To enter a new resource, enter the Title, choose a Media Type from the list (see "Customizing ReQuest Manager" above for creating Media Types), and either enter the number or allow RQM to compute the next available one for you. Note that with Free-format numbering, RQM is not able to compute the next available, and you must enter the entire ResCode in the line given.

After pressing OK, you will be taken to the Resource Details screen to continue entering the resource information.

WebScan

An alternative to manually entering all information is to purchase the WebScan module, which allows you to type or scan an ISBN code and have RQM attempt to look up the title, author, description, and other resource information from various web sources:



WebScan Wizard

WebScan New Resource Step 1 of 3

Please enter an ISBN number or use your barcode scanner now to scan an ISBN barcode:

READY FOR ISBN OR BARCODE...

➡ ⬅

Please see <http://www.requestmanager.org/webscan.asp> for more information about purchasing this module.

Editing Resources

From the search results screen, click on Details to view the Resource Details screen. This is the same screen that you see after pressing OK to create a new resource:

Resource Details

Parent: _____ Series #: 0

ResCode: PR864 Title: Welcoming the Stranger - A Hospitality Workshop

Details Misc Fees Copies Transactions

Length: _____ Author: Franzier, Frances; Zentner, M

Pub Yr: 2002 Publisher: Women of the ELCA

Location: _____ Vendor: ELCA

Purch. Date: 1/1/2002 Purch. Cost: _____ # Items: 1

ISBN13: _____ Main Heading: _____ Head Key: _____

Format: _____ Sub-heading: _____

Copyright: _____

Description:

This resource is designed to help the church welcome people, especially those marginalized by society, who want to hear the gospel, have fellowship and support. It invites discussion and reflection on what it means to be in relationship with God and reflect that relationship on the stranger. Time needed is approximately three hours.

Usage fee for this resource is default for category PR
Postage fee for this resource is default for category PR

Ages: P e E M H Y A S

Subjects:

- Bible Study
- Hospitality
- Retreat
- Women of the ELCA
- Workshop

New... Close New Trans...

On this screen, you can see most of the important information about the resource. Here is the same screen after you press the Edit button to go into edit mode:

Notice the red caption on the screen and the depressed Edit button that indicate you may make changes to the record. See below for information about various parts of this screen.

Some basic information about resources you should know:

ResCodes

Every resource in the database must have a unique identifier, called a ResCode (short for resource code). There are three available formats in ReQuest Manager for ResCodes – see the section above under “Customizing ReQuest Manager” for more information about these three types.

To modify the ResCode for a resource, press the “Change...” button to the right of the resource title. This will bring up a modify screen that is similar to that used for entering new resources. Please note that if you change a ResCode, it will be changed everywhere in the database that that resource occurs, including new, open, and closed invoices.

Resource Headings and Subjects

Resources can be cataloged according to headings and subject areas, both of which you can define (see above under “Customizing ReQuest Manager”).

When you enter a new resource, it is important that you enter subjects for the resource. This will allow you to search for resources by subject. First, make sure that you are in Edit mode (click the Edit button in the upper left corner of the screen). You should see a blank line in the subjects list. Enter the subject or select from the list of subjects already entered. If you enter a subject not in the list, you will be given the option to add it.

Subjects:	
▶	Bible Study
	Hospitality
	Retreat
	Women of the ELCA
	Workshop
*	

Resource subjects

Main Heading:	CH - Church Holidays	Head Key:	
Sub-heading:	CH2 - Christmas		CHCH2

Resource headings

Resource Fields

You can enter information in any or all of the given resource fields, including Author, Publisher, Vendor, Length, Publication Year, etc.

Note that the Description field is an unlimited length memo field.

The Age Groups are defined as follows:

- P – Preschool
- e – Lower elementary
- E – Upper Elementary
- J – Junior High
- S – Senior High
- Y – Young Adult
- A – Adult
- Sr – Senior (55+)

P e E M H Y A S	
Ages:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>

To enter ISBN or ISSN, either enter the 10-digit code by typing it, or if you have a barcode wand, click in the field ISBN/ISSN: and then scan the barcode with the wand:



You can also use the barcode wand to quickly search for a resource. Use the "QuickScan" ribbon icon any time in RQM to jump to a resource.

Needs Return

If you want to track certain expendable items, such as photocopies or items for sale that you do not want returned, you can mark those resources as not needing returned (clear check box "Needs Return"). You can still enter these resources on invoices and run reports on them, but they will not be marked with a due date. Note that you can still enter usage fees for these resources (see below).

Parent Resources and Series

Some resources may be in a series that you wish to keep together by creating a "Parent" resource with several "Children" resources within it. For example, you could create a "Parent" record to represent an entire video series (but which could not itself be checked out), and the "Children" resources under this parent would be the individual video items (Video #1, Video #2, etc.).

Here are two screens showing a resource parent and a child record in Resource Details:

Resource Details

This resource is a parent resource

ResCode: DVD70= Title: Davey and Goliath

Details Misc Fees Series Transactions

Length: 510 Mins Author: Clokey, Art; Goodell, Ruth Clo

Pub Yr: 2005 Publisher: ELCA

Location: Vendor: ELCA

Purch. Date: 9/12/2005 Purch. Cost: # Items: 1

ISBN13: Main Heading: Head Key:

Parent resource. Note the "=" sign at the end of the ResCode and the designation "This resource is a parent resource"

Resource Details

Parent: (DVD70=) Davey and Goliath Series #: 1

ResCode: DVD70 Title: Davey and Goliath: Volume I - Collector's Edition

Details Misc Fees Copies Transactions

Length: 150 Mins Author: Clokey, Art; Goodell, Ruth Clo

Pub Yr: 2005 Publisher: ELCA

Location: Vendor: ELCA

Purch. Date: 12/5/2005 Purch. Cost: # Items: 1

ISBN13: Main Heading: Head Key:

Child resource in a series. The parent resource is shown above the child title. This is video #1 in the series.

To create a series, first create a "Parent" resource that will represent the entire series. From the resource search form, select "New Resource..." and enter the title information and resource type. Check the box "This item is a parent resource." Notice that an equals sign (=) will be appended to the ResCode, indicating that it is a parent resource. This will create the series.

Next, create the children resources in the series. When entering new resources, make sure that the box "In a series" is checked, and select your new parent resource from the Parent box. The Series # indicates the order of the children resource in the series. Continue entering children resources until you have entered the whole series.

If you have an existing resource you want to attach to a series, choose the "Change..." button when in Edit mode for the resource and choose the option "In a series" as above.

When you wish to check out resource from a series, you can either select a child resource directly and check it out as you would any other resource, or you may select the parent resource and select some or all of the children to be checked out. You can also schedule each child resource to be checked out at regular intervals (on consecutive weeks, for example). See the section Invoices: Resource Series below.

Resource Fees

To edit fee information for a resource, choose the Fees tab on the Resource Details screen:

The screenshot shows the 'Resource Details' window for resource 'DVD70'. The 'Fees' tab is selected. The window displays the following information:

- Parent: (DVD70=) Davey and Goliath
- Series #: 1
- ResCode: DVD70
- Title: Davey and Goliath: Volume I - Collector's Edition

Below the tabs (Details, Misc, Fees, Copies, Transactions), there are two sections for fee configuration:

- Usage fee for this resource:**
 - ☒ Default for resource category DVD
 - ☐ No fee
 - ☐ Custom usage fee:
- Postage fee for this resource:**
 - ☒ Default for resource category DVD
 - ☐ No fee
 - ☐ Custom postage fee:

Many resource centers will want to charge clients fees for usage or postage. You may always enter or change fees on a new or open invoice at any time. However, it is often easier to set up a default fee system for items so that ReQuest Manager will automatically enter the fees in the fields for you.

