INSIGNIA LIBRARY SYSTEM

RESOURCE MANAGER TRAINING GUIDE

INSIGNIA SOFTWARE CORPORATION

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WELCOME TO INSIGNIA SOFTWARE

This training will provide you the knowledge and the hands on experience to learn the key features of the Insignia Library System so you can manage your library following the training. We recommend working in pairs during the hands-on part of the training.

NAVIGATING TO INSIGNIA LIBRARY SYSTEM FROM A BROWSER.

1. Library Staff interface: https://hcdsb.insigniails.com/ils
2. Student interface: https://hcdsb.insigniails.com/library

SYSTEM REQUIREMENTS

The computers in the training lab and the computers in the library for cataloging and circulation should meet the following requirements:

1. Recommended Windows 7+
2. PIV+ with 2GB RAM (Recommended 4 GB).
3. Resolution 1024x800+.
4. Adobe Reader 10.0+.
5. Internet Explorer 9.0+, Firefox, Opera, Chrome

For patrons to search the system, the system requirement is:

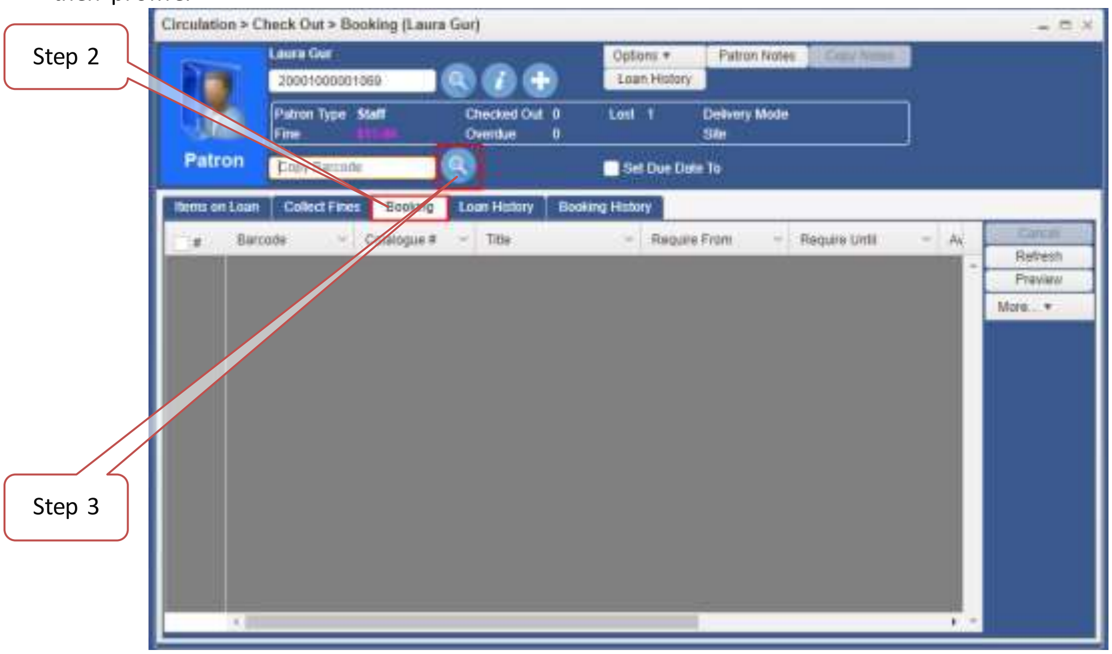
1. Any computer with leading browser.
2. Minimum resolution 1024x800+.

We thank you again for choosing Insignia and appreciate very much if you can provide some feedback on the training, Insignia Library System features and Insignia customer care by sending email to wecare@insigniasoftware.com.

