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Insignia Library system

Version 3.0

User Manual

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Welcome

Welcome to Insignia Software. Thank you for choosing the Insignia Library System for your automation needs. At Insignia Software we strive to exceed the expectations of our customers.

We listen to our customers and work very hard to provide the features they want. Innovation and customer satisfaction is what we strive for at Insignia Software. We shall continue to provide complete, cost effective solutions to our customers through innovation.

Thank you again for choosing the Insignia Library System. Your complete satisfaction is important to us and we value your comments and feedback.

Insignia Software offers the following products:

1. Insignia Library System
2. Insignia Student Information System
3. Insignia Media Manager
4. Insignia Z39.50 Gateway

Setup

Insignia Library System Setup

Unless instructed accept the default prompts during the setup

Check List:

1. Close/Disable all programs including antivirus program during the installation
2. You must login with administrative privilege to install .Net Framework
3. You must have server service running on Windows 2000+ computers (MSDE installation will rollback without server service), this service can be installed by installing the “File and Printer Sharing for Microsoft Networks”, see instruction below on how to install this service
4. You must have Microsoft Internet Information Server installed on the server for Web OPAC, if you are not sure how to install Microsoft Internet Information Server, have Windows 2000/XP CD available and call Insignia Software or follow instruction in section “Installing Internet Information Server.”
5. Static IP address and Unique computer name for the server is required
6. You must have Internet Explorer 5.5+ installed
7. Sound card with drivers installed for multimedia and “ShowMe” videos
8. Latest service pack for operating system (Windows 2000/XP)
9. Operating System supported: Windows 98/2000/Windows XP, Recommended: Windows 2000/XP
10. To use Z39.50 client you must have Internet access and be authenticated by the firewall (if any)

Installing Internet Information Server:

1. Click on Add/Remove programs
2. Click on Add/Remove Windows components
3. Select IIS
4. Click on Details
5. Uncheck the following if available: FTP, Visual Interdev, SMTP.
6. Click “Ok”
7. Click “Next”
8. After installation reboot the computer

Installing File/Print Sharing for Microsoft Networks:

1. Click with right mouse on “My Network Places” and select “properties”
2. Double click on the “Local Area Network”
3. Click on “Properties”
4. Click on “Install”
5. Select Services and click “Add”
6. Select File and Printer sharing for Microsoft Network
7. Click “OK” to complete the install

Install Client for Microsoft Network:

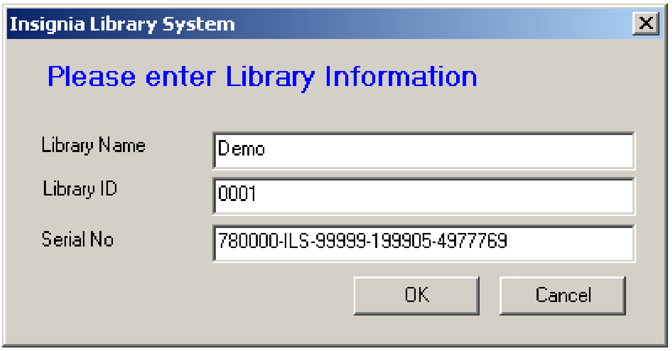
1. Click with right mouse on “My Network Places” and select “properties”
2. Double click on the “Local Area Network”
3. Click on “properties”
4. Click on “Install”
5. Select “Client” and click “Add”
6. Select Client Services for Microsoft Network
7. Click OK to complete the install

You will also need to make sure you are running Dot NET Framework versions 1.0 and 1.1. It is also recommended you apply any critical patches from Microsoft.

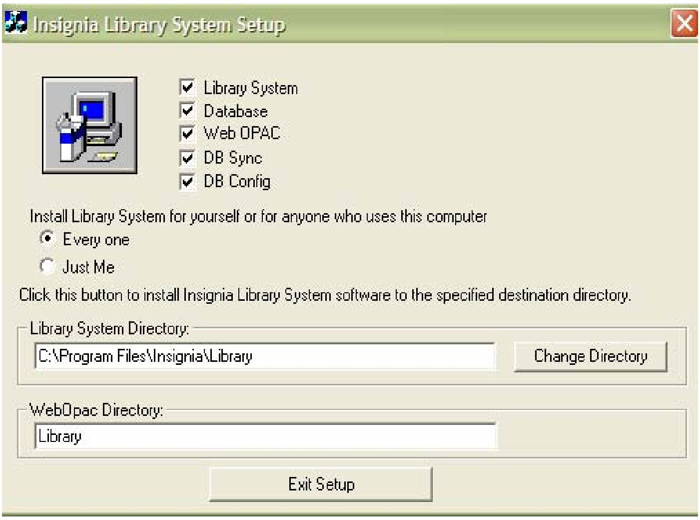
Installing Insignia Library System:

1. Insert CD

2. Setup should start automatically, if it does not, double click on ILSSetup.exe on Insignia Library System CD
3. Setup may prompt to install the .net framework, click Yes and if prompted, reboot the computer and start the setup again
4. Read the License Agreement and click on “I Agree” to accept the terms of the agreement
5. Enter your Library Name, Library ID and serial number

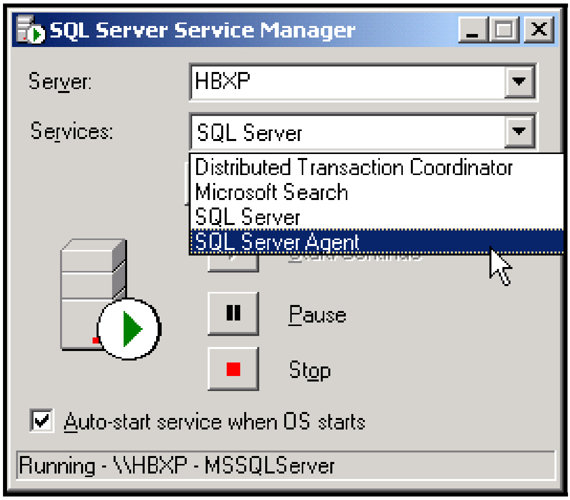


6. Select the options needed as shown below
7. Library System: If you want to install the library system
8. Database: If this machine will be the server
9. Web OPAC: If you want to install Web OPAC



10. DBConfig : To Install Database Configuration Tool
11. DBSync : To Install Database Sync Tool
12. Click on setup icon to start the installation
13. You may be prompted to install .net framework, click "Yes"
14. You may receive the following message to restart, click "No"

15. If computer reboots, restart install process Initial Install screen
16. Click on Programs >> Startup >> Service Manager, select service "SQL Server Agent", select "Auto-start …" and click on start, as shown below



17. When setup is complete reboot the computer and login
18. To access Insignia Library System over the web open your Web Browser and then type in the address http://computername/library

How to Uninstall

To uninstall, go to add/remove programs in the control panel and remove MSDE. You will also need to select and remove the Insignia Library System

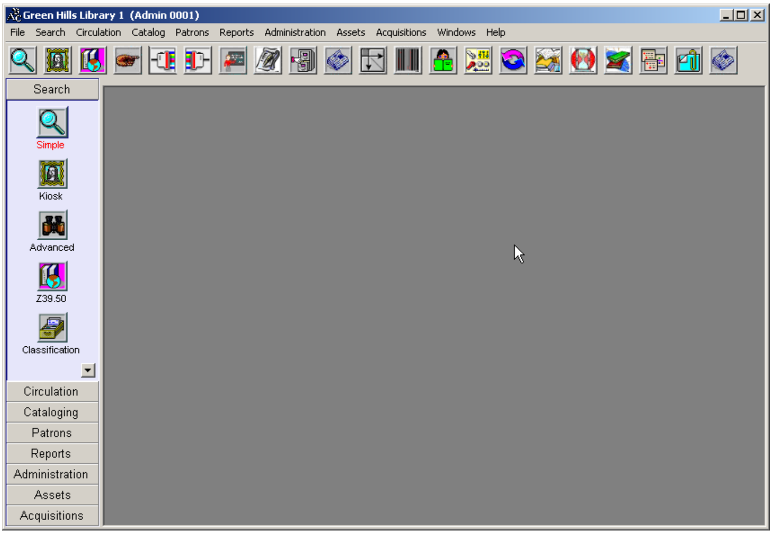
Getting Started

1. To start the Insignia Library System, follow these steps (if you have taken the default setup configuration
2. Click on “Start”
3. Select Program > Insignia > Insignia Library System
4. When you start the Insignia Library System you will see the login screen

5. Enter the Patron ID “admin0001”, (where the last 4 digit corresponds to your library id in the union)
6. Enter the password
7. Assuming the information is entered correctly, the system will open.

<u>Tips on using the Insignia Library System</u>

Using the Navigator Toolbar



The Navigator is designed to provide easy access to different functions in the library system. It allows staff to access most functions in the library system with a maximum of three mouse clicks.

On the left side of the Navigator is the list of modules in the Insignia Library System. When you click on one of the modules, you see the features in that module under its heading.

Users can navigate to any module of the application from the navigator toolbar. Simply click on the main module heading to see all of the corresponding features. You can turn the Auto Hide feature on by right clicking the Navigator toolbar, then left clicking the Auto Hide feature. You can also switch between large icons and small icons.

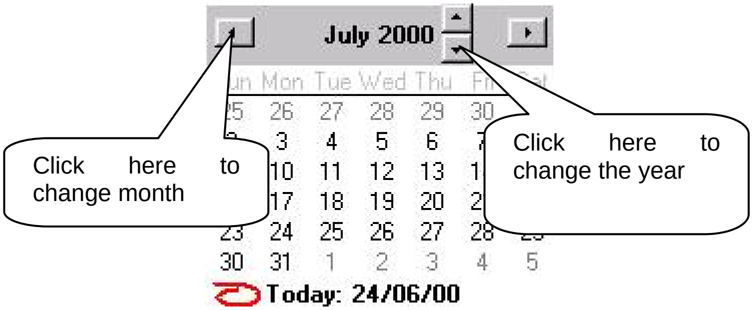
Escape Key
When you press Esc in Edit mode, you are prompted to save or ignore changes. If you are in Read mode, then the current screen is closed. If you are in Search mode, the current criteria are cleared and if you press Esc again the screen is closed.

Show Me
The Insignia Library System provides "Show Me" demos for all tasks in the library system. ShowMe allows staff to learn how to use different features in the library system. When a user clicks on ShowMe, a video demonstration is played with audio describing how to use the selected feature. To learn what to do in any given module, just click on the "Show Me" button.

Help File
The Insignia Library System provides a help file for all the screens in the library system. To open the topic in the file, press F1.

Update
Clicking on this feature in the help menu will cause the program to close and go through an update cycle. This only should be done under supervision or with help from Insignia Software

Calendar

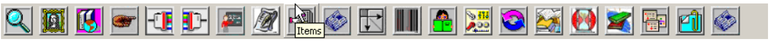


To change a date, click as shown below and then select the date

Quick Card
Many fields in the Insignia Library System have associated Quick cards explaining the function and providing examples
Quick Card can be turned on or off by pressing Ctrl+Q

Spell Check
The Insignia Library System has a built-in spell check. Wherever a user enters data in the form of notes, a spell check is provided. When a word is misspelled, the color will change to red. To verify the spelling, click on the word in question with the right mouse button and you will see the list of suggested words. You can also start spell check by pressing F7

Toolbar



You can customize the top toolbar with the most commonly used features from the Navigator Toolbar. To add an icon, just drag an icon while holding the left mouse from the navigator and drop it on the top toolbar. To remove an icon from the top toolbar, click it with your right mouse button and then click "OK" to remove it

The program automatically remembers the configuration and attempts to restore it whenever the program is started again

Shortcuts

The following Shortcuts are used in the Insignia Library System.

- F1 - Help
- F2 - Tool Tip
- F3 - Find\Add Item
- F4 – Loan History
- F5 – Check In
- F6 – Check Out
- F7 - Spell-check
- F8 – Simple Search
- F9 – Change Library
- F10 – Homeroom Check Out
- F11 – Renew
- F12 – Logout
- Alt+F8 – Advanced Search
- Ctrl+F1 – Staff
- Ctrl+F – Configuration
- Ctrl+E - Find/Add Equipment
- Ctrl+M – Find\Add Serials
- Ctrl+Q - Quick Card
- Ctrl+R – Patron Reports
- Ctrl+T – New Item from Template
- Ctrl+Z – Z39.50 Search
- Ctrl+Shift+O - Find/Add Order

Right Mouse Click

On most screens, users can press the right mouse button to invoke relevant commands.

Sorting Data in Grid

To sort data in a grid, select a row (if one is not already selected) and click on the column header you would like to sort by. The data will be sorted in ascending order. If you would like to sort by descending order, click on the column header a second time

Edit Mode
When you are in edit mode it is important to remember the following:

1. The background color of all controls is white
2. The field that is in focus has its caption underlined and its color changes to blue, making it easier to see where the cursor is
3. You cannot switch to another screen without saving or canceling the current screen
4. Any caption that is bold means this information must be entered in the field before the record can be saved
5. To expand the notes just double click on it

Multilingual
The Insignia Library System can support several languages. To switch to another language click on “Help” in the menu bar and select the preferred language from the “Language” sub menu

Item and Patron History
The Insignia System is configured to hold Item and Patron Information within the database even after the patron is removed. This way you can easily track passed removed items or problems that arise within the system

Offline Checkout
The program automatically detects if you go OFFLINE and will launch the Offline Circulation Module

Marc Import Quality Check
Our updated Marc import module now has ADVANCED Marc Record checking and will warn you when inferior quality records are detected

Web Link dead link detect
The Library System scans your 856 tags, to detect dead or bad links

Automatic Emails
Added configuration to allow emailing patron when reserves become available

Search History
Searches are logged for catalog searching and have related reports

Locking Items
Items can be locked, by doing this when you use the import program it won't update locked items

Item and Patron Archiving
Items and Patron archiving feature has also been added. This will allow any Items or Patrons that are deleted to be kept in an archived status. This allows you to review patrons or items before final deletion. This feature can be turned on and off in Custom Settings.

Search

The Insignia Library System has seven different search engines. Patrons can find items not only in the local library, but also in other libraries that are part of the union, and in all the libraries in the world that are Z39.50 compliant. Search engines available:

1. Simple Search
2. Kiosk Search
3. Advanced Search
4. Z39.50 Search
5. Classification search
6. Authority Search
7. Insignia Search

Regardless of which search mode is used, the interface is intuitive and user-friendly.

Important Features

There are some important features that accompany these search engines:

1. Favorites List
2. Copy List
3. Union/Local
4. Filter

Favorites List

The Favorites List is used to keep track of items that are of interest to the patron. Patrons select an item from the search results list and then click on the "Add to Favorites" button located on the lower left side of the window. If patrons wish to move all the items from the search results list to the Favorites List, they may right-click the mouse and select "Add All to Favorites". Patrons are prompted to select a name for the Favorites List. They can choose either to add the current favorites to a list that has already been created, or they can create a new list.

Once the patron has created a Favorites List, they can view the list. To see the Favorites List, the user must click on the “Show Favorites” button, which will bring up a search box. Scroll down to find the desired Favorites List.

To delete an item from the Favorites List, the patron selects the item and presses the "Delete" key on the keyboard. To remove the whole list, right-click with the mouse and then choose “Clear My Favorites”. Patrons may print the Favorites List if they have permission (enabled in the Security function).

Union/Local

If your library is part of a union, you may select to search either the local library or the entire union by checking the appropriate box in the upper left-hand corner of the Simple Search screen. In Advanced Search, you may select one or more libraries from the list.

Copy Listing

The Copy Listing is shown on the lower grid in the search results window. It provides a list of locations for all the copies of the highlighted title.

Filter Search

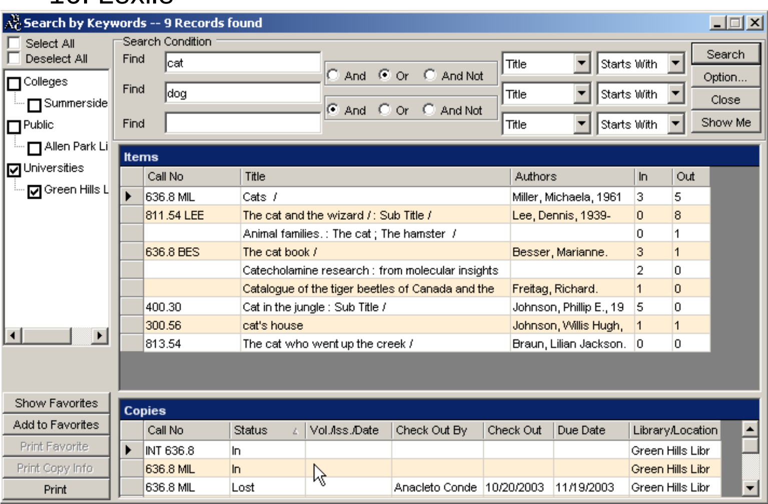
The Insignia Library System allows patrons to perform search-in-search. Placing a check in “Filter” on the bottom left of the Simple Search screen will apply any new search term to the results returned in the preceding search. In Advanced Search, the filter is applied automatically by adding additional criteria in the “Search Condition” column.

Advanced Search

Advanced Search is designed to assist patrons who want to use a variety of parameters to locate library materials more accurately. In Advanced Search, a patron can specify multiple search criteria using a Boolean interface. Up to three of the following can be combined in any search:

1. Title
2. Author

3. Subject
4. Keywords
5. Call Number
6. Barcode
7. ISBN
8. ISSN
9. LCCN
10. Publisher
11. Local Call Number
12. Series Title
13. AR Level
14. AR Test Number
15. AR Points
16. Lexile

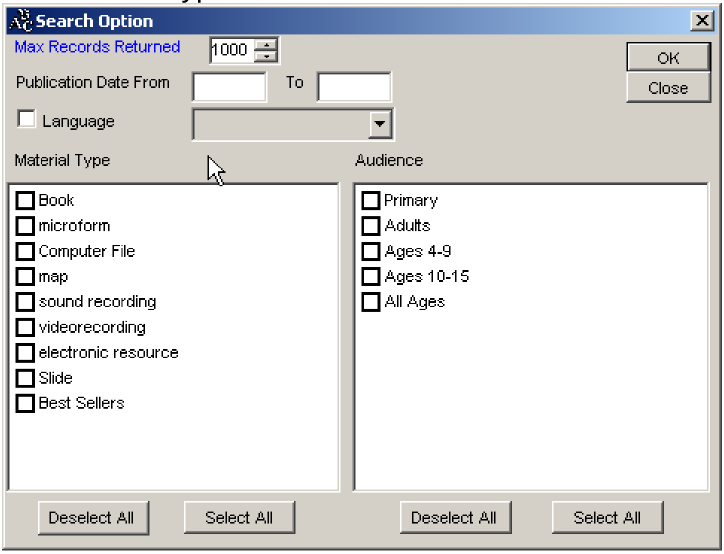


To find an item using "Advanced Search":

1. Click on "Search" on the toolbar on the left
2. Click on "Advanced"
3. Enter a search term (e.g. dog, cat, computer).
4. Select the parameter to search (e.g. Title, Call Number)
5. Select the manner in which the term is searched (e.g. Starts With, Exact Match, Any Match)

6. Specify up to two additional search terms and set the Boolean operators you wish to search by (e.g. and, or, and not)
7. If you are part of a union, check the libraries you would like to search on the left side of the screen.
8. Click on “Search”
9. To terminate a search in progress, click on the “Cancel” button
10. To view the copy information for an item, select the item in the grid. To view detail information for an item, double click on the item in the grid

Advanced Search Options
In advanced search, patrons can apply additional filters to refine a search. This can be done by clicking on the “Options…” button. Options that can be chosen are:
1. Maximum records returned (absolute limit is defined in configuration)
2. Publication year (range)
3. Language
4. Material type
5. Audience type

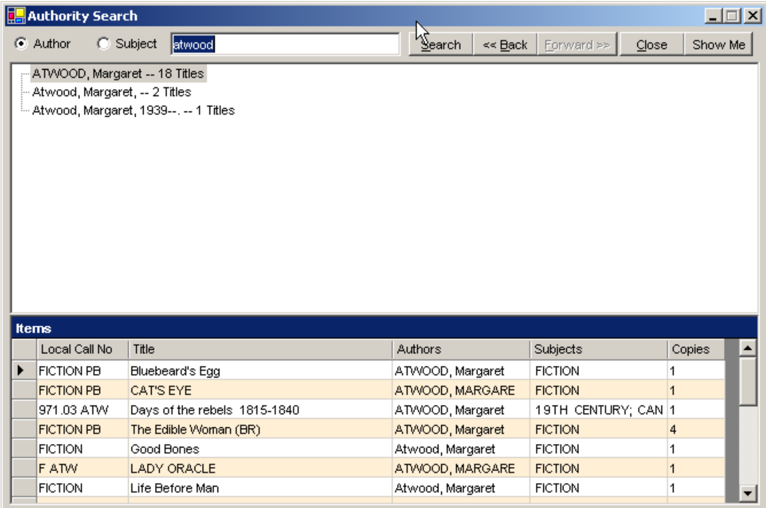


Check the option you wish to filter by and leave the rest as unchecked. Changes made here are temporary and are lost when the patron closes the advanced search form.

Authority

The Insignia Library System provides complete authority control, and allows browsing authority indexes for names and subjects. To search for books using authority search, follow these steps:

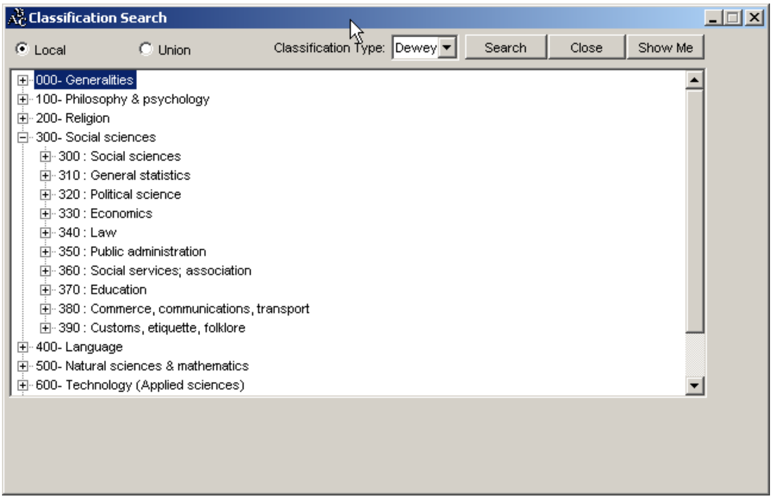
1. Click on “Search” in the Navigator Toolbar
2. Click on “Authority Search”
3. Select an index to search. (e.g. authors or subjects)
4. Type the term you wish to search for. Optionally, you can enter only a partial term in which case the system will go to the first term in the index that matches your entry
5. Click once on an index term to see items linked to that term in the item box display at the bottom of the window (“See” references are provided without requiring any further navigation)
6. Double click on an index term to see the MARC authority record for that term as well as the copy information



Classification

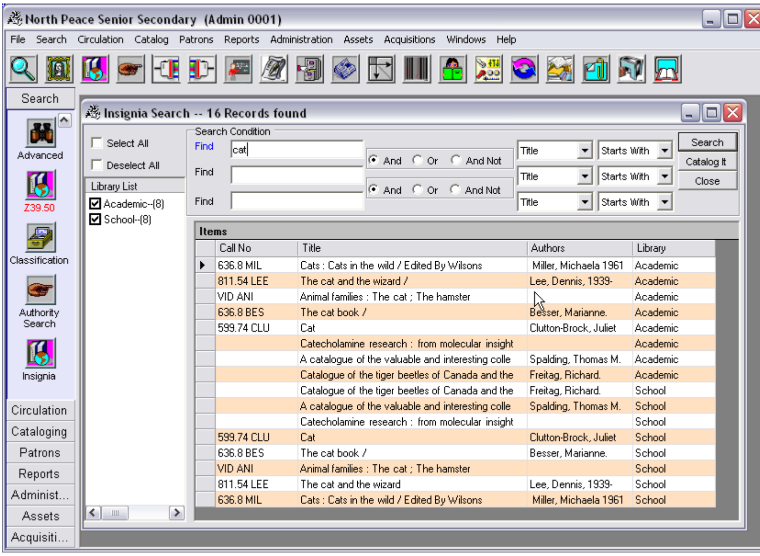
This search mode allows the user to virtually browse the shelf from their computer. The Insignia Library System supports both the Dewey Decimal and Library of Congress classifications. Items are assigned to the classification search index according to the item's Call Number. To find an item using "Classification Search", follow these steps:

1. Click on "Search" on the toolbar on the left
2. Click on "Classification"
3. To search the entire union, select "Union" at the top left
4. Click on the desired Classification area
5. Click on "Search"
6. To learn more about an item, double click on the item in the grid of search results



Insignia

Insignia search allows librarians to search other Insignia libraries, just as they could search other Z39.50 libraries. Librarians can also import MARC records from other Insignia libraries.
In the Custom Setting parameter “HideInsigniaSearch” turning this option “on” will result in the Insignia Library search being hidden from view.

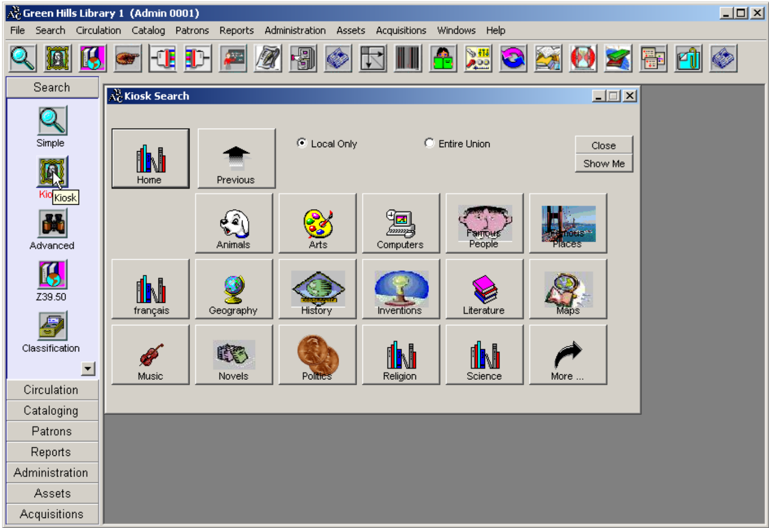


To find an item using "Insignia Search", follow these steps:

1. Click on "Search" on the Navigator toolbar
2. Click on "Insignia"
3. Enter the search term
4. Select the search parameters (e.g. title, author)
5. Specify up to two more search terms, and any Boolean operators needed
6. Select the libraries you would like to search
7. Click on "Search"
8. To learn more about an item, double click on the item in the grid. This information can also be acquired by right clicking the item, then left clicking on "View Detail"

Kiosk

Kiosk search provides a visual interface that allows young patrons to search for books by clicking on pictures. Kiosk can be completely customized. Staff members can Add/Edit/Delete categories and their associated pictures. More information about Kiosk is available in Chapter 6 - Administration.



To find an item using “Kiosk Search”, follow these steps:

1. Click on “Search” on the Navigator toolbar on the left hand of your screen
2. Click on “Kiosk”
3. To search the union, select “Entire Union”
4. Click on a picture that best represents the topic you are searching. Repeat this process until you find the right category
5. To learn more about an item, double click on the item in the grid. This information can also be acquired by right clicking the item, then left clicking on “View Detail”

The patron may also choose to view all items in a given category by clicking on the link “Show: Category” at the top of the screen

Simple

Simple search allows patrons to search for an item by keyword, title, author, subject or call number. It is as simple as selecting the type of search and typing a few words

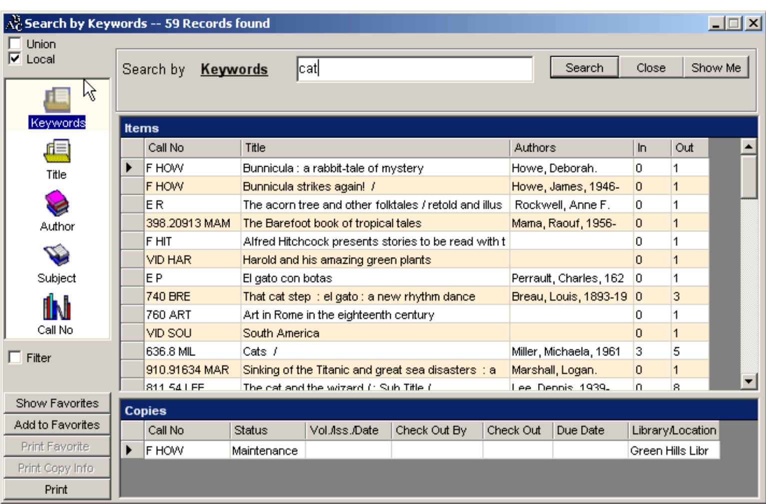
By Keywords
Searching by keyword returns items where the search term is found in title, author, subject, or notes.

By Title
Searching by title returns all the items that include the search term in the title field

By Author
Searching by author returns all the items that include the search term in the author field

By Subject
Searching by subject returns all the items that include the search term in the subject field

By Call Number
Searching by call number returns all the items that include the search term in the call number field

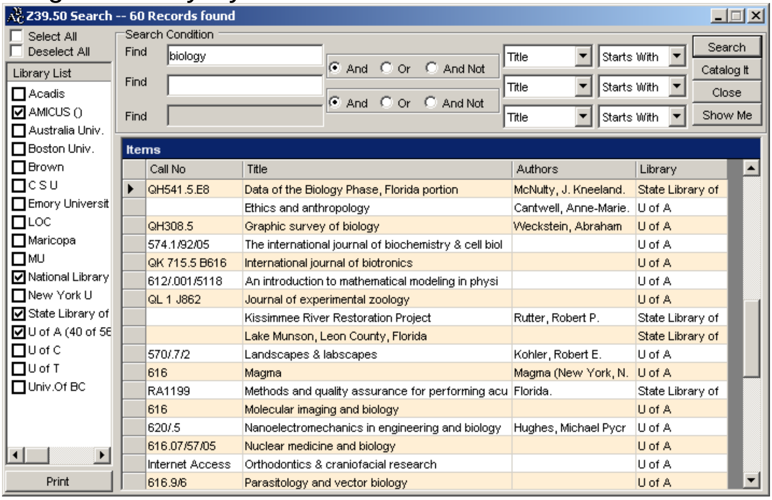


To find an item using Simple Search, follow these steps:

1. Click on “Search” on the toolbar to the left
2. Click on “Simple”
3. To search the entire union, select “Union” at the top left
4. Type in your search query
5. Press enter or click on “Search” if you want to search by the default (which is search by keywords). Optionally you can select one of the icons on the left side of the panel (Title, Author, Subject, Call Number) to search by a different criterion
6. To acquire the details of any items returned by the search, simply double click on the desired item in the grid. This information can also be acquired by right clicking the item, then left clicking on “View Detail”

Z39.50

The Z39.50 search allows patrons to search other libraries that support Z39.50 information retrieval protocol. This includes most of the public and university libraries all over the world. The Z39.50 search also allows staff to compare, and then import MARC records from other libraries into the Insignia Library System.



To find an item using “Z39.50 Search”, follow these steps:

1. Click on “Search” on the toolbar on the left
2. Click on “Z39.50”

3. Enter the search term
4. Select the search parameters (e.g. Title, Author)
5. Select the manner in which the term is searched (e.g. Starts With, Exact Match, Any Match)
6. Specify up to two additional search terms and set the Boolean operators you wish to search by (e.g. and, or, and not)
7. Select the libraries you would like to search.
8. Click on “Search”
9. To terminate the search in progress click on the “Cancel” button
10. To learn more about an item, double click on the item in the grid. This information can also be acquired by right clicking the item, then left clicking on “View Detail”
11. If you wish to import the MARC record into your existing collection, simply select the item from the grid and click on “Catalog It”. The “Catalog It” feature is discussed in more detail in Chapter 3 - Cataloging

Z39.50 searches also allow search-in-search functionality in the same way that an “Advanced Search” does. Simply adjust the Boolean operators (and, or, not) and apply additional search strings. Search-in-search functionality allows for more precise record retrieval with integrated Z39.50 searches

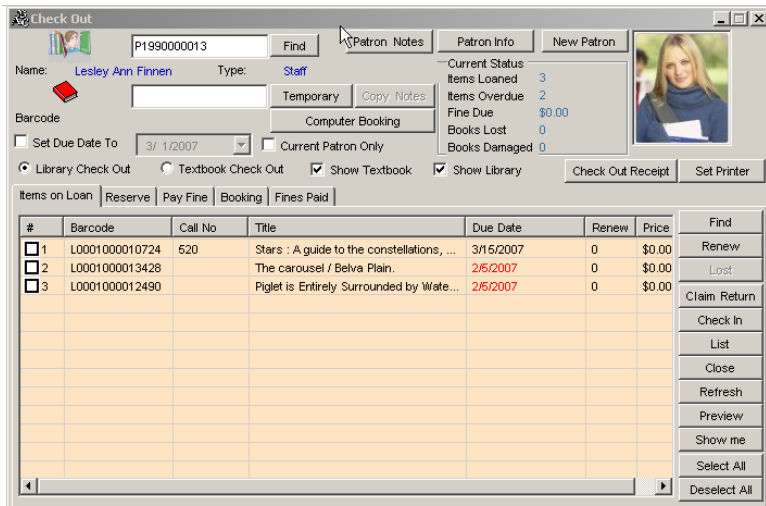
Circulation

The Insignia Library System is a complete library automation system. It is fully configurable, allowing librarians to restrict circulation tasks to other staff members or enable limited circulation permission to patrons. We have also added the ability to print out receipts for your patrons.

Important

If textbook tracking is enabled, staff can circulate textbooks by selecting the “Textbook Checkout” button from the Circulation interface.

Checkout



To checkout items, follow these steps:

1. Click on “Circulation” on the Navigator Toolbar
2. Click on “Check Out”
3. To checkout textbooks, select the “Textbook Checkout” button
4. Scan patron card. Alternatively, enter the first or last name (depending on the default criteria you have defined in Configuration >> Circulation)

5. Scan Barcode
6. Once the patron card has been scanned, the patron's picture (if available) and statistics will appear
7. Scan the barcode of the item to be checked out
8. Repeat previous steps for all the items being checked out
9. Overdue items are shown in red text. Items checked out today are shown in blue
10. To renew an item, select the item and click on "Renew"
11. To declare an item lost, select the item and click on "Lost"
12. If a patron claims that a book has been returned, select the item and click on "Claim Return". The system will not calculate fines after today's date
13. Staff can also attach/view notes for an item or patron by clicking on the "Patron Notes" button
14. To print the list of items checked out, click on "Preview", then click on the printer icon
15. To print a receipt for the patron for items checked out today, click on the "Check Out Receipt" button

Check In from Check out window

The check in button on the check out screen will now check the selected books in rather than just taking you to the Check in window.

Change Default Due Date

Staff may change the default due date for any items being checked out. To change the default due date, check the "Set Due Date To" checkbox and select the new date. Be aware that until the checkout window is closed, or the checkbox is unchecked, the new default due date will remain in effect instead of the due date based on circulation parameters.

Override Default Permission

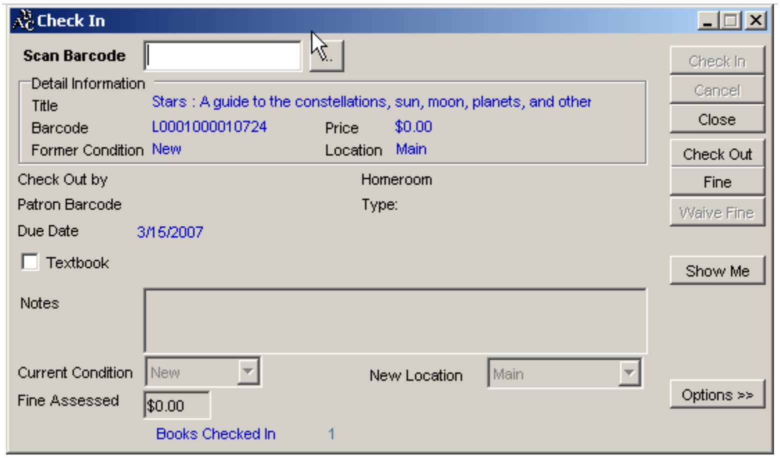
The Insignia Library System is designed so that staff can override restrictions. Suppose a patron is only allowed to check out two items and wants to check out a third. Staff can allow the additional checkout by entering the override password.

Setting Override Password
The override password can be set in Administration >> Configuration >> Circulation. Click on "Edit", then type the password into the "Override Pswd" box, confirm it and save.

Offline Checkout
If the database is not connected to the network, you will be able to continue checking out offline. Once the server connection has been restored, you are able to update the circulation data by selecting Import Offline Circulation.

Set Printer
Before you can print checkout receipts you will need to set up the system to recognize your slip printer. Clicking on the "Set Printer" button will bring up a list of the printers currently installed. select the printer from the drop down list and click "OK".

Check In



To Check In items:
1. Click on "Circulation" in the Navigator Toolbar
2. Click on "Check In"

3. Scan the item barcode and press enter
4. Repeat steps to check in other items
5. If an item is on reserve, a message box will pop up alerting you to this fact

Reset Check In date

In the Insignia Library System, circulation staff can reset the check in date. This feature is useful in the event of an interruption in library service if fines are being calculated. It is important that patrons are not fined for overdue material if the librarian is not able to check in books on time.

To Change the Check In date:

1. Click on "Circulation" in the Navigator Toolbar
2. Click on "Check In"
3. Click on "Options" button
4. Select "Forced Check In Date To" and specify the check in date
5. Until this form is closed or the check box is deselected, all items will be checked in as if they were returned on the date specified
6. When you are finished click on "Close

Check In Damaged Books

Staff may optionally assign fines to patrons who return items in worse condition than when the materials were checked out. During check in, staff can also add comments.

To check in multiple items without pausing, ensure that "Check In Damaged Books" is not enabled. The toggle for "Check In Damaged Books" is located on the Check In screen under the "Options" menu. To check in damaged items, follow these steps:

1. Click on "Circulation" on the Navigator Toolbar
2. Click on "Check In"
3. Click on "Options"
4. Select "Check In Damaged Items"
5. Scan in the barcode and press enter
6. Specify the condition, fine and comment
7. Click on "Check In"

Declare Items Lost

To declare an item lost, follow these steps:

1. Click on “Circulation” on the Navigator Toolbar
2. Click on “Check Out”
3. Scan in patron card (or enter the first name or last name depending on the default criteria you have defined in Configuration >> Circulation)
4. Check the box next to the item to be declared lost, then click on “Lost”

Claim Returned

If a patron claims they have returned an item when the record shows that item has not yet been returned.” You can set the items status to Claimed Returned.

Follow these steps to change the status to “Claim Returned

1. Click on “Circulation” on the Navigator Toolbar
2. Click on “Check Out”
3. Scan in Patron card (or enter the first name or last name depending on the default criteria you have defined in Configuration >> Circulation)
4. Check the box next to the item to be claimed returned, and click on “Claim Returned”

Renew

Staff can renew books from either the “Check Out” interface or the “Renew” interface.
To renew an item from the checkout screen, follow these steps:

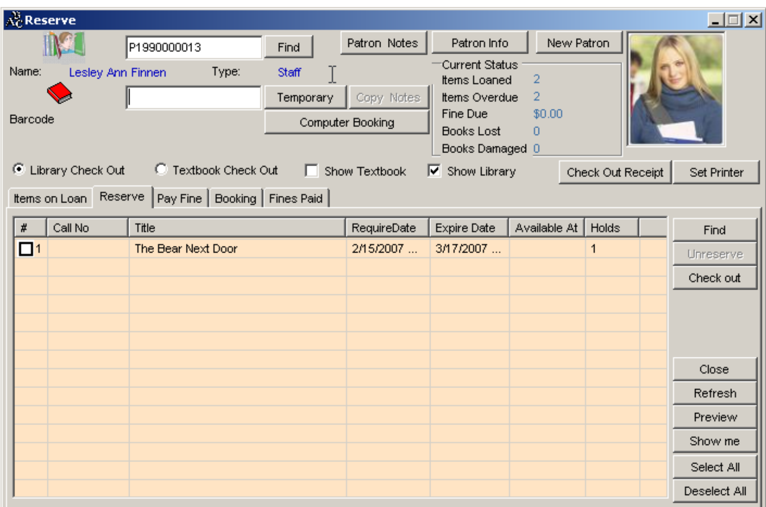
1. Click on “Circulation” on the Navigator Toolbar
2. Click on “Check Out”
3. Scan in Patron card (or enter the first name or last name depending on the default criteria you have defined in Configuration >> Circulation)
4. Check the box next to the item to be renewed, and click on “Renew”

To renew an item from the renew screen, follow these steps:

1. Click on “Circulation” on the Navigator Toolbar
2. Click on “Renew”
3. To renew textbooks, select “Textbook” option
4. Scan the barcode
5. If you want to set a due date other than the default based on patron type, then set the “Renewal Due Date” by selecting the checkbox next to the date
6. Click on “Check Out”

Reserve

You can NOW reserve multiple items at once using the CTRL key, making for a quicker and easier experience. Hold down the CTRL key and click on items you would like to request.



To reserve an item for a patron, follow these steps:

1. Click on “Circulation” on the Navigator Toolbar
2. Click “Reserve

3. Scan in patron card (or enter the first name or last name depending on the default criteria you have defined in Configuration >> Circulation)

4. Click the “Find” button in the right column

5. Search for the item you want to reserve

6. Select the item from the search results and click on “Reserve”

7. To reserve multiple items at once, select the first item to be reserved from the search results and then select additional items while holding down the CTRL key

8. When finished, click on “Close”

Interlibrary Loan

Inter-branch lending is similar to reserve. When you place a reserve on an item belonging to another library in the union, the Insignia Library System initiates its inter-branch lending process.

To process an inter-branch loan on behalf of a patron:

1. Click on “Circulation” on the Navigator Toolbar
2. Select “Reserve”
3. Scan in Patron barcode (or enter the first name or last name depending on the default criteria you have defined in Configuration >> Circulation)
4. Click on “Find” button in the right column
5. Select the radio button "Other Libraries in Union" (on the bottom of the window), and search for the desired item
6. When you have found the item, click on the “Reserve” button
7. The holding library automatically receives the details of the item on its Reserves List
8. The holding library scans the reserved item's barcode when it is returned from the previous borrower, or

scans the barcode in the Reserves List and clicks on "Send". The item status changes to "Outbound"

9. The requesting library scans the copy barcode in "Reserves" and click on "Receive" when it receives the item from the holding library. The item status changes to "Available"
10. The requesting library checks out the item to the patron. The item status changes to "Out"
11. The patron returns the item to the requesting library which checks it in. When the book is checked in, a message appears informing the librarian that it belongs to another library. The book is sent to the holding library, and its status changes to "In Bound"
12. The holding library checks in the item when it is received from the requesting library, and the item status changes to "In"
13. To see what items are in the process of being loaned between libraries in the union, click on "Reserves List" in Circulation on the Navigator Toolbar. You can quickly distinguish between inter-branch loans and local reserves by looking at the first two columns on the Reserve List: "Library" and "Pickup At". These fields remain blank for local reserves. The first field, "Library", contains the name of the library that owns the item and is lending it to a patron at another library. The second field, "Pick up at", contains the name of the library that will receive the item and circulate it to the requesting patron

You can edit the pickup location of your reserve by following these steps:

1. Double click the item you wish to edit
2. Click on "Edit"
3. Choose a new pickup location from the dropdown list
4. Click "Save"
5. Click "Close"

The status of inter-branch loans is displayed on the Reserve List as "In progress" or "Available", signifying exactly the same thing as they do in local reserves. In addition, however, inter-branch loans may have the status of "Inbound" or “Outbound”. "Outbound" means the copy is on its way to the requesting library; "Inbound” means the copy is on its way back to the owning library.