For both Usage and Postage fees, you have three options:

Default for resource category xxx – RQM will calculate the fee based on the media type and the client's membership level. You can view this list of fees by clicking on "View/Edit...", which will take you to the list of Media Types. Note that a client's membership level can be set through the synod or set individually (see below under "Clients"). For example, you can set a default usage fee for non-members to \$10 while a member's fee is \$5.

No fee – RQM will not assign a fee

Custom fee – You can specify a fee to be used for this resource only. This is useful if you have a special item that may cost more to use or mail. For example, a multi-video set may cost \$10 instead of \$5 for most single videos.

You are always free to change the fees on each invoice before shipping if they are not correct.

Number of Copies

You may have more than one copy of identical resources. In this case, do not enter the resources under different ResCodes. Instead, simply add copies of your resource to the ResCode using the Copies tab:

Resource Details

Parent: (DVD70=) Davey and Goliath Series #: 1

ResCode: DVD70 Title: Davey and Goliath: Volume I - Collector's Edition

Details Misc Fees Copies Transactions

Copies:

ResCopy	Status	Date Acquired	Last Used /Count	Maintenance Description	Maint Date	Label Printed
A	Available	12/5/2005	6/3/2009			
Collection: Main						
B	Available	11/17/2009				
Collection: Main						
*						
Collection:						

Note: Do not use this form to check resources in. Change the status of a resource only if the information above is incorrect.

Total # copies: 1

copies in circulation (active): 1

Print Barcode Labels

New... Close New Trans...

Screen showing a resource with two copies, A and B. Both are currently available.

When in Edit mode (click the edit button at the top left corner of the screen) you will see a blank line at the bottom of the list of copies. You may add copies by entering a new letter in that line. It is probably best to use consecutive letters (A, B, C, etc.), but you may use whatever system you wish.

The possible resource copy statuses are as follows:

Available – The resource is not currently checked out and should be on the shelf.

Checked Out – The resource is currently checked out and there should be an open transaction for the item.

Deleted – The resource has been deleted. Use this when you need to pull an item from circulation.

Lost – The resource has been lost, and is unavailable.

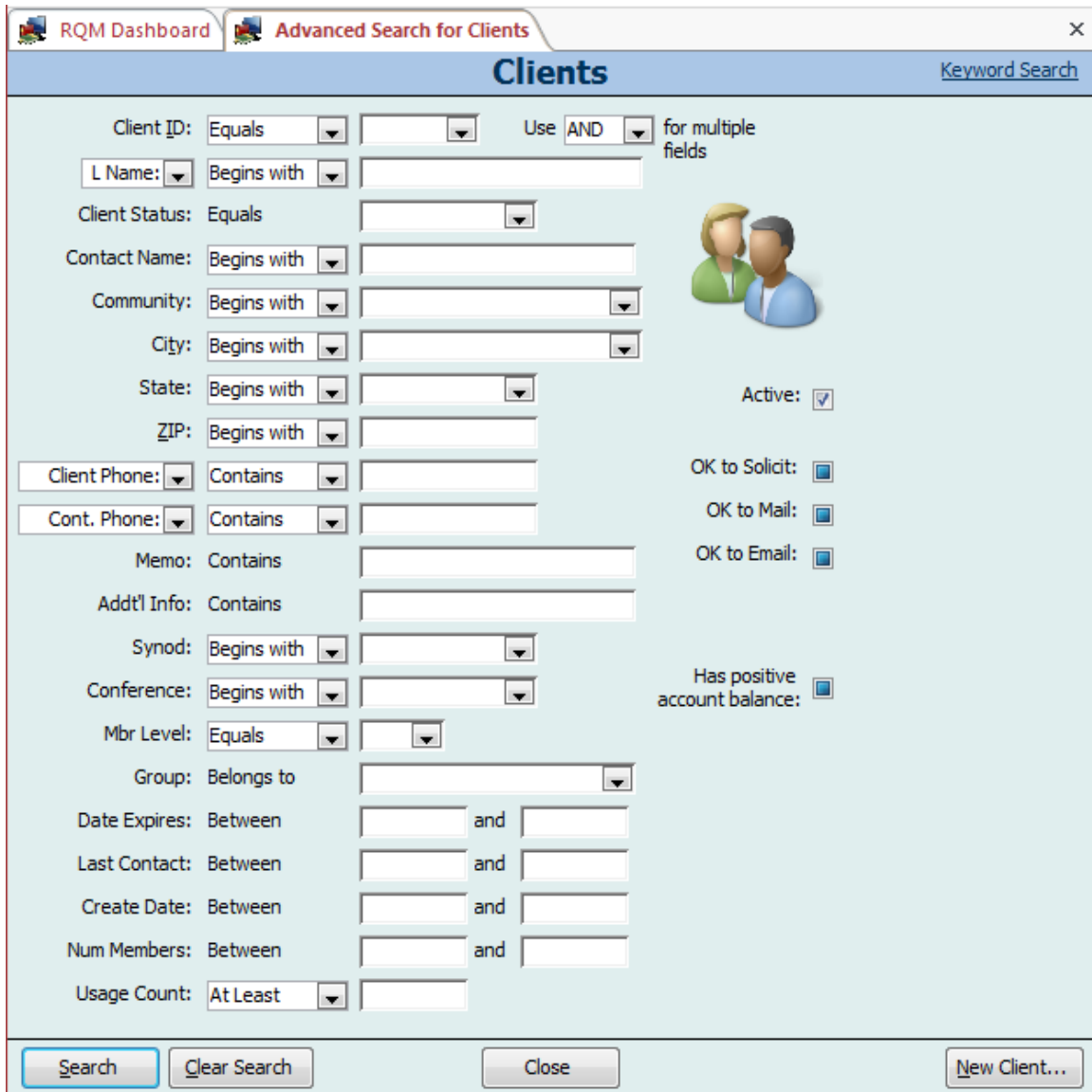
Out for Repairs – The resource is not currently available for check-out due to repairs.

You can use the Maintenance Description field to track needed maintenance or other comments per copy.

Use the Collection feature if you wish to track copies by different locations (such as satellite libraries or special areas of your facility). The collections can be defined under Resources / Data Lists in the ribbon.

Clients

You can enter, edit, and search for clients much in the same way as for Resources. Choose the “Clients” button from the main menu to find the Search for Clients screen:



Advanced Search for Clients

Clients [Keyword Search](#)

Client ID: Equals [] Use AND [] for multiple fields

L Name: [] Begins with []

Client Status: Equals []

Contact Name: Begins with []

Community: Begins with []

City: Begins with []

State: Begins with []

ZIP: Begins with []

Client Phone: [] Contains []

Cont. Phone: [] Contains []

Memo: Contains []

Addtl Info: Contains []

Synod: Begins with []

Conference: Begins with []

Mbr Level: Equals []

Group: Belongs to []

Date Expires: Between [] and []

Last Contact: Between [] and []

Create Date: Between [] and []

Num Members: Between [] and []

Usage Count: At Least []

Active: ☒

OK to Solicit: ☐

OK to Mail: ☐

OK to Email: ☐

Has positive account balance: ☐

Clients are normally churches or groups, but clients can be individuals if you choose. If you choose to track individuals as clients, you can ignore the contact fields, as this would normally apply to contacts within a church or other organization.