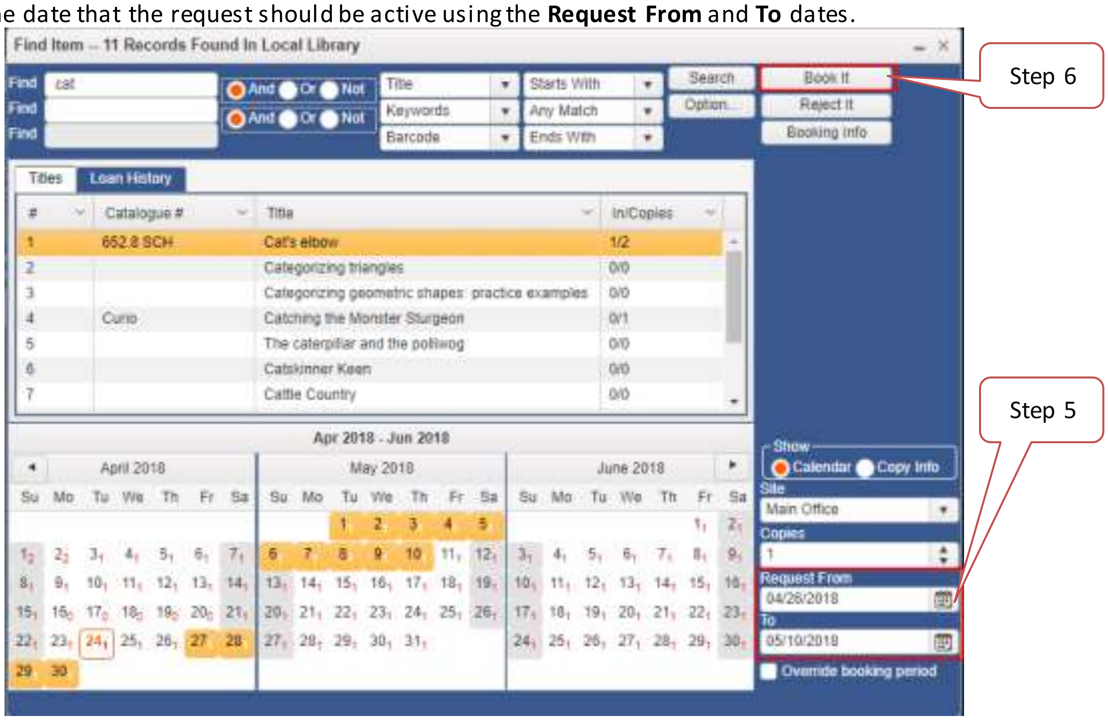
CIRCULATION

MAKE A BOOKING

1. Go to **Circulation > Check Out > Check Out** and search for patron in the **Patron Name/Barcode** field to load up their profile.



2. Select the **Booking** tab.
3. Click **Find**.
4. Search for the booking you would like to make.
5. Select the date that the request should be active using the **Request From** and **To** dates.



6. Click **Book It** to place the booking.

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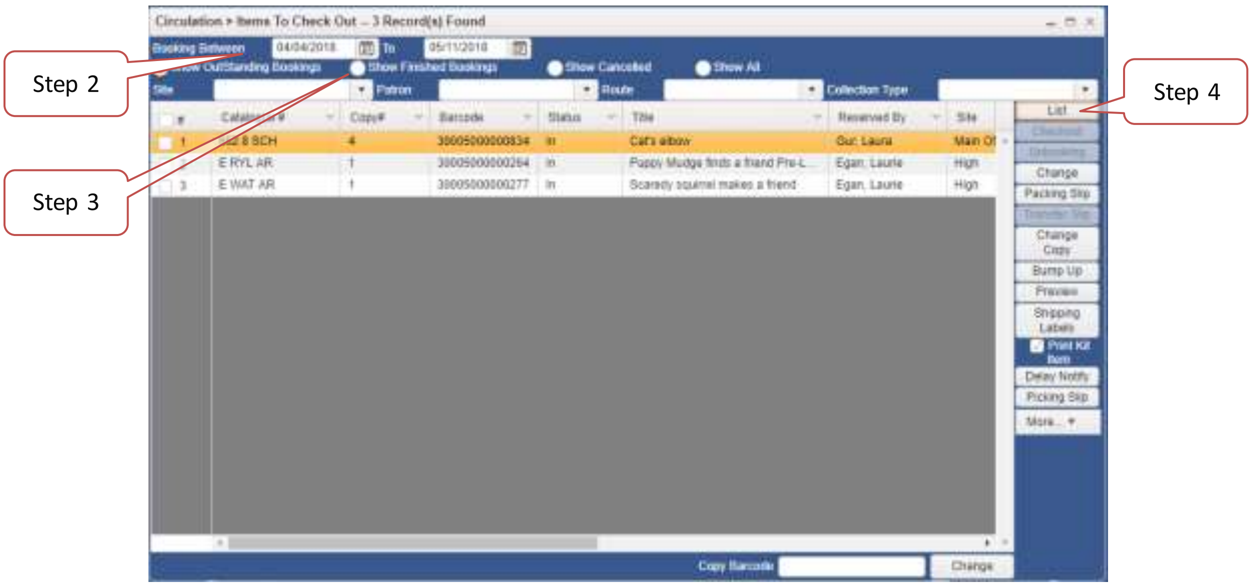
Items to Check Out: View Bookings

1. Go to **Circulation > Items to Check Out**.



2. Specify the **Booking Between** dates. If necessary, specify additional refinement options including: **Site**, **Patron**, **Route**, and **Collection Type**.
3. Specify the bookings you would like to view.
   3.1. Select **Show OutStanding Bookings** to prepare an upcoming delivery. When this is selected only items that have not yet been prepared or sent for delivery will display.
   3.2. Select **Show Finished Bookings** to only display items only items that have been prepared and sent out for delivery (checked out) will display in the grid. You may wish to use this in case a delay notification should be sent.
   3.3. Select **Show All** to display both the outstanding and finished bookings.
4. Click **List** to show the bookings in the grid.