Reserve List

To see all pending reserves, follow these steps:

1. Click on "Circulation" on the Navigator Toolbar
2. Click on "Reserve List
3. The list shows title and call number of the item, the name of the patron who placed the reserve, the number of copies of the item available in the system, and the current status of the reserve

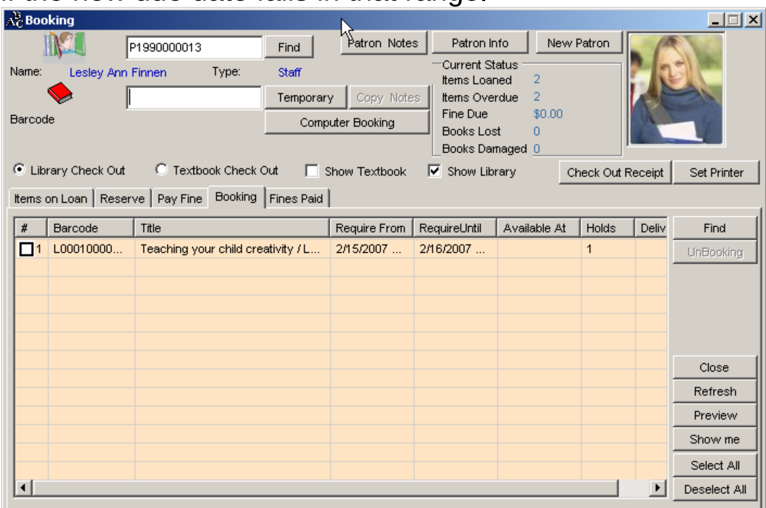
The following instructions apply to local reserves. For instructions on inter-branch reserves, see the section in this manual entitled “Inter-Library Loan.”
For local reserves, reserve status can be either "In Process" or "Available”. The system automatically changes the status of a patron's reserve from "In Process" to "Available" when it is checked in (it need not be checked out first). When checking in a reserved item, you will receive a prompt asking you to confirm the patron for whom the reserve is to be filled. The default is the first patron in the queue, but you may override the queue at this point and assign the item to another reserving patron. When the status changes from "In Process" to "Available", the reserving patron will automatically receive an email message to that effect. Two other fields appear on the Reserve List: "Library" and "Pick up at". These fields remain blank for local reserves: they provide information only for inter-branch lending.

Changing Reserve Order

If you have more than one reserve placed on the same item, and you wish to change the order of them, click on the “Order” button on the right hand side of the screen. You can then choose to “Move Up” or “Move Down”, which will change the order of the reserves. You can also cancel a reserve by clicking on the “Cancel Reserve” button.

Booking

This feature is used to reserve an item for future use. For example, a teacher may want to reserve material that she will need a month later for a project. This can be done through the booking function. Booking does not allow an item to be checked out if its checkout/due date falls in the booking date range, nor does it permit an item be renewed if the new due date falls in that range.



To book items, follow these steps:

1. Click on “Circulation” in the Navigator Toolbar
2. Click on "Booking”
3. Scan in patron card (or enter the first name or last name depending on the default criteria you have defined in Configuration >> Circulation)
4. Click the “Find” button in the right column
5. Find the item you want to book
6. Highlight the copy of the item that the patron wants, then click the "Book" button located on the bottom right side of the window
7. Specify the date range

8. To recall an item that is checked out, click on the “Recall” button. If the user profile of the patron to whom the item is currently checked out contains an email address, the system will automatically send an email to the patron recalling the item, provided the “Email notification” box on the Recall screen is selected
9. Click on "OK"

To Circulate Booked Items:

1. Click on “Circulation” in the Navigator Toolbar
2. Click on "Booking List”
3. Ensure that you have selected "Show Outstanding Bookings"
4. Select a date range and click on "List”
5. Check the box beside the item you wish to circulate and click on the button "Check Out"
6. To view circulated booked items, select “Show Finished Bookings” and click on “List”

To Edit Bookings:

1. Click on “Circulation” on the Navigator Toolbar
2. Click on the “Booking List”
3. Click on the “Show Outstanding Bookings” option
4. Select a date range and click on “List”
5. Double click on the item you wish to edit
6. Then click on “Edit”
7. Enter the new information into the “Required Date From” and “Required Date Until” fields
8. Click on “Save”
9. Click on “Close”

Cancel Bookings:

Click on “Circulation” on the Navigator Toolbar
Click on "Booking List”
Select the item you want to cancel by checking the box to the left of the barcode
Click on “Delete”
Then press “Yes” to confirm the cancellation

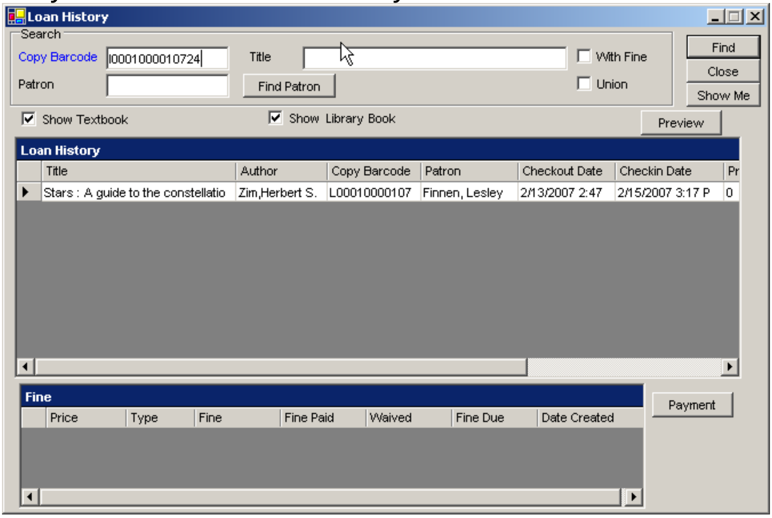
Loan History

Loan history allows staff to easily see the history of a specific patron or a specific item. For this function to work properly, the "Track Loan History" option should be enabled (in Administration>>Configuration).
The History status will be kept even if the item and patron are deleted.

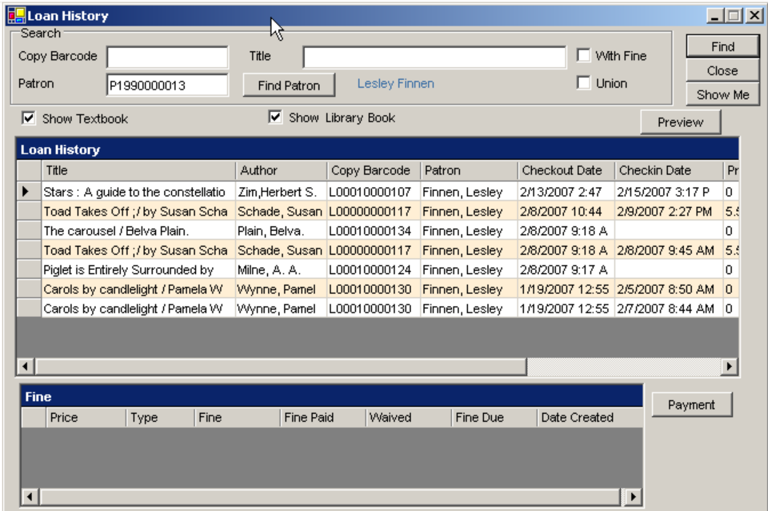
Loan History by Item

To view a loan history for an item, follow these steps:

1. Click on "Circulation" on the Navigator Toolbar
2. Click on "Loan History"
3. Enter the copy barcode or the title of the item for which you wish to view the history. Then click on Find



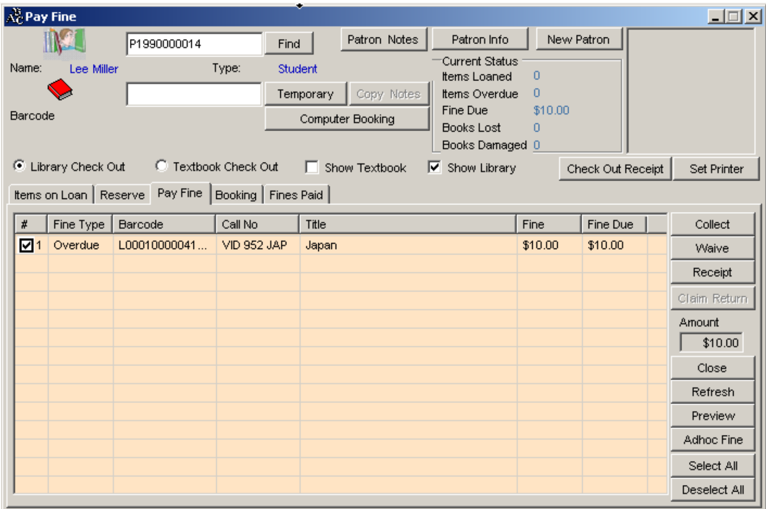
Loan History by Patron



To find the loan history for a patron, follow these steps:

1. Click on “Circulation” on the Navigator Toolbar
2. Click on “Loan History”
3. Enter the patron name, scan the patron barcode, or just click the “Find Patron” button
4. Once you have found the patron, double click to select
5. On the grid below you will see all the items that patron has had checked out

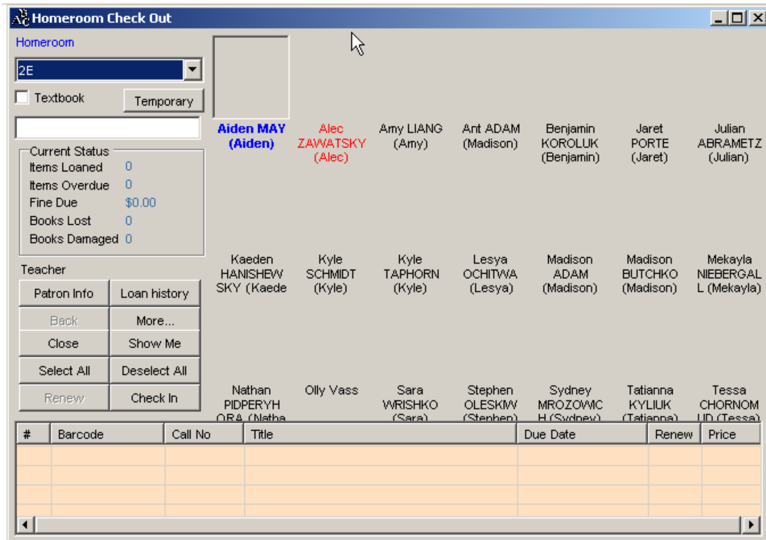
Collect Fines



To collect fines, follow these steps:

1. Click on “Circulation” on the Navigator Toolbar
2. Click on the “Fines”
3. Scan in Patron card (or enter the first name or last name depending on the default criteria you have defined in Configuration >> Circulation)
4. Check the box beside the item(s) for which a fine will be either collected or waived
5. Enter the amount to collect or waive
6. Click “OK”

Homeroom Checkout



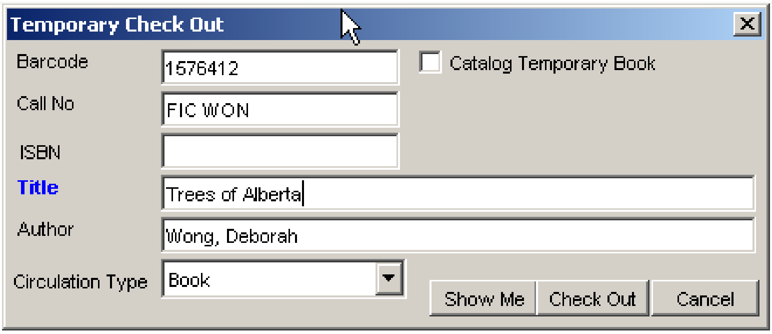
This feature allows rapid checkout for an entire homeroom.

1. Click on “Circulation” in Navigator Toolbar
2. Click on “Homeroom Check Out”
3. Select a homeroom
4. Click on a patron picture/name
5. If you click on a patron who has an available reserve you will receive the message “There are {1} reserve items available for this patron. Please pick up.”
6. Scan or enter the barcodes of the items to be checked out to that patron.
7. To renew, select a patron, then select the item(s) you wish to renewed then click on the “Renew” button

Temporary Items

This feature allows the library to create temporary item records or quick MARC records for circulation.

Checkout Temporary Items



To check out a temporary item:

1. Click on “Circulation” in Navigator toolbar, then Check Out
2. Scan in Patron card (or enter the first name or last name depending on the default criteria you have defined in Configuration >> Circulation)
3. Click on the “Temporary” button
4. Input the desired information for the item
5. Click on “Checkout”

Check In Temporary Item

To check in a temporary item, follow these steps:

1. Click on “Circulation” in Navigator toolbar, Then Temporary List
2. Select the item you wish to check in
3. Click on “Check In”

To view your temporary items, follow these steps:

1. Click on “Circulation” in Navigator toolbar
2. Click on “Temporary List”
3. Temporary items that are currently on loan will be listed, along with the checkout date, the due date, and the patron
4. To see a list of all temporary items, select the “List History Records” box on the top left side of the screen

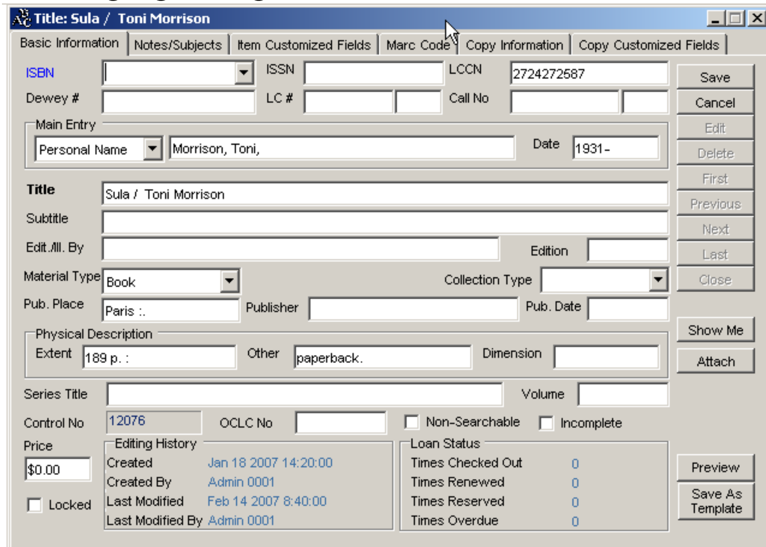
Catalog

The Insignia Library System offers MARC and non-MARC interfaces for cataloging any item, as well as the ability to import MARC records using a Z39.50 client or Internet Explorer. Cataloging is no longer a daunting task; you do not have to understand MARC format to create MARC records in the Insignia Library System.

The following fields provide dropdown menus

- Main Entry
- Subject Added Entry
- Publisher
- Place of publication
- Series

Cataloging Using non-MARC Interface



To catalog items manually using the Non-Marc Interface, follow these steps

1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Find Item,” select “New”
3. Select the Bibliographic Item Type (e.g. Books, Maps, Music) and click “Select”

4. Enter all the information you need to create a suitable description of the item using the Basic Information tab and Notes/Subjects tab
5. Dropdown lists may appear as you are entering data into any of the six fields mentioned above. This matching occurs because the text you are entering is being compared with relevant database entries already existing in the system.
6. Choose a relevant material type from the dropdown list. If you do not have material types in the dropdown, you will need to go to “Administration” then select “Parameters” and finally “Material Type” and define the types you want (additional types may be added at any time). You may also choose to mark an item as incomplete by selecting the “Incomplete” checkbox on the Basic Information screen. You can search for items marked “Incomplete” from the “Find Item” screen. On the Notes/Subjects tab, to create a new subject, click on the “New” button on the Subject Detail tab near the bottom of the screen. Repeat for any subsequent subjects you wish to add
7. To see how the record will appear to patrons, click on “Preview”. To see where the book will appear on the shelf while cataloging, click on “Shelf” on the Copy Information tab. A form will display the shelf list based on the call number (a call number must exist for the record before the “Shelf” function will work)
8. To add up to ten customized item fields, click on “Item Customized Fields”
9. To add up to ten customized copy fields, click on “Copy Customized Fields

Attaching Multimedia Objects to an Item

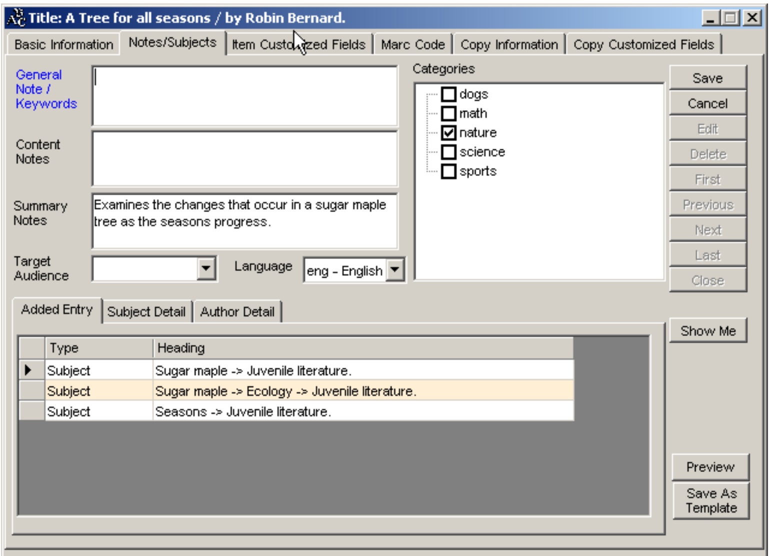
In the Insignia Library System, staff can attach an unlimited number of multimedia objects or web links to any given item. This can be done in the cataloging module when adding a new item or while editing an existing one. Adding PDF, DOC or Text files will also cause the system to index those documents and make the contents Keyword searchable.

To attach a multimedia object, follow these steps:

1. In the cataloging module, find the item to which you would like to attach multimedia objects
2. On the “Basic Information” tab, click on “Edit”
3. Click on “Attach”
4. Click on “Browse” to attach a file, image, audio, etc. Note: After clicking “Browse”; ensure that “Files of Type” is set to “All Files (*.*)”
5. Click on “Scan” to scan an image from a scanner attached to your computer
6. Click on “Web Link” to link to a website (a default address may appear automatically). Simply enter the website address you want linked
7. Click on “Save”
8. Additional attachments can be added by repeating steps 3-7

Assigning a Kiosk Category

Staff can assign one or more Kiosk categories to a given item. This can be done when adding a new item or while editing an existing one.



To assign a Kiosk category, follow these steps:

1. In the cataloging module, find the item to which you would like to assign a Kiosk category, and double click on the item
2. Click on "Edit"
3. Click on the "Notes/Subjects" tab
4. In the "Categories" list on the right side of the screen, check the boxes next to the categories into which you would like to place this item
5. Click on "Save"

Apply Kiosk Category Globally

You can also choose to apply one or more kiosk categories to a set of items selected. To apply categories globally, follow these steps:

1. Click on Cataloging in the Navigator Toolbar
2. Click on "Find/Add Item"
3. Search for items to be assigned a category
4. To add all the items in the list to one or more Kiosk Categories, click on "Kiosk All". To add one or more items, select them by right-clicking the items, and then click on "Kiosk"

5. Select one or more Kiosk Categories and click “OK”

Item Template

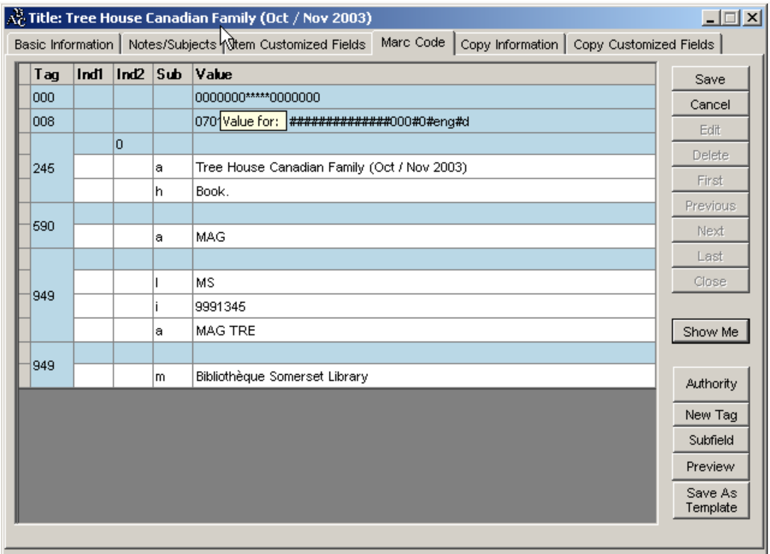
Librarians can create an unlimited number of item templates. They can use these templates to eliminate redundant manual entry while cataloging. To Create an Item Template

1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Find/Add Item” and then click on “New”
3. Select the appropriate Bibliographic Item Type
4. Specify the information you would like to save as a template
5. Click on “Save As Template”
6. An “Item Templates” box will appear. Select “Create New”
7. Enter a name for the template and click “OK”

Cataloging from an Item Template

1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “New Item from Template”
3. Select the appropriate template from the list and click “OK”
4. Add information to the template as required, then click on “Save”

Catalog Titles Using MARC Interface



If you prefer to catalog using a MARC interface, follow these steps:

1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Find/Add Item”, and then click “New”
3. Select the Bibliographic Item Type
4. Click on the “MARC Code” tab
5. Place the cursor in the value field corresponding to the MARC tag and subfield you wish to enter
6. Enter the desired information
7. To see how the record will appear to patrons click on “Preview”
8. To get subject or author headings from the authority records, click on “Authority”
9. Enter the search term and click on “Search”
10. Click on any line of the returned search. Items using this heading will appear in the “Items” box on the bottom of the screen
11. Double click any of the items in the “Items” list. This will bring up the “Item Information” box
12. Click on MARC tab

13. To add a heading to your new/edited MARC record, quickly click on the tag you would like to link (e.g. 150) until the entire line appears highlighted
14. Select the highlighted item and drag and drop on the MARC grid of the new/edited record

Adding a New Tag

15. To add a new tag, click on “New Tag”
16. Enter the tag number (e.g. by typing in 650, the system will automatically jump to tag 650)
17. Click on “OK”
18. Specify the content for the field

Adding a New Subfield

19. Select the tag where you want to add a subfield(e.g. 650)
20. Click on “Subfield” on the right side of the screen
21. Select all the subfields you would like to add
22. Click on “OK”

Changing Subfield Order

To change the subfield order, use the left mouse to drag the tiny grey rectangle at the beginning of each subfield up or down

Cataloging a URL

1. To add tag 856 for a web site, you can either add the tag itself or just use the drag and drop capability
2. Start the library system
3. Start Internet Explorer
4. Go the URL you would like to add
5. Drag the URL by selecting the icon immediately preceding the “http://” portion of the address; a small arrow should appear. Then simply drag and drop it into the MARC code interface
6. The System will automatically add tag 856 specifying the webpage address
7. Click on “Save” once you are done

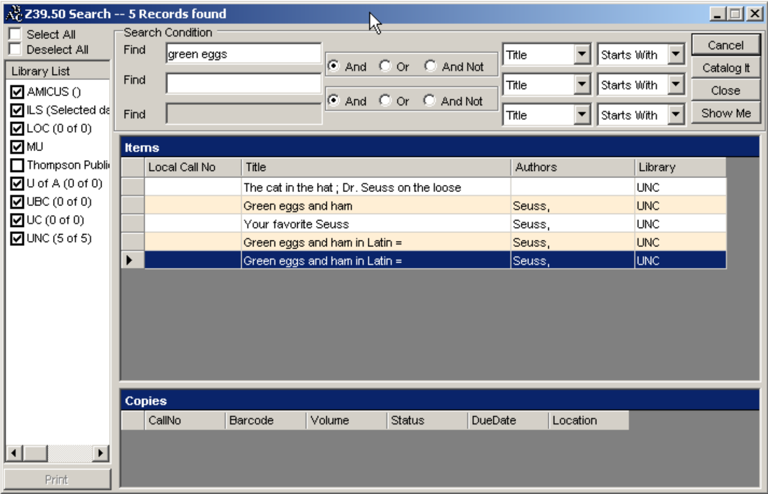
Loan Statistics

This feature provides information about how many times an item has been checked out, renewed, reserved, and overdue.

To see the loan statistics for an item,

1. Go to the cataloging module and find the item
2. The loan statistics appear in the lower right hand corner of the "Basic Information" tab under Loan Status

Cataloging Using Z39.50 Interface



The easiest way to accurately catalog items in the Insignia Library System is to use the Z39.50 search.

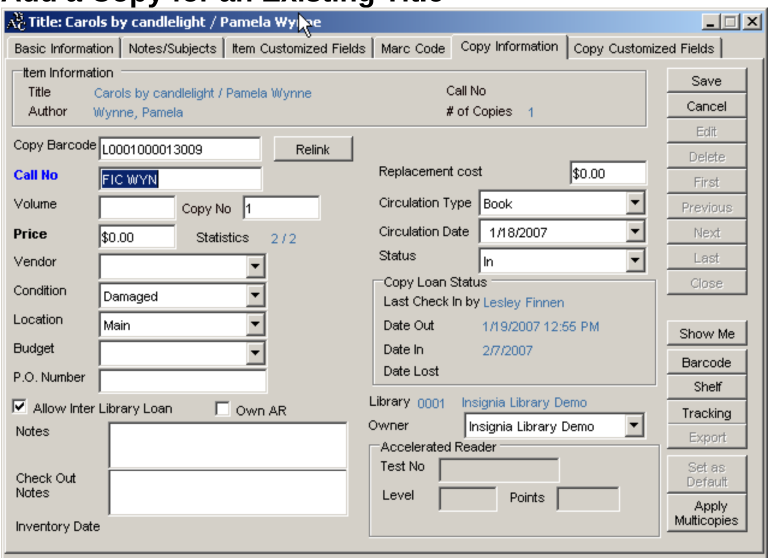
To catalog a Z39.50 item, follow these steps:

1. Click on "Cataloging" on the Navigator Toolbar
2. Click on "Find/Add Item"
3. Click on the "Z39.50" button
4. Enter search criteria (applying additional filters if desired)
5. Select any Z39.50 server(s) you would like to search from the Library List
6. Click on "Search"
7. Double click on the title to see more information
8. To import the MARC record, click on "Catalog It"

9. To edit a record, click on “Edit”
10. Make any necessary changes and click on “Save”

Copy Information

Add a Copy for an Existing Title

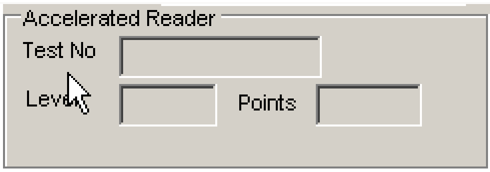


To add an additional copy for existing item, follow these steps:

1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Find/Add Item”
3. Search for the item
4. Select the item and click on “New Copy”
5. Enter the number of copies you want to add and click “OK”
6. Enter the barcode or allow the system to generate the barcode
7. If you are adding more than one copy, the “Set Barcode” screen will appear, allowing you to choose whether you want the system to generate barcodes automatically from the first available number or set them individually yourself
8. Save the record. Optionally, you can use the “Next” and “Previous” buttons to switch between copies. By

selecting “Edit”, you can change the details of the copy currently selected

Accelerated Reader



Staff can enter Accelerated Reader information (located in the bottom right corner of the “Copy Information” screen). Click on “Edit”, and then enter the information into the “Test No”, “Level”, and “Points” fields. If your AR information is grayed out, make sure the “Own AR” box is checked on the copy information screen then click on “Save”

To Set Default Values

There are several values on the Copy Information screen that you can set as defaults. This will allow the librarian to keep the same values when cataloging, eliminating the need to re-enter information commonly shared between records.

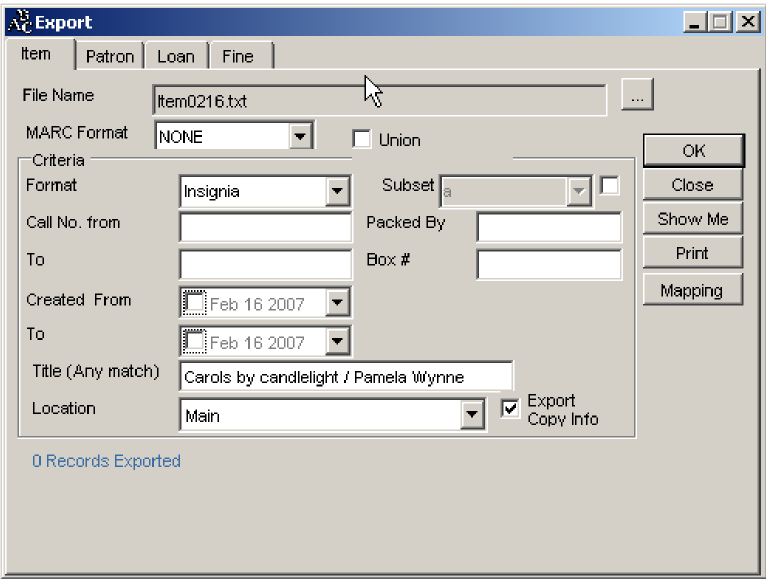
Example:

1. Find a record for which you wish to save the values
2. Go to the “Copy Information” tab
3. Click on the “Set as Default” button on the bottom right side of the screen
4. This will set the values for price, location, vendor, budget, item circ type, and condition to be the same whenever you enter a new copy for a title
5. From the Copy Information screen, staff can perform a number of functions, including:

Print Barcode

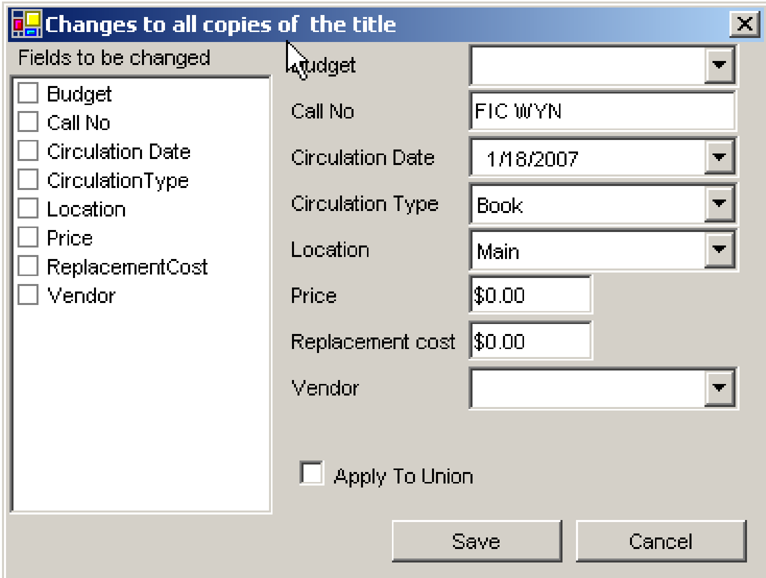
Simply select the “Barcode” button on the right side of the screen. This will open the “Barcode/Spine Labels” window and automatically limit the range of barcodes to the single item that is selected (although this can be altered to allow for multiple copies). At this point, staff need only choose their layout and print the barcode label for this/these item(s).

Export
Items can be exported by clicking on the “Export” button on the right side of the screen. This will take you to the “Export” screen and allow you to export the selected record, multiple records, or other relevant information.



Apply to Multicopies

By clicking on the “Apply Multicopies” button, you will be able to change information for records which have multiple copies without going to each copy individually. Click on “Apply Multicopies” and specify the criteria you wish to change and the new value you wish to assign.



Adding Same Title to Multiple Libraries

To add same title to more than one library, follow these steps:

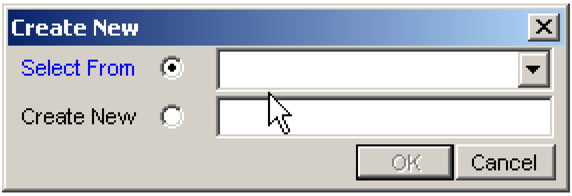
1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Find/Add Item”. Search and select the desired item
3. Click on button “New Multi-site Copies”
4. Select the libraries to which you would like to add the copies and also specify the number of copies for each library
5. Specify if the barcodes are to be generated by the system or to be specified manually
6. Click on “Add”
7. If barcodes are to be entered manually, enter the barcode for each item

Note: Only district librarians can add same title to multiple libraries.

Creating Subsets

A Subset can be used to group together different items that you would like to work on. Subsets can be used in reports and global changes. To create a subset, follow these steps:

1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Find/Add Item”
3. Find the items that you would like to add into a subset
4. Click on “Subset All” if you want to add all the items on the list to a Subset
5. Individual or multiple items may also be selected by right clicking on each item you want. Selected rows will appear highlighted
6. Press the “Subset” button



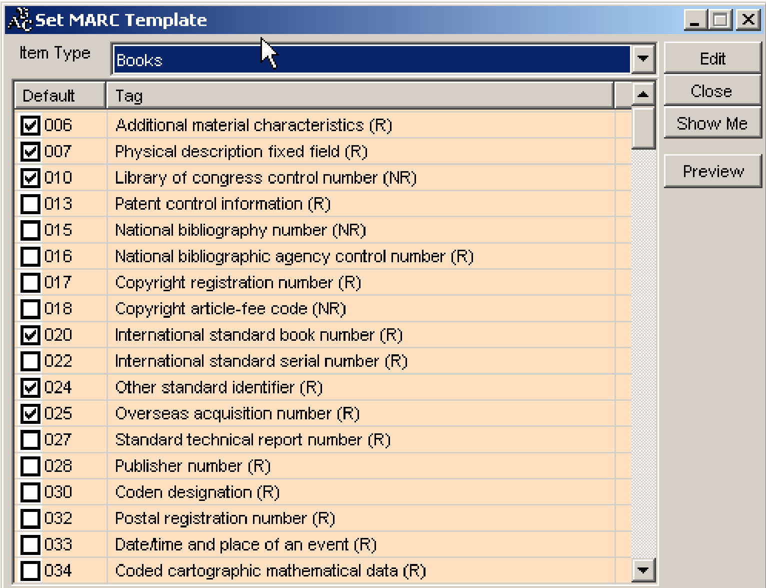
7. Click radio button for Select From to add items to an already existing subset or click radio button for Create New to name a new subset
8. Click “OK”

Creating Copy Subsets

1. Click on “Cataloging” on the Navigator Toolbar, then on “Copy Subset”
2. Search for the records you would like to subset
3. To select multiple records, right-click the desired records. Then click the “Subset” button
4. If you want to subset all the records then you can use the “Subset All” feature

Set MARC Template

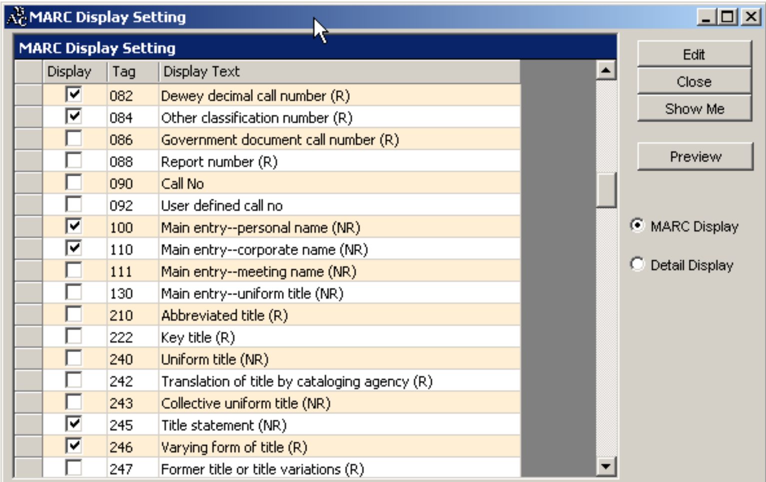
You may pre-configure which MARC tags will appear on the MARC code tab. To configure the Marc Tag Display:



1. Click on “Cataloging” in the Navigator Toolbar
2. Click on “Set MARC Template”
3. Select an item type from the drop-down list, and then click on “Edit”
4. Select those tags that you wish to have appear on the MARC code tab for items of that type, and click on “Save”

MARC Display Settings

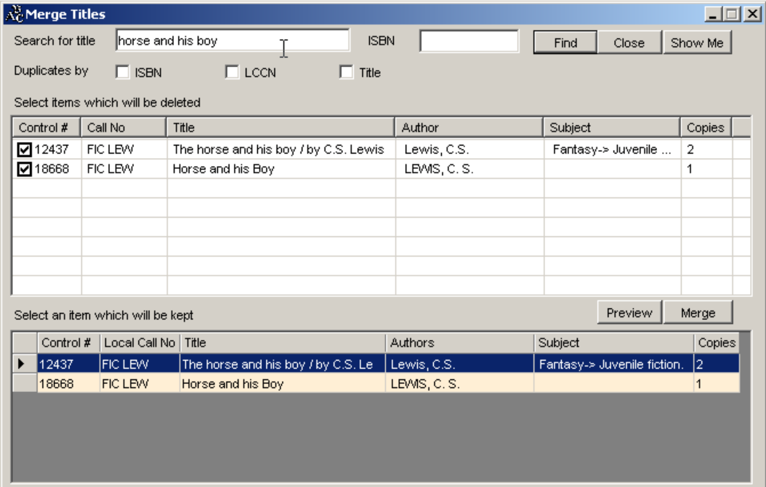
Library staff may determine which MARC fields will be visible to patrons using the Web OPAC. You can set tags for both detail and MARC display. To set the MARC display settings:



1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “MARC Display Setting”
3. You can change the “MARC Display” or the “Detail Display” by selecting the appropriate radio button on the right side of the screen
4. “MARC Display” will show tags in a MARC format; “Detail Display” will show tags with a more detailed description
5. Click on “Edit”
6. Check the MARC tags you wish to make visible in the display of search results
7. Click on “Save”

Merge Titles

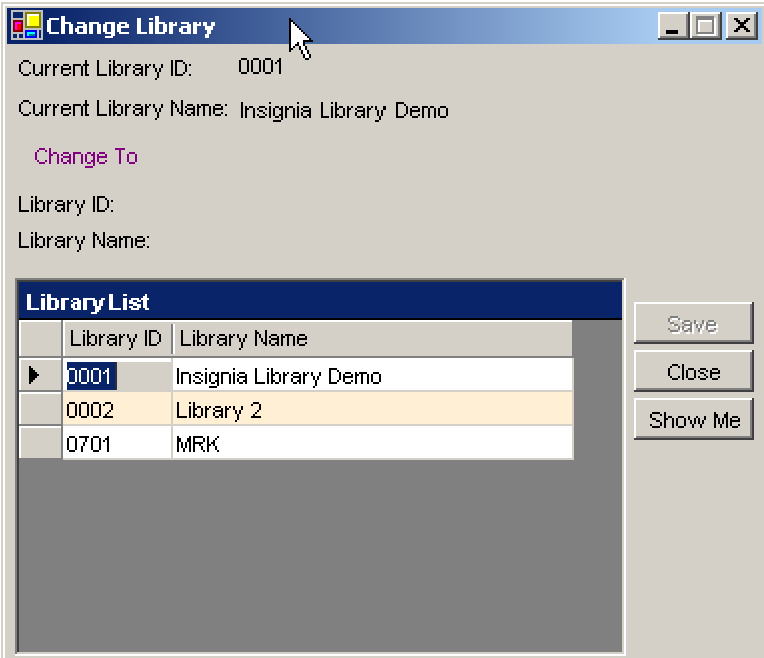
When items have been duplicated by ISBN, LCCN or title, they can be merged to eliminate redundancy. To merge titles, follow these steps:



1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Merge Titles”
3. Select matching criteria for duplicate titles (e.g. ISBN, LCCN, Title) by checking the appropriate box(es)
4. Search for items by typing the title and then selecting the “Find” button. By leaving the title field blank while selecting ISBN or LCCN or Title, all matches will be returned
5. Select the titles that are to be merged by checking the box to the left of the title
6. At the bottom of the window choose the title you would like to keep as the master record and then click the “Merge” button located in the center right side of the window
7. The items you have chosen will now become merged into a single title with the appropriate number of copies

Change Library

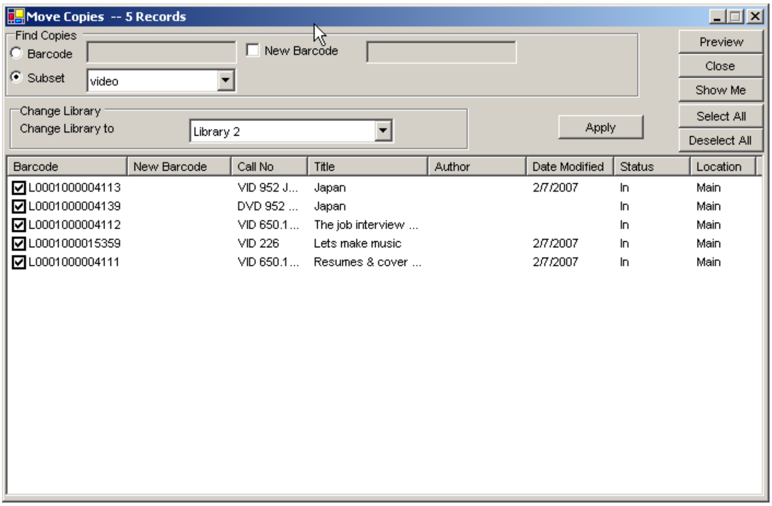
This function allows libraries that are part of a union to quickly change their library ID without having to log out of the system and then log back in.