Entering New Clients

From the “Search for Clients” screen, choose “New Client...” to enter a new client:

Create New Client

Enter client full name:

Enter client ID:

Client IDs are numeric and must be between 1 and 9999999.

Did you know you can enter a number at the start of a range, then press the button to have me find the next available number in the sequence?

You can use this to keep track of clients in certain ranges (e.g. 1000s, 2000s, etc.)

You can use the "Compute Next Available" button to find the next available number. RQM will start at the number you have entered (or 1 if nothing is entered) and search until it finds an unused number. You can conveniently organize your client IDs by range by entering the first value of the range and computing the next available. For example, if you want to keep clients from a certain county or state within the range of 8000-8999, enter 8000 and chose "Compute Next Available". The next number after 8000 will be automatically selected (for example, 8012).

Client Details

After entering a new client or selecting Details from the Search results, you will see the Client Details screen:

Client Details

Client ID: Abbrev name: Community:

Addresses Details Groups Contacts Invoices Trans Payments Consults

Full name: Status:

Shipping Addr: Phone:

City/State/ZIP: Fax:

Billing Addr: Email:

City/State/ZIP: Website:

Synod: Conference:

Member Level: Expires: Fee: Date Paid:

*** Client has Basic membership through its synod ***

Clients: 179 of 437

On this screen you can enter shipping and billing addresses and other contact information. Note that there is a "Community" field and separate shipping city and billing city fields. You can use this Community field to track metropolitan areas if you choose (for example, Cincinnati, OH, instead of the subdivision Norwood).

Memberships

You may track membership information by client or by synod. You can select from the list of membership levels (up to ten, set in Administration / Memberships), and optionally, enter the membership fee and expiration date of membership.

If an entire synod subscribes to membership, you can save time by setting the membership level for the entire synod. This will automatically give every client in the synod that membership, unless they have a higher level.

For example, in the screen shot above, the client has membership level "N – None", but receives Basic membership through its synod (set in Administration / Data Lists / Synods)

About Client IDs

Client IDs must be numeric, up to 6 digits long. No alphabetic characters are allowed in Client IDs at this time.

To change the ID of a client after it has been entered in the database, go to Edit mode for the client and make the change to the ID directly in the Client ID box. You will be asked to confirm this change. The ID will change everywhere in the database, including closed invoices and payments.

Other Details

The Details tab gives more information, including Memo and Additional Info fields to store comments about the client. Additional fields give you an overview of the client's usage, including number of open invoices, date of last contact, and the date the client was created.

Contacts

Click on the Contacts tab to view a client's contact list:

The screenshot shows the 'Client Details' window for Client #12430, 'First Lutheran Church'. The 'Contacts' tab is active, showing a table of contacts. The table has columns for ID, Name, Title, Status, Phone, and Email. The contacts listed are:

ID	Name	Title	Status	Phone	Email
2156	Cindy Formo		Active		
299	Dianna Formo	Sunday School an	Active	(701) 762-4459	
2068	Dorie Hanson		Active	762-4292	
2147	Faye Bubach		Active		
1689	Gayann VanBruggen		Active		
1569	Lauri Skoge Bruse		Active	701-762-3696	

Click on the ID field to view details for the contact, where you can enter both shipping and billing addresses as well as other contact information for the contact. Note that you can choose to use the client billing and shipping addresses or the contact's billing and shipping addresses when you create invoices (see "Invoices" below).

Invoices, Transactions, and Payments

You can view a client's history of new, open, and closed invoices and transactions using the appropriate tab on the Client Details screen. To view closed invoices, you will have to check the box marked "Show closed invoices".

Client Details

Client ID: 12430 Abbrev name: First Lutheran Church
Community: Litchville

Addresses Details Groups Contacts **Invoices** Trans Payments Consults

82 invoice(s)

Inv ID	Date	Contact	Title	Phone	Status	# Items	Fee	Paid
960180	2/9/1996	Rev Lee Herberg	Pastor		Closed	2	\$0.00	\$0.00
960196	2/13/1996	Dianna Formo	Sunday Sc		Closed	1	\$0.00	\$0.00
960263	2/26/1996	Rev Lee Herberg	Pastor		Closed	2	\$0.00	\$0.00
960322	3/8/1996	Rev Lee Herberg	Pastor		Closed	1	\$0.00	\$0.00
960335	3/12/1996	Rev Lee Herberg	Pastor		Closed	1	\$0.00	\$0.00
960348	3/15/1996	Rev Lee Herberg	Pastor		Closed	3	\$0.00	\$0.00
960371	3/20/1996	Rev Lee Herberg	Pastor		Closed	1	\$0.00	\$0.00
960897	10/14/1996	Dianna Formo	Sunday Sc		Closed	3	\$0.00	\$0.00
960943	10/23/1996	Rev Lee Herberg	Pastor		Closed	2	\$0.00	\$0.00
960996	11/4/1996	Rev Lee Herberg	Pastor		Closed	2	\$0.00	\$0.00
970023	1/8/1997	Rev Lee Herberg	Pastor		Closed	1	\$0.00	\$0.00
970148	2/12/1997	Rev Lee Herberg	Pastor		Closed	3	\$0.00	\$0.00
970349	4/2/1997	Sheila Cuypers			Closed	3	\$0.00	\$0.00
970396	4/16/1997	Rev Lee Herberg	Pastor		Closed	3	\$0.00	\$0.00
970561	8/21/1997	Rev Lee Herberg	Pastor		Closed	2	\$0.00	\$0.00
970602	8/23/1997	Rev Lee Herberg	Pastor		Closed	6	\$0.00	\$0.00

☒ Show closed invoices ☒ Dates Ascending

Close New Trans... New Consult...

To jump to an invoice, select it and choose "View Invoice..." below.

Invoices

Invoices consist of one or more transactions of a client borrowing a specific resource for a specific date range.

Invoices can have any of the following statuses:

New / Unsent – The invoice has been created for a future date but has not been sent yet. This is called a "Reservation" in some other systems.

Open – The Invoice has been created and sent out. All resources in the invoice have been sent and marked as checked-out. The invoice may still be marked Open if all items are returned but if there are outstanding fees not yet paid.

Closed – All resources have been returned (checked-in) and any fees for the invoice have also been paid.

Cancelled – The transactions on the invoice were canceled and resources were not checked out.

To create a new invoice, you must create a new Transaction, which you can do by choosing "New Trans..." at the bottom of the Client Details screen, the Resource Details screen, or the Invoices or Transactions screen:

The screenshot shows the 'Select Client for Invoice' window. At the top, there are tabs for 'RQM Dashboard', 'Advanced Search for Clients', 'Client #12430 - First Lutheran Church', and 'Create New Transaction'. The main title is 'Select Client for Invoice'. Below the title, there are fields for 'Client' (12430), 'First Lutheran Church', and 'Litchville, ND'. There are also fields for 'Status' (Active), 'Mbr Level' (N), and 'Date Expires' (11/18/1999). A 'Client Memo' field is present. On the right, there are buttons for 'Search Client...', 'Client Scan...', and 'Info from Previous'. Below these, there are dropdowns for 'Send method' (M), 'Return method' (M), and 'Contact Method' (T). There are also checkboxes for 'Use Client shipping address' and 'Use Client billing address'. A section for 'Select contact or add new:' has a 'No Contact' checkbox. Below this is a table with columns: 'Name/Title', 'Address 1/2', 'City/State/ZIP', 'Phone/Fax/Email', and 'Memo'. The table lists four contacts: Cindy Formo, Dianna Formo, Dorie Hanson, and Faye Bubach. At the bottom, there is a 'Record' section showing '1 of 14' records, a 'No Filter' button, and a 'Search' button. There are 'Continue' and 'Cancel' buttons at the very bottom.

Name/Title	Address 1/2	City/State/ZIP	Phone/Fax/Email	Memo
Cindy Formo 2153	Ship: [] Bill: []	[]	[]	
Dianna Formo 299 Sunday School and	Ship: [] Bill: []	[]	(701) 762-4459	
Dorie Hanson 2068	Ship: 205 7 Ave. Box 164	Litchville ND 58461	762-4292	
Faye Bubach 2147	Ship: 10624 County Road 35	Litchville ND 58461		

You must first enter the Client ID for the invoice (already entered if you pressed "New Trans..." from the Client Details screen). You can search for the Client ID using "Search Client...", scan a user's barcode using "Client Scan...", or use the client information from the most recently entered invoice (useful if you're creating multiple invoices on different dates for the same client).

Choose your send and return methods, and choose or enter a contact for the client. If there is no contact (the client is an individual), click "No Contact".

Click on continue to proceed to the next screen:

After entering the ResCode, select “Add to List” to add it to the invoice:

Resource	Ship	Use	Due
(B1006) Roads Jesus Traveled, The	11/17/2009	11/20/2009	12/23/2009
(B1005) What to Do When Everyone's Doin	11/17/2009	11/20/2009	12/23/2009
(B1156) Jesus the Christ-Hist.Originsofchris	11/17/2009	11/20/2009	12/23/2009

An invoice with three resources added

For each resource, you can enter a Ship, Use, and Due date. Note that the Ship date must be the same for each resource in the invoice (because they will by definition all be shipped together on one invoice), but each resource can have different use and due dates. The default loan length is set for the media type in Administration / Data Lists / Media Types. Note that in the example above, the video defaults to a 14 day loan and the book and kit to a 30 day loan.

You can change these dates by typing them in or by clicking the calendar icon:

Resource	Ship	Use
(B1006) Roads Jesus Traveled, The	11/17/2009	
(B1005) What to Do Wh		
(B1156) Jesus the Chris		

When you specify a ship date (either today's date or sometime in the future), if ReQuest Manager finds that there is already an invoice scheduled to ship to the same client within 10 days of the ship date, you will be given the option of adding the transaction to the existing invoice. Otherwise, the new invoice will be created as normal.

Shipping the Invoice

When the invoice has been created, the Invoice Details screen will open for it:

Invoice Details

Inv ID: 090342 Client ID: 12430 Client: First Lutheran Church/Litchville

Inv Date: 11/17/2009 Contact: Cindy Formo Status: New/Unsent

Item List | Item Details | Invoice Details | Shipping Info | Billing Info

Transactions:

3 item(s)	ResCode	Copy Title/Status	Ship Use	Due Return	Usage	Postage	Overdue	Paid
B1005	A	What to Do When Everyone's Do	11/17/2009	12/23/2009	\$0.00	\$0.00	\$0.00	\$0.00
B1005-A	New/Unsent	11/20/2009						
B1006	A	Roads Jesus Traveled, The	11/17/2009	12/23/2009	\$0.00	\$0.00	\$0.00	\$0.00
B1006-A	New/Unsent	11/20/2009						
B1156	A	Jesus the Christ-Hist.Originsofch	11/17/2009	12/23/2009	\$0.00	\$0.00	\$0.00	\$0.00
B1156-A	New/Unsent	11/20/2009						
Totals:					\$0.00	\$0.00	\$0.00	\$0.00

View Resource... Add Transaction...

Print and Ship Close

Invoices: 1 of 1 Filtered Search

New invoice with three transactions in it. Note the status is "New/Unsent" in the upper-right corner.

You can review the details of the invoice, shipping and billing addresses and enter comments to appear on the printed invoice. When the invoice is ready to ship, click on "Print and Ship", which will mark the items as checked out and open the invoice in print preview for you to review and print.

Invoice IDs

The invoice numbering system of ReQuest Manager is of the form YY####, where YY is the last two digits of the year and #### is automatically incremented from 0001 to 9999. In the event that you have more than 10,000 invoices in a given year, the next year's numbers will be used.

Transaction Statuses

Like invoices, transactions can have one of four statuses:

- New/Unsent – indicates a reservation or that the item has not yet shipped
- Open – indicates the item has shipped, but has not been returned
- Closed – indicates the item has shipped and has been returned (or doesn't need to be returned)
- Canceled – indicates the request was canceled

Note that transactions are closed as soon as the items are returned. Invoices, however, are not closed until all the items in the invoice have been returned (if they need returning) AND any fees have been paid. Thus, a transaction can be closed even if the item's fee has not been paid. Also, an invoice can still be open if a fee is owed even if all of its transactions are marked as closed.

Send From / Return To

In some cases, two clients may wish to use the same resource within a short period of time of each other. To facilitate this, you may wish to have the first client send the item directly to the next client. First, create both invoices for the item. Next, go to the Item Details tab from one of the Invoice Details:

Invoice Details

Inv ID: 090342 Client ID: 12430 Client: First Lutheran Church/Litchville

Inv Date: 11/17/2009 Contact: Cindy Formo Status: New/Unsent Recalc Status

Item List Item Details Invoice Details Shipping Info Billing Info

ResCode: B1005 Copy Title: What to Do When Everyone's Doing It-Moral Messages Status: New/Unsent # Items: 1

Trans	Ship	Use	Due	Returned	Cancelled	Usage	Postage	Overdue	Paid
11/17/2009	11/17/2009	11/20/2009	12/23/2009			\$0.00	\$0.00	\$0.00	\$0.00

Remarks: (printed)

Research Time: 5 mins Contact Method: T Preview

Sender: Default Return to: Default Send/Return...

Last Updated: 11/17/09 Updated By: admin

Items: 1 of 3 No Filter Search

View Resource... Add Transaction...

Print and Ship Close

Invoices: 1 of 1 Filtered Search

In Edit mode, click on the "Send/Return..." button.

The Resource Send/Return screen looks like this:

Resource Send/Return

Resource: B1005 What to Do When Everyone's Doing Use date: 11/20/2009

Sender:

☒ From resource center (Default)

☐ Directly from previous client: [dropdown]

Sender:
No previous client within 180 days.

Select "From previous client" if the resource will be sent on to them by the previous user instead of from the resource center.

Return to:

☒ To resource center (Default)

☐ Directly to next client: [dropdown]

Recipient:
No next client within 180 days.

These are instructions to the client that the resource is to be sent on to another client instead of being returned to the resource center.

OK Cancel

Instructions are printed on the invoice of the first client with the due date and destination address of the next client. A notice is printed on the second client's invoice advising that the resource will be sent from a previous user.

Resource Series

Suppose a client wanted to receive an entire video series, one video per week. You can schedule each resource by creating a new transaction and selecting the parent resource. You will be shown a screen of all the resources in the series:

Select Resource Series Items

These are the resources in the series:
(DVD70=) Davey and Goliath

Clear the check box next to a resource if you do not wish to select it. Enter the ship, use, and due dates or automatically calculate them.