1. Click on “Cataloging” on the Navigator Toolbar
2. Select “Change Library”
3. To change libraries, simply highlight the school name on the grid and click on “Save”

Move Copies

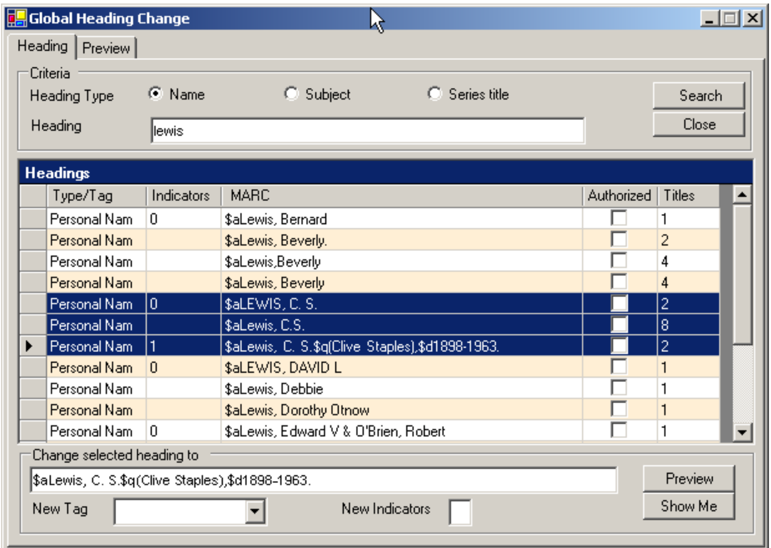
The move copies function allows you to move records within libraries of the same union. To move records, follow these steps:



1. Click on “Cataloging” on the Navigator Toolbar
2. Select “Move Copies”
3. Search for copies you wish to move by either typing or scanning the barcode. Alternatively, you can search for copies by selecting a subset from the dropdown list
4. Specify the library to move the records to by selecting it from the dropdown list
5. You can choose to specify a new barcode for a copy by checking the “New Barcode” checkbox and entering the desired barcode number
6. Ensure the records you wish to move are selected (a checkmark in the checkbox)
7. Click on the “Apply” button

Global Heading Change

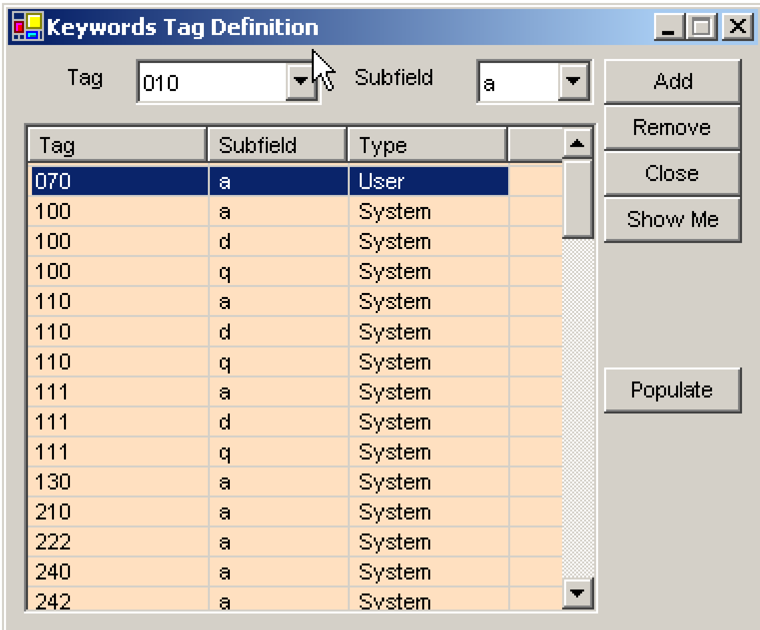
Global heading change allows you to make global changes to author/subject/title fields in the MARC record. Global Heading change is useful, for example if you wanted to change the series title from “Boxcar children series” to just “Boxcar children”. You can also add tags and modify indicators for your items through this process. To make global changes, follow these steps:



1. Click on “Cataloging” in the Navigator Toolbar
2. Click on “Global Heading Change”
3. Choose the heading type (i.e. Name, Subject, or Series title) by selecting the appropriate radio button
4. Enter your search term into the “Heading” box
5. Click on “Search”
6. From the graph, select the heading you would like to change
7. Specify the new heading, including all of the subfields
8. Click on “Preview” to see the new heading
9. If you are satisfied with the new heading, click on “Apply” to make the changes

Keywords Tag Definition

Keywords Tag Definition allows you to choose which tags and subfields are indexed in keyword searches. To add or remove tags, follow these steps:



Adding a Tag to the Keyword Search

1. Click on “Cataloging” in Navigator Toolbar
2. Click on “Keywords Tag Definition”
3. Choose the tag you want to add from the “Tag” dropdown list
4. Select the subfield from the “Subfield” dropdown list
5. Click on “Add”

To Remove a Tag from the List

1. Highlight the tag you want to remove from the list
2. Click on the “Remove” button

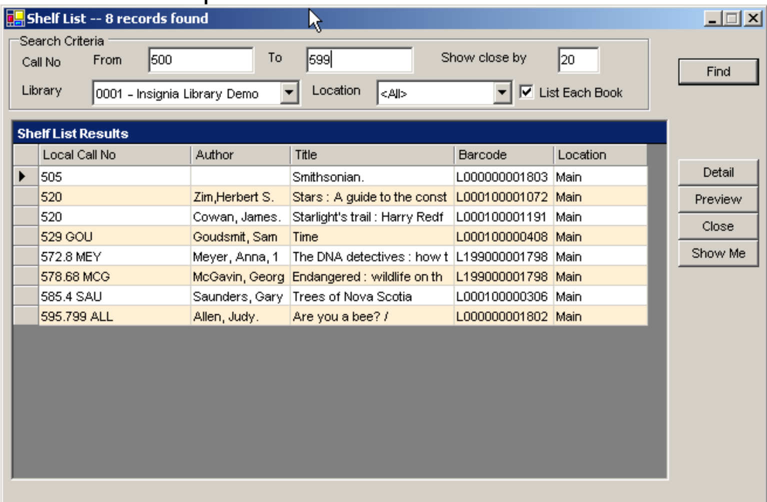
You can only delete tags that are user defined. Tags with the type “System” cannot be removed

Populate

The populate feature has been added for when you modify the searchable keywords tags. Once you have added or removed tags, click on the populate button to re-populate the keywords.

Shelf List

The Shelf List feature allows staff to create shelf lists according to libraries and locations. To create a shelf list, follow these steps:



1. Click on “Cataloging” in the Navigator Toolbar
2. Click on “Shelf List”
3. Enter the call number in the “From” field. Setting the value in “Show close by” determines how many records will be returned. Alternatively, you may simply specify a call number range (e.g. from: 205 to: 206) without entering a “Show close by” value
4. Choose the library and the location from the dropdown menus
5. Click on the Find button to display the shelf list
6. To view a record, select it and then click on “Detail”

Import Bibliographic Records

Items can be locked, by doing this when you use the import program it won't update locked items

Bibliographic records can be imported using any of the following methods:

1. From Z39.50 interface
2. From a MARC file

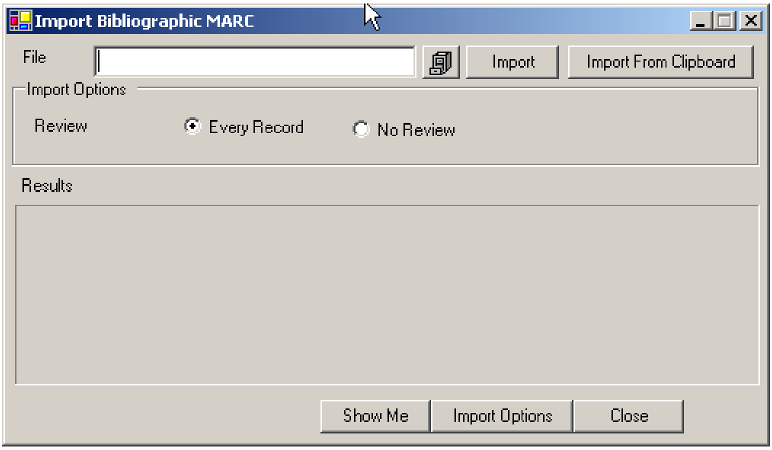
3. From a web site

Librarians have the option of disregarding tags or subfields that should not be imported. Librarians can also specify which subject headings should not be imported. If the items already exist in your library, you also have the option to add them to existing records or to create an entirely new record.

If inferior quality MARC records are being imported there is a warning message

To import MARC records from a file or website, follow these steps:

From a File



1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Import Bibliographic MARC”
3. Click on the icon to select the file path
4. Browse for the file and click on “Open”
5. Click on “Import”

From a Web Site

1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Import Bibliographic MARC”
3. Using Internet Explorer, go to the web site that allows you to download MARC records

4. On the web site, select the option that lets you save the MARC record
5. Select the MARC code by pressing Ctrl + A; then press Ctrl + C to copy it to the Clipboard
6. Change focus back to the Insignia Library System
7. Click on “Import From Clipboard”

Below is an example of how you would import a bibliographic record from the Library of Congress:

1. Start Internet Explorer and go to http://www.loc.gov
2. Select “Search Our Catalogs” and then choose “Basic Search”
3. Set “Search Type” to “Title”, then under “Search Text” enter “Physics” (without quotation marks)
4. Press “Begin Search”
5. Click the hyperlinked title of any returned items for a brief outline of the record (e.g. my search returned “Acta ciencia Indica. Physics”)
6. Click on either “Full Record” to see the entire record or “MARC Tags” to view the MARC layout
7. If you are satisfied with this record and want to import it into the Insignia Library System, go down the page and click on “MARC Format (ONLY Save)”
8. Click on “Print or Save Search Results”
9. A window will open with a single line of text across the top. Press Ctrl+A to highlight it and then Ctrl+C to save a copy to the clipboard
10. Go back to Insignia Library System
11. Click on “Import From Clipboard”
12. Click on “Save”
13. If the record already exists in your system you will be asked if you want to save, skip or create a new record. Creating a new record will not add an additional copy to the record in your system; they will both be treated as separate entries

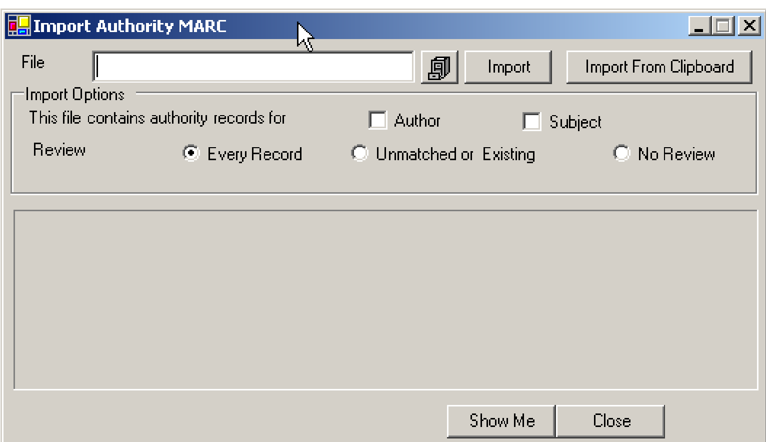
MARC Import Options

When importing data, librarians can specify what information is to be imported into the Insignia Library System. To specify which tags should be imported, follow these steps:

1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “MARC Import Options”
3. Click on “Edit”
4. Select the tags or subfields that you DO NOT want to include when importing MARC records
5. You may also specify a range of tags that you do not want to be imported in the “Other Tags” field. Range is separated by “-“ and individual tags are separated by a space
6. Under the “Subject” tab, librarians can select types of subject headings not to be imported

Import Authority Records

Importing an authority record is almost the same as importing a bibliographic record.
To import an authority record, follow these steps:



From a File

1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Import Authority MARC”

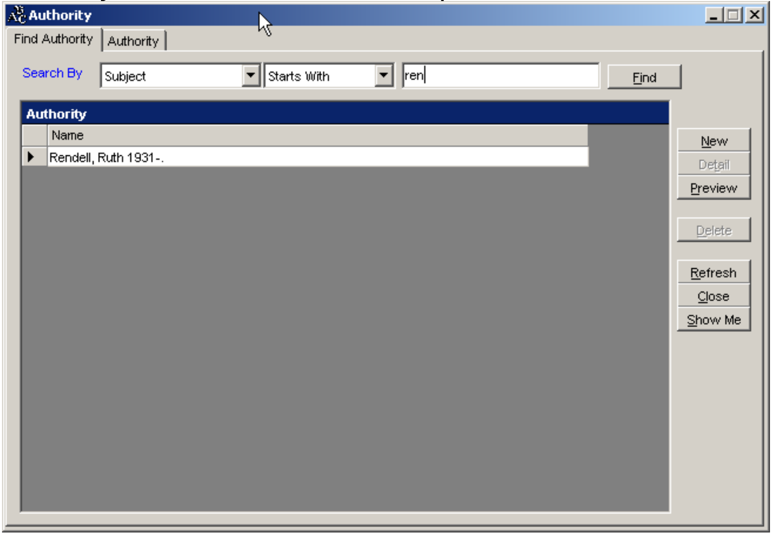
3. Click on the icon to select the file path
4. Browse for the file and click on "Open"
5. Click on "Import"

From a Web Site

1. Click on "Cataloging" on the Navigator Toolbar
2. Click on "Import Authority MARC"
3. Using Internet Explorer, go to a web site that allows you to download MARC authority records
4. Select the option that lets you save the MARC record
5. Press Ctrl+A to select the text and Ctrl+C to copy it to the clipboard
6. Change focus to Insignia Library System
7. Click on "Import From Clipboard"

Creating Authority Records

Librarians can create authority records. To create authority records, follow these steps:



1. Click on "Catalog" on the Navigator Toolbar
2. Click on "Find/Add Authority"
3. Click on "New". Select the desired tag, and then click "OK"
4. To add additional tags, click on "New Tag"

5. To save the record as a template, click on “Save As Template”
6. Enter a name for the template, or select a template from the dropdown list
7. Click “OK”
8. Enter the required information to create the record
9. Click on “Save”
10. Specify the type of index you want to create for this authority record (e.g. author or subject or both)
11. Click “OK”

Creating Authority Records from a Template

To create authority records from a template, follow these steps:

1. Click on “Catalog” on the Navigator Toolbar
2. Click on “Find/Add Authority”
3. Click on the “Authority” tab
4. Click on “New From Template”
5. Select desired template, Click “OK”
6. Update the record as required
7. Click on “Save”
8. Specify the type of index you want to create for this authority record (author or subject or both)
9. Click on “OK”

Creating Slides

To create slides, follow these steps:

1. Click on “Catalog” on the Navigator Toolbar
2. Click on “Find/Add Slide”
3. Click on “New” to create a new slide, and select the appropriate Bibliographic Item Type. Alternatively, enter a search to find a slide you wish to edit
4. Enter the information to create the record
5. Click on “Save” to complete the record

Creating Videos

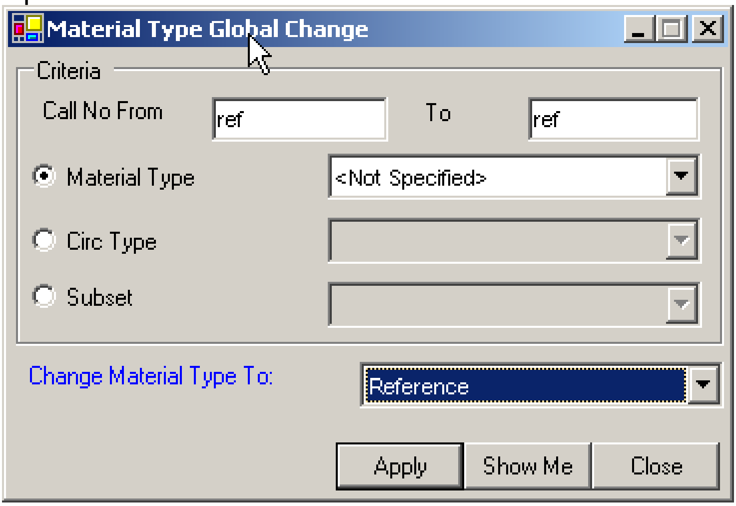
To create videos, follow these steps:

1. Click on “Catalog” on the Navigator Toolbar

2. Click on “Find/Add Video”
3. Click on “New” to enter a new video, and choose the appropriate Bibliographic Item Type. Alternatively, enter a search to find a record you want to edit
4. Fill out the information as needed
5. Click on “Save” to complete the record

Material Type Global Change

To make global changes for material type, follow these steps:

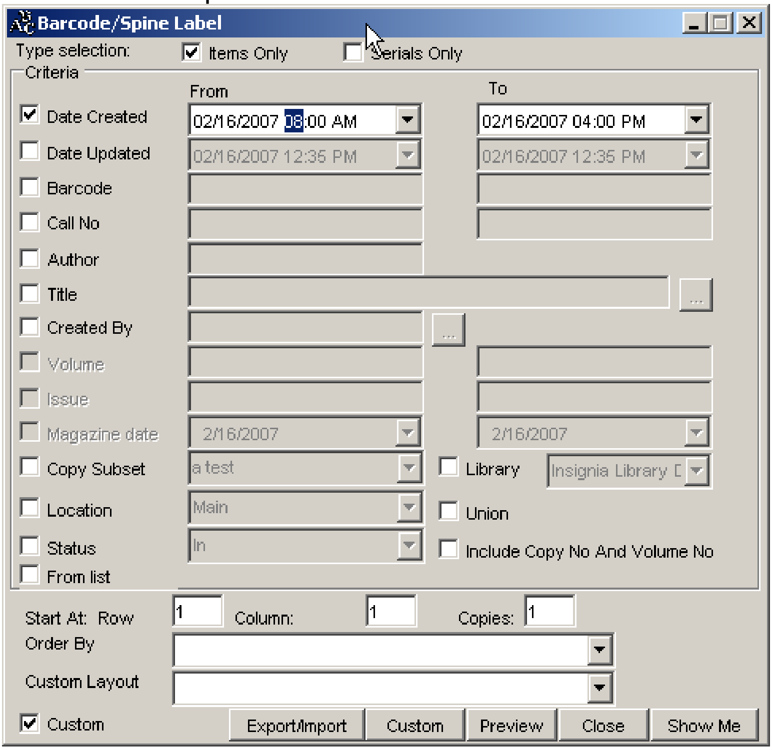


1. Click on “Catalog” on the Navigator Toolbar
2. Click on “Material Type Global Change”
3. You may specify a call number range
4. Specify what Material Type is to be changed. Or you can specify a Circ Type to be changed
5. You may also specify a subset for the global changes Once you have made your choices
6. Click on “Apply”

Note: The larger the number of records affected, the longer it will take to make the global changes requested.

Print Barcodes and Spine Labels

Barcodes and spine labels can be printed by clicking on “Barcode/Spine Label” in the Cataloging module. Barcode labels can also be printed directly from the “Copy Information” tab within an item record. To print labels, follow these steps:



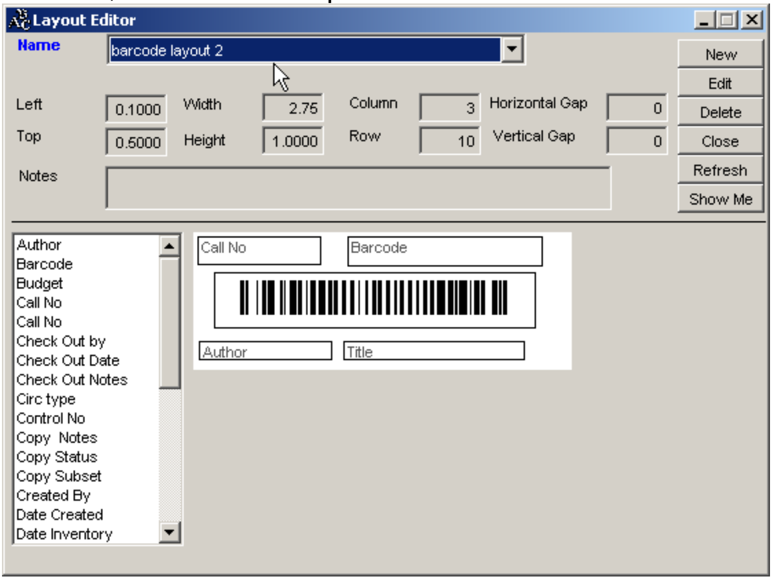
1. Click on “Catalog” in the Navigator Toolbar
2. Click on the “Barcode/Spine Label” icon
3. Specify the criteria for printing labels:
    3.1. Date created: check the box and specify a date range to create labels for holdings added within a certain time period. You can also set a time limit
    3.2. Date updated: check this box and specify a date range to print labels for holdings updated in a certain time period. You can also set a time limit

   3.3. Barcode: check the box and specify a range of barcode numbers to create labels for holdings covering a specific range
   3.4. Call no: check this box to print labels for a call number range
   3.5. Author: check this box to print an author range
   3.6. Title: check this box and click on “Find” if you wish to create labels for holdings that have a specific title
   3.7. Created By: check this box to print all the records created by a particular staff member
   3.8. Copy Subset: check this box to print labels for items in a certain copy subset
   3.9. Location: check this box if you want to print labels for items from a certain location
   3.10. Status: check this box if you want to print labels for all the items with a certain status
   3.11. From list: check this box if you wish to print barcodes for specific items
4. Select the row and column on which you wish to start printing. This allows you to print on label sheets on which some labels have already been used
5. Select the number of copies you would like to print
6. Click on the “Order by” drop down arrow to choose Call No., Local Call No., Barcode, Title or Author
7. To choose a label sheet layout, click on the “Layout” button
8. Scroll to find the desired layout
9. Click on the desired layout (the selected layout’s description will appear in green)
10. Click “Set Default” if you plan to regularly use the selected layout
11. Check the box “Use system default margin” if you wish to print your labels using the default margins
12. Use the ‘Top and “Left’ boxes to adjust margins if needed – increments are in inches
13. Click “OK”
14. Click “Preview” to view your labels
15. If you are satisfied with the layout, press the print icon to print the labels

16. We also have the option to have the Volume and Copy number appear on the labels. For this to happen, make sure the box "Include Copy No and Volume No" is checked
17. If you would like to limit your selections by library you can do this by checking the library box and then selecting the library

Custom Barcodes

Staff may also print custom barcodes. This allows staff to choose which fields will appear on their barcodes and the order in which they will appear. To create a custom barcode, follow these steps:



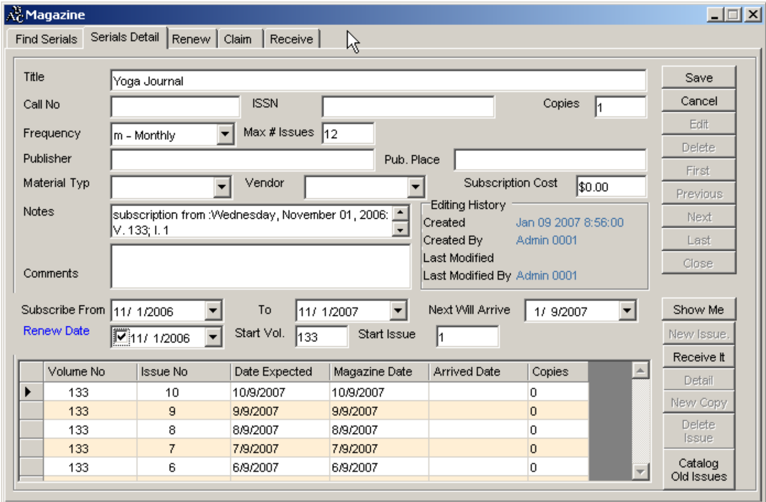
1. Click on "Catalog" on the Navigator Toolbar
2. Click on "Barcode/Spine Label"
3. Click on the "Custom" checkbox on the bottom left corner of the screen
4. If you have already created a custom layout, select it from the "Custom Layout" dropdown menu (leave the field blank if there are no layouts)

5. Click on the “Custom” button. This will bring up the “Layout Editor” screen
6. In the “Layout Editor” you can once again select an existing layout, or you can create a new layout by clicking on “New”
7. Specify the size of your barcodes by entering the relevant information, such as height and width in inches. Columns and rows will be adjusted automatically according to the height and width entered
8. Enter any notes for this layout in the Notes field
9. To add the fields you wish to appear on your barcode label, double-click on the field name on the right hand side of the screen. You will then see a box added to your layout
10. To add an actual barcode, right click on the layout and choose “Add Barcode”
11. To edit the size of a text box, drag the edges of the box, or right mouse-click on the box and choose “Property”. You may modify the properties of the actual barcode by the same methods
12. To select a font, right-click on a box and select “Property”. Click on the box beside the font example once you are in the “Property” screen
13. When you are satisfied with your layout, click “Save”
14. You can then click “Close”
15. Once back to the “Barcode/Spine Label” screen, select your custom barcode from the “Custom Layout” box
16. Click on the “Preview” button to see view your layout
17. If you are satisfied with your layout, click on the print icon to print your labels

Serials

The Insignia Library System has an integrated serials module. It keeps track of information for periodicals such as subscription costs, expiry date and anticipated date of arrival for issues. It also allows staff to renew serial subscriptions, receive issues, and to create routing lists.

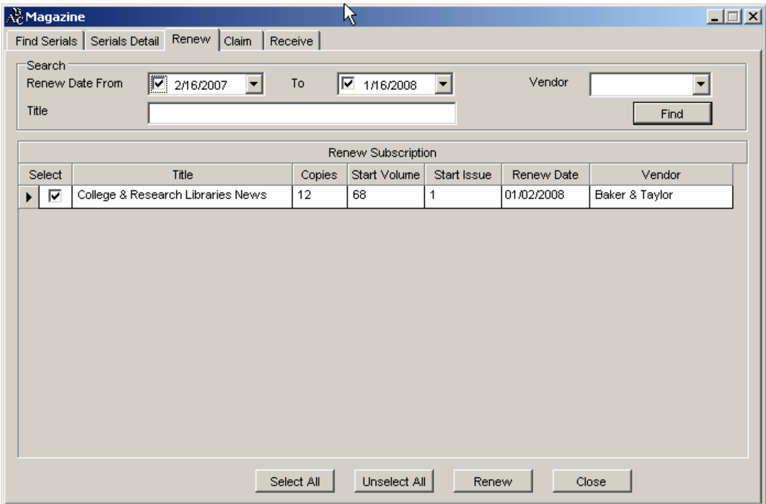
To add a new serials title, follow these steps:



1. go to the catalog menu and then Find\Add Serials
2. Click on New to create a new serial
3. fill out values making sure to set the following values
   3.1. Subscribe From: Date of first magazine issues in hand (eg. 7/1/2005)
   3.2. Subscribe To: Date of ending subscription date (eg. 7/1/2006)
   3.3. Next will arrive: Next issue expected date (eg. 8/1/2005)
   3.4. Renew Date: Must be same as Subscribe Date (eg. 7/1/2005)
   3.5. Start Vol.: for issue in hand (eg.118)
   3.6. Start Issue: for issue in hand (eg. 27)
4. Once all the information has been entered you are now ready to renew the serials.

Renewing the Serials

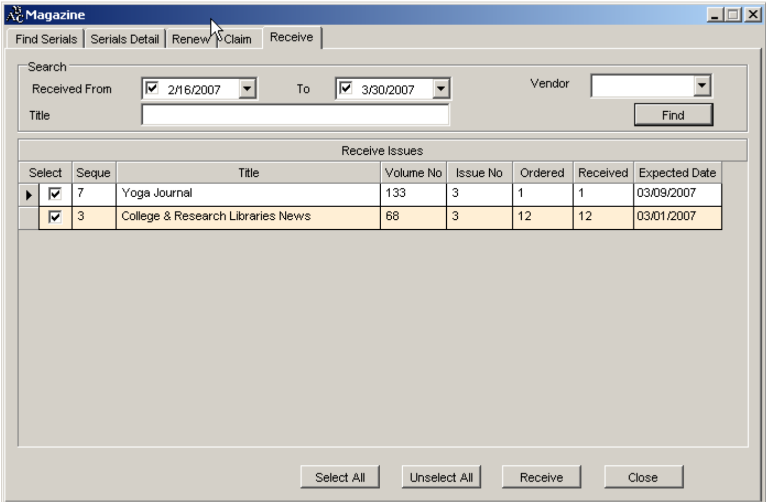
Renewing your serials will give you an entry into the serials detail window for all of the issues you will receive throughout the subscription length. To renew a serials title, follow these steps:



1. Go to the catalog menu and then Find\Add Serials
2. Next go to the renew tab
3. Enter a date range for your serials, then click on find
4. The magazines that fall within that date range will now appear
5. Make sure the item is checked and then click the renew button.
6. This will now create new issues for the subscription date but will not add copies.

Receiving Serials

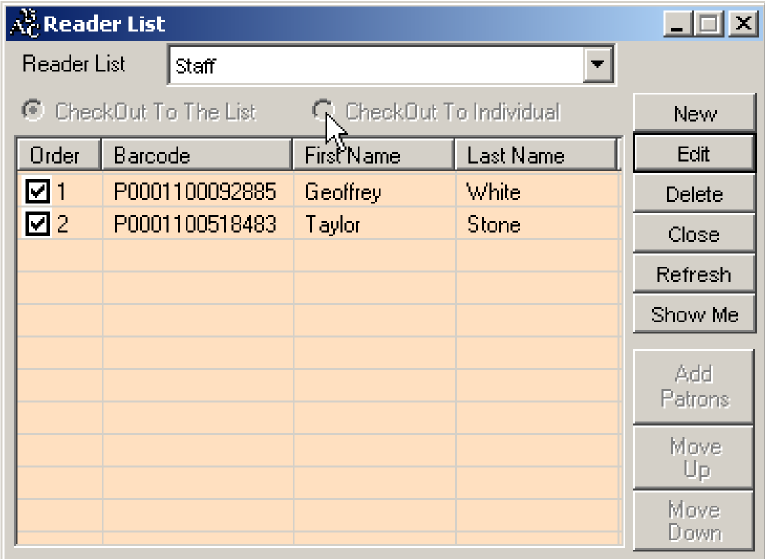
When you receive a serial it will add that copy into the detail record of the serial received. To receive a serials title, follow these steps:



1. Go to the catalog menu and then Find\Add Serials
2. Next go to the receive tab
3. Enter a date range for your serials, then click on find
4. The magazines that fall within that date range will now appear
5. Make sure the title is checked and then click the receive button.
6. This will now create your copy for your serial and give it a barcode number

Creating a Reader List

The Insignia Library System allows staff to create a reader list that can be used to check out new issues of a serial as they are received. To create a reader list, follow these steps:



1. Click on "Cataloging" on the Navigator Toolbar
2. Click on "Find/Add Serials"
3. Search for the serial for which you want to create a reader list, and then select it
4. Click on the "Routing List" button
5. Click on "New"
6. Enter a title for the list
7. Add patrons to the list by clicking on the "Add Patrons" button and then searching for the patrons
8. Once you have finished adding patrons to the list, click on "Save"

Once you create a Reader List for a serial, the system automatically reserves the new issue for the patrons in the order they are listed.

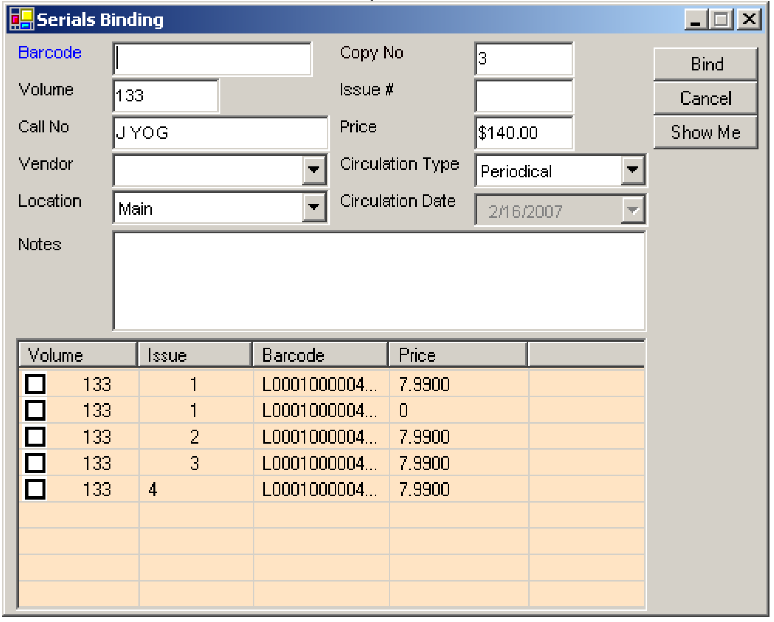
Routing

Once you have created a Reader List for a serial, you can use the Routing feature to route issues of that serial. The issues will either be signed out to the Reader List or to individual patrons on that list, depending on the option chosen in Administration>> Configuration>>Circulation. To route an issue of a serial, follow these steps:

1. Click on “Cataloging” on the Navigator toolbar
2. Click on “Routing”
3. Scan or manually enter the barcode of the issue to be routed
4. Select the Reader List desired from the dropdown box. The list will be visible in the grid below
5. Click on the “Routing” button
6. If the item is being signed out to the Reader List, a pop-up message will inform you that the issue status has been changed to “Routing”
7. If the item is being signed out to individuals on the Reader List, you will be asked to confirm which patron the item will be signed out to first

Binding Serials

The Insignia Library System allows staff to bind serials. To bind serials, follow these steps:

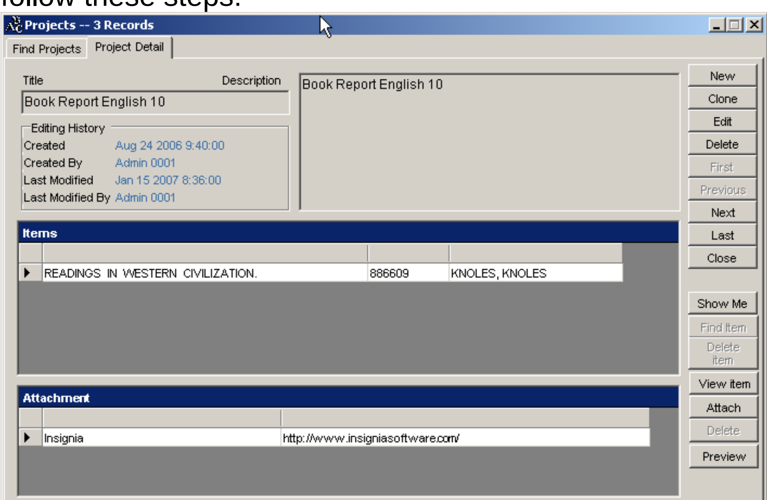


1. Click on “Cataloging” on the Navigator Toolbar

2. Click on “Find/Add Serials”
3. Search for and select the serial title that is to be sent to the bindery
4. Click on “Binding”
5. Select the items in the grid which you wish to have bound
6. Enter the barcode for the bound serials, or the system will automatically generate a barcode
7. Click on “Bind”, this will prevent selected issues from being circulated

Projects

The Insignia Library System allows staff to create projects. In a project, a librarian can group together different items such as books, multimedia files, and web links into a collection. Patrons can then search for the project and find the relevant information in one screen, rather than searching for the items individually. To create a project, follow these steps:



1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Find/Add Projects”
3. Click on “New”
4. Give your new project an appropriate title

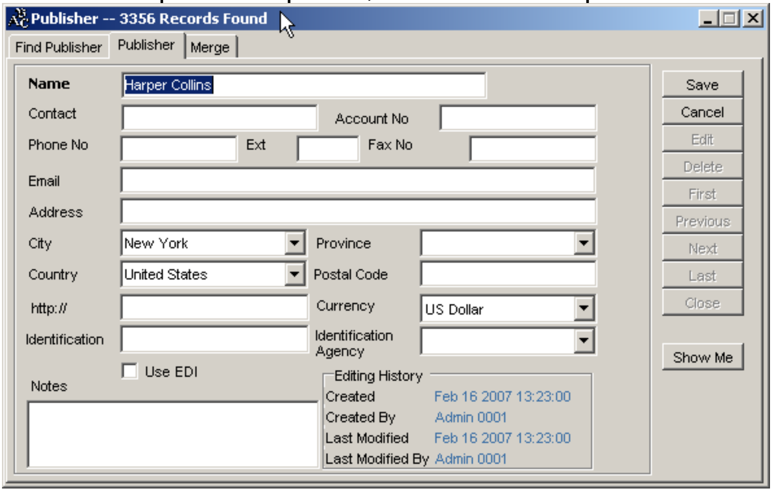
5. To add an item from the library catalog to the project, click on “Find Item”. Search for the desired item and select it from the results list. Then click on “Apply”
6. You may repeat step 5 until all desired items are found
7. To add a URL/multimedia object to the project, click on “Attach”
8. Click on “New”
9. Select the attachment “Type” from the dropdown menu (URL, Video Or Audio, or Picture)
10. Enter a title for the attachment
11. If you are attaching a web site, enter the URL into the “Location” field. If you are attaching a multimedia file, browse for the file by clicking on the “…” button
12. Click on “Save” to save the attachment
13. Repeat until you have added all desired URLs/multimedia files
14. Click on “Save” to save the project

Publisher

Staff can maintain profiles of publishers in the library system.

Adding a Publisher

To create a publisher profile, follow these steps:

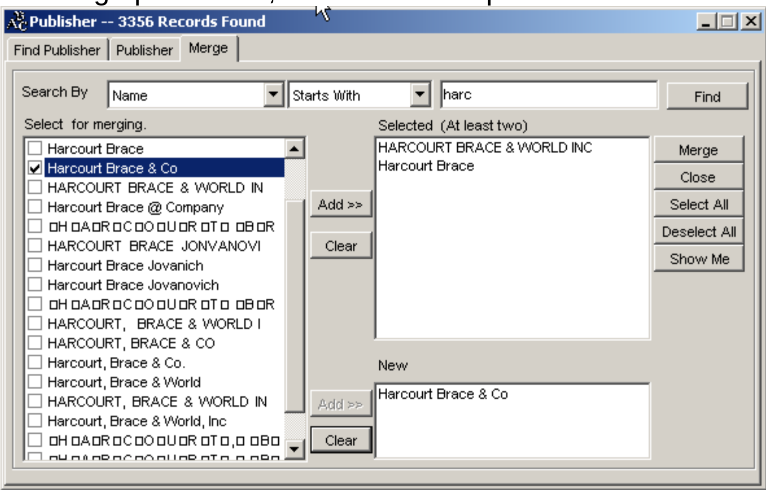


1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Find/Add Publisher”
3. Click on “New”
4. Enter the information available
5. Click “Save” once finished

Publishers can also be merged in the system. This is useful if two publishing companies merge.

Merge Publishers:

To merge publishers, follow these steps:



1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Find/Add Publisher”
3. Click on the “Merge” tab
4. Search for the first publisher to be merged
5. From the search results on the left, select the publisher to be merged by checking the box to the left of the publisher’s name. Then click on the “Add” button located near the center of the screen
6. Search for and add the other publisher(s) to be merged by repeating steps 4-5
7. With at least two publishers in the “Selected (at least two)” box, you must now select the name into which these publishers will be merged. Search for and select the new publisher, then press the “Add” button located

near the bottom of the screen. The new publisher should appear in the “New” box

8. Click on “Merge”
9. The publishers you selected are now merged into the publisher listed in the “New” box

Destroy / Change Copy Status

Staff may choose to destroy items that are in poor condition or are no longer in circulation.

Deleting Copies

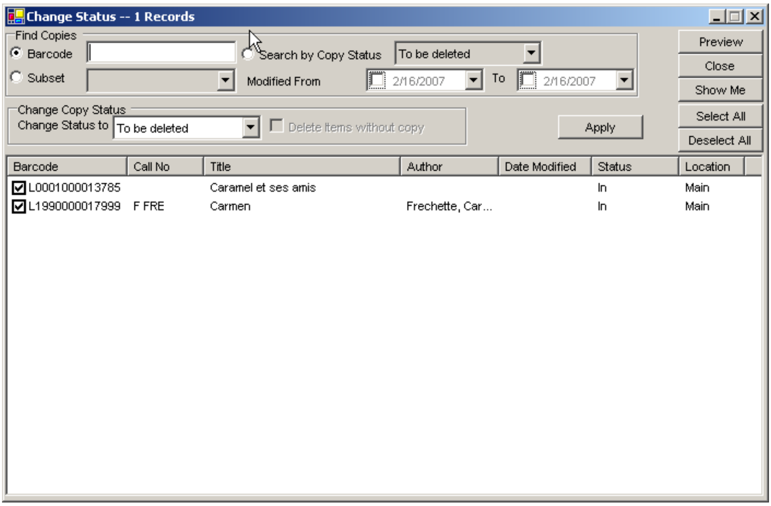
Items/copies can be deleted in two different ways:
By going into the cataloging module, finding the item and clicking on “Delete”; or by using the Change Status function. This facilitates batch processing: a number of items can be marked for deletion and then destroyed later in one operation.

Change Status

To destroy items, follow these steps:

1. Click on “Cataloging” on the Navigator Toolbar
2. Click on “Change Status”
3. Input or scan in the barcode you would like to take out of circulation and press enter
4. Check the box beside the copies you wish to destroy and change the status to “To be deleted”
5. Click on the “Apply” button

You may also use the “Change Status” interface to change the status of an item by following these steps:

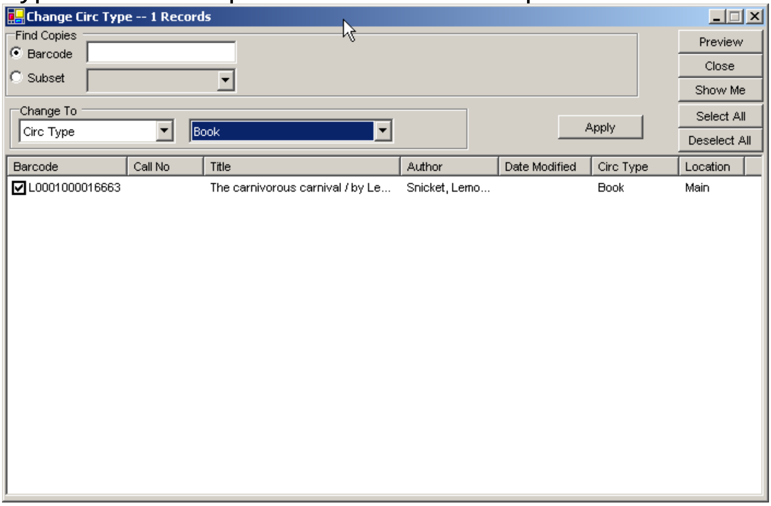


1. Click on "Cataloging" on the Navigator Toolbar
2. Click on "Change Status"
3. You can locate items for which to change copy status by searching by "Copy Status" rather than "Barcode". (e.g. if you wish to bring up a list of all copies with the status "Lost")
4. You may input or scan in an individual item barcode
5. You may select a subset
6. Additionally, you may limit the results to items last modified within a specified date range
7. Once you have your desired list on the screen, you can choose the items for which you would like to change the copy status by selecting or deselecting the checkboxes beside the item barcodes
8. Select the new status from the dropdown list "Change Status To"
9. Once you are satisfied with the items you have chosen, click on the "Apply" button

The "Change Status" function allows you to easily change any copy's status on either an individual or group basis

Change Circ Type

This feature will allow you to change the Circ Type or Location for items within your library. To change the Circ Type or Location please follow these steps:



1. Click on "Cataloging" on the Navigator Toolbar
2. Click on "Change Circ Type"
3. Input or scan in a barcode, or select a subset
4. Select either "Circ Type" or "Location" from the dropdown menu, depending on which field you wish to change. Select the Circ Type or Location to which you wish to change the records
5. Click "Apply" to save your changes

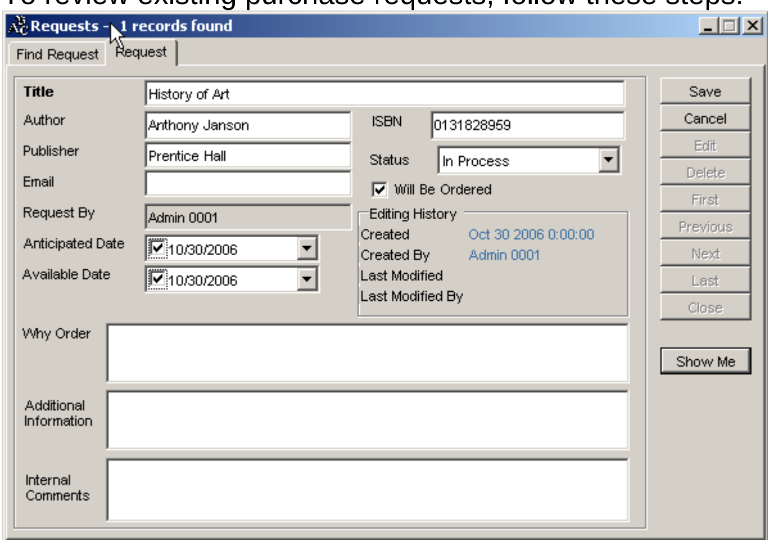
Purchase Requests

The Insignia Library System allows you to track requests to purchase materials for your library. These requests can then be reviewed and a decision on whether to purchase these items can be made. Patrons can make purchase requests using the Web OPAC. For more information, see "Requests" in the Administration chapter of this manual. To create a new purchase request, follow these steps:

1. Under the Catalog menu, select "Find/Add New Request"

2. Click on the “New” button
3. Enter the title of the item being requested as well as the author, ISBN, publisher, and email address of publisher if available
4. In the “Why Order” field, enter the reason given for requesting the book. You may also enter comments into the “Additional Information” field
5. Click on “Save” when finished
6. Library staff may view and modify existing purchase requests. They may add internal comments to a request change its status, mark a request as “Will be ordered”, or delete a request.