Space use dates every days after the first:

Series	Selected	#	ResCode	Copy	Title	Ship	Use	Due
	<input checked="" type="checkbox"/>	1	DVD70		Davey and Goliath: Volume I - Collector's Edition	11/17/2009	11/20/2009	12/7/2009
	<input checked="" type="checkbox"/>	2	DVD83		Davey and Goliath: Volume 2 - Learning About Caring f	11/17/2009	11/20/2009	12/7/2009
	<input checked="" type="checkbox"/>	3	DVD84		Davey and Goliath: Volume 3 - Learning About Forgivel	11/17/2009	11/20/2009	12/7/2009
	<input checked="" type="checkbox"/>	4	DVD85		Davey and Goliath: Volume IV - Helping Each Other	11/17/2009	11/20/2009	12/7/2009

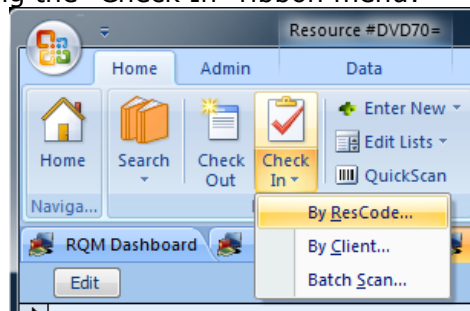
4 item(s)

To schedule the resources, double-click on the ship date of the first resource and set it, as well as the use date and the due date. Enter the number of days between each resource in the box "Space use dates every ___ days after the first" and select Calculate. To remove any resources from the list, highlight the record selector to the left of the resource and press the delete key. This will not delete the resource itself, but only remove it from the transaction list.

In the example above, five separate invoices will be created, one for each ship date. It is a great time saver over entering each manually!

Resource Check-in

When a client returns resources used, you must tell ReQuest Manager that the items have been returned by using the "Check In" ribbon menu:



There are three ways to check in resources:

Check-in Resources

Please select the item to check-in from the list of open transactions. If you would like to narrow the list by client ID, click "Check-In by Client..."

Open transactions:

ResCode Copy Title

193 transactions

Invoice ID	Client ID	Contact/Client	City/State	Shipped	Due	Fees	Usage	Postage	Paid	# Items

View Resource...
View Invoice...
View Client...

Check-In Close Check-in by Client... Batch Scan....

Manual Check-In: Enter or Choose the item's ResCode from the list above, then click on "Check-In".

Batch Resource Check-In

Select client: Name/City

Zion Lutheran Church / Thief River Falls Search...

Resources checked out:

ResCode	Copy	Title	Status	# Items
<input type="checkbox"/> VT102	A	Moms, Dads, and Other Endanger	Open	1
<input type="checkbox"/> VT144	A	In the Beginning	Open	1
<input type="checkbox"/> VT1545	A	Time Travel Through the Bible	Open	1
<input type="checkbox"/> VT17	A	Beginning, The	Open	1
<input type="checkbox"/> VT313	A	Confirmation Is	Open	1
<input type="checkbox"/> VT697	A	Choice, The	Open	1

Record: 1 of 6 No Filter Search

Check-In Cancel Batch Scan.... Manual Check-In...

Check-In by Client: Enter the Client ID and check the boxes next to each item returned, then click "Check-In".

Batch Resource Check-In

Please use your barcode scanner now to scan one or more resources you wish to check-in. The resources can be from different invoices and clients. When finished scanning all resources, press the Check-In button below to processed the scanned entries.

READY FOR BARCODE...

Scanned Resource Client ID

Remove from list

Check-In Cancel Check-in by Client... Manual Check-In...

Batch Scan (if barcoding enabled): Scan the barcode of each resource that you want returned, then click "Check-In"

Financial Manager

ReQuest Manager allows you to set up and track usage and postage fees for the use of your resources. Before using these features, however, you must set up a few things in Administration.

Prepare Accounting Information

First, go to Administration / Data Lists and click on the "Account Numbers" button to bring up the Account Numbers screen:

Account Numbers

RQM can maintain some basic accounting of your transactions if you enter account numbers for the activities.

Acct Num	Acct Title	Active
1111	Non-member Video Usage	<input checked="" type="checkbox"/>
2400	Accounts Receivable	<input checked="" type="checkbox"/>
*		<input checked="" type="checkbox"/>

You should enter account numbers by which you will track money received for rentals and shipping costs. You will later assign one of these account numbers to each Media Type. At a minimum, simply enter a single account number, such as "1111" to use as a placeholder account number if you do not wish to keep detailed accounting information.

If you wish to keep a separate account for tracking positive client account balances, enter an account for this and select it in the list "Account for client credit". Otherwise, select an existing account number for client credit from the list. This entry is required in order to enter payments in the Financial Manager.

If you wish to track postage fees by a separate account number, you can create an account for that in the list above and select the box labeled: "Use separate account for shipping charges". Select your shipping account in the drop-down box to the right.

Use the "Reset all client accounts" button if you would like to reset client credit balances to zero. This will not erase any outstanding fees owed, but will only erase any client credit balances that may exist.

Assign Account Numbers by Media Type

Next, while in Administration, click on the Media Types tab, and for each Media Type you have entered, select an account number to use for fees received. More than one Media Type can be assigned to each account number.

You can also assign default use fees for each Media Type for each level of membership. These are only default fees, and you can assign specific use fees for specific resources later. You can also change the fees directly on each invoice.

<div>RQM Dashboard Database Administration Media Types</div> <div> Resource Media Types Edit the list of possible resource media types below. You can set default loan lengths and default fees for each type as well. </div>															
Abbr./ Full Name	# Res	Unit Len.	Acct Num for fees	# Days to loan (def.)	Lev N	Lev B	Lev O	Usage/Postage Fees for member levels							Full Name
					Lev P	Lev 4	Lev 5	Lev 6	Lev 7	Lev 8	Lev 9				
B Books	3531	Pages	1111	30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Books
			Export to Web/RQC?	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
C Cassettes	336	Mins	1111	14	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Cassettes
			Export to Web/RQC?	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
CD Compact Disc	56	mins	1111	30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Compact Disc
			Export to Web/RQC?	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
CDR CD Rom	28	mins	1111	28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	CD Rom
			Export to Web/RQC?	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
CR Curriculum	89	Pages	1111	30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Curriculum
			Export to Web/RQC?	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
DVD Digital Video Device	291	Mins	1111	14	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Digital Video Device
			Export to Web/RQC?	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
G Games	20	Pages	1111	30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Games
			Export to Web/RQC?	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
K Kits	155	Pages	1111	30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Kits
			Export to Web/RQC?	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
PR Printed Resources	1015	Pages	1111	30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Printed Resources
			Export to Web/RQC?	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

That's all! You should be all set up to track usage and postage fees.

Entering Client Payments

From the Main Menu, click on "Financial Manager" to enter client payments you have received:

Payments entered are collected in "Deposits" which remain open until you print a deposit slip for them. You can view the current open deposit or previous deposits, and also print reports of payments received.

Click the "Enter Payment" button to bring up the following screen:

Seq	Client	Check #	Date	Amount	Remarks
23	Miscellaneous Transac	99999	2/11/2009	\$80.00	

First, enter the Client ID or use the button "Search Client..." to search for the client by name.

You can enter the payment in the very last row of blank boxes. The list above it shows previously entered payments in the deposit.

After entering the check number, date, and amount, click on OK to bring up the next screen:

Enter Payment

Client ID: 99999 Name: Transactions for Non-Members Community: Deposit #: 06005

Seq	Client	Check #	Check Date	Amount	Remarks
24	Miscellaneous Transac	856	11/17/2009	\$115.00	

Unpaid Transactions:

Paid	Acct Num	Invoice	Fees	Resource	Usage	Postage	Overdue
\$0.00	1111	090108	\$10.00	VT2550: Biology and	\$10.00	\$0.00	\$0.00
\$0.00	1111	090108	\$10.00	VT2551: Biology and	\$10.00	\$0.00	\$0.00
\$0.00	1111	080420	\$10.00	VT1569: Sex, Drugs,	\$10.00	\$0.00	\$0.00
\$0.00	1111	080341	\$10.00	VT2189: Fish! Sticks:	\$10.00	\$0.00	\$0.00

Amount disbursed: \$0.00
Amount remaining: \$435.00 (\$115.00 check + \$320.00 account credit = \$435.00)

OK Cancel

On this screen, you must split the check amount among the various transactions with outstanding fees. Enter the dollar amount to apply to each transaction in the "Paid" column, and optionally set the account number for the transaction. When you have finished, press OK.

If you do not apply all of the payment to transactions, you will be prompted to apply the remaining amount to other accounts (not associated with a transaction) or to apply it to the client credit. If the items for an open invoice have been returned, recording the payment of all fees owed on the invoice will mark the invoice as closed.

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.

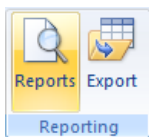
Ways of Sending Emails

- 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!

Reports



To print reports from any area, first search for the items you wish to view, then while viewing the results, click the "Reports" button on the Data ribbon.

For example, to get a report of all DVD resources in the database, go to Resources, select DVD from the Media Type list, and click Search. Once you are viewing the results list, click on the Reports button.

A list of reports for that area will appear. For some reports, you may be able to specify other criteria or sort records by different fields. You may enter a title and subtitle for the report, and also specify a starting page number. This last feature is useful if you will be

appending two reports together into a single report. Just set page offset to the number of pages in the previous report and the page numbering will continue from there.

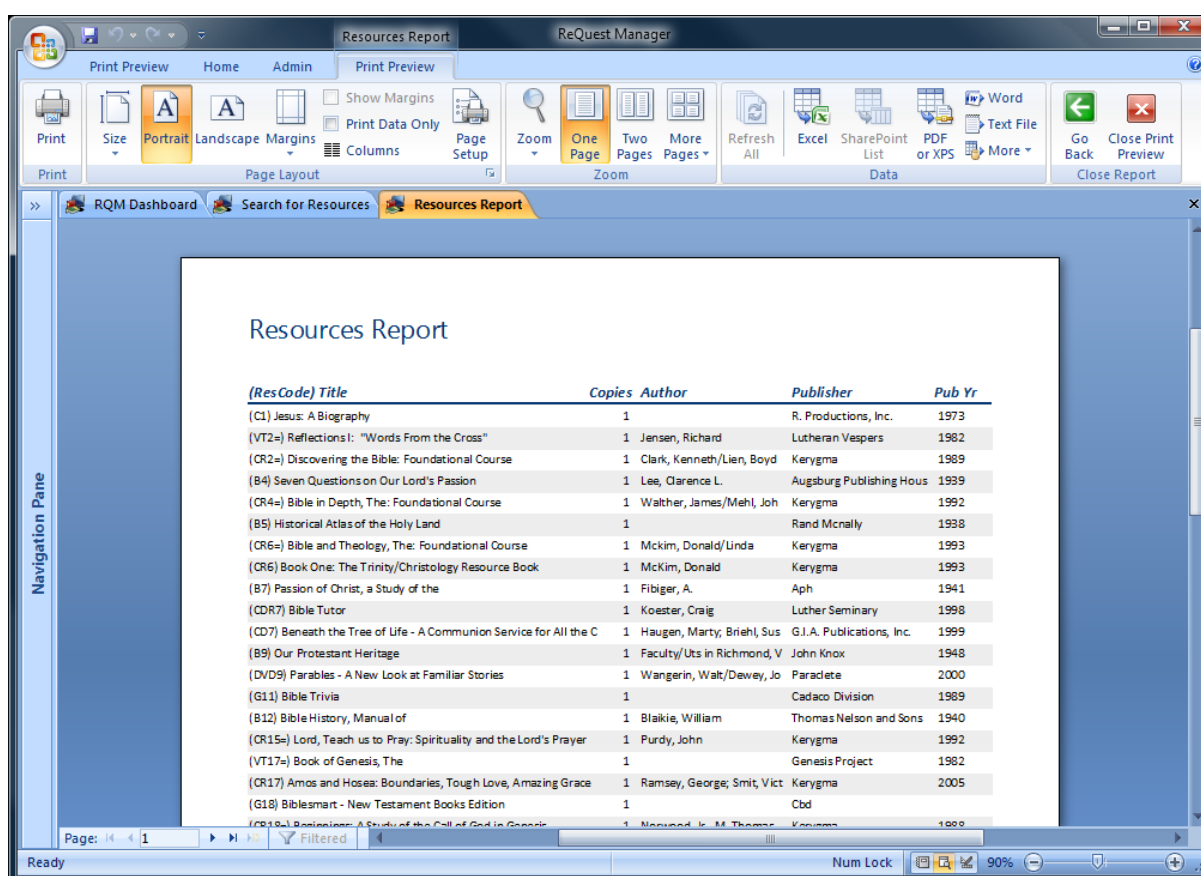
When you are ready to view the report, select "Print Preview" to view a preview of it on screen before it is printed. Select "Print!" to print it directly and skip the preview screen.

Exporting Resources

Resource centers often want to export their resource data for use in other programs (custom labeling software, for example), or for publication to a website. There are several methods for exporting your data from RQM. The benefits and drawbacks of each are discussed below.

Report Export

When you view Print Preview for any report, there are a number of built-in exporting options, including export to PDF, to Word, or to Excel.



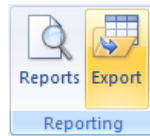
Print Preview view for a report

The exports to Word or Excel are built-in functions of the Access runtime engine, on which ReQuest Manager is based, and are very limited. For example, if you export to Word, the line breaks and page breaks are hard-coded, meaning that the data will not naturally wrap around paragraphs or pages if you re-format the data.

This method is an easy way to get the raw data out, but often requires a good deal of manual reformatting to get it to look the way you would like.

Export to Mail Merge

Another way to get the raw resource data out is to use the Mail Merge function. From the Search Results screen, choose the Data ribbon icon marked "Export":



You will receive two or three options (the third is hidden if you do not have barcoding enabled):



Choose the first option, "Export data for use in a mail merge".

You will see the following screen:

From here, you can choose the fields that are available for export. Use the arrow buttons to select them and the Up/Down arrows to arrange them in order. Next, choose up to three sort fields, and then finally, choose an output filename (use the "..." button to open a File Save dialog).

The resulting file will be a straight text file with comma-delimiters. This format can be imported into Excel or used as a Word mail merge file.

Export to HTML

The third and final export option is the most sophisticated and flexible. It is ideal for quickly outputting a web page of your selected resources (for example, "New Resources in June": search for all resources added from June 1 to June 30, then choose a catalog format and you're done!).

Export to HTML is a sophisticated data export procedure. It is able to read a specially-formatted template file that describes the desired format of the data file and produces the appropriate output. This process is far better than the built-in function "Export to Word" because unlike the resulting *.rtf file using the "Export to Word" routine, the data file produced by this method does not contain hard line-breaks or page-breaks that makes editing impossible. The resulting file here is generally intended to be imported into another application, such as a word processor.

This export method is the most flexible but also requires some advanced HTML skills if you wish to modify the standard templates included with RQM. To start, choose the second option from the Export Data dialog (above), marked "Export data to HTML or other format":

Export Template Format

This process will export your current data search set to an external file using ReQuest Manager's special template format. Templates allow you to customize the file format in which your data will be exported. HTML format is often the simplest format to use because it can be read and imported easily into most common applications. See the ReQuest Manager documentation for information on creating template files.