To review existing purchase requests, follow these steps:



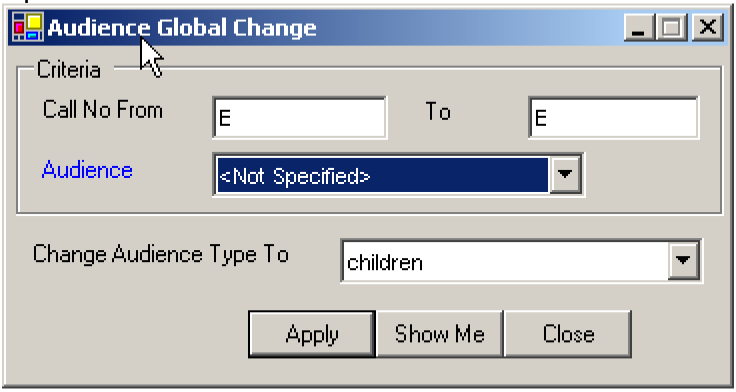
1. Under the Catalog menu, select “Find/Add New Request”
2. Search for a request by title; or, select <All> to view all requests
3. Select the request you wish to review and click on “Detail”
4. You can now review the request. The request can be marked as “Will be ordered”, and its status may be changed from “New” to “To Be Processed” or “In

Process". An anticipated arrival date for the item, as well as an item availability date, may be entered. Internal comments may also be added to a request

5. To delete a request, click on the "Delete button"

Audience Global Change

The Audience Global Change process, allows you to change a current Audience Level to another Audience level. This is helpful if you have duplications or wrong Audience Levels. You can make the right levels and then quickly and simply move them into the right groups. To use the Audience Global Change feature, follow these steps:



1. Under the Catalog menu, select "Audience Global Change"
2. Next enter a call number range or an existing Audience Level
3. Now select the level you want to move them into
4. Click "Apply" to make the changes
5. Repeat above steps until you are done

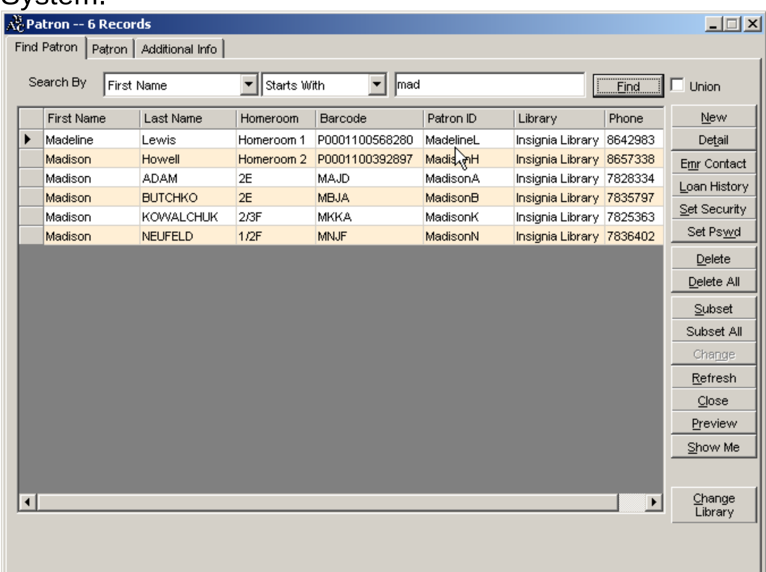
Item Archiving

The Item Archival feature allows you to remove an Item or Items from the system. This feature is enabled in Administration >> Custom Setting >> Archive Item set to a value of 1. (You must be logged in as the administrator to view or modify this setting) When deleted, items will then be stored in an Archived state. This allows you to monitor and remove the Items as you see fit. You can bring up the Archived Items by going to the Catalog menu and then to Find\Add item. Select “Archive” as the search type and then click on Find to display all archived items. From this list you can remove the items you need or all of the items. ONCE ITEMS ARE REMOVED FROM ARCHIVE THEY ARE GONE FROM THE SYSTEM

Patrons

The Insignia Library System allows staff to keep updated profiles of all patrons using the library. This includes general information about the patron, loan history, circulation type and security information. The Insignia Library System can also be configured so that patrons can manage their profiles themselves. Patron information can be imported from any Student Information System (using customizable templates) or can be added manually.

If your school is using Insignia Student Information System, then the above information is automatically loaded and updated in real-time from the Student Information System.

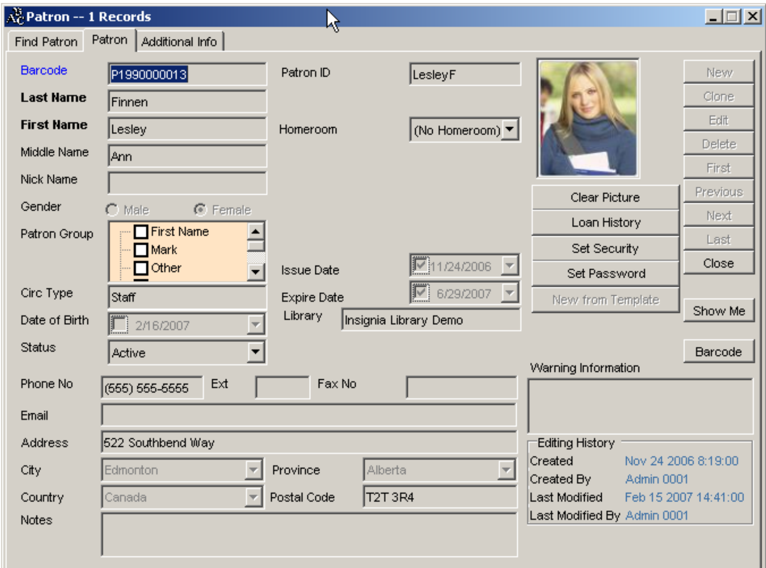


Patron Profile

To add a patron manually, follow these steps:

1. Click on “Patrons” on the Navigator Toolbar.
2. Click on “Find/Add Patron”, and then click on “New”.
3. Enter all the information that is available to you (you will notice that each Patron Group has its own interface).

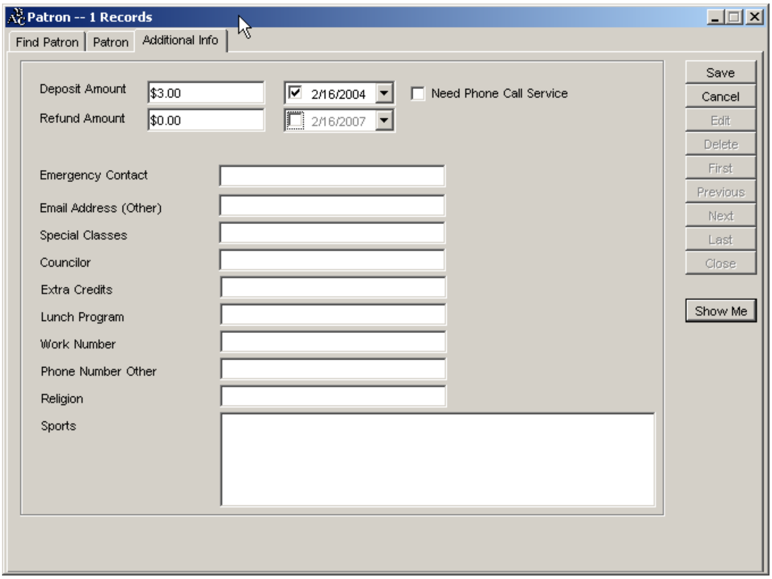
4. If the barcode is left blank, it will automatically be generated for you.
5. To add a patron's picture, click on the picture frame and select patron's picture (or click on the "Add Picture" button directly below the frame). It is strongly recommended that the file format for pictures be .jpg and the size be less than 15K.
6. Click on "Save".



Additional Info tab

The additional info tab will allow you to track deposits for items in your library. Entering a value into the deposit field and selecting a date will allow you to track deposits made for that patron. We have also added four custom fields to this tab; you can use these fields for any value or information needed. The field names are customizable in the setup.

To enter a new deposit, follow these steps:



1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “Find/Add Patron”.
3. Find the patron you want to add the deposit to.
4. Click on the “Additional Info” tab.
5. Click on “Edit” then enter the deposit amount.
6. Then click on “Save” to update your changes.
7. If you wish to refund the deposit, repeat steps 1 to 3. Then, when clicking “Edit”, enter the refund amount and click on save to save your changes.

To enter a patron custom field, follow these steps
1. Click on “Patrons” in the Navigator Toolbar
2. Click on “Find/Add Patron”
3. Find the patron you want to add the custom fields to
4. Click on the “Additional Info” tab
5. Click on “Edit” then enter the values in the desired box
   5.1. Then click on “Save” to update your changes

Create a New Patron by Copying an Existing One

Copying patron information is useful when the librarian is entering data for siblings. To create a new patron by “Cloning”, follow these steps:

1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “Find/Add Patron”.
3. Find the patron you want to copy.
4. Double click on the patron on the list.
5. Click on the “Clone” button.
6. Make the necessary changes.
7. Click on “Save”.

Create a New Patron from a Template

Templates are useful when the librarian is creating data for given type of patron. Librarians can predefine various parameters in a template. To create a new patron from a template, follow these steps:

1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “New Patron from Template”.
3. Select the template.
4. Make the necessary changes.
5. Click on “Save”.

Create a New Patron Template

To create a new patron template, follow these steps:

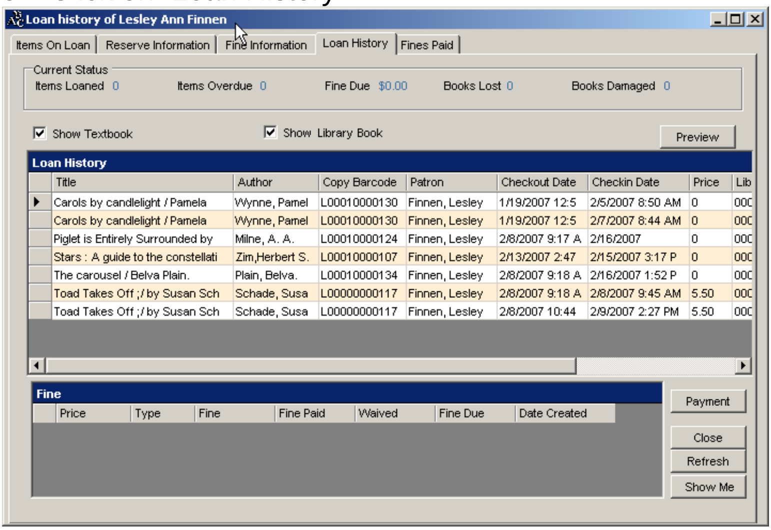
1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “Find/Add Patron”.
3. Click on “New”.
4. Enter the information you would like to save in the template.
5. Click on “Save as Template”.
6. Click on “Create New”, and then name the template.

Patron Loan History

This feature allows staff to find out what items the patron currently has on loan, the items they have on reserve and any outstanding fines. Textbooks on loan will have an asterisk beside them to denote that they are textbooks. To view the loan history of a patron:

1. Click on “Patrons” on the Navigator Toolbar.
2. Click on “Find/Add Patron”.
3. Enter the patron’s information in the search box.

4. Find the patron for whom you would like to get more information and select their name.
5. Click on “Loan History”.



Note: You must turn the “Track Loan History” option on by selecting the checkbox located on the Circulation tab in the Configuration screen under Administration dropdown menu. By default, the “Track Loan History” option is turned off. see Chapter 6 -Administration for more information.

Security Profile

The Insignia Library System supports user level and group level security. Therefore, staff can set permissions for an individual patron or for a group of patrons. It is strongly recommended that permissions are assigned to groups only. After group level security has been assigned, patrons should be assigned to their appropriate groups. Extra privileges can then be assigned to individual patrons over and above their normal group permissions. To learn more about security, see Security Setting in Chapter 6 – Administration.

Setting Patron Passwords

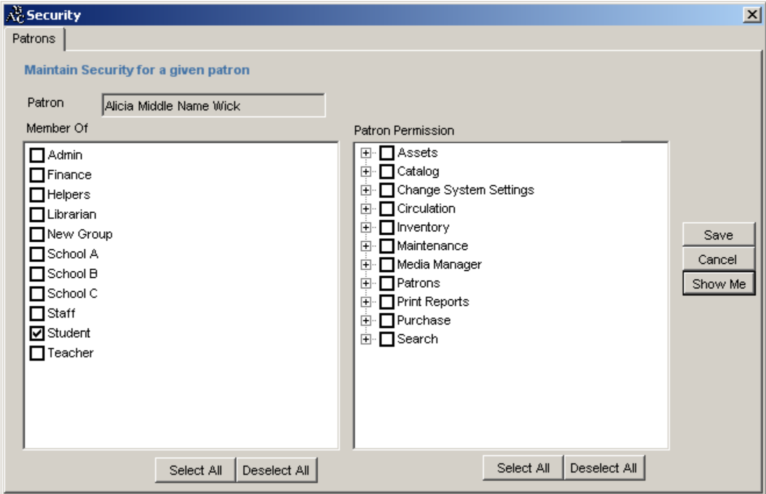
If the library has been configured to allow patrons to change their personal information, each patron will have a login password. The library system can be configured to set a default password for each patron. To change a patron password:

1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “Find/Add Patron”.
3. Find the patron whose password you would like to reset.
4. Click on “Set Password”.
5. Type in a new password, then confirm the password and click OK to save it.

Change Security Permission

To set patron security, follow these steps:

1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “Find/Add Patron”.
3. Select the patron whose security permission you would like to change.
4. Click on “Set Security”.
5. Click on “Edit” to change the permissions.
6. Select the groups this patron belongs to (by checking the box under the “Member of” list). You can also assign permissions to this patron, but it is recommended that you assign permissions to a group first and then make this patron a member of that group.
7. Click on “Save”.



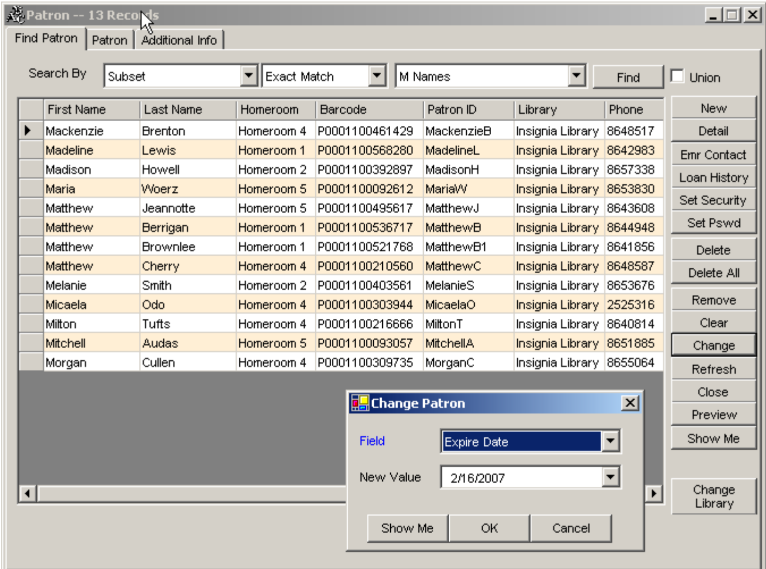
Creating Subsets

Staff can create subsets of patrons and then apply changes to these subsets. To create a subset, follow these steps:

1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “Find/Add Patron” and find the patrons who meet the desired criteria.
3. Click on “Subset” to add the selected student to a subset or click on “Subset All” to add all the students to a subset.
4. Select the subset to which the student(s) should be added from the dropdown list. If the desired subset does not exist, a new subset may be created at any time by selecting the “Create New” radio button.

Apply Global Changes to a Subset

To apply changes to a subset, follow these steps:



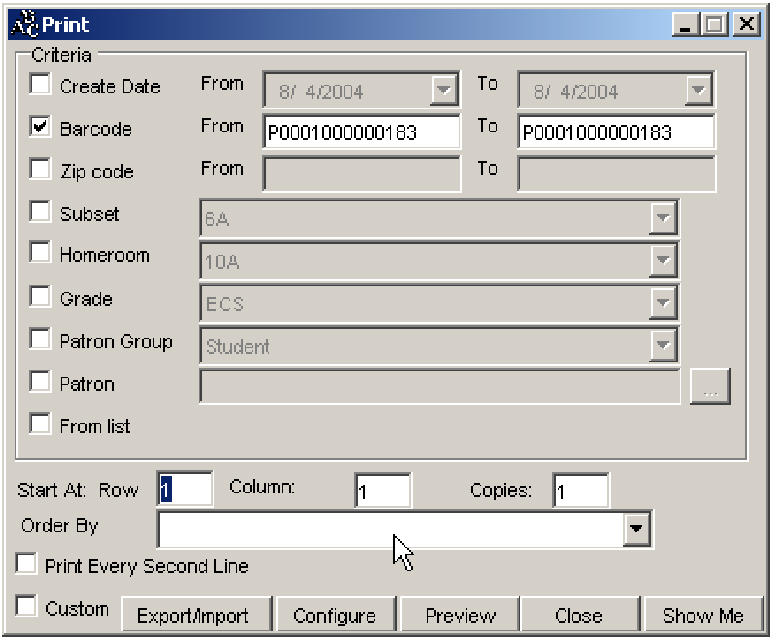
1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “Find/Add Patron”.
3. In the first “Search by” box, select “Subset” from the dropdown list.
4. To remove a patron from the subset, click on “Remove”. To clear the subset list, click on “Clear”.
5. To apply changes to all the patrons in the subset, click on “Change”.
6. Specify the desired field type and the new value associated with the field type.
7. Click on “OK”.

Printing Patron Barcodes

Staff can print patron barcodes using the various parameters shown below:

1. Date Created
2. Barcode Range
3. Zip Code/Postal code
4. Subset
5. Homeroom
6. Grade
7. Patron Group

8. Patron
9. From List



Staff can also choose to skip a line when printing barcodes. They can select the starting row, starting column, and the number of copies they wish to print as well.

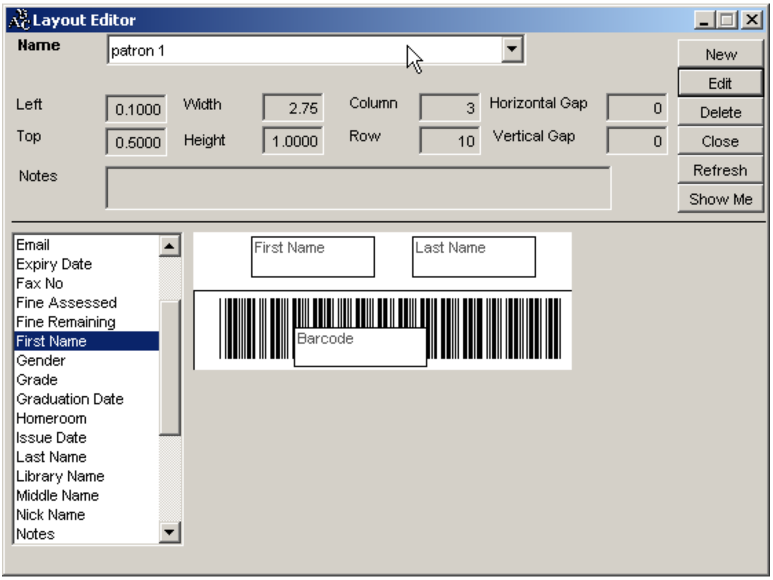
To print patron barcodes, follow these steps:

1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “Barcode”.
3. Specify barcode criteria (e.g. Create Date, Grade).
4. Click on “Configure” for barcode configuration.
5. Click on “Preview” to print barcodes.

Custom Barcodes

Staff can also print custom barcodes. With custom barcodes, staff can choose which fields will appear on the barcodes, the order the fields are in and their size.

To print custom barcodes, follow these steps:



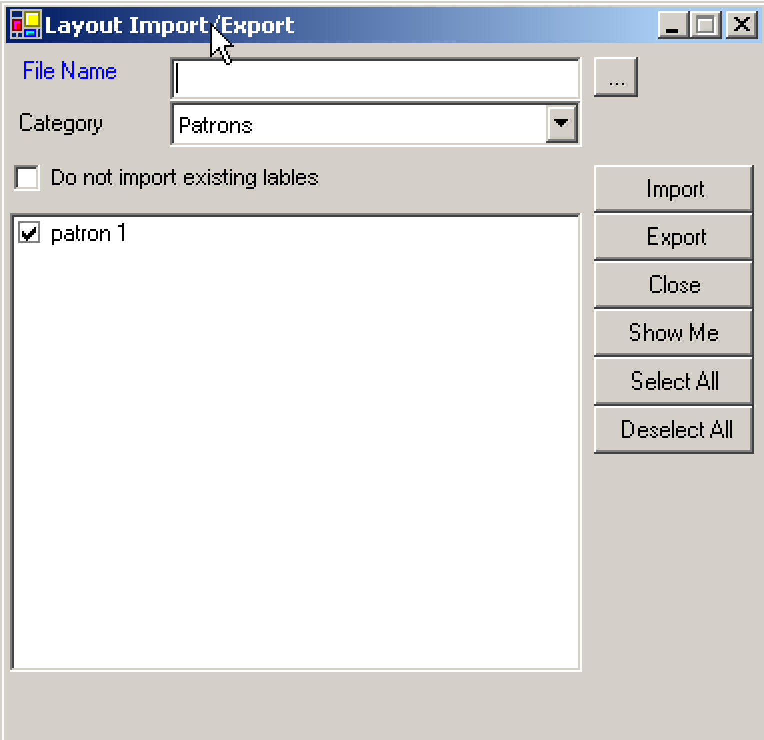
1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “Barcode”.
3. Select the “Custom” checkbox on the bottom left.
4. Click on the “Custom” button at the bottom of the screen.
5. To create a new layout, click on “New”, then enter a name for the new layout in the “Name” box. To work with an existing layout, select the layout from the dropdown list, and then click on “Edit” to modify it.
6. Choose the barcode size by entering the relevant information, such as height and width. The columns and rows will be adjusted automatically according to the height and width specifications entered. You can also enter the value in inches for the left and top margins.
7. You may add comments for this layout in the Notes field.
8. To add fields to your barcode layout, double-click on the field in the list located on the left side of the screen.
9. To add an actual barcode to your layout, right-click in the barcode area and choose “Add Barcode”.

10. To edit the size of any of the text boxes, drag the edges of the boxes, or else right click on the box and choose “Property”. You may also edit the properties of the actual barcode by right mouse clicking and choosing “Property”.
11. You may also choose a font (default is Arial) by right-clicking a box on your barcode, left-clicking “Property” and then selecting the “…” button that follows the current font name. Then, simply select the desired font. The user can select a different font for each field on the barcode for unparalleled flexibility.
12. Once you are finished modifying the layout, click on the “Save” button.
13. Click on “Close” to go back to the main barcode screen.
14. Select the custom label you have created from the “Report Title” dropdown list.
15. Click on the “Preview” button to see a preview of your labels.

Import/Export Custom Barcodes

Staff can also import/export custom barcodes. This allows librarians to share custom barcodes. To import/export custom barcodes, follow these steps:

1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “Barcode”.



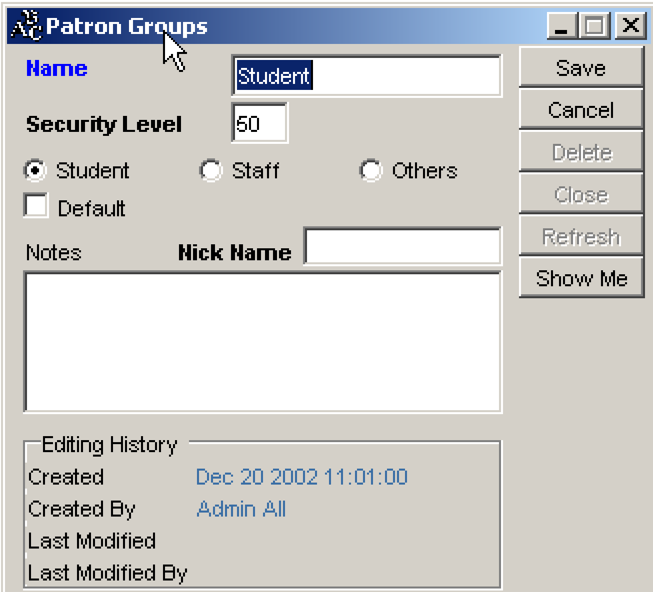
3. Click on “Export/Import”.
4. Specify the name of the file from which to import or export.
5. To export, select the layouts you would like to export and click on “Export”. To import layouts, click on “Import”.

Importing Patrons from a File

Staff can import data from a student information system. To learn more about how to import data from a file, see Chapter 6 - Administration.

Patron Group

Staff can create and define different groups of patrons. This allows the system to display only relevant information on the screen. For example, if the group is "Teachers", then the patron record will not display fields relevant only to students, such as student ID, grade, etc. Now when you move a patron from one group to another, it will ask you if you want to keep old security settings or use the new ones, or both.

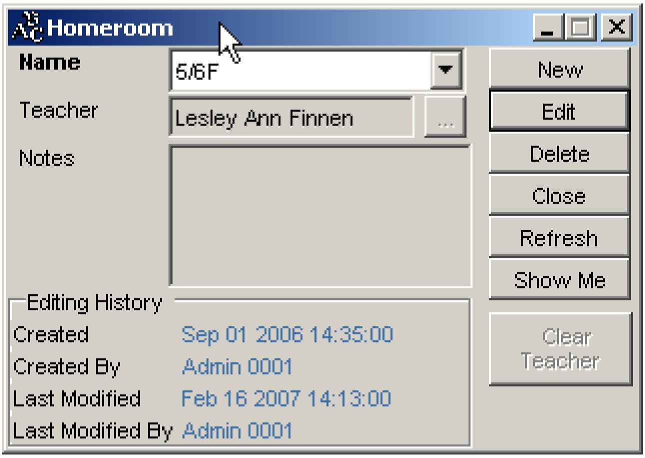


To add a new Patron Group, follow these steps:

1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “Groups”.
3. Click on “New”.
4. Enter the name and security level. Users cannot modify permissions for patrons with a higher security level. For example, a typical setup would have patrons at a level 50, and library staff at 90.
5. Click on “Save”.

Homerooms

Staff can create homerooms for their schools.



To add a homeroom, follow these steps:

1. Click on “Patrons” in the Navigator Toolbar.
2. Click on “Homeroom”.
3. Click on “New”.
4. Enter the name you want to assign the homeroom (usually the room number e.g. 101). Then click on the “…” button on the “Teacher” line. Now select the teacher for the class. You can also add any notes that you may have.
5. To clear a teacher’s name without adding a new one, click on the “Clear Teacher” button while in edit mode.
6. Click on “Save”.

Patron Archiving

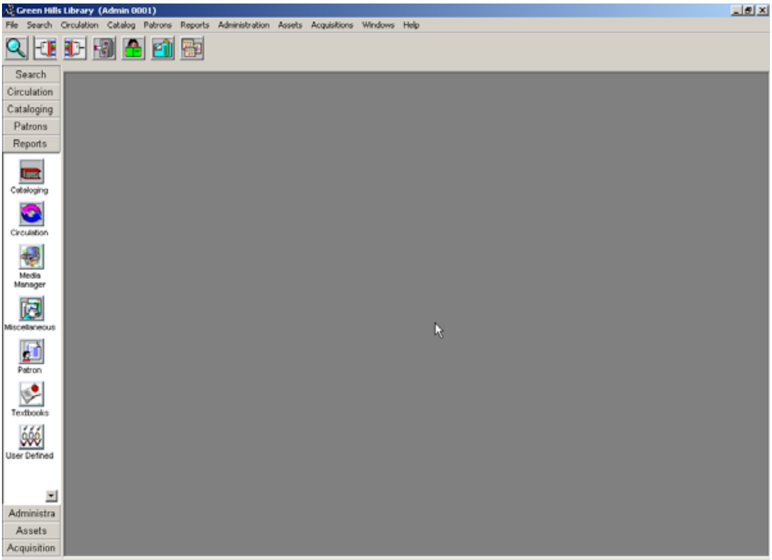
The Patron Archival feature allows you to remove a Patron or Patrons from the system. This feature is enabled in Administration >> Custom Setting >> Archive Patron set to a value of 1. They will then be stored in an Archived state. This allows you to monitor and remove the patrons as you see fit. You can bring up the Archived Patrons by going to the Catalog menu and then to Find\Add Patron. Select “Archive” as the search type and then click on Find to display all archived Patrons. From this list you can remove the items you need or all of the Patrons. ONCE PATRONS

ARE REMOVED FROM ARCHIVE THEY ARE GONE FROM THE SYSTEM

Reports

The Insignia Library System has more than 100 predefined reports in the following categories plus the ability to produce fully customized reports:

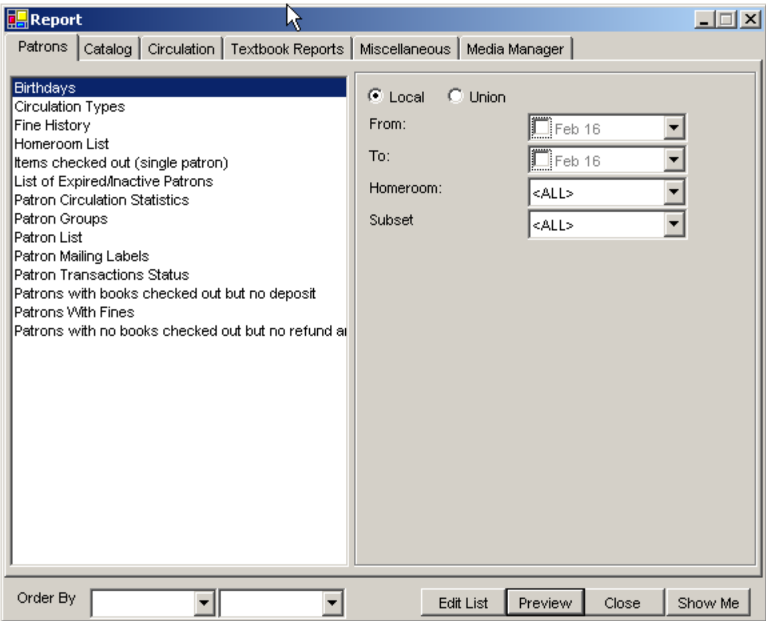
1. Patrons
2. Catalog
3. Circulation
4. Textbook
5. Miscellaneous
6. Media Manager
7. User Defined
8. Report Designer



Each report has multiple criteria, allowing staff to create reports based on the information they are interested in. Most reports with relevant information can also be applied to a patron or item subset you have previously saved.

Patron Reports

There are 14 Patron Reports as listed below:

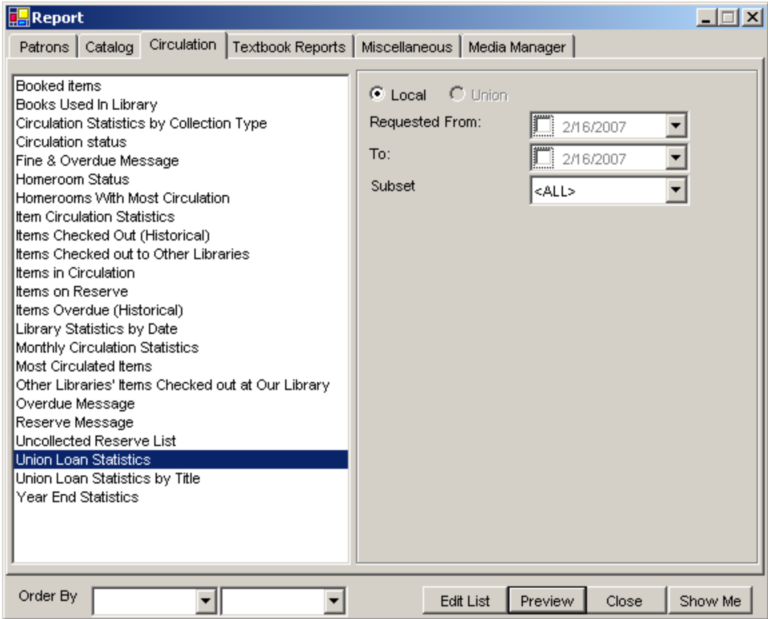


Birthdays: lists patrons and their birthdays. Select a date range, homeroom, or subset.
Circulation Types: lists patron circulation types and their circulation restrictions.
Fine History: lists fine details for patrons. Select a single patron, homeroom, patron group, status, or subset. You may limit the report to a fine activity date range. You may choose to include lost items with overdue amounts, or not.
Homeroom List: lists homerooms with teachers.
Items checked out (single patron): lists title, call number, checkout date, due date, barcode number, and status of items checked out to a single patron. You may also choose to print overdue amounts only.
List of Expired/Inactive Patrons: lists patrons who have expired or inactive memberships. You may limit the report to a specific homeroom or by subset.
Patron Circulation Statistics: lists patron circulation statistics. You may limit the report by date range, times overdue, times renewed and subset. You may also group

this report by: Homeroom, Patron Circ Type and Patron Group.
Patron Groups: lists patron groups, level of permission, and number of patrons assigned.
Patron List: lists patrons. You may limit the report to a specific patron group or subset.
Patron Mailing Labels: prints standard mailing labels for sending notes to patrons. You may limit the report by patron group, patron last name, postal/zip code, and subset. You may also choose to print one specific patron from a list.
Patron Transaction Status: lists the transaction status for a specific patron. Lists Items Checked out, Overdue List, Lost Items, Damaged Items, Fine History, Items on Reserve, Booked Items, and Checked out assets.
Patrons with Books Checked out and no Deposit: lists patrons who have books checked out with no deposit.
Patrons with Fines: lists patrons with fines. Includes amount owed. Prints separate sheets for each homeroom. You may limit the report by patron group, homeroom, fine amount, and subset.
Patrons with no Books checked out but no Refund Amount: lists patrons with no books out and no Refunds.

Circulation Reports

There are 23 circulation reports; a brief description of each is given below:



Booked items: lists booked items. You may specify a single patron. You can also limit the report by booking date range, booking status and subset. You may also print out a separate page for each patron.

Books Used in Library: lists books that have been counted as “in house use”. Whenever an item is scanned in check in that has not been checked out, it is counted as “in house use”. Print this report locally, or by union.

Circulation Statistics by Collection Type: A breakdown of circulation statistics by collection type.

Circulation Status: lists fines, overdues, and reserves for individual patrons. The report prints separate pages for each homeroom. You may limit the report to an individual patron or patron group, by minimum number of overdue items, and by subset.

Fine & Overdue Message: This is a combination report of both the Fine and Overdue messages

Homeroom Status: Number of checkouts by homeroom

Homerooms with most Circulation: lists the homerooms with the most circulation. Limit this report by a date range and specify a top limit.
Item Circulation Statistics: lists circulation statistics for items. You may limit the report by check in date range, number of renewals, times overdue and subset. You can also group by Author, Material Type and Subject.
Items Checked Out (Historical): lists all circulating items with the name of the borrowing patron. The report prints separate pages for each homeroom. You may limit the report by checkout date range, call number range, material type, patron group, homeroom, teacher, grade, and by subset.
Items Checked out to Other Libraries: Tracks interlibrary loans.
Items in Circulation: lists items that are in circulation. You may limit the report by circulation activity date range, number of circulations (Circulation Less Times) and by subset. This report also combines the Items checked out, overdue list, and Lost items. You can select any one of the check boxes or as many as you want to get the required results.
Items on Reserve: lists items on reserve. You may limit the report to a single patron, by reserve date range, by reserve status, and by subset.
Items Overdue (Historical): lists all overdue items with the name of the borrowing patron. The report prints separate pages for each homeroom. You may limit the report by checkout date range, call number range, material type, patron group, homeroom, teacher, grade, and by subset.
Library Statistics by Date: provides a snapshot of library activity in all modules for a given date range. You may limit this report by subset.
Monthly Circulation Statistics: lists monthly circulation statistics. You may limit the report by check in date range and by subset. You can also report by classification, material type and subject.

Most Circulated Items: This report will help you find your top or bottom circulated items
Other Libraries' Items checked in at Our Library: lists items received from other libraries in the union. You can limit this report by a date range, and by subset.
Overdue Message: Will allow you to create a report that you can give to your patrons, asking them to return their overdue books. It can be limited by date range, patron Group, homeroom, message type, and subset. You can also choose to print a simple format which will be a shorter report. You can also choose "from list" if you want to scan in individual patrons.
Reserve Message: A report that lets your patrons know there items on reserve has come in.
Union Loan Statistics: Lists the libraries in the Union and how many books are on loan to other libraries as well as how many each library has borrowed.

Uncollected Reserve List: Lists items on reserve that have not been picked up by patron.

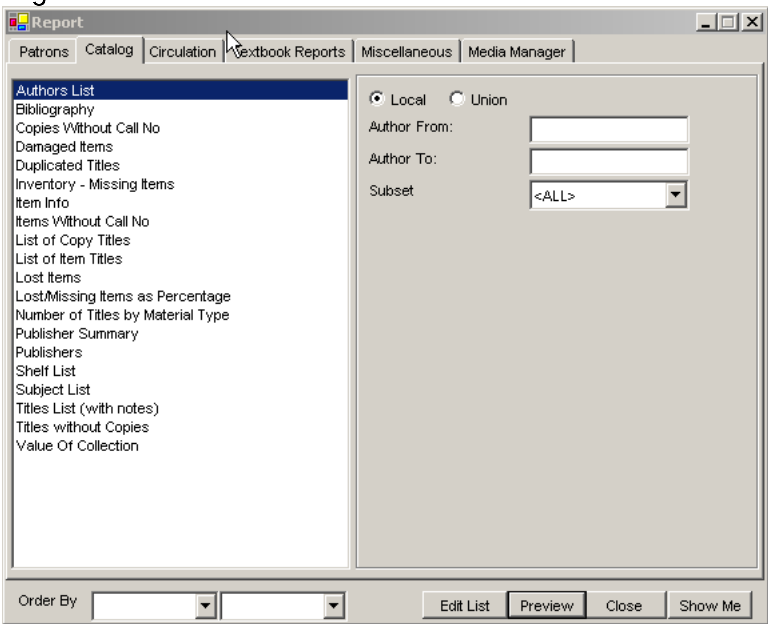
Union Loan Statistics: Tracks loan statistics between libraries in Union.

Union Loan Statistics by Title: lists titles borrowed from and lent to other union libraries. You may limit this report by request date range and by subset.

Year End Statistics: lists circulation activity for a year broken down by month. You may limit this report by request date range and by subset.

Cataloging Reports

There are 20 cataloging reports; a description of each one is given below:



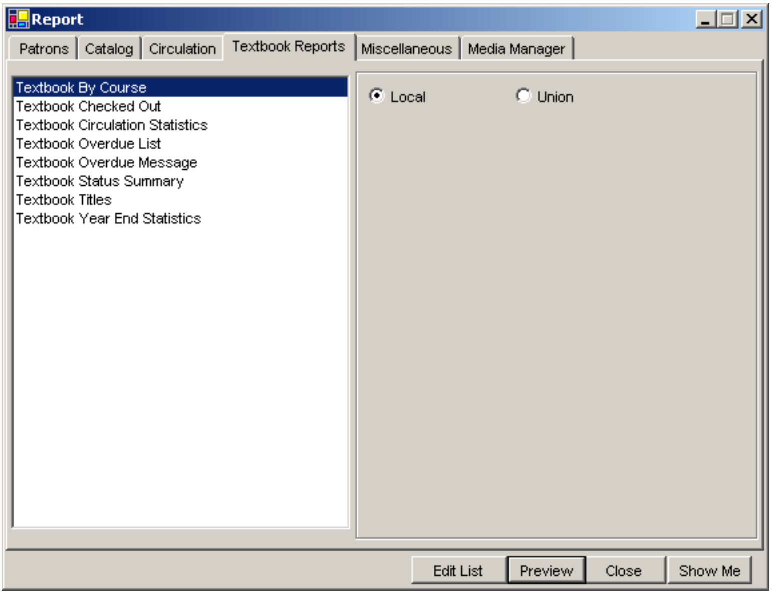
Authors List: lists name authorities. You may limit the report by last name range and subset.
Bibliography: Bibliography of selected items
Copies without call Number: lists items that have no call number. You may limit this report by subset.
Damaged Items: lists books that have a damaged status. You may limit this report by subset.
Duplicated Items: lists duplicate book titles within the system. This report can be limited by subset.
Inventory - Missing Items: lists items which the inventory has determined as missing. You may limit the report by date range, call number, material type, circ type, location and by subset. You may also print a report of items used in in-house use.
Item Info: Coming Soon

Items without Call Number: lists items that have no call number. You may limit this report by subset.
List of Copy Titles: this report will give you a print out of all of the copies in your system including duplicates. You may limit the report by created date range, publication year date range, author, subject, publisher, location, circulation type, language, audience, subset and group by.
List of Item Titles: this report will give you a list of unique titles within your system. You may limit the report by created date range, publication year date range, author, subject, publisher, location, circulation type, language, audience, subset and group by.
Lost Items: lists items with a status of lost and the name of the responsible patron. You may limit the report by lost date range, patron group, homeroom, and by subset. You can also choose to include items “declared” lost.
Lost/Missing Items as Percentage: is broken down first by Location and then Materials type. The criteria that you can set are call number range, publication date range, purchase date, location and material type. The report will show you the amount of books in the sections that the search criteria specified, as well as the total lost books, and also a percentage for the amount of lost books against the total you have in that section.
Number of Titles by Material Type: lists the number of titles by material type. You may limit this report to a subset.
Publisher Summary: lists the amount of books per publisher and total cost of items. The report can be limited by publisher and subset.
Publishers: will give you a detailed description of each publisher in your system. You can limit this report by publisher.
Shelf List: lists library holdings in the shelf list order with bibliographic and holdings Information. You may limit the report by call number range, material type, audience, publication year range, and by subset. You can also choose to have one item per line or not.
Subject List: lists subject headings used in the library. You may limit the report by subject heading range.

Titles List (with notes): lists titles with bibliographic information including notes. You may limit the report by call number range, subject range, material type, audience, publication year range, and by subset.
Titles without Copies: lists titles that have no attached copies. You may limit this report to a subset.
Value of Collection: this report will list the items within your specified range and give their collection value. This report can be limited by call number range, publication year, purchase date, material type, location and subset.

Textbook Reports

There are eight textbook reports:



Textbook by Course: lists all textbooks by the course they are linked to. The report includes the number of copies for each textbook.
Textbooks Checked Out: lists all the textbooks checked out. You may limit this report by individual patron, homeroom, grade, and course.

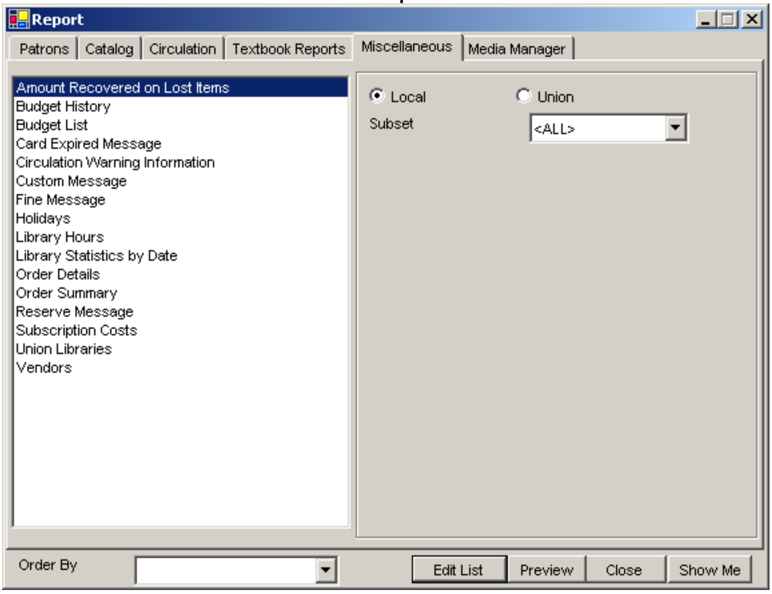
Textbook Circulation Statistics: lists circulation statistics for textbooks. You may limit the report by date range.

Textbooks Overdue List: lists all overdue textbooks. You may limit the report by homeroom and group.

Textbook Overdue Message: lists overdue textbooks. You may limit the report by patron group and by date. You may also specify an individual patron by using the “from list” option and entering or scanning in the patron barcodes.
Textbook Status Summary: lists all textbooks in the system and their status.
Textbook Titles: lists all textbooks in the system.
Textbook Year End Statistics: lists textbook circulation activity for a year, broken down by month. You may limit this report by date range.

Miscellaneous Reports

There are 17 miscellaneous reports.

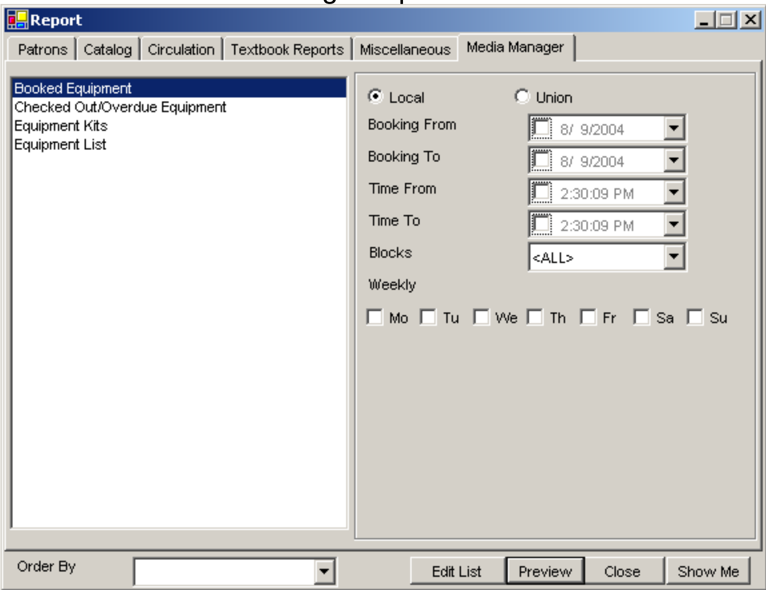


Amount Recovered on Lost Items: lists amounts charged, paid, and waived for lost items. You may limit this report to a subset.
Budget History: lists budgets and provides summary of transactions for each order. You may limit the report by budget dollar value range.
Budget List: lists budgets with value summaries. You may limit the report by budget dollar value range.
Card Expired Message: prints notices to send to patrons with expired memberships. You may limit the report to a specific patron, by date range, but patron group, and by subset.
Circulation Warning Information: prints warnings attached to patron records. This report can be limited by subset.
Custom Message: prints custom messages to patrons. You may limit the report by message type, patron group, homeroom, and subset.
Fine Message: prints messages to patrons regarding fines. You may limit the report to a specific patron, patron group, and by subset. You may also choose to exclude overdues, exclude lost fines, and exclude damages. It can also be printed in a simple format and for the libraries you specify.
Holidays: lists holidays as specified in library info. You may limit the report to a date range.
Library Hours: lists library hours as specified in library info.
Magazine Claims: Shows serials that have been claimed
Order Details: provides details on orders in process. You may limit the report by date range, vendor, order status, dollar value range, budget name and who it was created by.
Order Summary: provides summary information on orders. You may limit the report by date range, order status, budget name, vendor name, created by and budget amount range.
Search Statistics: Shows a pie chart graph of successful and unsuccessful searches by Search type

Search Statistics 2: Provides a text report of successful and unsuccessful searches by search term and count
Subscription Costs: lists amounts spent on serials subscriptions.
Union Libraries: provides basic information on the libraries that form your union.
Vendors: provides basic information on vendors that supply assets. You may limit the report by vendor name range.

Media Manager Reports

There are 4 Media Manager reports



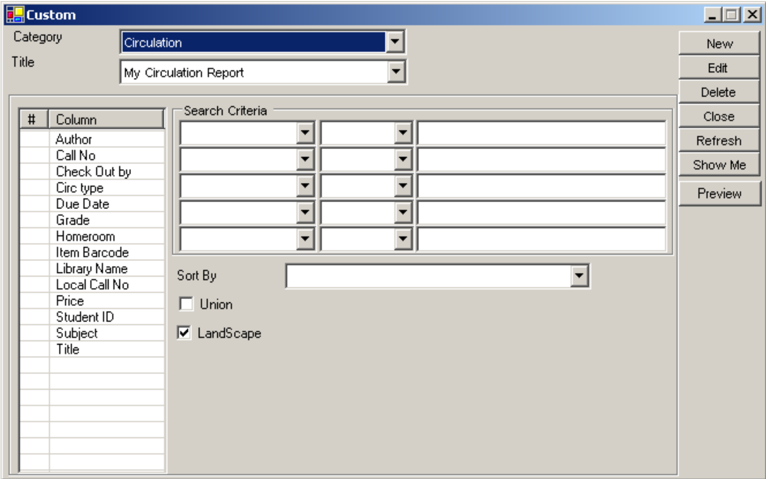
Booked Equipment: lists all equipment booked out. You may limit this report by booking dates, booking times, blocks, or on a weekly basis.
Checked out / Overdue Equipment: lists all equipment checked out, including items overdue. You may limit this report by individual patron, booking dates, material type and location. You may also limit this report to include overdues.

Equipment Kits: lists all the kits you have in your system.
Equipment List: lists all the equipment in your system. You may limit this report by title, purchase year, vendor, media type, and location.

User Defined/ Custom Reports

The Insignia Library System allows you to design your own reports. To create a new report, follow these steps:

1. Click on “Reports” on the Navigator Toolbar.
2. Click on “User Defined”.
3. Select a category of report:
   - 3.1. "Copies" provides information relating to holdings.
   - 3.2. "Patrons" provides information relating to library users.
   - 3.3. "Titles" provides information relating to bibliographic item records.
   - 3.4. “Equipment” provides information relating to Media Manager equipment.
   - 3.5. “Kits” provides information relating to Kits that have been created in the Assets module.
   - 3.6. “Circulation” provides information relating to circulation statistics and information.
   - 3.7. “Text Book Copy” provides information on textbooks in the system.
4. To work with a report created previously, choose the corresponding category and title from the dropdown lists.
5. To create a new report, click on the “New” button.
6. Select the report columns you wish to use by clicking in the corresponding box beside the fields and placing a number in them. For example, if you wish to have a report with Title, Author, and Barcode in it, and you wish to have Title in the first column, then place a number “1” in the box beside Title, etc.
7. Set the search fields from the dropdown menus and enter your criteria.
8. Input a title for your report.

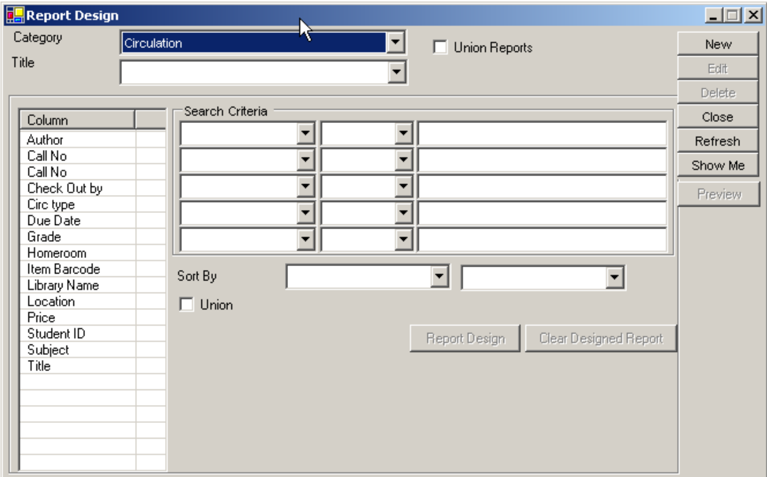


9. If you wish to print the report in landscape format, check the "Landscape" checkbox
10. To save this layout for future use, click on the "Save" button
11. Print the report by clicking on "Preview" and then on the printer icon on the top of the screen

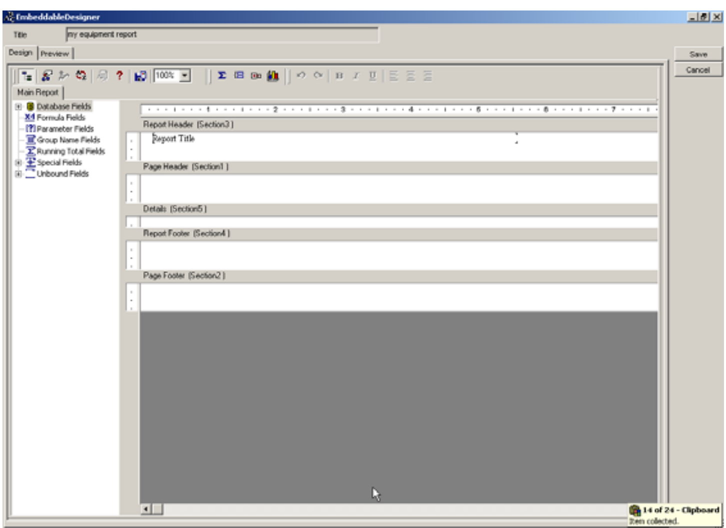
Report Designer

The Insignia Library System allows you to design your own reports. To create custom reports using report designer, follow these steps:

1. On the Navigator Toolbar, click on Reports.
2. Click on "Report Designer".



3. Select a category. Click on “New”.
4. Enter a title for the report.
5. Specify any criteria you like to specify (it can also be specified later).
6. Click on “Save”. Click on “Edit”.
7. Click on “Report Design”.



1. On the left side of the screen, expand “Database Fields” by clicking on the “+”.

2. Expand “ado” by clicking on the “+”.
3. Drag and drop the fields on the report.
4. To select special fields, expand “Special Fields” by clicking on the “+”.
5. To add a group, click on the “Group Name” field.
6. Specify the field to group by.
7. When finished click on “Save”.
8. To print the custom report, specify the parameters and click on “Preview” and then click on the print icon to print the report

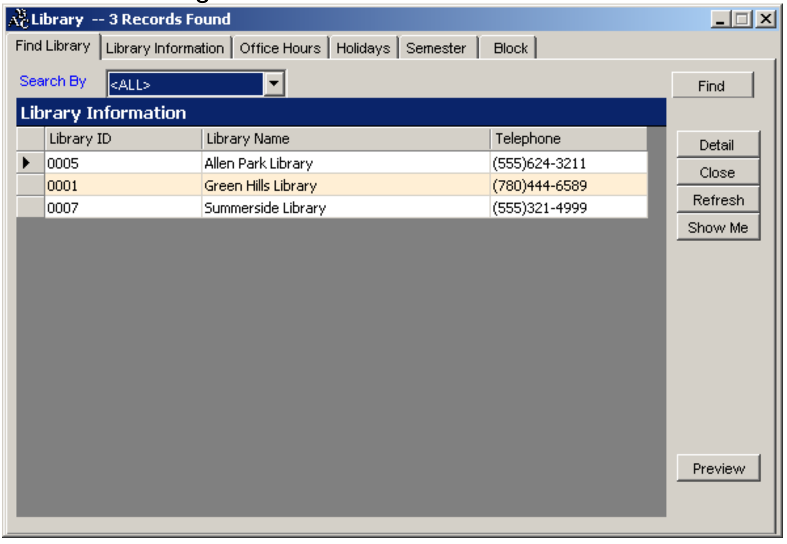
Administration

In the Administration module, staff can set the configuration parameters for the library system.

Library Info provides a profile of your library as well as other libraries in the union. When logged in as your library administrator (“admin####”), you can only modify information about your own library. You can modify information on any library if you are logged in as “admin”. To quickly switch locations while logged in as “admin”, go to “Cataloging”, “Change Library”, and then select the appropriate site. Logging on as “admin” will allow you to access to the Custom Setting option as well as allowing you to change the Web OPAC configuration.

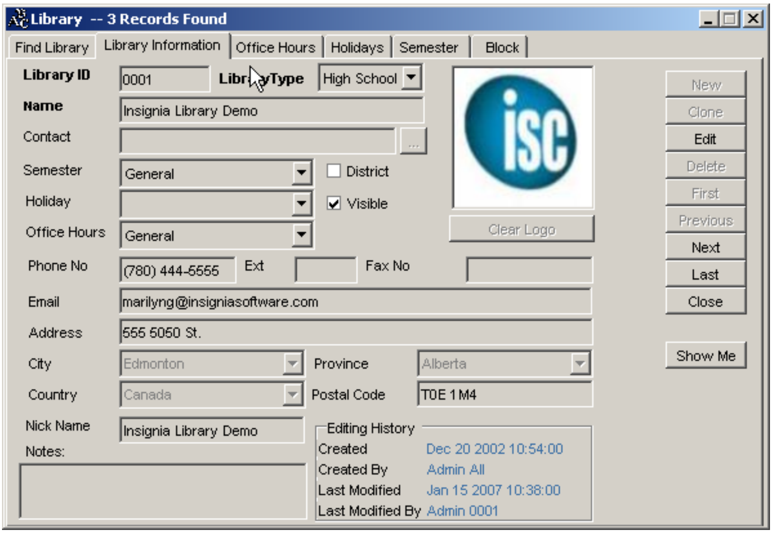
Library Information

Staff can save general information about the library (address, phone number, etc.) This information is automatically retrieved when placing an order. Since other staff in the union will be viewing these details, it is important that library information be updated whenever there is a change.



To make changes in your library information, follow these steps:

1. Click on “Administration” on the Navigator Toolbar.
2. Click on “Library Info”.
3. Search for your library.
4. Double-click on it.
5. Click on “Edit” to modify the profile. Remember, you must be logged in as the administrator and the appropriate location must be selected for the “Edit” button to be available.
6. Input the information.
7. Click on “Save”.
8. Note: create Holidays, Office Hours, Semesters and Blocks before creating the Library Profile.

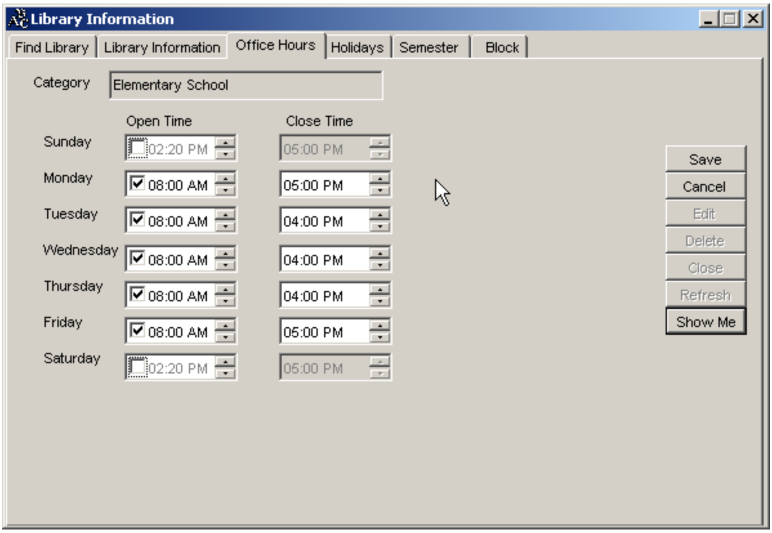


Office Hours

Office hours are used to calculate fines when books are checked out hourly and are also used to determine weekend holidays. To change office hours, follow these steps:

1. Click on “Administration” on the Navigator Toolbar.
2. Click “Library Info”.

3. Click on “Office Hours” tab.
4. Select the Category and click on “Edit”; or, click “New” to create a new category.
5. Set the library hours. To disable the hours for a particular day, uncheck the text box.
6. Click on “Save”.

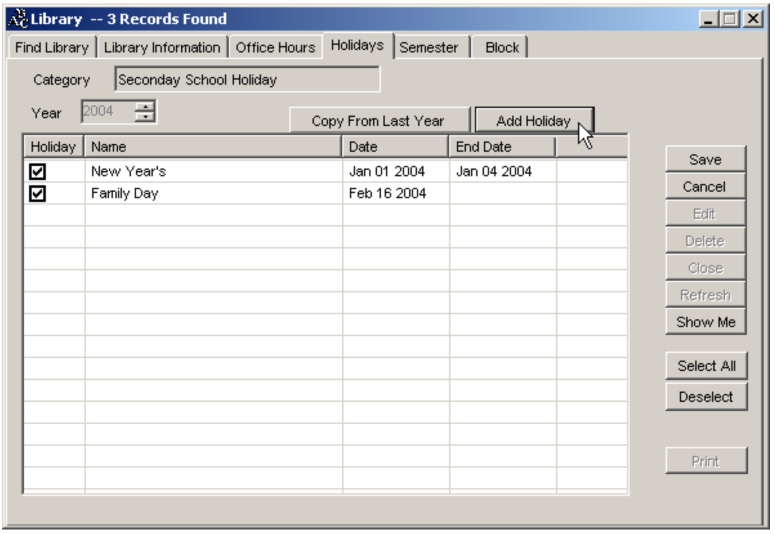


Holidays

Holidays are used in the calculation of overdue fines. Depending on the policies of the library, the system will either include or exclude fines for specified holidays. To set holidays, follow these steps:

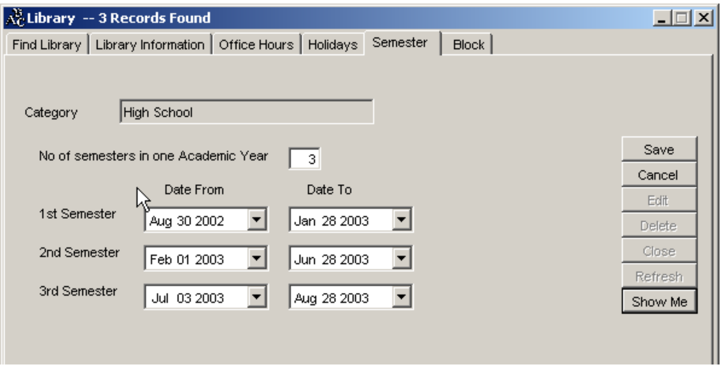
1. Click on “Administration” on the Navigator Toolbar.
2. Click “Library Info”.
3. Click on the “Holidays” tab.
4. Select a category.
5. Select a year and click on “Edit”.
6. Click on “Add Holiday”.
7. Enter a name for the holiday and specify the date or date range.
8. Click on “OK”.
9. Click on “Save”.

To copy holidays from the previous year, select the year and holiday category, click on “Edit” and then click on “Copy from Last Year”. New holiday categories may also be generated, creating a template that any location may apply. To create a new holiday category, simply click on “New” and enter a name for the category. Then click “Add Holiday”, and proceed to add holidays to the category. Press “Save” when finished. Your new holiday category may now be applied to any location.



Semesters

Semesters are used in schools and academic libraries but are not used in public library environments. Semesters are used to calculate due dates and can also be used to checkout regular materials or textbooks.



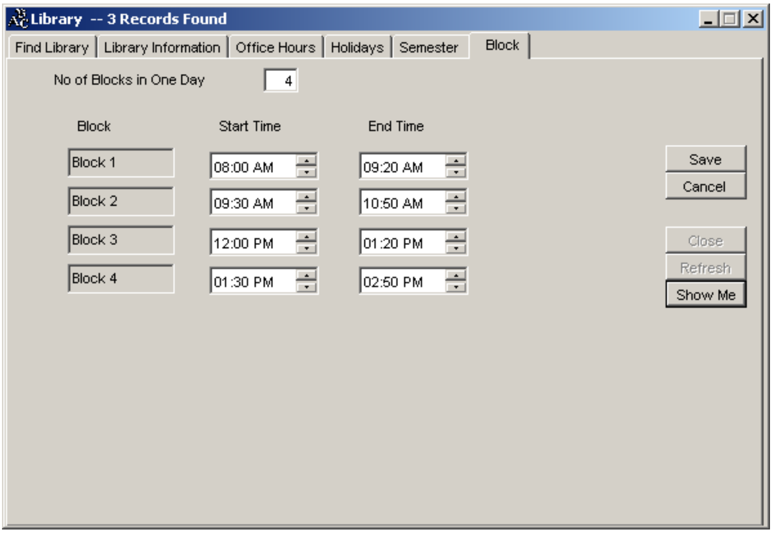
To create semesters, follow these steps:

1. Click on “Administration” on the Navigator Toolbar.
2. Click “Library Info”.
3. Click on the “Semester” tab.
4. Select a category and click on “Edit”. Or, to create a new category, click on “New” and enter a name for the category.
5. Specify the number of semesters.
6. Specify date ranges for semesters.
7. Click on ‘Save”.
8. As you can see, creating new semesters is consistent with creating new “Holiday Categories”

Blocks

You can specify the number of blocks or periods in a day, and the times for these blocks. The times will be used in the library system for Media Manager bookings. To create blocks, follow these steps:

1. Click on “Administration” on the Navigator Toolbar.
2. Click “Library Info”.
3. Click on the “Block” tab.
4. Click on “Edit”.
5. Specify the number of blocks.
6. Specify the times of the blocks.
7. Click on “Save.



Configuration

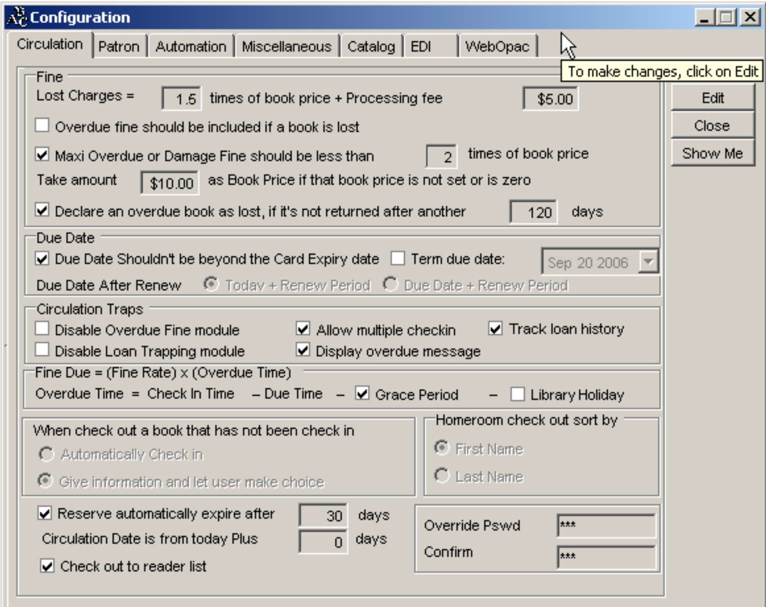
The Insignia Library System is pre-configured so that you can start using it right away. Common groups, permissions and defaults are predefined. Staff can add new groups; assign permissions to groups, and change default parameters. However, staff cannot add new permissions or change the security setting for the Administrator user.

Auto-dialer

The Insignia Library System has now added in an exciting new feature called Auto-dialer. It would allow your system if configured for it, to call Patrons and inform them of there overdues or fines. We have added a check box to the patron window to also allow you to set this feature on a patron by patron basis. This feature can be run two different ways. You can either purchase the Auto-dialer card, or if needed it can be run through Insignia Software. Contact us for more information.

Circulation

In the Insignia Library System staff can configure every aspect of library automation.



Track Loan History
Determines whether the system tracks the history of the books being checked out (with complete patron history).

Override Password
This password can be used to override the circulation restriction.

Reserve Parameter
This option dictates the amount of time before a reserve expires.

Circulation Date
The additional delay (if any) between the time a material is catalogued and the time it is first checked out. If the value is set to zero, the material may be checked out the same day it is catalogued.

Due Date
To set the due date, the librarian needs to answer the following questions:

Should due date go beyond the card expiry date?
Should the Renew Date be equal to Due Date + Renew Period or Today + Renew Period?
Should an end-of-term due date be set for all items?
After how long should an overdue item become a lost item?

Fines
To set your fine structure for your library, you will need to determine the following:

Should there be a processing fee for lost items?
What is the maximum fine as a function of the item price?
What price should be set when there is no price given for an item?
Should the overdue fine be included for lost items?
Should the fine calculation exclude holidays and a grace period?

Circulation Flags

1. The Insignia Library System allows staff to enable or disable circulation restrictions. When the circulation restrictions are enabled, you will be prompted to enter a password. If disabled, only a warning is given before items can be checked out.
2. Should the fines module be enabled?
3. If the “Allow multiple Check In” box is unchecked, the user will get a message if they try to check in an item that has already been checked in.
4. Should an item be checked out to an individual then checked out to the next user (without first being checked in) without a prompt?

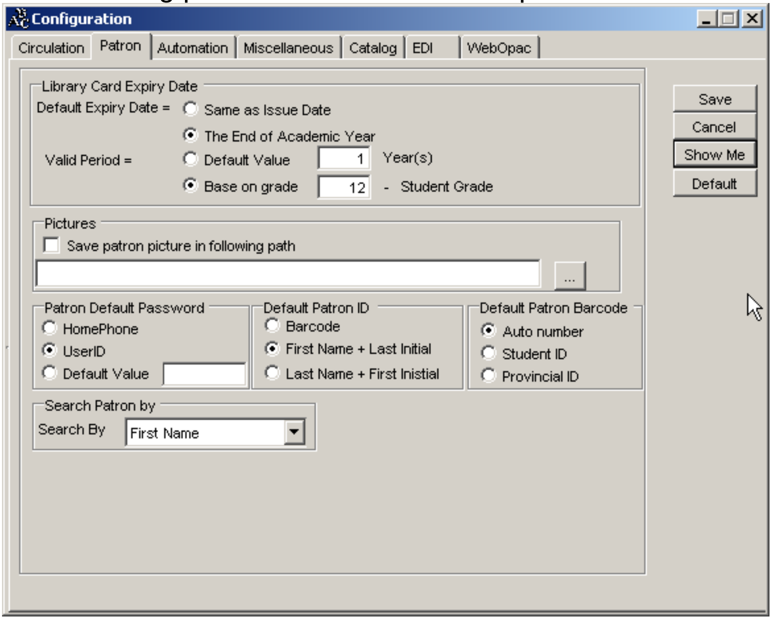
Homeroom Checkout Sort By
An option has been added to allow you to set the sort order of the Homeroom checkout window. You can choose to have it either sort by first or last name.

Check Out to Reader List

When this feature is enabled, serial issues being routed will be checked out to the Reader List instead of individual patrons on the list.

Patron:

The following parameters are saved for patrons:



Picture Path
Save the patron picture in the path you specify.

Default Patron Password
The default password can be set to:
Home phone no.
User ID
Default value that you specify

Default Patron ID
The default patron ID can be set to:
Patron barcode
First Name + Last Initial
Last Name + First Initial

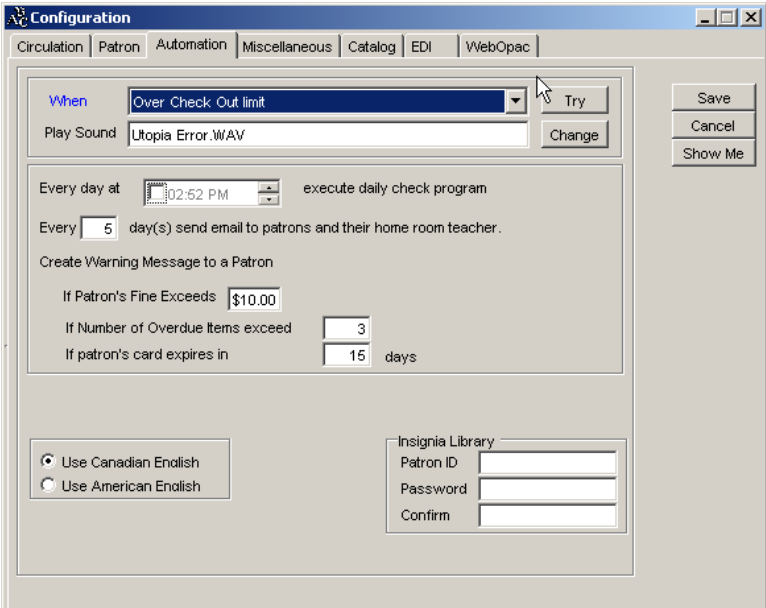
Default Patron Barcode
The default patron barcode can be set to:
Auto Number
Student ID
Provincial ID

Default Search By
Allows you to set the default “Search By” criteria when searching for patrons.

Library Card Expiry Date
Specify when you would like patron cards and privileges to expire.

Automation

The Insignia Library System is designed so that very little maintenance is required.
Send messages (if email is provided in patron profile) for:
Overdue items
Fine overdue
Cards expired



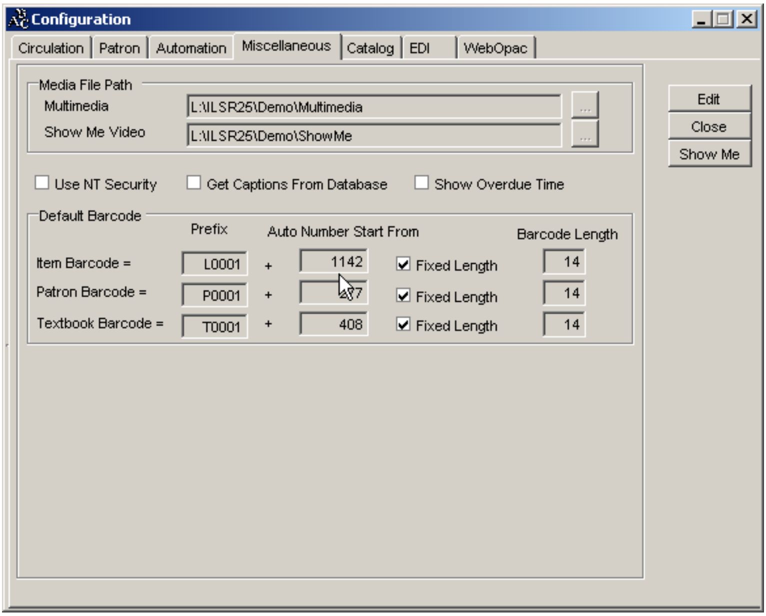
Sounds
Librarian can specify different sounds for circulation.

Update
Insignia Software regularly provides updates to the Insignia Library System. Qualified customers receive update files providing new features via electronic transmission. To use this feature, you must specify the location of the update file you have received from Insignia Software. note that the field in which you can specify the update path will be visible on the Automation tab only when logged in as “admin”.
Once you have set the path and placed an update file in the selected directory, you may update your library system by clicking on "Help" from the main menu and selecting "Update". The update should be done under supervision or with help from Insignia Software.

If the Auto Update box is checked, the system will automatically detect a new update according to the update path. When the system is started it will prompt the user to update.

Miscellaneous:

This section allows you to specify the “Media File Path” for any multimedia materials and/or Show Me Videos. You can also control the Windows NT Security integration from this screen.



Default Barcode

What barcode format should be used? Staff can specify the prefix, starting point and length of barcodes.

In the “Prefix” column, input any desired alphanumeric prefix (up to six characters). This will be the prefix used if you choose to automatically generate your barcodes when creating new item copies and new patrons.

In the “AutoNumber Start From” column, specify the number of the first item or patron barcode (subsequent numbers increase by an increment of 1). You may specify that your barcodes be a fixed length. A maximum of 14 characters, including leading zeros, is permitted.

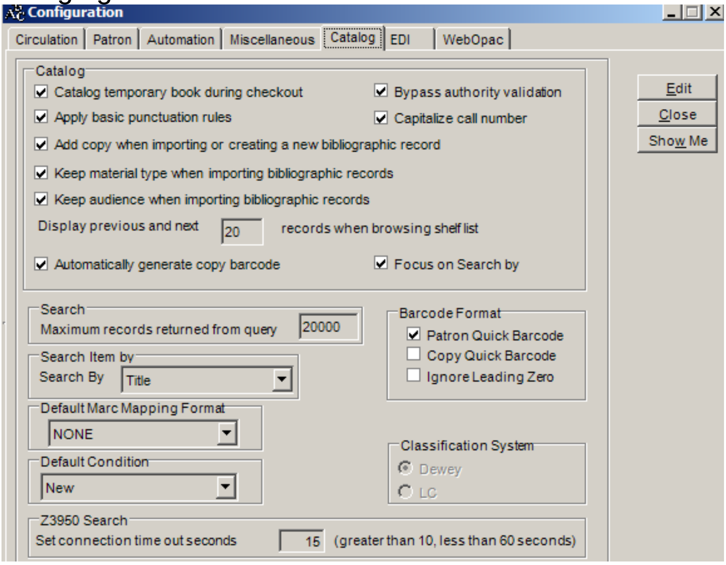
Show Overdue Time
This option will allow for the overdue time to be shown within circulation.

Use NT Security
Using this option will allow the system to use the same logon as your network logon. Therefore once you are logged into your network you will not have to logon in with a password to the library system.

Get Captions from Database
Turning this option on will force the system to grab the captions from the Database.

Catalog:

Staff can specify different parameters that affect cataloging.



Catalog Parameters
The following parameter can be set for cataloging:

1. Should the user be allowed to catalog temporary items?
2. Should you bypass confirmation for authority record validation when a MARC record is being saved?
3. Should call number be capitalized?
4. Should the system automatically apply basic MARC punctuations?
5. Should the user be prompted to add a copy when importing or creating a new bibliographic record?
6. Should the system keep material types when importing?
7. Should the system keep audience types when importing?
8. When displaying shelf list, what should be the default range?

Z39.50 Search Parameters
What should the connection timeout be when connecting to Z39.50 servers?

Search Parameters
What is the maximum number of records that should be returned from a catalog search?

Barcode Format
Here you can choose to use “quick barcodes”. This feature allows you to enter part of the barcode rather than the full 14 digits to bring up the record. Selecting the “Ignore Leading Zero” option will remove any leading zeros from a barcode scanned into circulation. The quick barcode feature can now be set separately for Patrons and Copies.

Default Search By
When in searching in the catalog module, what should be the default “Search By” criteria?

Default MARC Mapping Format
What should be the default MARC mapping format when importing MARC records?

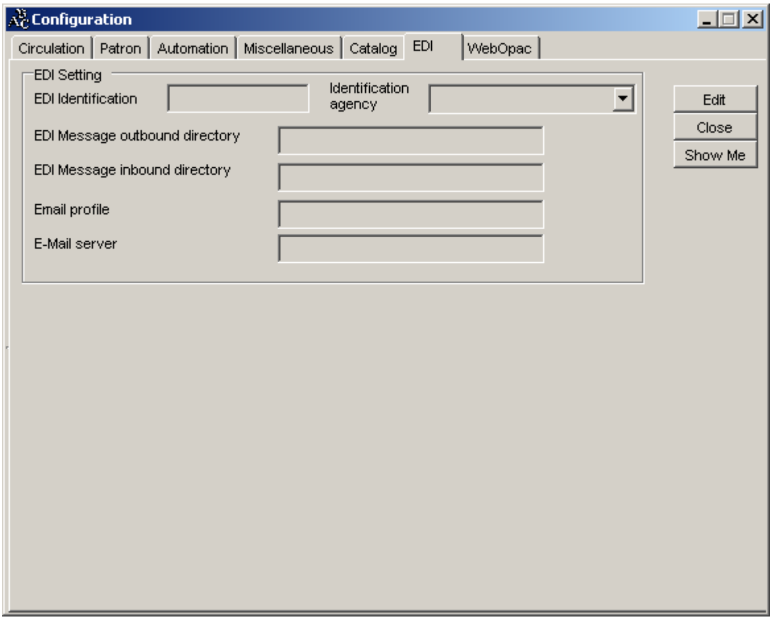
Default Condition

What will be the default condition of items added to the catalog?

Classification System
Which classification system will be used?

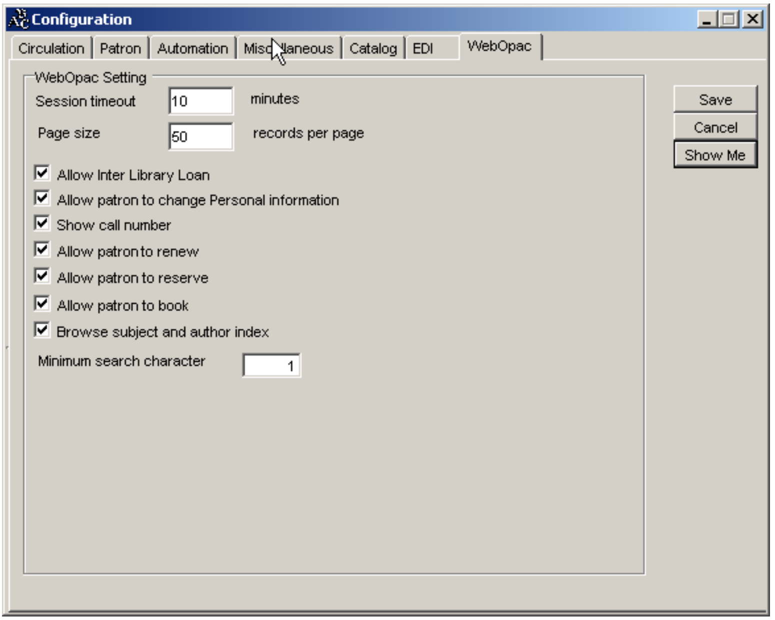
EDI

Here staff can specify different parameters required for EDI communication.



Web OPAC

In the Insignia Library System, Web OPAC configuration is customizable. Staff can choose to enable and disable different features of Web OPAC in real-time. The parameters that staff can control are listed below:



Max Search Results Returned
Determines the maximum number records to be returned within a single search. It is important to keep this number less than 1000. If this value is set too high, searches for simple terms may put undue stress on your network.

Minimum Search Characters
This parameter defines how many characters a patron must type for a search to be run. It is strongly recommended that this should be set to 3 as this covers most useful words. If this parameter is set to 1, you may put undue stress on your network.

Timeout
Sets the number of minutes after which the check out screen will clear the patron session.

Insignia Library Password

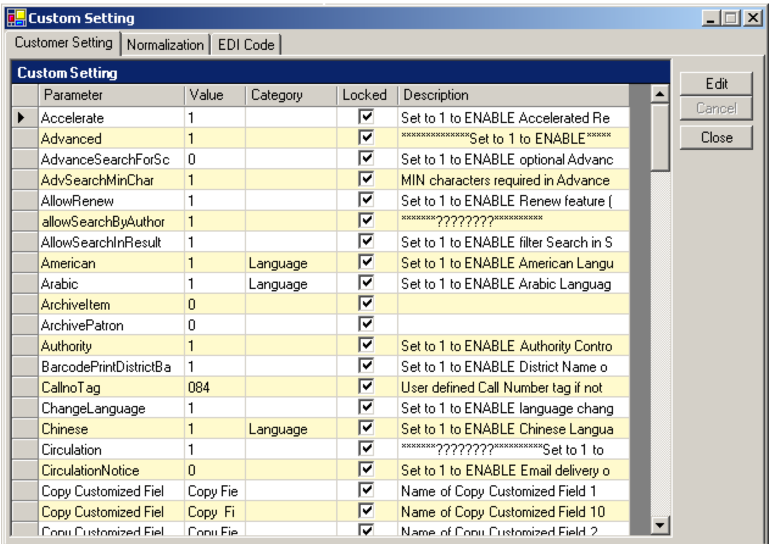
Specify the ID and password that other Insignia libraries will use to connect to your library for Insignia Search.

Language

The Insignia Library System supports multiple languages. Selecting any of the following languages means that it will be visible in “Language” under the Help menu:
American
Arabic
Chinese
English
French
Spanish
Urdu

Custom Setting

Custom Setting allows you to customize the library system according to your needs and the needs of your patrons. The Custom Setting screen gives you the ability to enable/disable various options of the library system and Web OPAC. Note that Custom Setting is visible under the Administration menu only when you are logged in as “admin”.
On the Customer Setting tab, you may disable and hide those features of the library system that staff or patrons will not use. To determine whether an option is currently “on”, look at the value in the Value column. “1” indicates “on”, and “0” indicates “off”.