Enter the template filename to read and the output filename to write to. You may also press "... " to browse for the files.

944 Resources records selected for export

Sorting

Sort by: [] Ascending []

then by: [] Ascending []

then by: [] Ascending []

Template filename: C:\prog\RQM\Apps\Templates\Catalog Children.tpl []

Output Filename: D:\My Documents\Resources.html []

☒ Open file after export

Export... Cancel

You can specify the sort order up to three levels of sorting.

Export to HTML uses template files to describe the format of the output file. There are several templates included with ReQuest Manager; click on the "... " button next to "Template filename" to browse for your desired format. There are several catalog formats, each with different information or formatting to choose from. You can also edit or create your own (see "Template File Format" below).

Finally, choose the output file. All of the sample files are in HTML format, so you will likely want to choose a filename ending in .html or .htm.

Click on "Export..." to complete and open the HTML file in your browser.

Once you have created the file, you can easily edit it using Word (or other word processor) or FrontPage (or other web page editor).

Step-by-step Process for a Full Catalog in Word Format

This section describes the exact procedure for exporting resources in a full catalog format to Microsoft Word. If you do not have Microsoft Word, the steps described below may be slightly different in your word processor.

1. Open ReQuest Manager, go to Resources, and search for the resources you wish to export. For a full resource catalog, leave all criteria blank and press the Search button.
2. While viewing the resulting list of resources, click on the File Menu and then Export Data.
3. On the "Export Data" menu, choose the second button: "Export data to HTML or other format".
4. You should now see the "Export Template Format screen. You may choose sorting parameters from those in the three lists. For example, you may sort first by media type and then title.

5. Next to the box "Template filename", click on the "..." button to browse for the template file "catalog.tpl" which should be located within the Templates folder in your ReQuest Manager client folder.
6. Next, enter a filename or browse for a location to save the output file. Your file will be an HTML file in this example, so it is recommended the filename end in ".html". In this example, name the file "catalog.html".
7. Click the "Export..." button to start the process. It may be a rather lengthy procedure, but you can cancel it at any time by clicking the Cancel button on the Progress screen. Exporting is quite slow due to the amount of computation involved in translating the template files.
8. When the data export procedure is done, the file will open in your browser for you to view. Check that the result was what you intended, then close the file and proceed to import into Word.
9. Run Word. Click on the File menu and then Open. In "Files of Type", make sure All Files is selected. Browse for the file "catalog.html" and click Open.
10. You have now opened the HTML file in Word. The next step is to save the document in Word format. To do this, click on the File menu and then "Save as Word Document". Save this as "catalog.doc".
11. You are now ready to start editing the catalog in Word. We recommend that you prevent the first line of a resource from being separated by a page break from the rest of the resource. To do this, select all the text in the document by clicking on the Edit menu and then Select All. Next, click on the Format menu and click on Paragraph. On the "Line and Page Breaks" tab, check the box "Widow/orphan control" so it is marked.
12. You are all set to finish the editing! You may run spell-check to check for typographical errors, set multiple columns, adjust the page margins, adjust the fonts, etc.

Template File Format

ReQuest Manager data export reads a specially-formatted file called a template file, generally with the file extension *.tpl. The resulting data file can be any text format, but HTML is especially recommended because it can be read by many applications and it uses simple formatting commands. The sample templates installed with ReQuest Manager generate HTML by default.

Editing a template file requires a basic knowledge of HTML editing. Use a text-editor such as Notepad to edit the template files. It is not recommended to use a graphical HTML editor such as FrontPage because it will not understand the special tags that are used by data export.

The data export procedure looks for special tags (similar to HTML tags, but unique to RQM) marked by brackets (< and >) and a dollar sign (\$). Keywords in brackets denote conditional tags or data loops while keywords preceded by a dollar sign denote data fields. Additionally, certain header tags are used to set export and formatting options.

Data Fields

Special keywords are recognized by ReQuest Manager as fields. When processing, these tags are replaced by actual data values. For example, the tag
\$ResTitle

will not literally be written to the export file, but instead will be replaced by the actual resource title of the resource being exported.

Generally, case does not matter for data field tags. That is, \$restitle and \$ResTitle are equally valid tags and are identical. There is a special exception for tags that are all upper-case. In this case, the data value substituted will be formatted in upper-case letters during export. \$RESTITLE would generate titles completely in capital letters.

The following is a list of valid keyword tags for use in data fields (\$ResCode) and data loops (<ResCode>).

Keyword	Field
ResID	Internal resource ID
ResCode	ResCode
ResTitle	Title
ResAuthor	Author
Description	Description
ResIsParent	Only for conditional loops. The section will be processed if the current record is a parent resource.
ResParentID	Internal resource ID of the parent resource
ResParentTitle	Title of parent resource. Not valid for conditional loops, use ResParentID instead.
ResParentCode	ResCode of parent resource. Not valid for conditional loops, use ResParentID instead.
ResParentSeq	Series number
ResPublisher	Publisher
ResPubYr	Publication year
ResVendor	Vendor
ResNumItems	Number of Items contained in resource
ResPurch	Purchase date
ResCost	Purchase Cost
ResLength	Resource Length. See LengthUnits below.
ResAge	Summary of resource ages
ResLocation	Location
ResFormat	Resource Format
ResCopyright	Resource Copyright
ResISBN	ISBN or ISSN number
ResFee	Fee
ResNeedsReturn	Does the resource need returning?
ResCodePrefix	Short version of Media Type
MediaType	Long name of Media Type
ResNumCopies	Number of copies of the resource
ResDateCreated	Date Created
HeadKey	Resource heading key (i.e. A03)
Heading	Resource heading title
HeadSub	Sub-heading title
LengthUnits	Units of the media type. For example, use \$resLength \$LengthUnits to give "51 pages" or "60 minutes".

Keyword	Field
Subject	Used only within a <subject> </subject> loop, fills in each subject associated with a particular resource

Conditional Tags

A conditional tag is only processed if the keyword contains meaningful data in the current record. You can make conditional tags out of any data field keyword. For example, the section:

```
<resAuthor>Author: $resAuthor</resAuthor>
```

will print the "Author:" string only if \$resAuthor is not empty. This is useful for omitting certain information depending on whether a field has data or not. Other keywords can be included within these qualifying tags. For example,

```
<resAuthor>Author: $resAuthor Publisher: $resPublisher </resAuthor>
```

is valid. Since it is included within the <resAuthor> section, the publisher information will only be printed if the Author field is not empty.

Data Loops

The general format of a template file will be:

```
headers
<record>
  resource details
</record>
footers
```

The tags <record> and </record> mark a repeating field: for each resource in your selected records, the *resource details* inside the data loop will be processed. The *headers* and *footers* are only exported once, at the top and bottom of the file, respectively.

Additionally, within a <record> loop, two special data loop tags may appear.

<resChild> and </resChild>

These tags designate a loop through all children resources (if any) of the current parent resource. All data field tags within the <resChild> loop will be replaced by records with data for each of the children. <resChild> loops should be completely contained within the <record> loop.

<subject> and </subject>

These tags designate a loop through all subjects (if any) for the current resource. The only tag that should appear in this loop is \$subject, which is replaced by the subject associated with the resource for each repetition of the loop. No other tags or loops should appear within this loop, or unpredictable results may occur.

Header Tags

<html>

If you are outputting to HTML, be sure to include the normal <html> tag in the header section of the template file. This will tell other applications that you are using HTML, but additionally ReQuest Manager will format certain special characters in ways appropriate for HTML (i.e. "<", ">" and "&"). If these characters are included in your resources and you do not use the <html> tag, some data may be incorrectly displayed or truncated.

<includeChildren>, <noIncludeChildren>

If you are using a <resChild> loop, you may specify either <includeChildren> or <noIncludeChildren> in the header section.

If you include children, the children resources will appear as individual entries, as well as within the series listing under the parent resource in the <resChild> loop. For example, you may choose only to include title and resource code under the parent listing and give a full listing for each child resource separately.

If you do not include children, the children resources will appear only in the <resChild> loop you have set up. They will not appear as individual resources in the listing.

White-space

So-called "white-space" characters include spaces, tabs, and paragraph breaks. In creating HTML, be sure to use the appropriate symbols for these white-space characters:

 	Non-breaking space
 	Line break
<p> and </p>	Start and end paragraph

Browsers interpreting HTML usually condense all other white-space characters in the HTML into a single space character, which may cause difficulty for reading.

Conclusion

The ReQuest Manager Data Export feature allows great flexibility in file formats, allowing the advanced user to customize data exports exactly to their needs. It is a much improved method of data export over the built-in function "Export to Word," due to the inherent limitations of the built-in function. The resulting data files from Data Export can be used in a great variety of applications and further edited and formatted conveniently in them.

Maintenance of Data File

Your data file contains all the information about your resources, clients, and transactions. It is essential that you follow a regular maintenance schedule to keep the data file safe, healthy, and efficient.

There are two specific procedures that should be done on a regular basis, usually once a week, and one that should be done every couple of years.

Backup

It is extremely important that you back up your data regularly (daily or weekly!). If something catastrophic should happen to the data file or server computer, there is no other way to recover your data apart from a backup.

Always maintain at least two recent backup copies of your data in case of computer or software failure and occasionally test the backup copies to make sure the backups are readable (backup tapes or CDs can go bad!). Many centers locate their main data folder on a server that is automatically backed up every night.

What to backup

The data file is "rqm4data.accdb" – this file at a minimum should be backed up regularly. For easier restoration in case of trouble, you may wish to back up the entire RQM server folder.

To locate your RQM server folder, click on Help/About ReQuest Manager. The line "Server RQM folder" is the folder you should backup frequently.

There is no built-in backup utility in ReQuest Manager. However, every version of Windows has a backup utility built in. You may use this or any commercial backup package (see the instructions for that package for details).

Automatic Data File Backups (New in 4.0)

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.

Restoration of data

The actual data file for ReQuest Manager is "rqm4data.accdb". One can recover all data from this single file. In the event that you cannot restore the entire ReQuest Manager folder, you can re-install ReQuest Manager, then copy your backed up file "rqm4data.accdb" into the ReQuest Manager folder, overwriting the blank default file. This will restore your data completely.

Save Files

Several procedures within RQM, such as updating the data version, cause the data file to be backed up automatically to a unique name ending in *.sav. After some time, these save files can occupy a large amount of disk space if they are not deleted.

The names of the files are of the form:

rqm4datammddhhmmss.sav

where the time and date are encoded as follows: mm = month, dd = day, hh = hour, mm = minute, and ss = second.

You may be asked to restore from one of these backups if a data update caused a problem with your ReQuest Manager system or other failure occurred, but it is usually safe to delete the files after several days have passed and you are certain RQM is working properly for you.

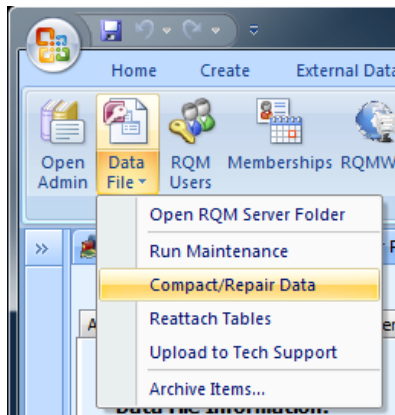
Compacting

Compacting of your data file is quick and easy and should be done about once a week. Compacting guarantees that the data is in its most efficient and healthy state.

As you work with the data in your database file by adding or deleting records, the size of the file may grow larger than the actual amount of data in it. For example, if you delete a record, that space may not be reclaimed for more data and may instead sit vacant, occupying valuable disk space. Also, ReQuest Manager stores your records in a certain order to optimize performance. Changes to the data may result in records no longer being stored in optimal locations, and database performance may suffer. Compacting the database file will reclaim wasted space and re-order your records so that the database will continue to operate efficiently.

To compact your data file, first make sure no one else is currently running ReQuest Manager.

Click on the Admin ribbon and choose the “Compact/Repair Data” option from the Data File menu:



You can also go to the "Data File Utilities" tab of Admin to access the compact function as well as additional data utilities:

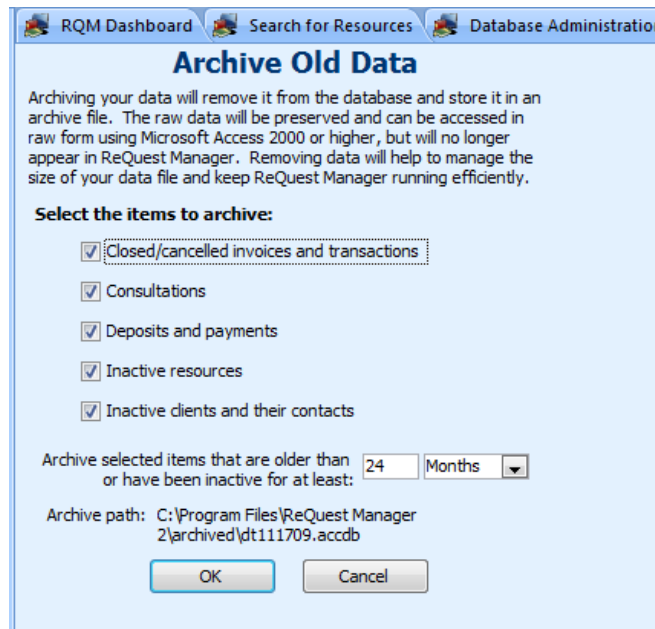


Click on the button labeled "Compact Data File..." After a few minutes, the compaction will be complete and you may continue using ReQuest Manager normally.

Archiving Data

After you have several years' worth of invoices and transactions, you may wish to archive some of your older data to a separate file so that your main data file does not grow too

large and inefficient. To archive your data, go to Administration / Data File Utilities and choose "Archive Data". You will see this screen:



You can choose which items you wish to archive and how many months of data to keep in the system. Please note that once the data is archived, you can no longer view it through RQM, but can access the raw data using Microsoft Access. The Archive process cannot be undone except through a restoration from a backup file.

RQMWeb Hosting

This online, searchable web catalog allows your users to browse and request resources. Your catalog data is hosted on our servers and requires almost no setup by you – just direct your users to the catalog at the link we provide. This feature is available on an annual-subscription basis; information available at: <http://www.requestmanager.org/hosting.asp>

This hosting is not designed to replace your current website host, but to supplement it. We will provide a link that you can provide on your center's website that will open up the search page. When your users click on that link, they will see a search page for quickly and easily searching your catalog.

To view a demonstration of RQMWeb ASP in action, go to the demo search site (<http://rqmweb.requestmanager.org/search.asp?q=demo>) and see how easily your center's users could be searching your own catalog!

We can work with you to customize the look of your online catalog to match the colors and style of your existing website. Also, if your website uses frames, the online catalog can be brought up inside a frame, so that your users never actually leave your website.

Please go to <http://www.requestmanager.org> or contact us at support@requestmanager.org for pricing information and further information.