The Customer Setting tab allows you to toggle on/off the following options:

Web OPAC:

You can disable and hide the following options for the Web OPAC:
Accelerate: Accelerated Reader activation in Web
Advanced: Advanced Search activation in Web
AdvanceSearchForSchool: Will change Web Advanced Search Interface to a secondary screen
AdvSearchMinChar: the minimum character requirement for Advanced Search can be turned off
Allow Renew: Renew activation in Web
AllowSearchByAuthor: Allow searching by Author in the Web OPAC
AllowSearchInResult: Allow you to search within a search
Authority: when Authority is on, a subject or author search in Simple Search will bring you into the subject or author authorities. When it is off, the search will be performed as if it were a keyword search in the subject or author fields.
ChangeLanguage: Set if Languages are to be changed in Web

Circulation: Enable Web Circulation Features
KeepFavoriteAfterLogout: Enable to keep favorites after logout
Kiosk: Kiosk Search
Marc: Set if Marc Record viewable in Web
MediaManager: hides the Media tab; patrons will be unable to search/book kits, equipment, and rooms
MyAccount: My Account tab Toggle on or Off
NLM: Will allow the National Library of Medicine's call Number to be stored in the 060 tag
Projects: Projects tab Toggle on or Off
Request: Toggle on or Off Request Button
RequireLogin: Set if Web OPAC use requires Login
ShowAudience: Audience can be displayed in item records
ShowBookingHistoryBtn: Set to enable or disable Booking History button
ShowCopyInfo: Set to display copy count
ShowCoverImage: Set to enable Cover Image view in Search Results
ShowDetailBtn: Set to enable or disable Detail button
ShowFine: Set to enable or disable Fine button
ShowISBN: ISBN can be displayed in item records
ShowLibrary: library can be displayed in item records
ShowLoanHistoryBtn: Set to enable or disable Loan History button
ShowMaterialTypeInTitle: Set if Material type is part of the title or will appear beneath it
ShowNewBookRequest: Request tab can be hidden
ShowOnLoanBtn: Set to enable or disable On Loan button
ShowOnReserveBtn: Set to enable or disable On Reserve button
ShowPatronInfoBtn: Set to enable or disable Patron Info button
ShowPublishedDate: Set to enable or disable Published Date Column in Web
ShowSectionOfAWorkInTitle: Set if 245 n and P fields viewable within records

ShowShelfListBtn: Set to enable or disable Shelf list button in Web
ShowSubject: subject can be displayed in item records
ShowWebLink: Set to enable or disable Web links in Web OPAC
WebCirculation: Web Circulation can be enabled
WebShowMARC: allows patrons to view MARC records

Library System:

The following options can be turned on/off within the Library System:
AdvancedMediaManager: Enable to view Advanced Media Manager
AllowCheckinOtherLibrariesBook: Will allow other libraries items to be checked in at your library
AllowCheckinOtherLibrariesTextbook: Will allow other libraries textbooks to be checked in at your library
American: American Language
Arabic: Arabic Language
Archive Item: Set this option to Turn on/off Item Archiving
Archive Patron: Set this option to Turn on/off Patron Archiving
BarcodePrintDistrictBased: Set this option to have all Barcode in your District use this Name
Call No. Tag: User defined call number tag if not using standard
Chinese: Chinese Language
CirculationNotice: If enabled an email will get sent after each transaction
Copy Customized Fields: INSIGNIA has given you TEN more custom fields that can be user configured. They allow extra fields for information when you need them
CopyNumberDistrictBased: This feature when turned on will let the District control the copy numbers. So if Library 1 has copy number 1 and then we add another copy to Library 2 then that copy number will be 2
CustomLayoutDistrictBased: When enabled, allows district based custom layouts

Decentralized: IMPORTANT FEATURE, contact INSIGNIA for help with this feature
Developer: Enable Advanced Modification features
DisplayLocalCallNo: Set if Local or District Call numbers appears in Searches and Reports
DistrictBased: IMPORTANT FEATURE, contact INSIGNIA for help with this feature
DistrictName: Set your District Name here
English: English Language
French: French Language
Hide Asset: Hide Asset Feature
Hide Homeroom: Hide Homeroom options
HideInsigniaSearch: Hide Insignia Search feature
Hide Textbook: Hide Textbook feature
HideIfOnlyOneSchool: If only 1 library in system Location will appear instead of Library in Search Results
Hide ShowMe: Hide ShowMe video buttons
Holiday District Based: Set if Holidays are set Locally or by the District
HomeRoomCheckout: Enable or Disable the Homeroom Checkout feature
IsPublicLibrary: Enable for Public Library
Item Customized Fields: INSIGNIA has given you TEN more custom fields that can be user configured. They allow extra fields for information when you need them. You can set the Custom Field number Ten to be called Book Reviews and Insignia will enable a special feature to show Book Reviews when present.
ItemCircReportNoPrice: Set to Enable or Disable price view on Circulation Reports
ItemCircTypeSchoolBased: Set to Enable or Disable circ types being Local or District Based
ItemPrice: Set to enable price field on Basic information Screen
Language: Set to Enable Language switch
ManualBarcode: Set if you want to choose or have barcode Auto assigned
NoLocalCallNo: Set to enable or disable local call number use within system

OnlyShowTitleWithCopy: Setting this will allow items only to be found in search module if it has a copy
Patron Customized Fields: INSIGNIA has given you TEN more custom fields that can be user configured. They allow extra fields for information when you need them.
PreciseSearch: Set to configure loose or Tight search
ReloadCaptions: Turn this option on to Reload captions from the database on Restart
ReloadCustomSettings: Turn this option on to Reload Custom Settings without Restart
RememberLastLogin: Set to remember last Login used to enter system. Will not remember password
Report Designer: Report Designer can be hidden
SelectTextbookInCirculationForm: This option will set if the Textbook checkbox is checked by default in the Check Out window
ShowOtherLibraryPatronNameInCopyInfo: Toggle this option to display or not display other libraries patron names

ShowSectionOfAWorkInTitle: This option enables the 245 N and P subfields to Appear in Title

Spanish: Spanish Language

Subscription Page: Provides a setup for a web based subscription and login

TBBarcodeDistrictBased: District based text book barcodes

TitleSearchNoSeries: Set to search series titles also when doing a Title Search

TitleSearchStartWith: Set to make Title searches default to Starts with

TotalGrades: Set total school grades

Urdu: Urdu Language

WarnInferiorQualityMarcDuringMarcImport: Turn on to enable Marc Record Quality check on Import

Z39 District Based: Turn on to set Z39.50 hosts to be District or Locally set.

Normalization

Normalization allows you to automatically change specified characters into other characters whenever they are entered into the library system.

EDI Code

On the EDI Code tab, you can set the parameters for various categories of EDI Code.

Circ Types

The Insignia Library System allows staff to customize all aspects of circulation. Each library has different needs, unique patron groups and specific circulation requirements. Some libraries may want to restrict access to certain materials or allow only specific types of patrons to check out allotted items.

For example, a teacher may be allowed to borrow a book for a month, while students can only borrow the same material for two weeks. Perhaps the librarian wants to limit the number of checkouts for a special collection, even though this number is much lower than what had been setup previously by patron circulation type. The Insignia library system offers a flexible environment, capable of circulating any collection in a way that is convenient and efficient

To provide complete control over circulation, the Insignia Library System requires three different types of groups, these are:

Item Circ Types

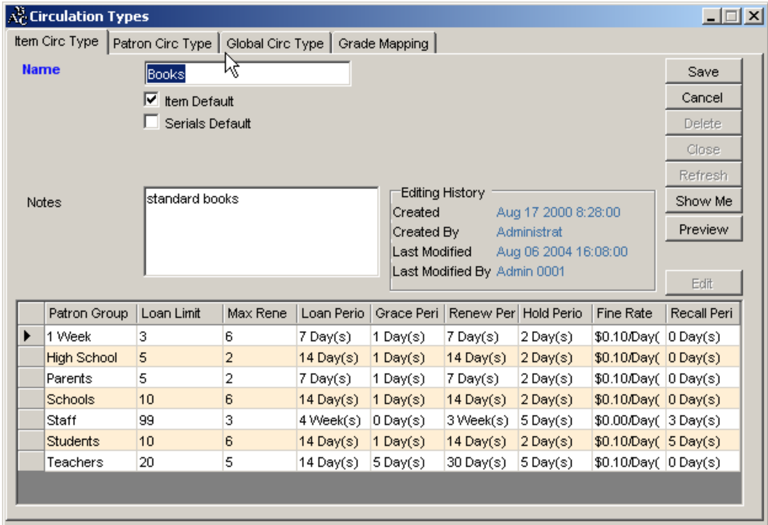
Patron Circ Types

Global Circ types

Item Circc Types

Staff can create different types of materials. Each time a unique material/item type is created and saved, all available patron groups are listed below. Double-clicking any of these specific groups will allow you to make further restrictions to the selected group. To create a new Item Circ Type, follow these steps:

1. Click on "Administration" in the Navigator Toolbar
2. Click on "Circ Type"
3. Select the "Item Circ Type" tab
4. Click on "New"
5. Type the name of the Item Circ Type
6. If you would like to set this type as the default to be used when adding new items, check the "Item Default" box
7. If you would like to set this type as the default to be used when adding new serials, check the "Serials Default" box
8. Click on "Save" (you will see the default values for all the patrons)
9. Double click on a patron type in the grid in the lower frame. This will bring up the “Loan Trap” screen
10. Specify all the parameters (for specific parameters, see below)
11. Click on "Save"



Item Circ Type Parameters:

Loan Limit
This is the maximum number of items of this type that the patron can have out at a given time. This number cannot exceed the overall loan limit as set in “Patron Circ Type”

Max Renew
This is the number of times an item of this circulation type can be renewed

Loan Period
This is the number of days, hours, weeks, months or semesters an item belonging to this circulation type can be loaned to a particular patron

Grace Period
This is the number of days you wish to allow as a grace period for patrons. If you do not want a grace period, set the value to 0

Renew Period
This is the number of days patrons can have particular items renewed for

Fine Rate

This rate is the amount you wish to fine patrons per day or hour for specific items

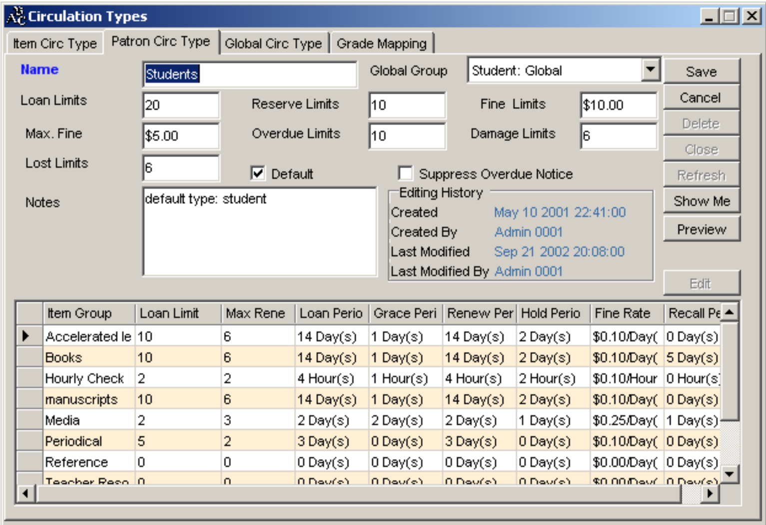
Hold Period
This value represents the number of days you wish items to be held on reserve for

Recall Period
This value represents the number of days set for a recall

Patron Circ Type

Staff can choose to create new patron circ types in order to assign specific privileges. Privileges can vary between different patron circ types. To create a new Patron Circ Type, follow these steps:

1. Click on "Administration" in the Navigator Toolbar.
2. Click on "Circ Type".
3. Select the "Patron Circ Type" tab.
4. Click on "New".
5. Enter the new patron type.
6. Check the "Default" checkbox, if you want this to be the default type.
7. Click on "Save". You will see the list of all the items in the grid below.
8. Double-click on an item in the grid. This will bring up the “Loan Trap” screen.
9. Make the changes in the parameters (for details on parameters, see below).
10. Click on "Save".



Patron Circ Type Parameters

Loan Limit

This is the maximum number of items the patron of this type can have out at a given time

Max Fine

This is the maximum fine for a patron of this type may incur for any one item

Lost Limits

This is the maximum number of lost items that the patron may have

Reserve Limits

This is the maximum number of reserves a patron of this type may place

Overdue Limits

This is the maximum number of overdue items a patron of this type may have

Fine Limits

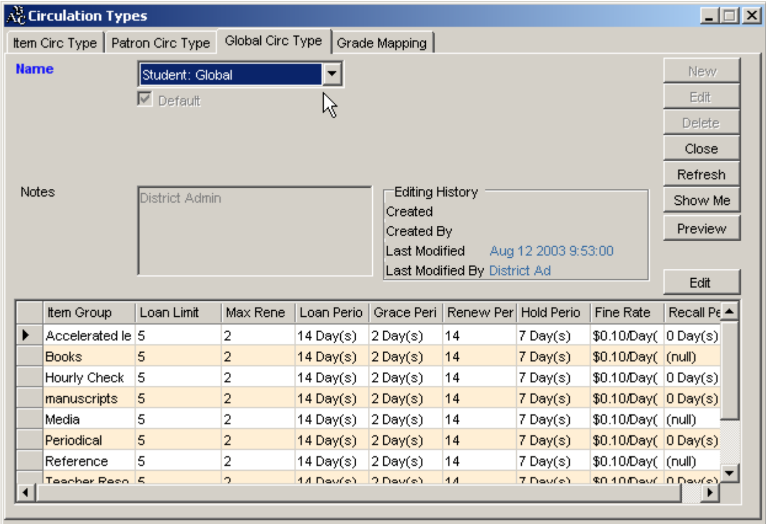
This is the maximum fine a patron of this type may incur

Damage Limits
This is the maximum number of damaged items a patron may have

Global Circ Types

Global groups are used to specify parameters to be used for inter-branch lending. Every “Patron Group” should be assigned a global type so that the system can determine what circulation parameters to use for inter-branch lending. To create global types you MUST login as district administrator, supplying the admin user id and the correct password. To add a new global type, follow these steps:

1. Click on “Administration” on the Navigator Toolbar
2. Click on “Circ Types”, then select the “Global Circ Types” tab
3. Click on “New”
4. Type the name of the global type
5. Check the “Default” checkbox if you want it to be the default type
6. Click on “Save”. You will see a list of global types with default values listed shown in the grid below
7. Double click on any global type in the grid
8. Modify the values until satisfied then click on “Save”

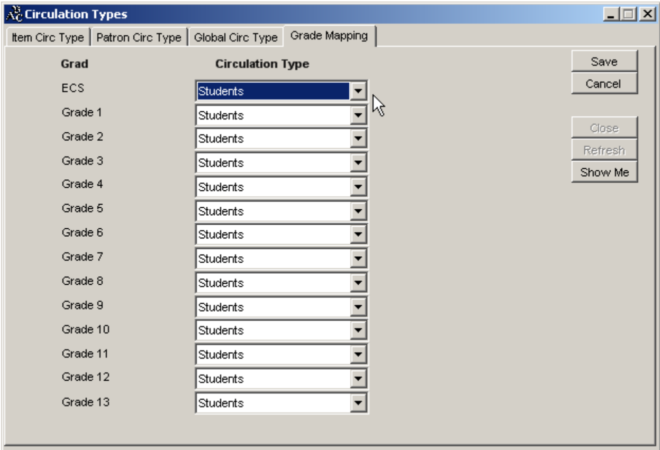


Grade Mapping

Grade mapping allows staff to assign certain patron circulation types to certain grades for circulation purposes.

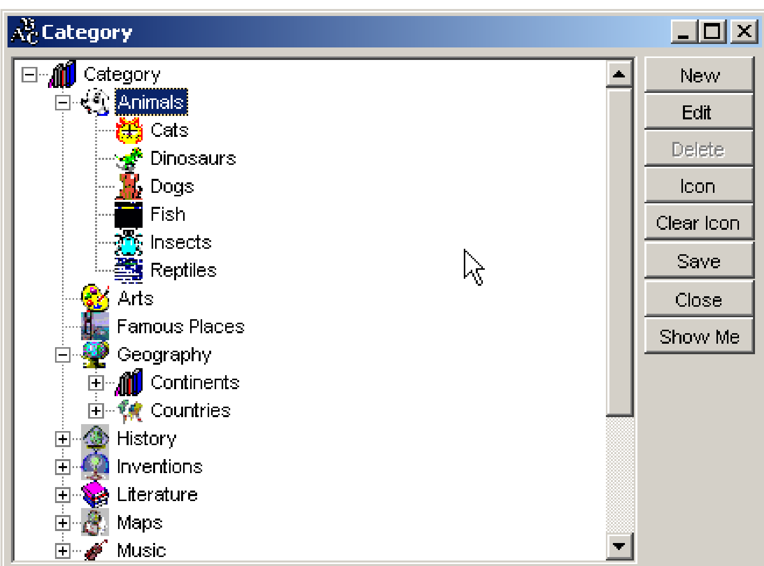
To map grades, follow these steps:

1. Go to “Administration’ in the Navigator Toolbar
2. Click on “Circ Types”
3. Click on the “Grade Mapping” tab
4. Click on the “Edit” button on the right side of the screen
5. From the dropdown lists, choose the patron circ type you wish to assign to each grade. Once you are done, click on “Save”



Kiosk Categories

The Insignia Library System allows the addition of new kiosk categories and deletion of existing ones (as long as they are in use). Staff may also assign new pictures to kiosk categories.

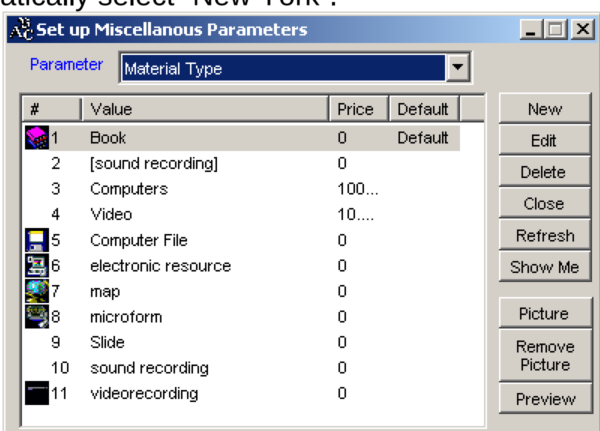


To add a kiosk category, follow these steps:

1. Click on “Administration” on the Navigator Toolbar
2. Click on “Kiosk Categories”.
3. To add a main category, simply move to Step 4. If you wish to add a subcategory click the (+) sign then right-click on the desired category and move to Step 4.
4. Click on “New”.
5. Type in the name of the new category.
6. To assign a picture, click on “Icon” and select the file.
7. Click on “Save”.

Parameters

Default parameters are used to set the default values which will automatically be displayed when adding a new record. Suppose you set the default city to be “New York”. Whenever you enter an address, the system will automatically select “New York”.



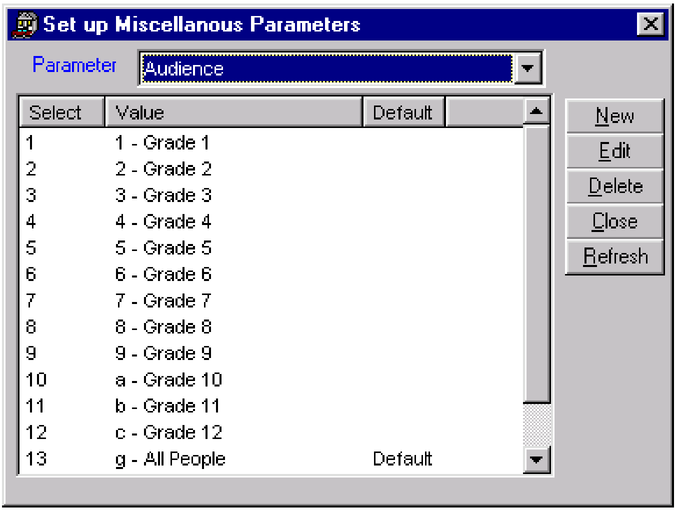
The following parameters have default options available:
1. Audience
2. Category
3. City
4. Country
5. Language
6. Library Type
7. Location
8. Material Type
9. Media Type

10. Place of Publication
11. Province\State
12. Tax Rate

Adding Parameters

To add a new parameter value, follow these steps:

1. Click on “Administration” on the Navigator Toolbar.
2. Click on “Parameters”.
3. Select the parameter for which you would like to add another value.
4. Click on “New”.
5. Type the value.
6. Select the “Default” checkbox, if you want it to be the default.
7. Click on “Save”.

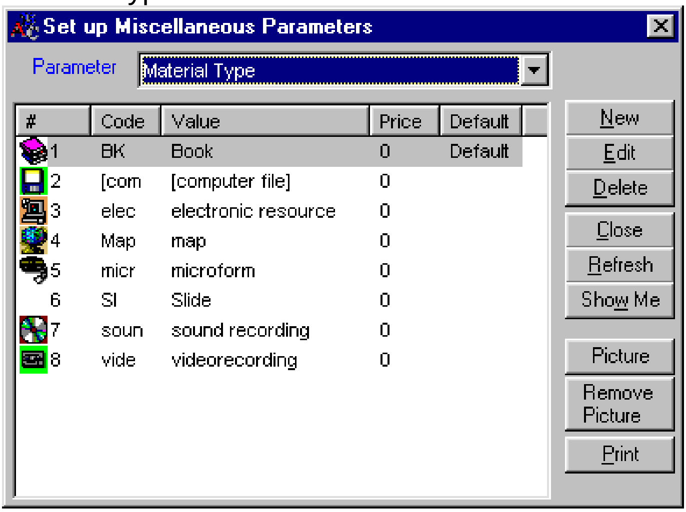


Staff can also assign pictures to material types, which will then display in the Web OPAC.
Note: Material types cannot be edited once created. If you need to edit a Material type, simply delete the existing type and create another.

Assign Picture to a Material Type

To assign pictures to material types, follow these steps:

1. Click on “Administration” on the Navigator Toolbar.
2. Click on “Parameters” on the Navigator Toolbar.
3. Choose Material Type from the dropdown list.
4. Highlight the material type to which you wish to assign the picture.
5. Click on the “Picture” button.
6. Choose a picture from your files and assign it to the material type.



Z39.50 Hosts

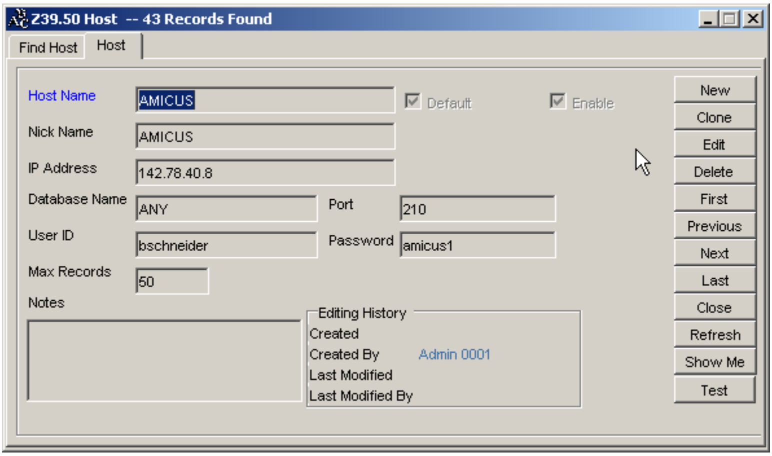
The Insignia Library System has a seamlessly integrated interface that allows patrons to search any library in the world that is Z39.50 compliant. The Insignia Library System comes with predefined libraries that are Z39.50 compliant. Staff can add more libraries of their choice. Technically, there is no limit to the number of libraries you can search, but it is recommended the number be reasonable. If there are too many libraries and you select all, then undue stress may be applied to your network.

Before you can enter another library for Z39.50 search, you will need the following information:

- IP address
- Port number
- Database name
- User ID and password (if any required)
- Adding New Z39.50 Host

To add a new library in your Z39.50 search, follow these steps.

1. Click on “Administration” on the Navigator Toolbar.
2. Click on “Z39.50 Hosts”.
3. Click on “New”.
4. Enter the information required.
5. “Enabled” means show the Z39.50 server on the list. “Default” denotes that it automatically appears pre-selected in the list.
6. Click on test to validate the connection.
7. If connection is successful, then click on “Save”, otherwise verify the information.



Insignia Libraries

To set up additional Insignia libraries for your system to search, follow these steps:

1. Click on “Administration”.
2. Click on “Insignia Libraries”.

3. You can search for the library you want to edit, or click on the new button to add a new Insignia Library.
4. Once all information is entered, click on "Save" to save your changes.

Change Personal Password

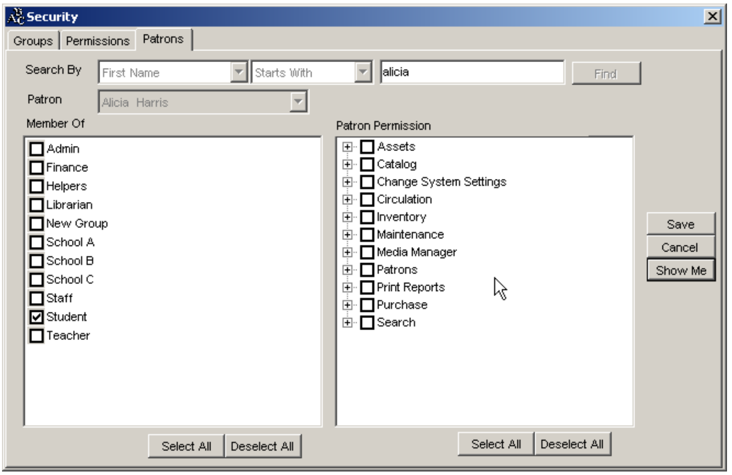
To change your personal password, follow these steps:

Click on "Administration" on the Navigator toolbar.
Click on "Password".
Input old password, then new password, then retype new password for confirmation.
Click on "Change ".

Security

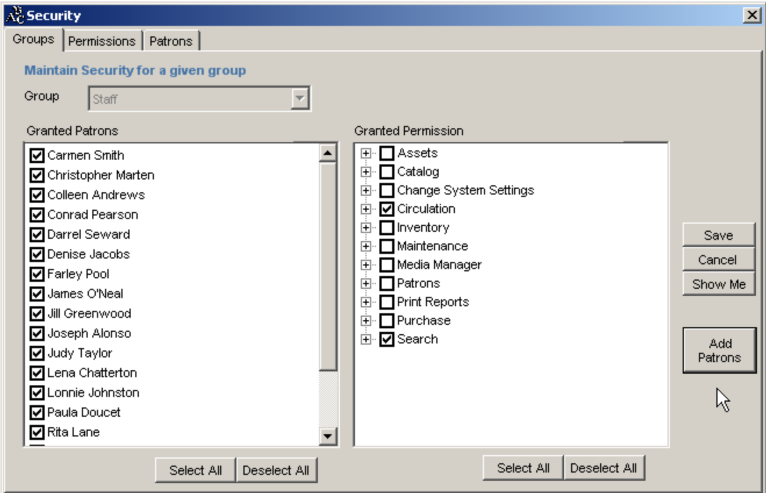
Security permissions can be set up from the patron screen or they can be set up from Administration in the Navigator. The Insignia Library System allows you to create a group and assign permissions to it and then add patrons to this group. This makes maintenance simple and is the recommended method of assigning permissions. Patrons can be assigned permissions individually, but this approach is not recommended and should be used as an exception rather than as a standard practice.
Assigning Groups and Permissions to a Patron

To assign groups and permissions to a patron, follow these steps:



1. Click on “Administration” in the Navigator Toolbar.
2. Click on “Security”.
3. Click on “Patrons” tab.
4. Enter the search criteria to find the patron.
5. Select the patron for whom you would like to change the security from the dropdown list.
6. Click on “Edit”.
7. Select the groups to which you would like this patron to belong.
8. Select the permissions you want to assign to this patron.
9. Click on “Save”.
10. Note: you may find it easier to change permissions for a single patron from the patron profile.

Assigning Permissions and Patrons to a Group



To assign permissions and patrons to a Group, follow these steps:

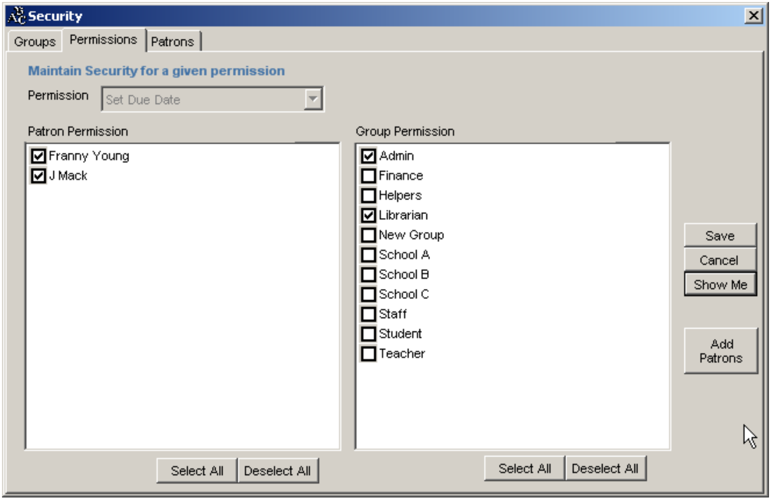
1. Click on “Administration” in the Navigator Toolbar.
2. Click on “Security”.
3. Click on the “Groups” tab.
4. Select the group from the dropdown list.
5. Click on “Edit”.
6. Select the permissions you would like to assign to this group.
7. Click on “Add Patrons”.
8. Specify the search criteria for patrons.
9. Click on “Find”.
10. Select all the patrons you would like to make members of this group by checking the box beside the patron name.
11. Click on “OK”.

Assigning Permission to Patrons and Groups

To assign permission to groups and patrons, follow these steps:

1. Click on Administration in the Navigator Toolbar.
2. Click on “Security”.
3. Click on “Permissions” tab.
4. Select the permission from the dropdown list.

5. Click on “Edit”.
6. Select the “Patron Group” to which you would like to assign the permission.
7. To grant this permission to individual patrons, click on “Add Patrons”.
8. Specify the search criteria for patron and click on “Find”.
9. Select those patrons to which you would like to assign the permission by selecting the checkbox.
10. Click “OK”.
11. Click on “Save”.

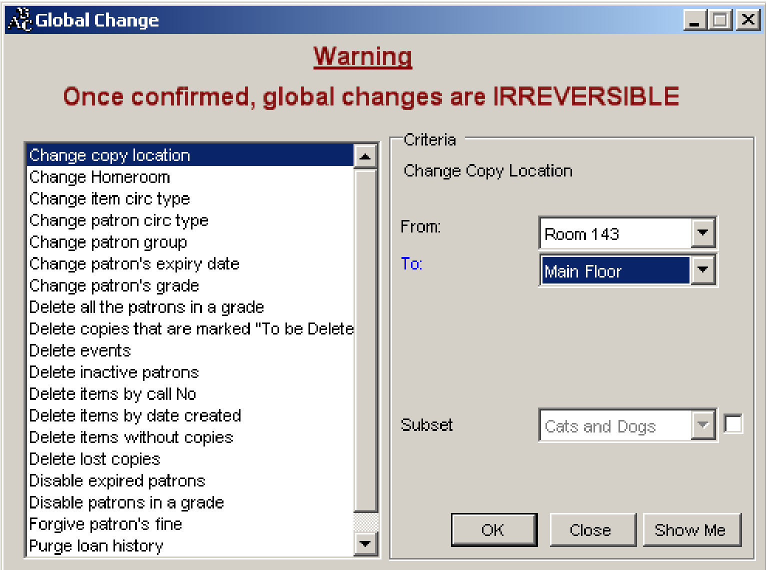


Making Global Changes

The Insignia Library System allows staff to make global changes. It is important that staff verify the criteria of any global changes process since GLOBAL CHANGES ARE IRREVERSIBLE. You may also apply Global Changes to subsets by choosing the “Apply to Subset” checkbox. To make global changes, follow these steps:

1. Click on Administration in the Navigator Toolbar.
2. Click on “Global Changes”.
3. Select the global change you would like to make.
4. Define the parameters (if any).
5. Click “OK”

6. Confirm the changes if you are sure.



Power Global Changes

The Insignia Library System also adds this powerful new feature to search for and make global changes to your data. It is important that staff verify the criteria of any "Power Global" changes you wish to make since power global changes are irreversible. You can limit the data by Author, Budget, Call Number, Circ Type, Copy Status, Created by, Item Barcode, Library Name, Local Call Number, Location, Note, Price, Replacement Cost, Subject, Subset, Target Audience, Title and Vendor. You can also limit the amount found.

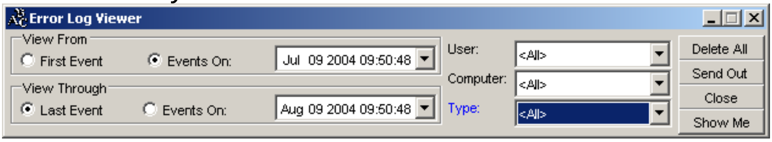
To use the Power Global Change in your library, follow these steps:

1. Once again remember that once any change is made it is irreversible.
2. Click on "Administration" in the Navigator Toolbar.
3. Click on "Power Global Change".

4. Select the Category you want to modify with the drop down menu.
5. Select your Search criteria and then click on “Find”.
6. After your search results display, you can then choose the field you want to modify by selecting an item from the “New Value” drop down menu.
7. You can then enter the value you want to change your records to in the box to the right.
8. If everything then looks correct, then click on the “Change” button to make your changes.

Error Log

The Insignia Library System has a built in error tracking system that allows it to track any system errors. If there is a problem, Insignia technical staff will try to solve it over the phone. If this process of troubleshooting does not work, you will be asked to send the error log, which our staff will analyze.



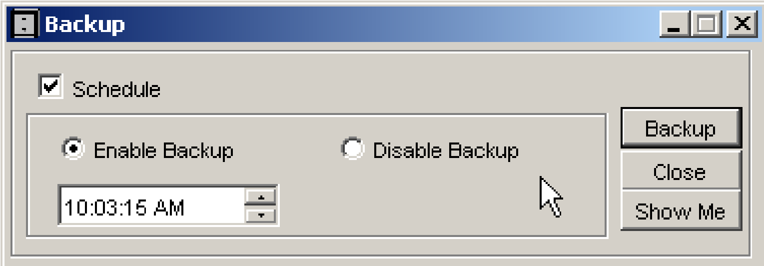
To send the event log to Insignia Software, follow these steps:

1. Click on Administration in the Navigator Toolbar.
2. Click on “Error Log”.
3. Specify the parameters (if any).
4. Click “Send Out”.

Although it is possible to clear the error log, we do not recommend it. To clear the log just select the desired criteria and click on delete.

Backup

Backup can be done manually or it can be scheduled. By default backup is done every night at 12:00 AM. The backup file is saved in the default backup directory of the SQL Server. This directory should be backed up every night by tape or suitable substitute.



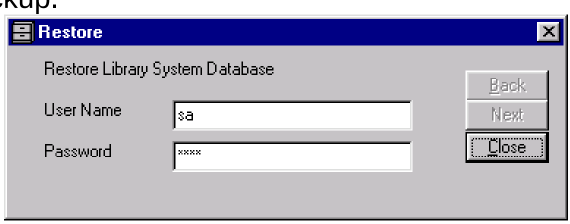
To manually backup or create a schedule for the library system:

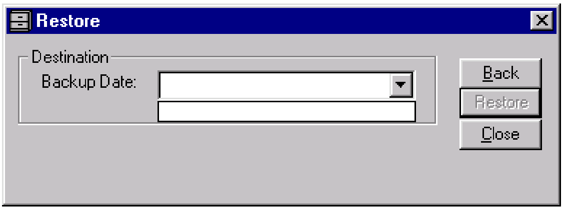
1. Click on “Administration” in the Navigator Toolbar.
2. Select “Backup”.
3. Click on “Backup” to start the backup.
4. To create a new backup schedule, you must make the first backup (by clicking on “Backup”).
5. check that the Insignialibrarybackup.bak file is being backed up on another computer or to tape drive and that the date is current. This will allow you to restore the system (in the event of a problem) with current data; thus backing up the Insignialibrarybackup.bak file is critical.

Restore

To restore the library system, follow these steps:

Caution:
Restore will result in the loss of changes made since the last backup.

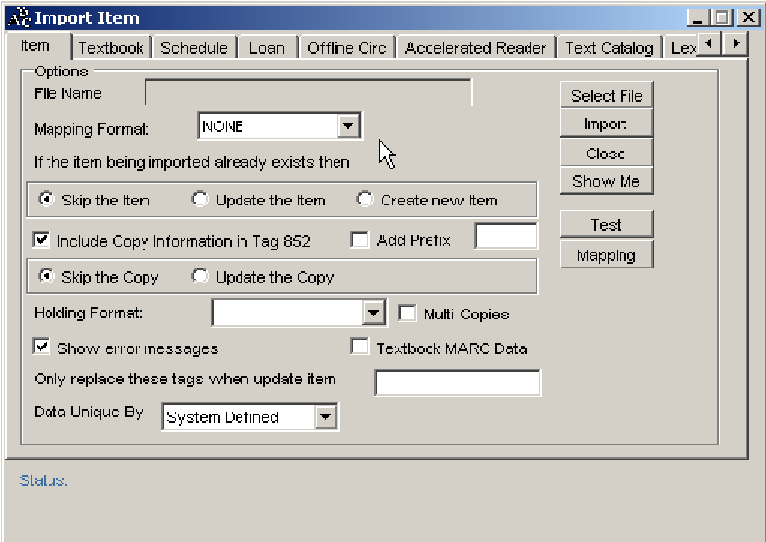




1. Click on “Administration” on the Navigator Toolbar.
2. Click on the “Restore”.
3. Enter the user name and password.
4. Click on “Next”.
5. Select the backup you would like to restore.
6. Click on “Restore” to start the restoration.
7. call Insignia Software before restoring the data.

Import Data

The Insignia Library System allows staff to import data for patrons and materials. Staff can import data for patrons from any student information system using user-defined templates.
The Insignia Library System can import any file that is MARC compliant. When importing data you should decide if you want to import Copy Information and also what to do if the title already exists in the database.
Staff can also choose to do a MARC test on the data they want to import to determine if the MARC records can be imported successfully into the library system. To test a group of MARC records, click on the “Test” button.



Import Items

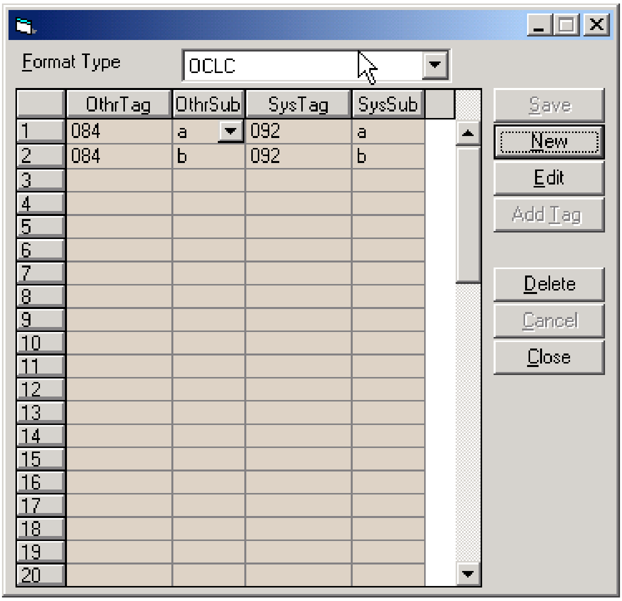
To import materials information, follow these steps:

1. Click on “Administration” on the Navigator Toolbar.
2. Click on “Import” on the Navigator Toolbar.
3. Select the “Item” tab.
4. Select the options for importing data.
5. Select the file from which to import.
6. Click on “Import”.

Map Tags

You may also choose to map certain tags when importing items. To map tags, follow these steps:

1. Click on “Administration” on the Navigator Toolbar.
2. Click on the “Import”.
3. Select the “Item” tab.
4. Click on “Select File” and locate the file accordingly.
5. Click on the “Mapping” button.



You can either choose to edit an existing mapping type or to create a new one.

Edit an Existing Mapping Type:

1. Choose which format type you wish to edit by selecting one from the dropdown list.
2. Click on “Edit”.
3. Choose which tag you wish to edit and either double click on it, start typing it in the box, or click on “Add Tag”.
4. The system will automatically give you the list of MARC tags to choose from.
5. The first two columns are the original tag and subfield you would like changed. The second two columns are the tag and subfield you wish to map them to.
6. When finished click “Save”.

Create a New Mapping Type:

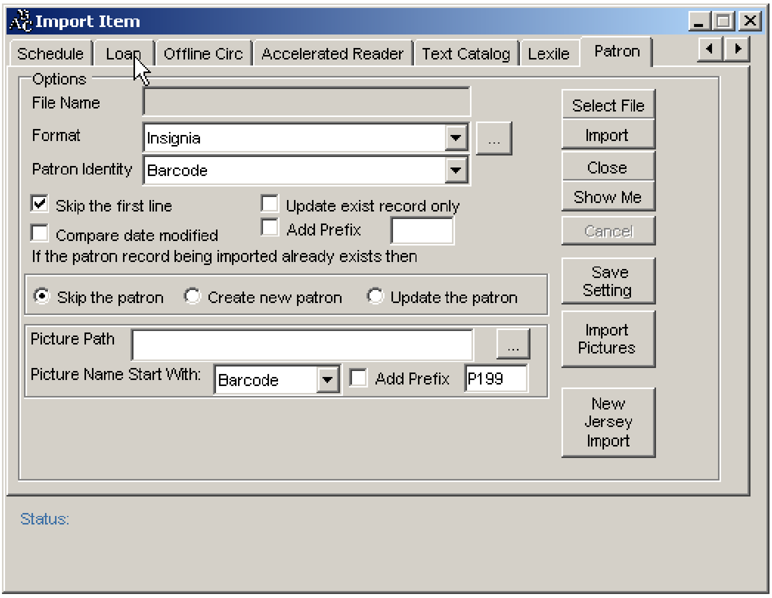
1. Click on “New”.
2. Type the name of the format type in the box.
3. Follow the same steps as above to enter tags you wish to map.

4. When you are done, click on "Save".
5. On the "Item" tab, once you have chosen the file you wish to import, simply click on the "Mapping Format" dropdown list and choose which format you wish to use when importing.

Import Patrons

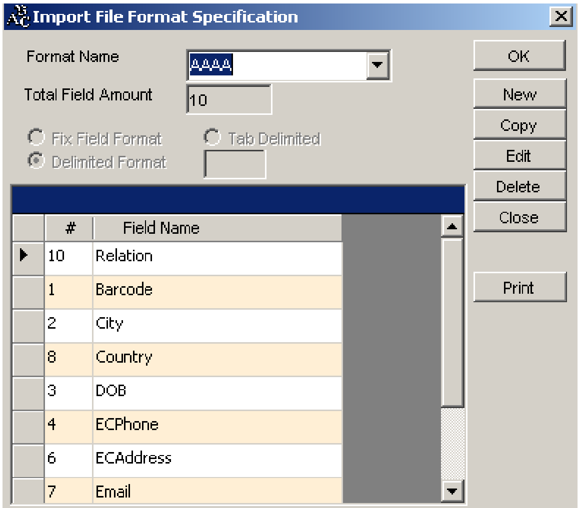
Staff can import data from different sources. Using the Insignia Library System, staff can create templates to import data from any student information system. To create a template you need to know how the data was exported from the student information system. Staff may also choose to import pictures for patrons. To import Patron information, follow these steps:

1. Click on "Administration" on the Navigator Toolbar.
2. Click on "Import" on the Navigator Toolbar.
3. Select the "Patron" tab.



4. Select the file you wish to import from.
5. Select a format for importing the data by clicking the down scroll button beside the format search box. You

may create or modify a custom import format by clicking on the "…" button.



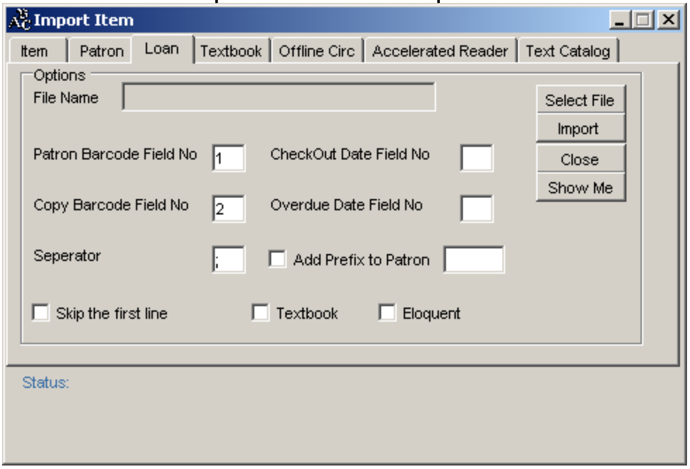
6. Click on "Import".
7. If you want to import pictures, select the file and click on "Import Pictures".
8. By default the program will match the pictures by their Barcode Number. We have now also added the ability to have it also match by Patron ID or Student ID
9. If the data is inconsistent with what the system is expecting, warnings such as "The fields ended before expected, do you wish to continue?" will appear. A message such as this implies that the imported file is not in the format expected and may require specifying a different "Format" or creating a custom format to properly handle the import.

Import Loan Data

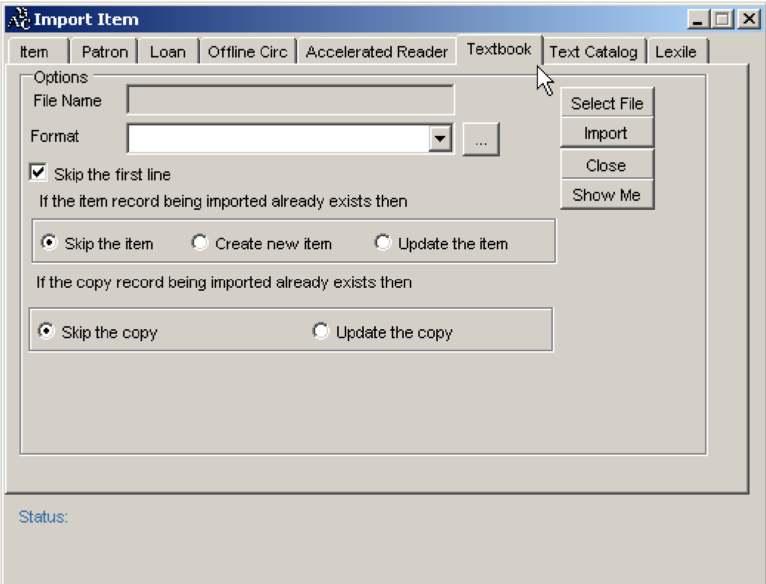
To import loan information, follow these steps:

1. Click on "Administration" in the Navigator Toolbar.
2. Click on "Import" in the Navigator.
3. Select the "Loan" tab.
4. Select the file name you would like to import from.

5. Select the field order, and how the fields are separated. You can also choose if the items are textbooks or if you need to skip the first line of information in the import file.
6. Click the "Import" button to import the loan information.



Import Textbooks



To import textbook data from a system that is not MARC compliant, the data must be pre-defined before the import has begun. If the data is MARC compliant, then data can be imported from the "Item" tab by selecting the checkbox for textbook.

To import textbook data in an ASCII file, follow these steps:

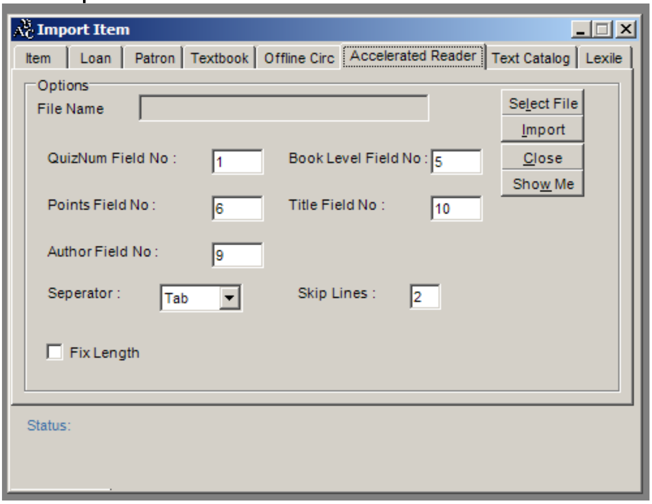
1. Click on "Administration" in the Navigator Toolbar.
2. Click on "Import" in the Navigator.
3. Select the "Textbook" tab.
4. Create/specify the file format.
5. Select the file name you would like to import from.
6. Click on "Import".

Import Accelerated Reader

To import Accelerated Reader files, follow these steps:

1. Click on "Administration" on the Navigator Toolbar.
2. Click on "Import" on the Navigator Toolbar.
3. Select the "Accelerated Reader" tab.
4. Select the file name you would like to import from by clicking on "Select File".

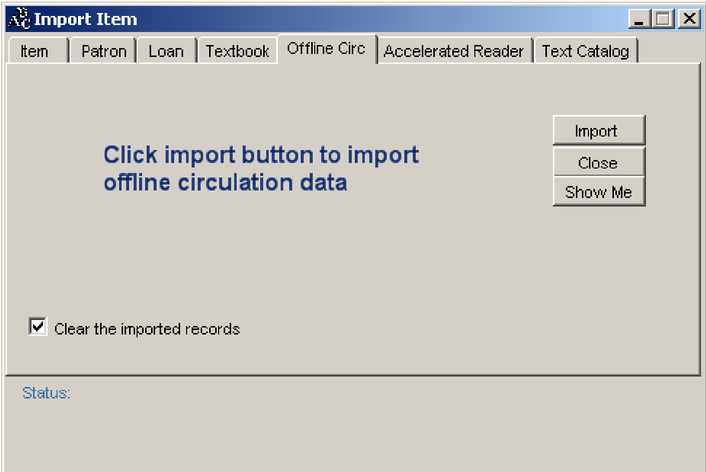
5. Then, setup the fields correctly by placing a value in each of the fields. Make sure this value corresponds with the column designated in the file.
6. Once done, you can click on the “Import” button to import the Accelerated Reader information.



Offline Circulation

If your circulation computer loses connectivity with the server, you can perform offline circulation. Once the server connection has been restored, you can update the circulation data.

When server is down, start “Offline Circulation” from “Program Files\Insignia\Library”.



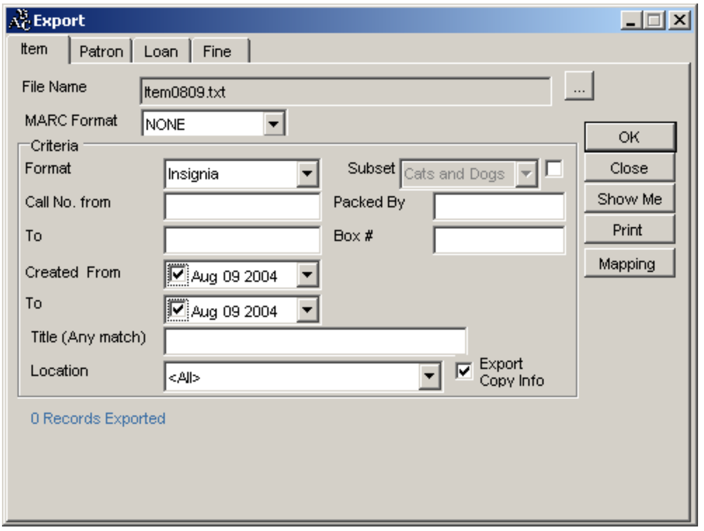
Export Data

The Insignia Library System staff can export data related to items, patron and loans. Data exported for items is in MARC format and data exported for patrons in ASCII format.

Export Items

When exporting item information, staff can choose to export copy information as well. To export item information, follow these steps:

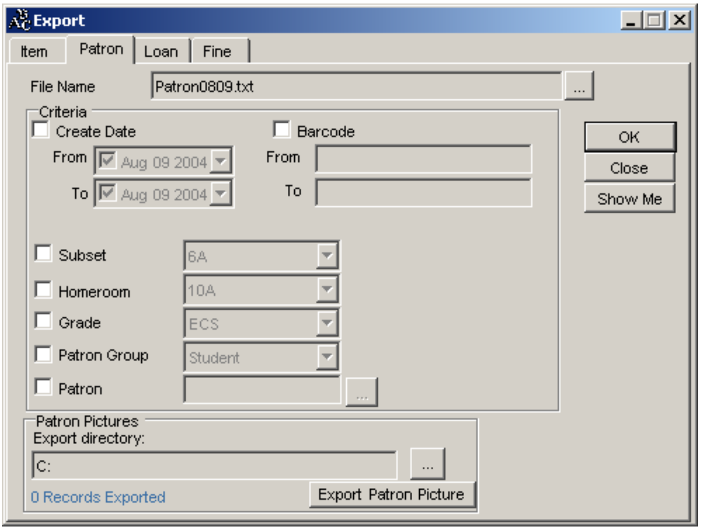
1. Click on “Administration” on the Navigator Toolbar.
2. Click on “Export”.
3. Select the “Items” tab.
4. Select the desired parameters.
5. Specify the file name or keep the default (default path is the application folder, c:\program files\insignia\library).
6. Click “OK”.
7. You can also map tags when exporting items the same way as when importing.



Export Patrons

To export patron information, follow these steps:

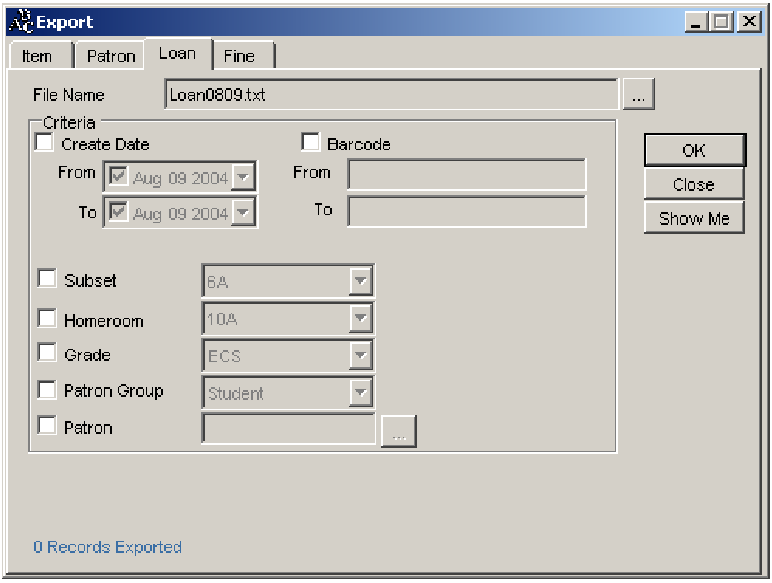
1. Click on Administration in the Navigator Toolbar.
2. Click on “Export”.
3. Select the “Patron” tab.
4. Select the desired parameters.
5. Specify the file name or keep the default one (default path is the application folder, c:\program files\insignia\library).
6. Click “OK”.



Export Loan Data

To export loan information, follow these steps:

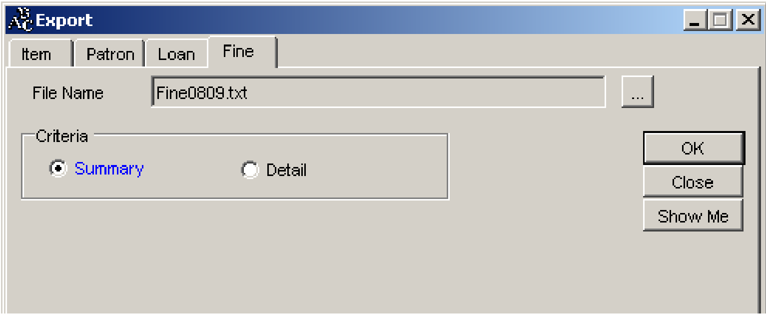
1. Click on Administration in the Navigator Toolbar.
2. Click on “Export” on the Navigator Toolbar.
3. Select the “Loan” tab.
4. Select the desired parameters.
5. Specify the file name or keep the default one (default path is the application folder, c:\program files\insignia\library).
6. Click “OK”.



Export Fine Information

To export fine information, follow these steps:

1. Click on “Administration” on the Navigator Toolbar.
2. Click on “Export” on the Navigator Toolbar.
3. Select the “Fine” tab
4. Select the file name or keep the default one (default path is the application folder, c:\program files\insignia\library)
5. Choose either “Summary” or “Detail” from the criteria box.
6. Click “OK”.



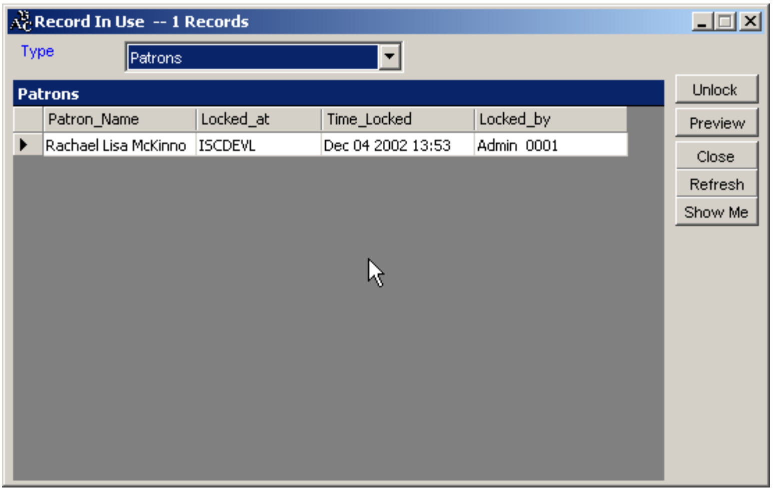
“In Use” Monitor

The Insignia Library System allows staff to see who is using the library system and which module they are using. This allows the librarian to warn those using the system to log off before using the restore function.

The Insignia Library System is a true multi-user client server application. This means that it will not allow two users to modify the same record at same time. This is achieved by locking the record for the first user. It is possible that the user’s machine could crash (without releasing the lock). If this happens, then no one else can edit that record. By using the “In Use” monitor, staff can see who is using the module and can remove the lock.

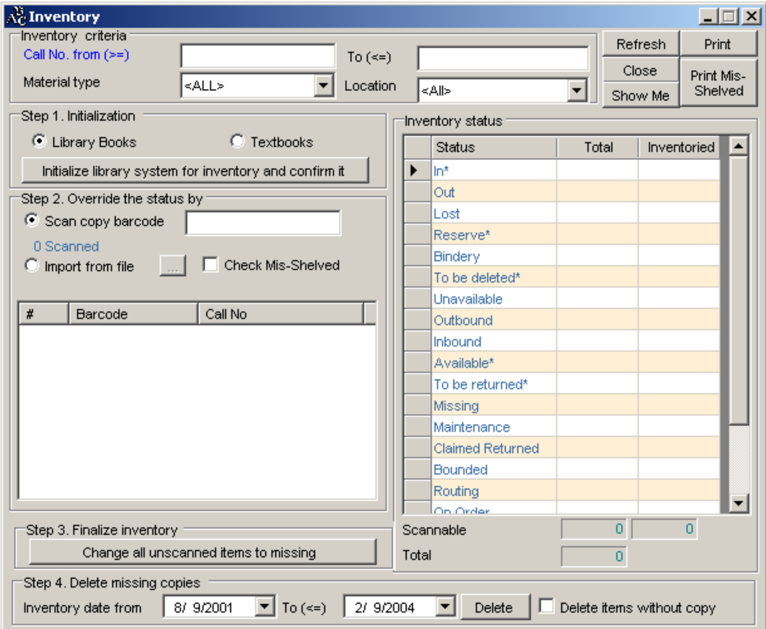
To see who is using the Insignia Library System, follow these steps:

1. Click on “Administration” on the Navigator Toolbar.
2. Click on “In Use” on the Navigator Toolbar.
3. Select the desired module from the dropdown list.
4. To unlock a given record, select the record and click on “Unlock”.
5. If you want to see who is logged into the Insignia Library System, select “Current Users” from the dropdown list.



Inventory

In the Insignia Library System inventory is a simple two-step process. You may choose to inventory the entire library or any part of it. Inventory may be discontinued and alternatively re-continued at any point. Staff may also use hand-held scanners for inventory and then specify the file name in “Import from File”. In this way, incoming records held in the imported file are compared with the current collection to discover unexpectedly “lost” copies. We have also added the ability for you to search and use the inventory date within the system. You will be able to use this feature in reports and search mechanisms.



To inventory your library, follow these steps:

1. Click on “Administration” in the Navigator Toolbar.
2. Click on “Inventory”.
3. Choose to inventory the entire library or part of it (if you only want to do a partial inventory, enter the desired range of call numbers or specify a material type).
4. Click on the “Initialize library system…” button.
5. Scan in the item barcodes individually or choose to import a data file (in which you have saved barcodes from the handheld scanner).
6. Once you are done scanning or importing the barcodes, you can click on the “Print” button to print a list of all the items thet have not been scanned, and are therefore missing. To finalize the inventory process and change the status to “Missing”, click on the “Change all un-scanned items to Missing” button.
7. To see the Miss-shelved items during the inventory process, select the checkbox for “Check Miss-Shelved Items”. Once you are done the inventory, you can click on the “Print Miss-Shelved” button to print a list of all

the items that were Miss-shelved. You must select the "Check Miss-Shelved" button from the time you start inventory in order to retrieve a complete list.
8. You may choose to delete missing copies. Choose an inventory date range and then click the "Delete" button. You may also choose to delete items without copies by selecting the check box.
9. The system will treat items that are currently checked out as accounted for in the inventory, so there will be no need to re-scan them these items.

Customize Captions

The Insignia Library System also includes many Q-cards and captions to help you within the program. We have added an option that allows you to customize these features to your own needs.

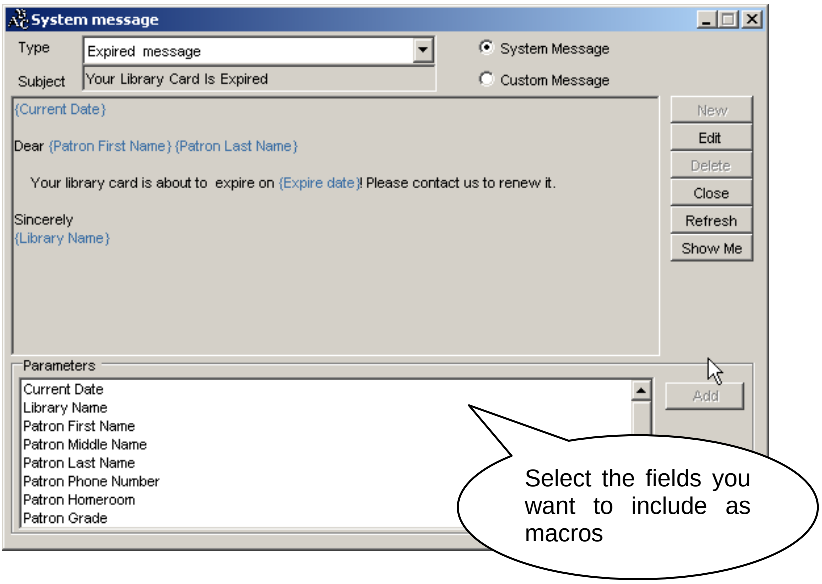
1. Click on "Administration" in the Navigator Toolbar.
2. Click on "Customize Caption".
3. From the "Category" drop down menu choose either Qcard or Caption.
4. You can then search for the Caption/Qcard needed.
5. Once found you can click on the caption shown in the results field, and change it to what you would like.
6. If the items are locked there is an "Unlock" button provided to alleviate that.
7. Once changes are made click on the "Save" button to save changes.
8. You can also choose to apply these changes to all current items found.

System Messages

The Insignia Library System allows staff to create customized messages. These messages are automatically sent to patrons when required. There are 9 messages that you can customize. Staff can customize the following messages:

1. Fine Message
2. Expired Message

3. Interlibrary loan request message
4. Overdue message for patrons
5. Overdue message for parents
6. Overdue message for teachers
7. Reserve message
8. Routing message
9. Textbook overdue message



Editing System Message

1. Click on Administration in the Navigator Toolbar.
2. Click on “System Messages”.
3. Select the “System Message” radio button.
4. Select a message type from the dropdown list.
5. Click on “Edit”.
6. You can add variables into your messages. Place your cursor where you want the variable to appear and then select a variable from the list and click on “Add”.
7. Add text or edit any of the text in the message.
8. Click on “Save”.

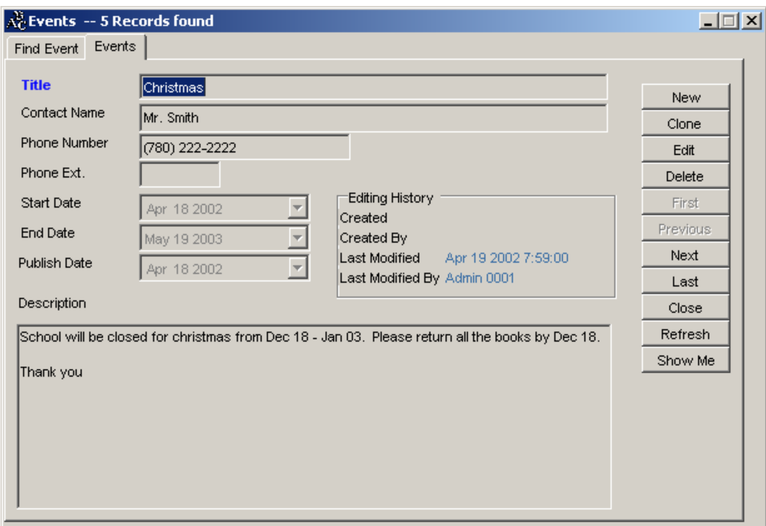
Creating and Editing Custom Messages

1. Click on Administration in the Navigator Toolbar.

2. Click on “System Messages”.
3. Select the “Custom Message” radio button.
4. Select the custom message you wish to edit from the dropdown list. Or, click new to create a new message and then enter a type and a subject line for the message.
5. Add variables into your message. Add text or edit any of the text in the message.
6. When finished, click on “Save”.

Library Events

You can create a school event notice that can be posted in your library system. Patrons can view these notices from the OPAC.



To add an event, follow these steps:

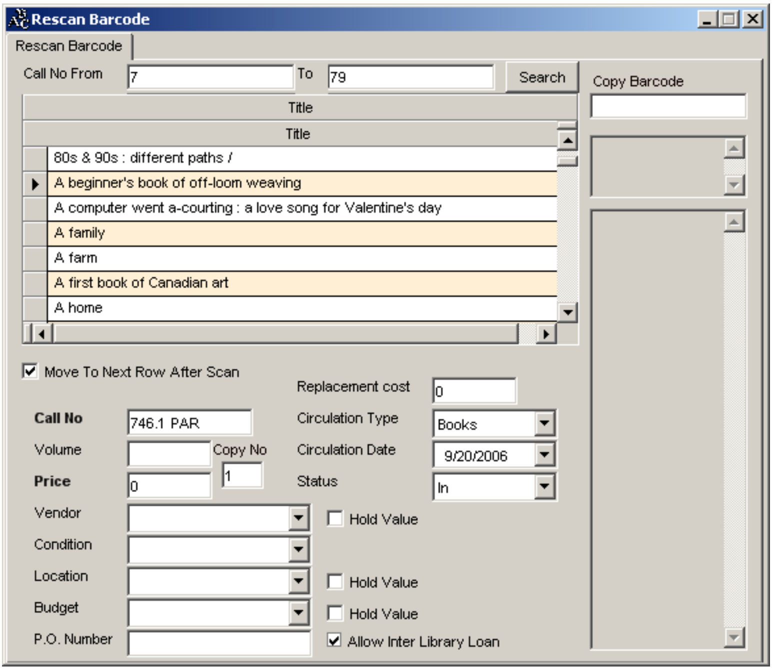
1. Click on “Administration” in the Navigator Toolbar.
2. Click on “Events”.
3. Click on “New”.
4. Enter the relevant information.
5. Click on “Save”

Rescan Barcode

The Rescan barcode process under the Administration menu allows you to bring up a range of items and then scan barcode numbers to attach to those records. Sometime a conversion will just bring in the records with no copies. So this is a way to add the barcodes back to the books by scanning them into the window.

To Rescan Barcodes, please do the following:

1. Go to the Administration menu and then to Rescan Barcode
2. Next look up the range of items you want to access
3. It will then bring up a list of all items that meet your criteria. Please enter what ever values needed into these fields
4. Next click on the Copy Barcode section and then scan in the barcode you want to attach to that book
5. Please repeat above steps for the items you need to do


Rescan Barcode
Rescan Barcode
Call No From
7
To
79
Search
Copy Barcode
Title
Title
80s & 90s : different paths /
A beginner's book of off-loom weaving
A computer went a-courting : a love song for Valentine's day
A family
A farm
A first book of Canadian art
A home
Move To Next Row After Scan
Replacement cost
0
Call No
746.1 PAR
Circulation Type
Books
Volume
Copy No
Circulation Date
9/20/2006
Price
1
0
Status
In
Vendor
Hold Value
Condition
Location
Hold Value
Budget
Hold Value
P.O. Number
Allow Inter Library Loan

Assets

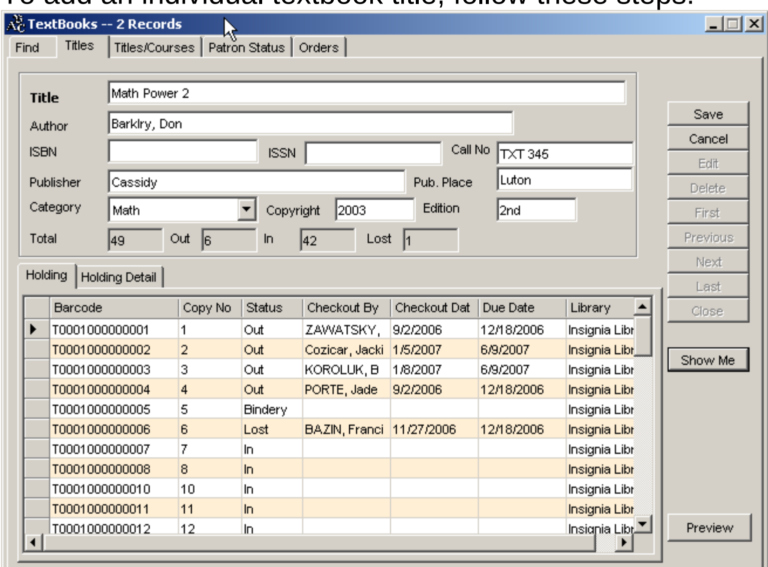
Asset tracking allows staff to trace the various assets of the school, such as textbooks, audio-visual equipment and computers. Asset Tracking consists of a “Media Manager”, and a textbook tracking system.

Textbooks

The Insignia Library System allows you to keep track of multiple textbook titles and volumes. Within the “Textbook” module, information about vendors, orders, and textbooks may be easily maintained and updated.

Creating Titles

To add an individual textbook title, follow these steps:

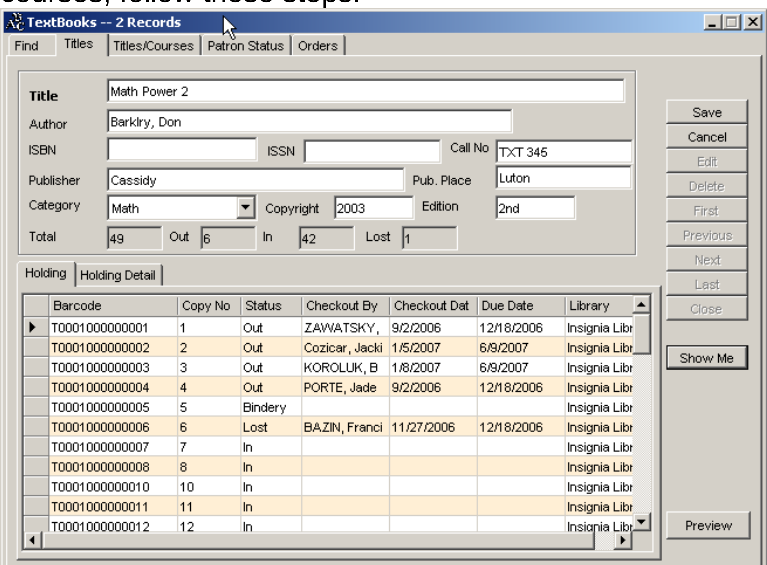


1. Click on “Assets” on the Navigator Toolbar
2. Click on “Find/Add Textbooks”
3. Click on “New”
4. Enter the information you have about that individual title
5. Click on “Save”

6. To add copies to a title, locate the title and then click on the "New" button located under the "Holding Detail" tab
7. Enter the number of copies you wish to add when prompted
8. Enter any additional information for the copies you are adding
9. Click on "Save"

Linking Titles and Courses

Linking titles and courses allows you to keep track of which textbooks are required for which course. To link titles with courses, follow these steps:



1. Click on "Assets" on the Navigator Toolbar
2. Click on "Find/Add Textbooks"
3. Click on the "Titles/Courses" tab
4. Choose a course from the list on the left
5. Select the textbooks you wish to link to that course from the list on the right by checking the box to the left of the title
6. Click the "Up or Down Arrows" to assign or un-assign checked titles on the list to a given course

Adding/Delete Course

To add a new course, fill in the information on the bottom left corner (title and course code) and click on the “Add” button. To delete a course, select the course and click on “Delete”.

Patron Status

Patron status allows you to see textbooks that have been checked out by a patron. To see the status of a patron, follow these steps:

1. Click on “Assets” on the Navigator Toolbar
2. Select “Find/Add Textbooks”
3. Click on the “Patron Status” tab
4. Scan in Patron card (or enter the first name or last name depending on the default criteria you have defined in Configuration >> Circulation
5. Click on “Find”

Order Status

To see an order detail, follow these steps:

1. Click on “Assets” on the Navigator Toolbar
2. Select “Find/Add Textbooks”
3. Click on the “Orders” tab
4. Find the order you are interested in (or set “Search By” to “ALL” to display a listing of all orders)

Note: Orders cannot be modified from this interface; you can only modify from the Acquisitions module.

Textbook Barcodes

To print textbook barcodes, follow these steps:

1. Click on “Assets” on the Navigator Toolbar
2. Click on “Textbook Barcodes”
3. Find the item you wish to print barcodes for by choosing your criteria. Options for criteria are:
    - 3.1. Date created
    - 3.2. Date updated
    - 3.3. Barcode range
    - 3.4. Call number range

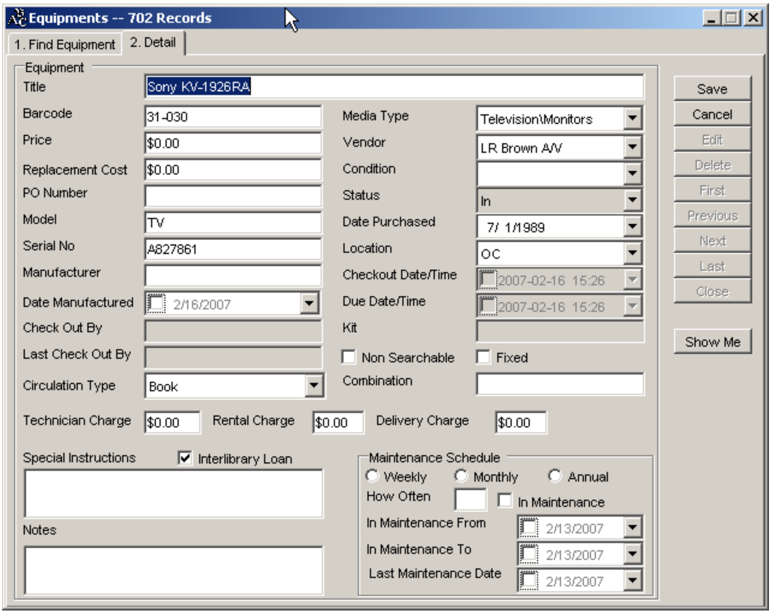
3.5. Author range
3.6. Title
3.7. From list

Media Manager

The Insignia Library System allows staff to keep track of items such as equipment, rooms and kits. Staff may enter detailed information about equipment, including reoccurring maintenance schedules. Staff may also enter, update and track booking information according to blocks, time periods, or a weekly schedule.

Equipment

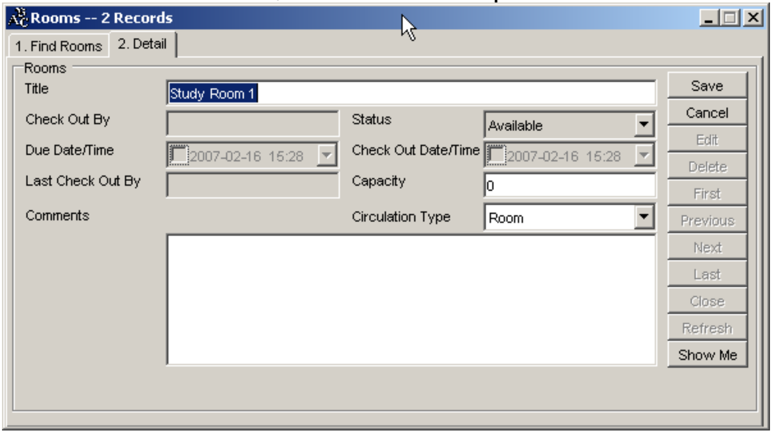
We have now added a new feature to allow you to make Equipment non searchable on web. To find a piece of equipment, follow these steps:



1. Click on “Assets” on the Navigator Toolbar
2. Click on “Find/Add Equipment”
3. Enter your search criteria and click on “Find”
4. To see detailed information about a specific item, double click on it
5. To add a new record for a piece of equipment, click on the “New” button
6. Enter all relevant information including model, price, serial number, and manufacturer. You may also setup a specific (optionally reoccurring) maintenance schedule for each item that is entered
7. Enter any notes or special instructions
8. Click on “Save”

Rooms

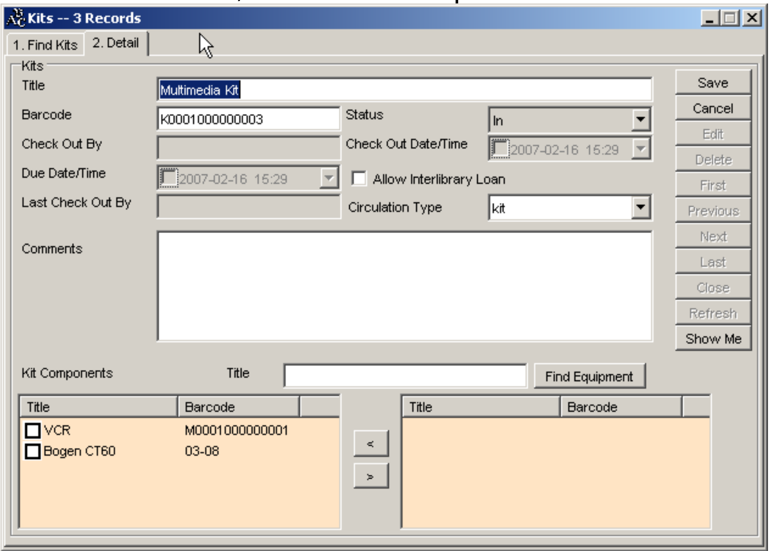
To search for a room, follow these steps:



1. Click on “Assets” on the Navigator Toolbar
2. Click on “Find/Add Room”
3. Enter your search criteria and click on “Find”
4. To see detailed information about any room, double click the item on the grid
5. To add a new room, click on the “New” button
6. Enter the information for the new room, including the name, capacity and comments/notes
7. Click on the “Save” button

Kits

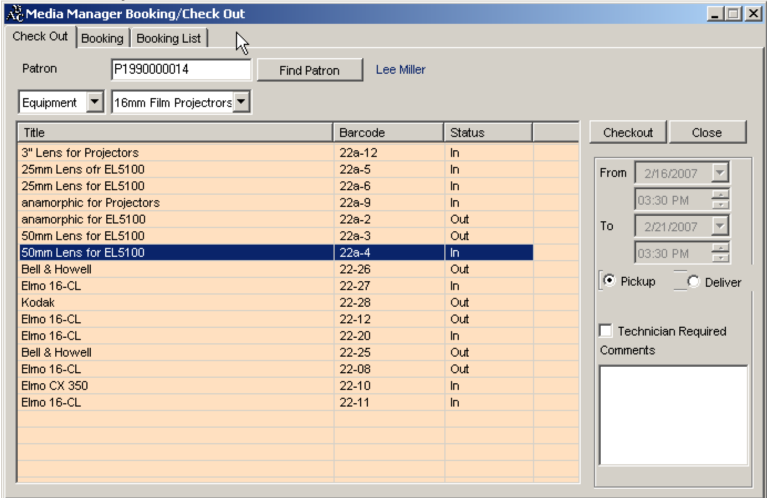
To search for a kit, follow these steps:



1. Click on "Assets" from the Navigator Toolbar
2. Click on "Find/Add Kits"
3. Enter your search criteria and click on "Find"
4. To see detailed information for a kit, double click the item on the grid
5. To add a new kit, click on the "New" button
6. Enter the information for the kit, including the title, barcode, and comments/notes
7. To add components, click on the "Find Equipment" button
8. Click on the checkbox beside the equipment name and select the left arrow to add this piece of equipment to your kit. Follow these steps for all other pieces of equipment you wish to add
9. Once you are done, click on the "Save" button

Bookings/Check Out

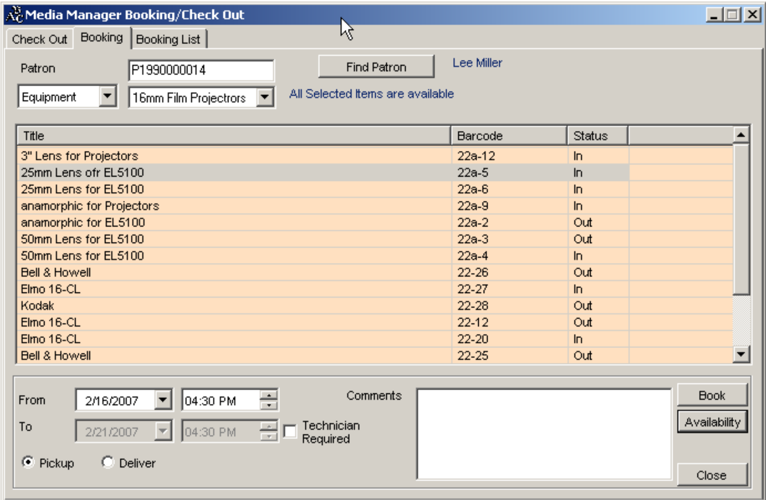
The Media Manager allows staff to book equipment, rooms, and kits in advance, by a time period or block, or on a weekly schedule. To check out a Media item follow these steps:



1. Click on “Assets” on the Navigator Toolbar
2. Click on the “Media Checkout”
3. Scan in Patron card (or enter the first name or last name depending on the default criteria you have defined in Configuration >> Circulation)
4. Specify your search criteria for equipment by clicking on the dropdown lists, enter your search and click on “Find”
5. This will display the equipment matching your search on the left side of the screen
6. Highlight the item you wish to checkout and specify the time period or block you wish to have it checked out
7. Click on the “Checkout” button on the right side of the screen

Media Booking

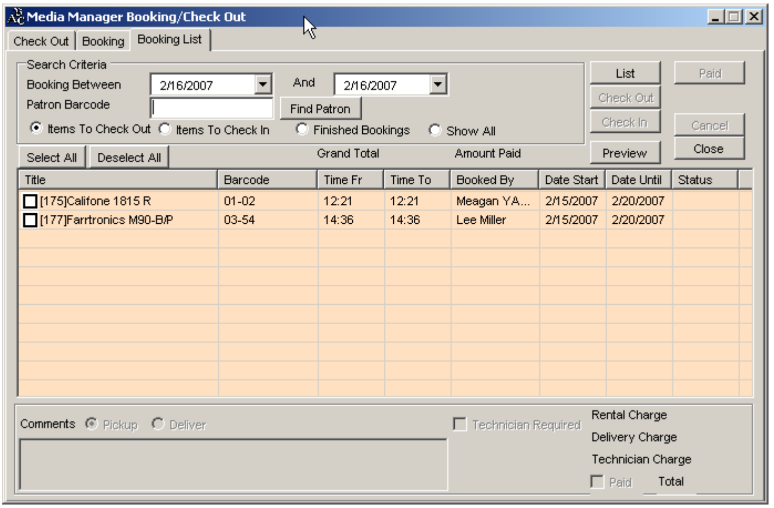
To book a Media item, follow these steps:



1. Click on “Assets” on the Navigator Toolbar
2. Click on “Media Booking”
3. Scan Patron card (or enter the first name or last name depending on the default criteria you have defined in Configuration >> Circulation)
4. Now you can specify your search criteria by clicking on the dropdown lists, the first list will allow you to specify whether you are searching for equipment, kits or rooms. In the second drop down list select the appropriate type (if any) and click on “Find”
5. This will display the media matching your search on the left side of the screen
6. Highlight the item you wish to book and specify the time period or block you wish to book it for.
7. Click on the “Availability” button to check if item is available to book and if it is, click on the “Book” button on the right side of the screen

Media Booking List

Staff can view the bookings list for all patrons, or for a specific patron. Staff can also view outstanding bookings, checked out bookings, or finished bookings. To view the bookings list, follow these steps:



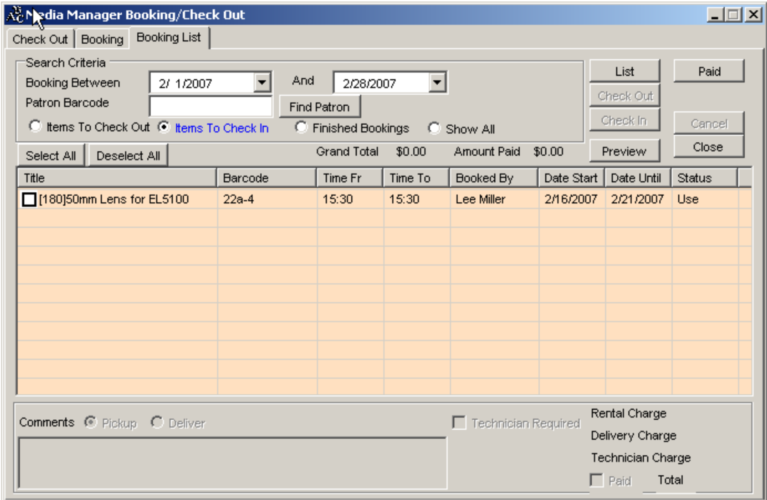
1. Click on “Assets” on the Navigator Toolbar
2. Click on the “Media Booking List”
3. To view outstanding bookings for all patrons, specify a date range, make sure the “Outstanding Bookings” radio button is selected and click on “List”
4. Follow these same steps to view “Finished Bookings” and “Checked Out Bookings” for all patrons

To View Bookings for a Specific Patron

1. Specify a date range
2. Scan in patron card (or enter the first name or last name depending on the default criteria you have defined in Configuration >> Circulation), or click on “Find Patron” to search for a patron
3. Choose the desired radio button and click on “List”

Media Check in

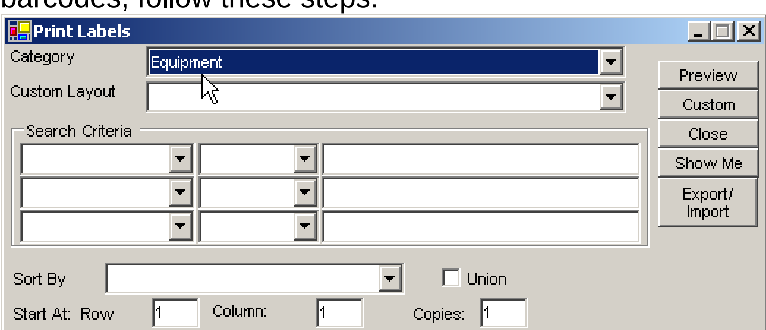
The check in function in Media Manager is much the same as the check in function in normal circulation. To check in Media Manager items, follow these steps:



1. Click on “Assets” on the Navigator Toolbar
2. Click on the “Media Check In”
3. The Items to check in radio button will be selected and the items due within the selected date range display.
4. Check the box for the item(s) and select the Check in button

Media Barcodes

Staff can print barcodes for equipment. To print equipment barcodes, follow these steps:

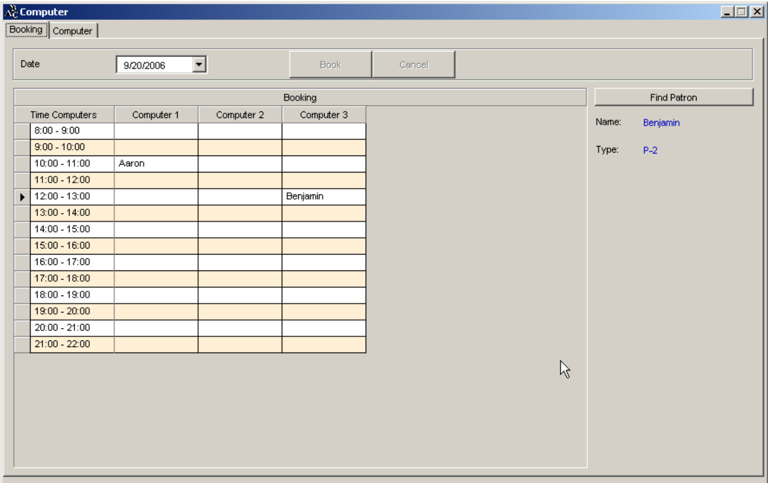


1. Click on “Assets” on the Navigator Toolbar
2. Click on the “Media Barcode” button
3. From the “Category” dropdown list, choose the type of barcodes you want to create

4. If you are using a previously created layout, choose from the “Custom Layout” dropdown list
5. To create a new layout, click on the “Custom” button
6. Click on New and enter a name
7. Double click on the variable you like to see on the label
8. Click with the right mouse to add the barcode image
9. Click on Save
10. You may also choose how you wish the labels to be sorted, and you may choose the start column and row, as well as number of copies for printing the barcodes
11. Specify the search criteria for the items and then click on the preview button to see and then print results if needed
12. You can also use the “Export/ Import” button to export or import a label layout

Computer Reservation

The Feature called Computer has been added to manage computer use in the Library. It gives you the ability to set up the computers in your library into our system. You would then install an application on your Computer machines. When someone wants to use a computer they book a time slot. When a user wants to use the machine they would need to login with their own username and password. Once their booked time is up, the program will close. The computer will log off to a password screen. It will then be available for the next person who has the machine booked. If anyone else tries to use it, it will not let them, unless they have the right password and username



To setup a new computer please do the following:

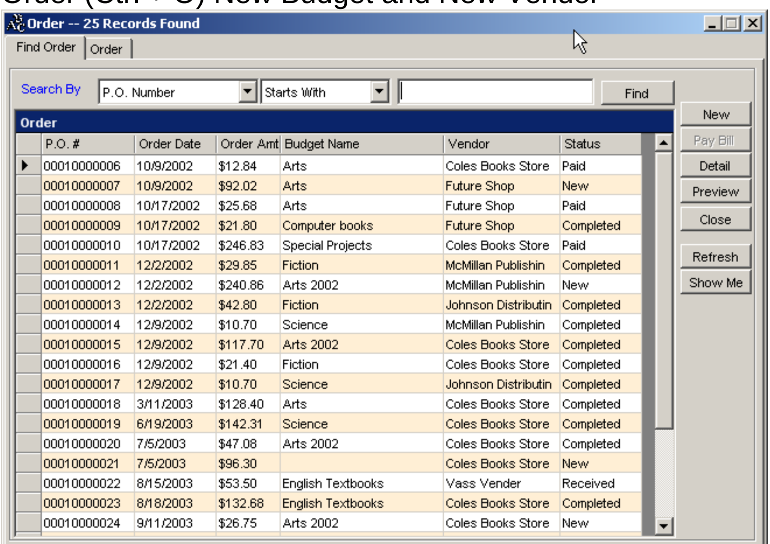
1. Go to the Assets menu and then to Computer
2. Next go to the Computer tab and click on Add
3. This will add a computer into the list below
4. Do this step for as many machines as you have to enter
5. Next you will need to fill out the computer name for each machine added. This is how the program knows which machines it has password control for
6. Once done click on save

To book a computer please do the following:

1. Go to the Assets menu and then to Computer
2. On the booking tab select the time frame the patron wants
3. You can then click on Find Patron to look up who needs the machine
4. Then you can click on book to book that time slot
5. If you booked in the wrong time frame you can select that time frame and then click on cancel to cancel that booking

Acquisitions

The Insignia Library System allows you to keep track of purchases in your library. If you are ordering a book already found in your collection, ordering and cataloging requires just a few mouse clicks.
The Insignia Library System Acquisitions Module also includes comprehensive budgeting that allows staff to keep track of all the funds available for the library. We have also added the capability to assign different budgets for a single order. The Acquisitions menu now has selections for New Order (Ctrl + O) New Budget and New Vendor



P.O. #	Order Date	Order Amt	Budget Name	Vendor	Status
00010000006	10/9/2002	$12.84	Arts	Coles Books Store	Paid
00010000007	10/9/2002	$92.02	Arts	Future Shop	New
00010000008	10/17/2002	$25.68	Arts	Future Shop	Paid
00010000009	10/17/2002	$21.80	Computer books	Future Shop	Completed
00010000010	10/17/2002	$246.83	Special Projects	Coles Books Store	Paid
00010000011	12/2/2002	$29.85	Fiction	McMillan Publishin	Completed
00010000012	12/2/2002	$240.86	Arts 2002	McMillan Publishin	New
00010000013	12/2/2002	$42.80	Fiction	Johnson Distributin	Completed
00010000014	12/9/2002	$10.70	Science	McMillan Publishin	Completed
00010000015	12/9/2002	$117.70	Arts 2002	Coles Books Store	Completed
00010000016	12/9/2002	$21.40	Fiction	Coles Books Store	Completed
00010000017	12/9/2002	$10.70	Science	Johnson Distributin	Completed
00010000018	3/11/2003	$128.40	Arts	Coles Books Store	Completed
00010000019	6/19/2003	$142.31	Science	Coles Books Store	Completed
00010000020	7/5/2003	$47.08	Arts 2002	Coles Books Store	Completed
00010000021	7/5/2003	$96.30		Coles Books Store	New
00010000022	8/15/2003	$53.50	English Textbooks	Vass Vender	Received
00010000023	8/18/2003	$132.68	English Textbooks	Coles Books Store	Completed
00010000024	9/11/2003	$26.75	Arts 2002	Coles Books Store	New

Placing an order

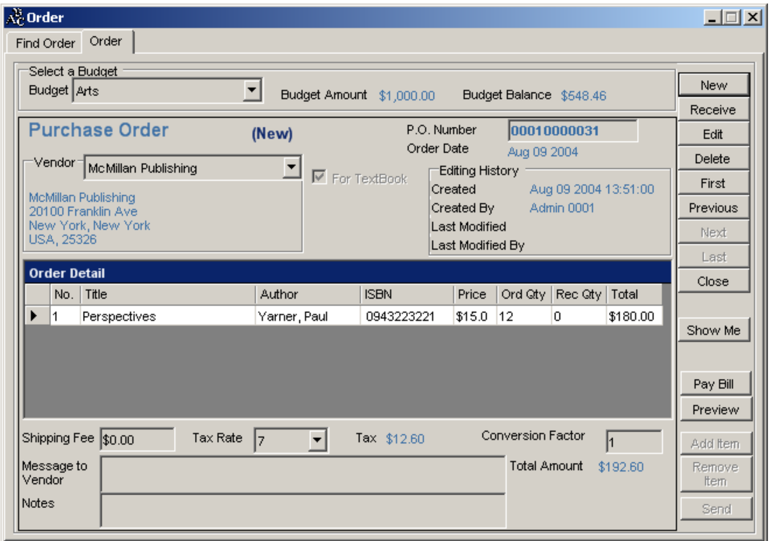
To place an order in the Insignia Library System for an existing title requires just a few mouse clicks. Once you receive the shipment, cataloging requires a few more mouse clicks to complete the order.
We have now added the ability to assign different budgets to items within the same order

To create a new purchase order for books:

1. Click on “Acquisition” on the Navigator Toolbar.
2. Select “Find/Add Order”.
3. Click on “New”.
4. Select a budget from the list.
5. Select a vendor from the list.
6. If the book is being ordered as a textbook, then check the check box “For Textbook”.
7. Click on “Add Item” to add a new item.
8. Click on “New”, and then provide the information required.
9. You can then click the “Save” button which will return you to the “Place a New Order” screen with the new material now visible in the order detail.
10. Repeat steps 7 through 9 until all items have been added to the order.
11. Click “Save”.

Ordering an Existing Item

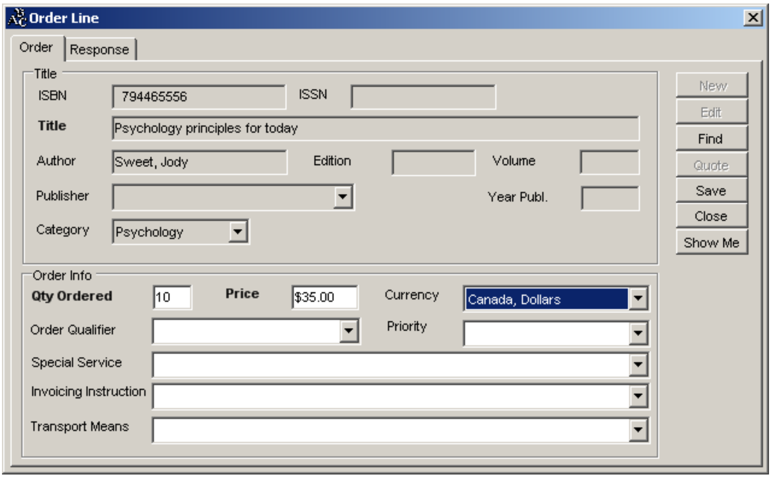
1. If you are ordering an item for which a MARC record already exists in your system:
2. On the Order tab, click on “Add Item”. Then click on “Find”, search for the desired item, and click “OK”. If the textbook checkbox was selected, then the system searched the textbook module for books (otherwise it searches in the catalog module).
3. Most of the information is automatically copied from the catalog module into the order line form.
4. Specify the price, quantity (if it is not 1), and currency.
5. Click on “Save”.
6. Select the tax rate and shipping cost.
7. Add any comments for the vendor.
8. Click on “Save”.
9. Click on “Preview” to see your purchase request, and you can then print it out by clicking on the printer icon.
10. If vendor is EDI compliant, you can click on “Send” to send the information out.



Ordering a New Item

If you are ordering a new item, follow these steps:

1. Click on the “New” button.
2. Fill in the information for the item you wish to order.
3. Enter the quantity ordered, and the price.
4. Click on “Save”.
5. Select the tax rate and shipping cost.
6. Add any comments for the vendor
7. Click on “Save”.
8. Click on “Preview” to see and then print the purchase request.
9. If vendor is EDI compliant then you can click on “Send” to electronically send that information out.



Receiving an Order

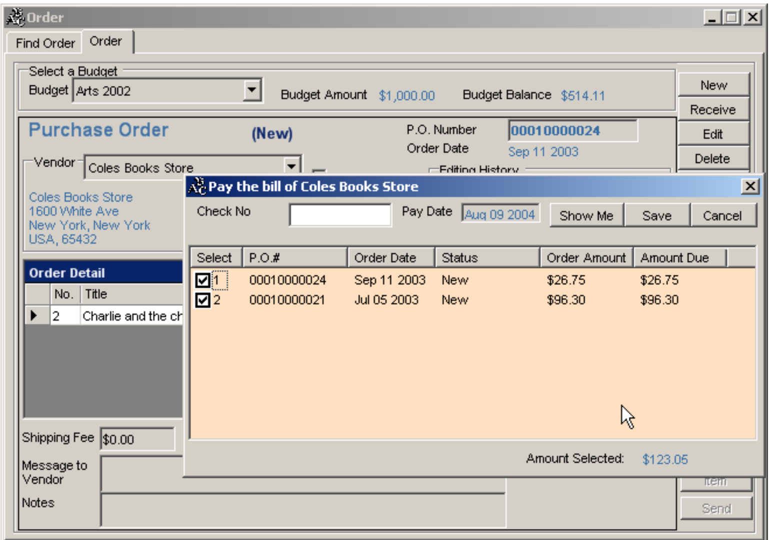
When a shipment arrives, only a few mouse clicks are required to catalog the items. Budget and cataloging are automatically updated behind the screen. To receive a shipment, follow these steps:

1. Click on “Acquisitions” on the Navigator Toolbar.
2. Click on the icon “Find/Add Order”.
3. Find the purchase order for which you have received the shipment, select it, and click “Detail”.
4. Click on “Receive”.
5. Double click on the line item that you have received.
6. In the “Qnty Being Add” box, enter the number of copies that you have received.
7. Click on “Save”.
8. Repeat step 4-7 for each item received.
9. Click on “Save” to update.
10. Making a Payment

Once you have received the shipment and you want to make the payment, follow these steps.

1. Click on “Acquisitions” on the Navigator Toolbar.
2. Click on “Find/Add Order”, and find the order you would like to pay.

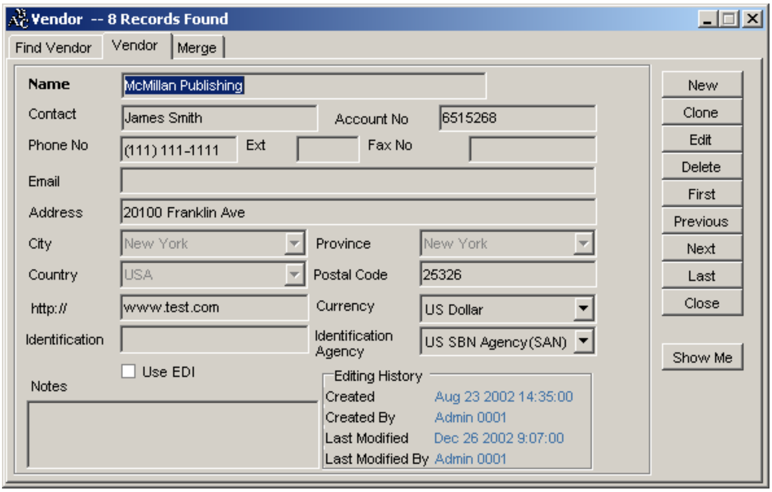
3. Click on “Pay Bill”.
4. Enter the check number.
5. Select the orders for which you like to make the payment.
6. Click on “Save”.
7. Enter the amount being paid.
8. Click “OK”.



Vendor Profiles

The Insignia Library System allows staff to keep vendor profiles in the database. This information from the profile is automatically used wherever necessary, such as when e-mailing a purchase order to the vendor or printing it to be faxed. To create a vendor profile:

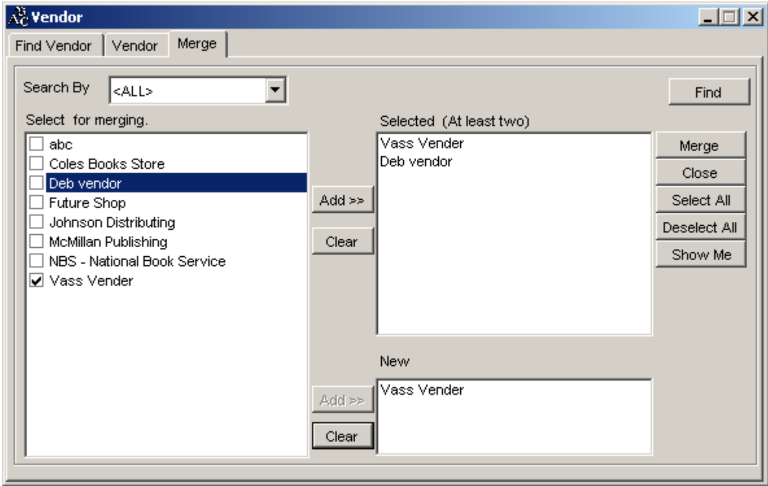
1. Click on “Acquisitions” on the Navigator Toolbar.
2. Click on “Find/Add Vendor”.
3. Click on “New” or select an existing one by using the search criteria.
4. Enter all the relevant information.
5. Click on “Save”.



Merge Vendors

To merge vendors, follow these steps:

1. Click on “Acquisitions” on the Navigator Toolbar.
2. Click on “Find Vendor”.
3. Click on the “Merge” tab.
4. Search for the first vendor to be merged.
5. From the search results on the left, select the vendor to be merged by checking the box to the left of the vendor’s name. Then click on the “Add” button located near the center of the screen.
6. Search for and add the other vendor(s) to be merged by repeating steps 4-5.
7. With at least two vendors in the “Selected (At least two)” box, you must now select the name into which these vendors will be merged. Search for and select the new vendor, then press the “Add” button located near the bottom of the screen. The new vendor should appear in the “New” box.
8. Click on “Merge”.
9. The vendors you selected are now merged into the vendor listed in the “New” box.

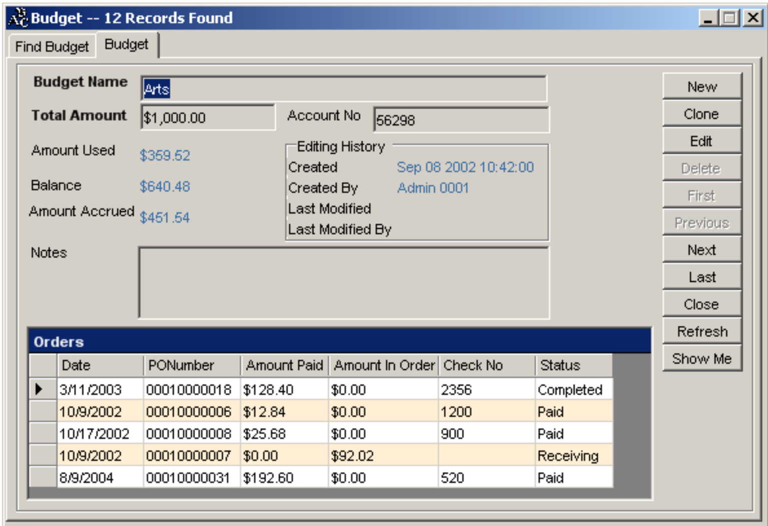


Budgets

The budget module allows staff to keep track of the money spent on books. For example, you may have (x) dollars allocated for the purchase of books in your library and out of that, only (y) dollars are to be used to buy books of a specific kind. The budget module keeps track for you and will not allow you to spend more money than is allocated for a given purpose.

To Add/Update a Budget

1. Click on “Acquisitions” on the Navigator Toolbar.
2. Click on “Find/Add Budget”.
3. Click on “New” or find the budget that you would like to edit using search criteria.
4. Enter the relevant data.
5. Click on “Save”.



Quotes

To find a quote for an item:

1. Click on “Acquisitions” on the Navigator Toolbar.
2. Click on “Quotes”.
3. Choose the vendor you wish to receive the quote from and type in the ISBN and Title of the item.
4. Click on “Find”.

Receive EDI

1. Click on “Acquisitions” on the Navigator Toolbar.
2. Click on “Receive EDI”.
3. Click on “Start” and begin downloading the EDI messages.

Web OPAC

The OPAC for Insignia Library System is completely web enabled. Web OPAC users can:

1. Search using any of the four search engines
2. Search projects (with complete support for multimedia objects and web links)
3. Check personal information (with the ability to update)
4. Check loan history
5. Reserve books
6. Renew books
7. Check fine status

Access to information in the Insignia Library System over the web is instantaneous; as soon information is saved patrons can access it over the web. The Web OPAC version is now viewable at the bottom of the Web screen

To provide www access to the Insignia Library System in your organization, Microsoft Internet Information Server 5.0 is required. Once Microsoft Internet Information Server is installed, it takes less than two minutes to have the Insignia Library System available over the Internet.

Before providing Internet access, it is important that patron security is enabled with unique passwords for each patron. Otherwise you may inadvertently allow unauthorized users access to a patron’s confidential information.
Other features of the Insignia Web OPAC include:

Search history – choose a previous search from the dropdown list to eliminate the need to re-enter a search.
Boolean searching – use the Boolean operators AND, OR, and NOT for more precise searching.
Use the on-line help, available on the first page of each search, to assist you.
School events – see school events, as created within the library system, by clicking on the “Events” link on the bottom of each page.

Enable/Disable Web OPAC features

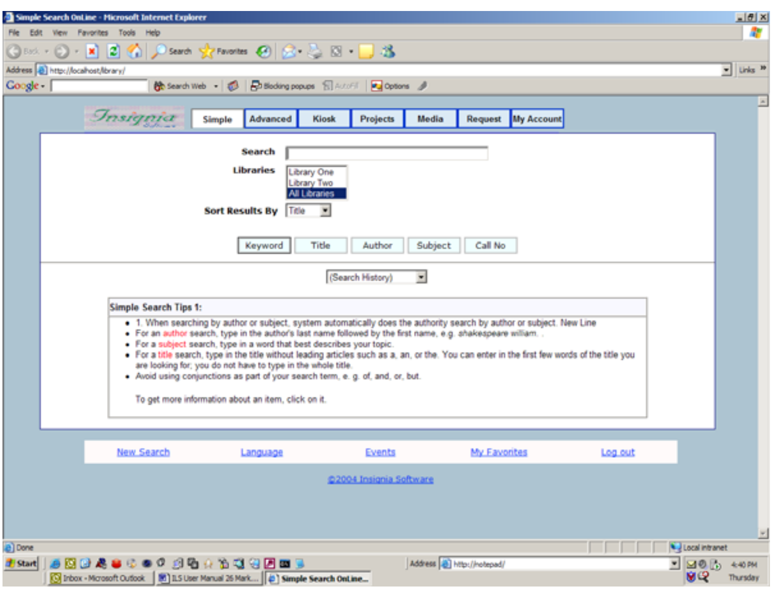
Go to the Web OPAC tab of the Configuration screen under the Administration menu to enable/disable the following Web OPAC features:

- Allow patrons to change personal information
- Show call number
- Allow patron to renew
- Allow patron to reserve
- Allow patron to book
- Browse subject and author index

Go to Custom Settings under the Administration menu to enable/disable the following features of the Web OPAC:

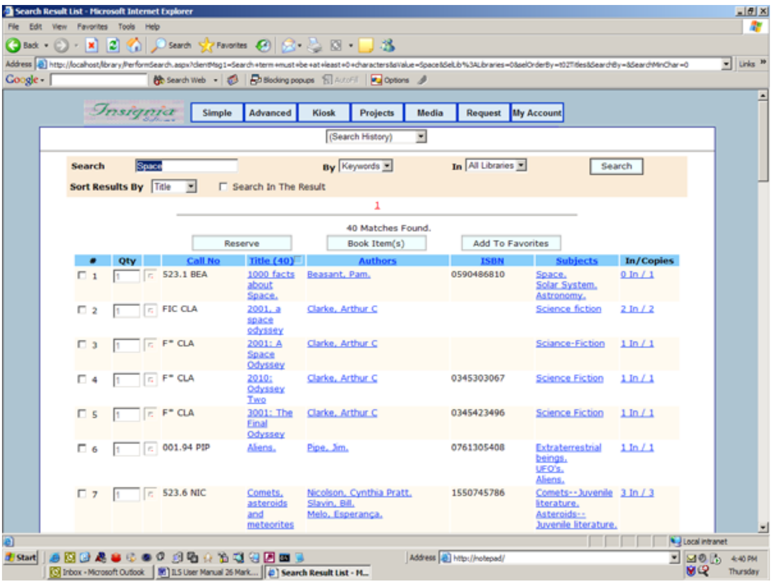
Enable/ disable and make visible or hide the various modules of the Web OPAC: Kiosk, My Account, Request, Media Manager, and Circulation.
Custom Settings will only be visible under the Administration menu when you are logged in as “admin”.

Simple Search



To search over the web using simple search, follow these steps:

Go to \\computer_name\library.
Click on the “Simple” tab.
Enter the search criteria and press enter (the default search is by keyword).



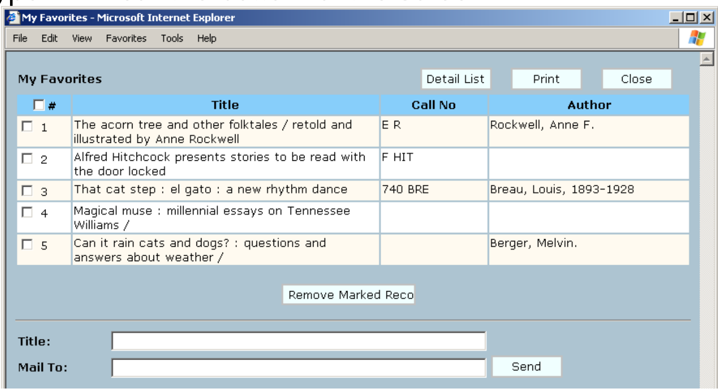
Click on the title to see the item record.
You may sort by Title, Call No., Author, or Subjects. Just click on the appropriate hyperlink in the title bar to sort by this field. Click on the pink arrow to change between ascending and descending order.

Favorites List

After performing a search, patrons may add items to a Favorites List. The Favorites List will not be saved; it will disappear once the patron logs out.
To add items to a Favorites List, follow these steps:

On the search results screen, check the box in the “#” column on the left for each item to add to the list.

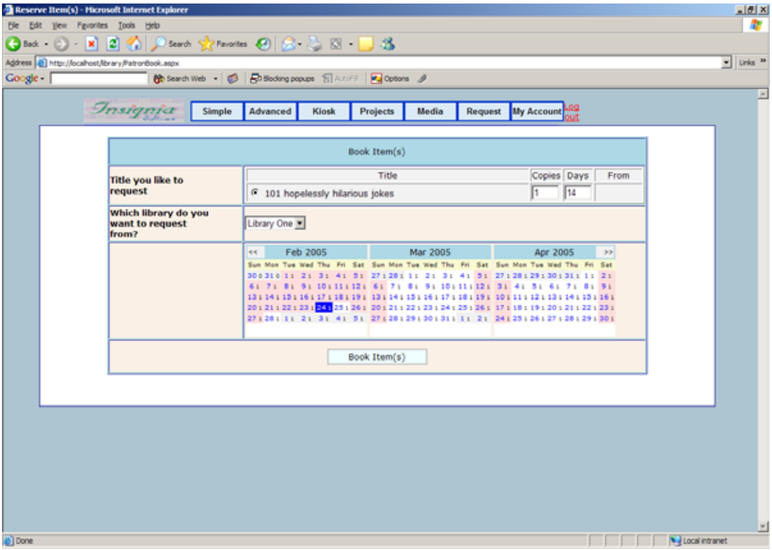
Then click on the “Add to Favorites” button located at the top or bottom of the screen.
To see the Favorites List, click on the “My Favorites” hyperlink near the bottom of the screen.



Booking

To book an item, follow these steps:

1. Check the box in the “#” column on the search results screen
2. Enter the quantity you want to book in the “Qty” column
3. Then click on the “book” button located near the bottom of the screen
4. On the “Booking” screen, select the title that you want to book and the library that you want to request from (only libraries that have holdings for this title will be shown)
5. Click on the date required (system does not verify if the item will be available on that date, it is based on first request first checkout)



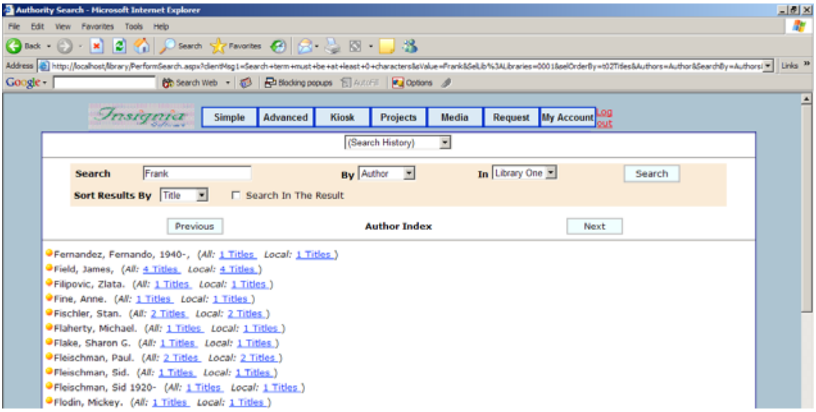
6. Repeat step 9 for all the items and then click on “Book Item(s)”.

Color Legend:

Pink: Holidays, Green: Item being reserved, Blue: Today’s date, White: Dates item available

Authority Search

When a search is done in Simple Search by subject or author, the system automatically performs this as an authority search. If a match is not found, the system jumps in where the search term would have been, as shown below.

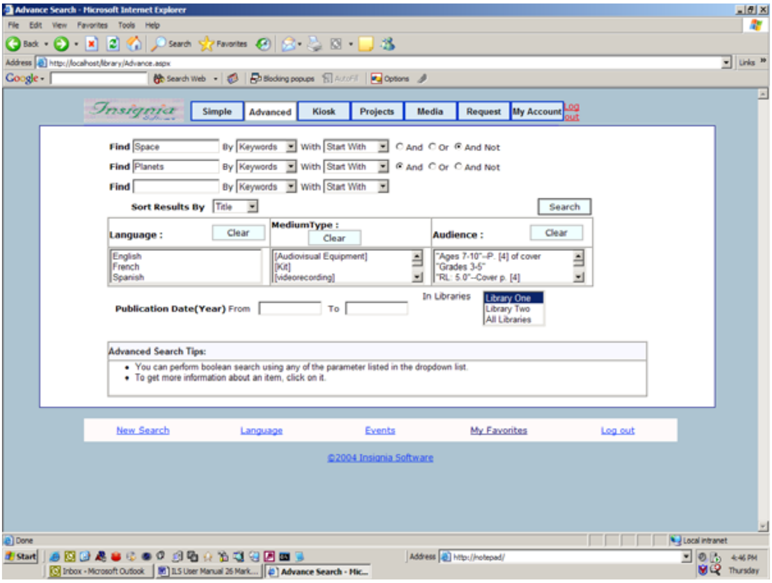


The number of titles held for each subject or author is shown in parentheses.

Advanced Search

Advanced Search allows the user to refine their search criteria and to use Boolean operators. To use Advanced Search, follow these steps:

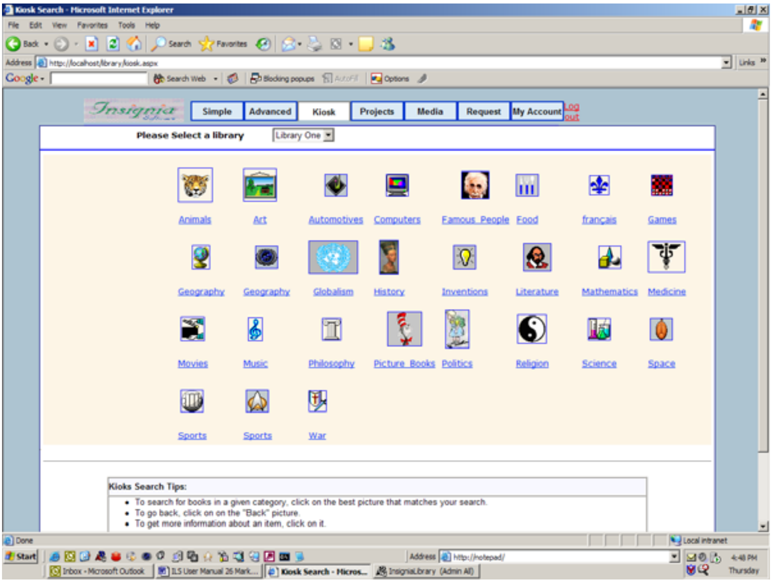
1. Click on the “Advanced” tab.
2. Select the library to search from the “In Libraries” list. To select more than one library, use the Ctrl key; or you can choose “All Libraries”.
3. Enter your search terms, and choose the desired search criteria and Boolean operators.
4. You may limit the search by language, media type, audience, and publication year. To select more than one value in a list, use the Ctrl key.
5. The results may be sorted by title, author, subject, call no., or ISBN, depending on what you choose from the “Sort Results By” box.



Kiosk Search

With Kiosk Search, patrons can search for books by clicking on pictures. To use Kiosk Search, follow these steps:

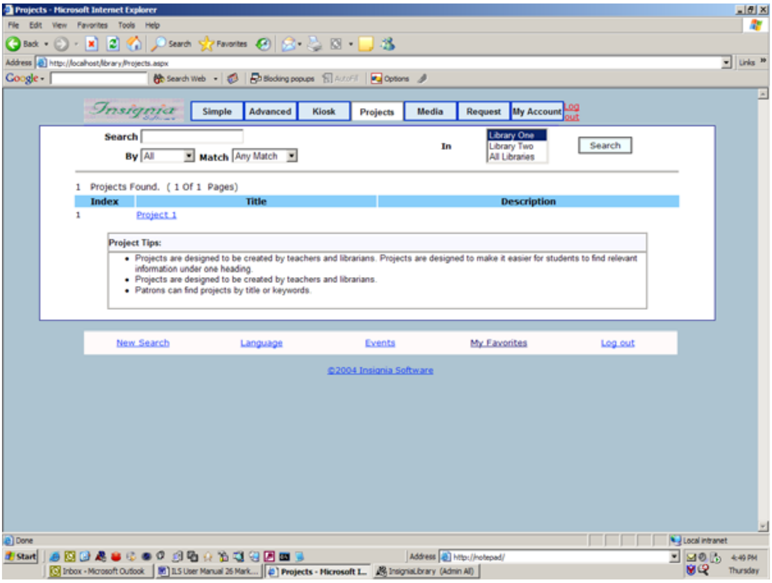
1. Click on the “Kiosk” tab.
2. Click on the picture that best matches your search.
3. Continue clicking on pictures down through the hierarchy until you find the picture that best matches your search. To move back up the hierarchy, click on the “Back” picture.
4. The system will list the items belonging to the selected category.



Projects

Patrons can view projects that have been created by staff. To view projects, follow these steps:

1. Click on the “Projects” tab.
2. Select the library for which you would like to see projects.
3. To search for a project by title or keywords, enter a search term and then choose “Title” or “Keywords” from the “Search by” box.
4. To see all projects, select “All” from the “Search by” box.
5. Click on “Search”.
6. In the results list, click on the title of a project to see the project details.



Personal Profile

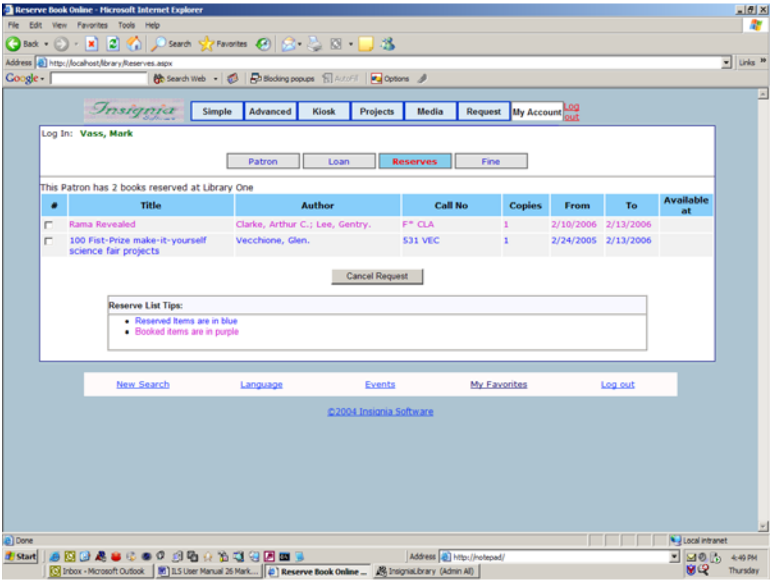
Patrons can view and update their personal profiles. To view a personal profile, follow these steps:

1. Click on “My Account”.
2. Enter the patron ID and password and click on “Log In”.

Update Profile

Patrons viewing their personal profile may update it by entering in the updated information and then clicking on “Save Changes”. Patrons may also change their password from this screen by clicking on “Change Password”.
Reserve

Patrons may view their reserves by clicking on the “Reserve” tab. They can cancel a reserve by selecting the check box associated with the list item and clicking on “Unreserve”.

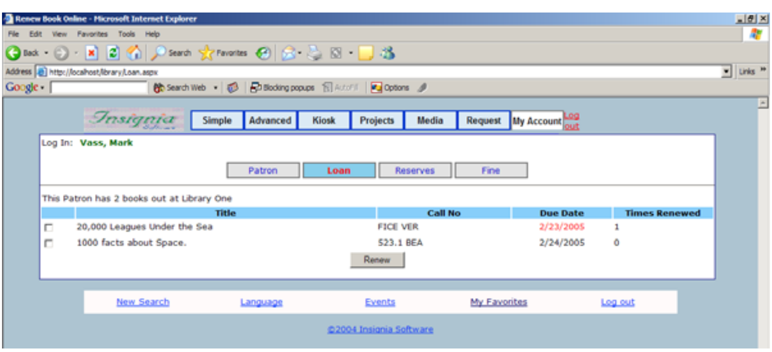


Fines

To view fines, patrons may click on the “Fines” tab.

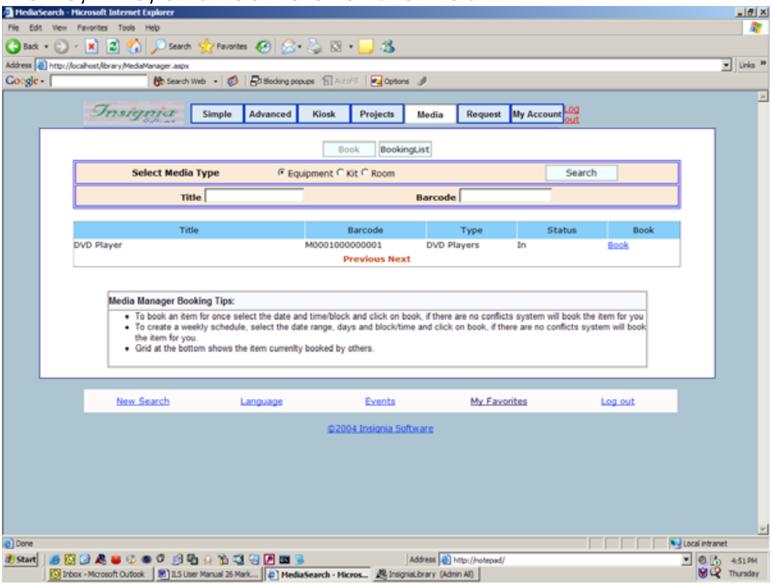
Items on Loan

To see items on loan, click on the “Loan” tab. The patron may renew an item from this screen by selecting the checkbox associated with the item and clicking the “Renew” button.



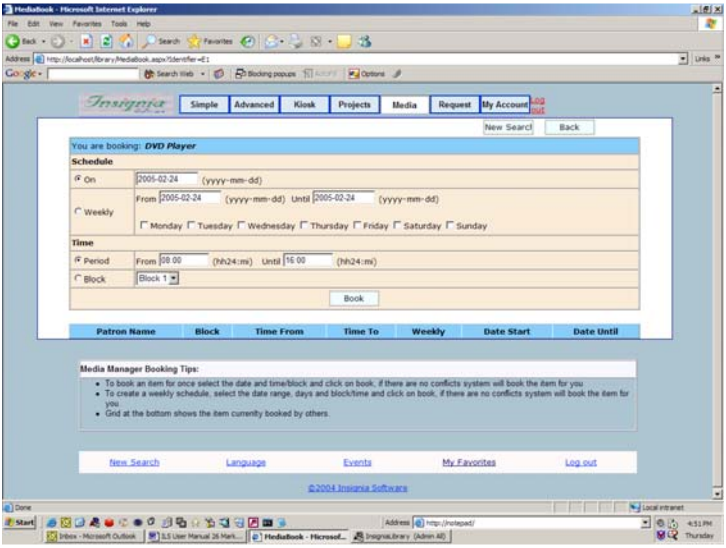
Media Manager

Media manager allows staff to book media objects, like VCRs, TVs, and rooms over the web.



To book an item, follow these steps:

1. Click on the “Media” tab.
2. Login with your patron ID and password.
3. Select the media type you would like to book (Equipment, Kit, or Room) and then click on “Search” to see a list of all items belonging to that media type. Or, you may enter a title or barcode and then click on “Search”.
4. Click on the “Book” hyperlink associated with the item you want to book.
5. Specify the desired booking time. You may specify a day or a weekly schedule. You may book the item for a specified time period or block.
6. Click on “Book”.
7. A message will appear on the booking screen indicating that your booking was successful.



Request

Patrons can make purchase requests using the Web OPAC. To make a purchase request, follow these steps:

1. Click on the “Request” tab. You will be prompted to login.
2. Click on “Add New Request”.
3. Enter as much information as possible about the item you are requesting, including the title, author, ISBN, and publisher.
4. Click on “Save” to save and submit the request.

Staff will now be able to see this request in “Find/Add Request” under the Catalog menu

New Additions this Release

1. Primary initial articles support for German, Spanish, French and English

2. 30 customized fields including book reviews

3. Inventory date is now searchable

4. History status of an item or patron stay within the system even after they are deleted
5. Implement Checkout history anonymous feature
6. Offline checkout are integrated into system
7. Ability for multiple bookings and reserves
8. Searches are logged for catalog searching and have related reports
9. Order by published date is available on web
10. Equipment can be marked as non searchable on web
11. Marc import has warning for inferior quality records
12. Items can be locked, the import program won't update locked items
13. Tag 856, dead URL detection implemented
14. Added configuration to allow emailing patron when reserves become available.
15. Patron Picture import can now match by Student ID, Barcode and Patron ID.
16. Patron and Item Archival
17. New Serials section
18. Support for Auto-dialer Feature (Call us for more info)
19. Support for PDF, DOC and TXT attachments are now searchable.
20. Added Syndetics links to the web Opac for searching book reviews and cover pages
21. Under Administration, Security, Circulation there is setting for Self Checkout