Items to Check Out: Prepare Bookings For Delivery

1. Select the items you would like to go out in the upcoming delivery and click **Checkout**.

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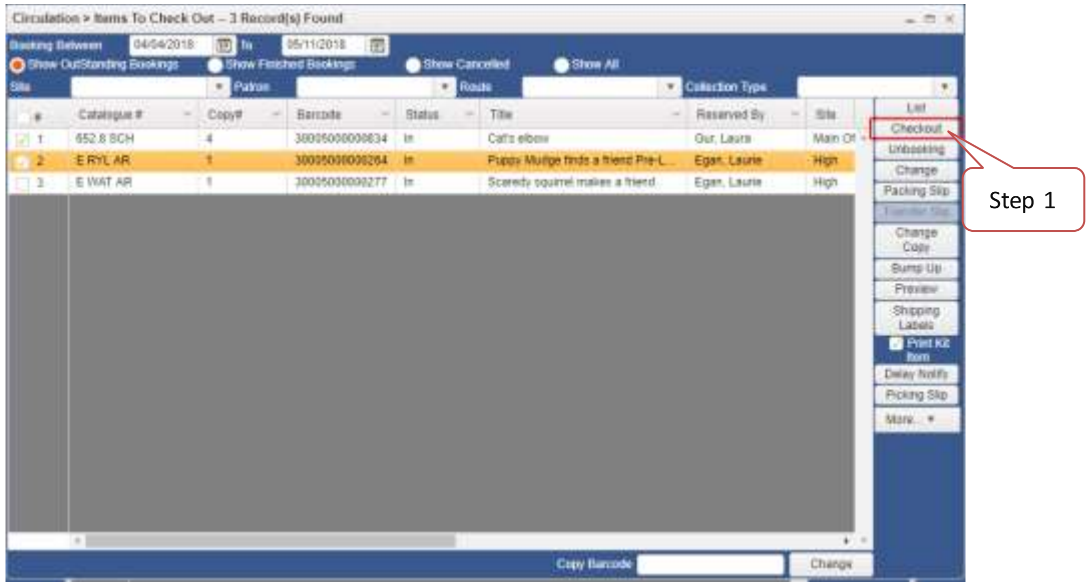
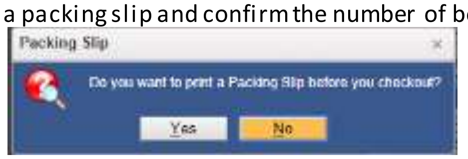
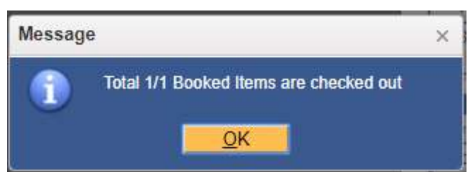


2. The system will prompt you to print a packing slip and confirm the number of booked items checked out.





ITEMS TO CHECK OUT: CANCEL OR CHANGE BOOKINGS

1. To cancel a booking, click **Unbooking**. You will be prompted to select a reason for cancelling the booking.

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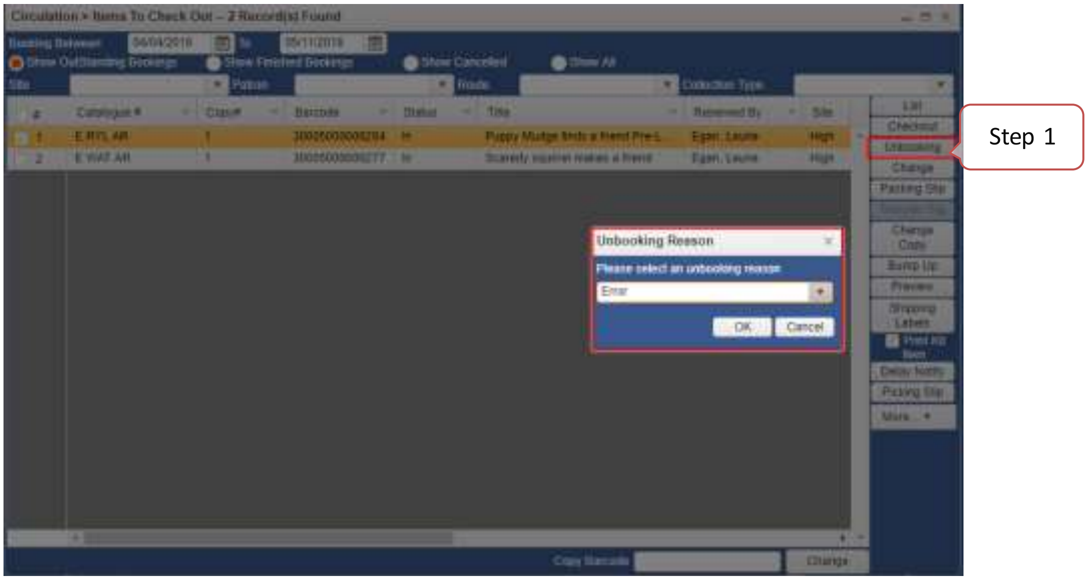
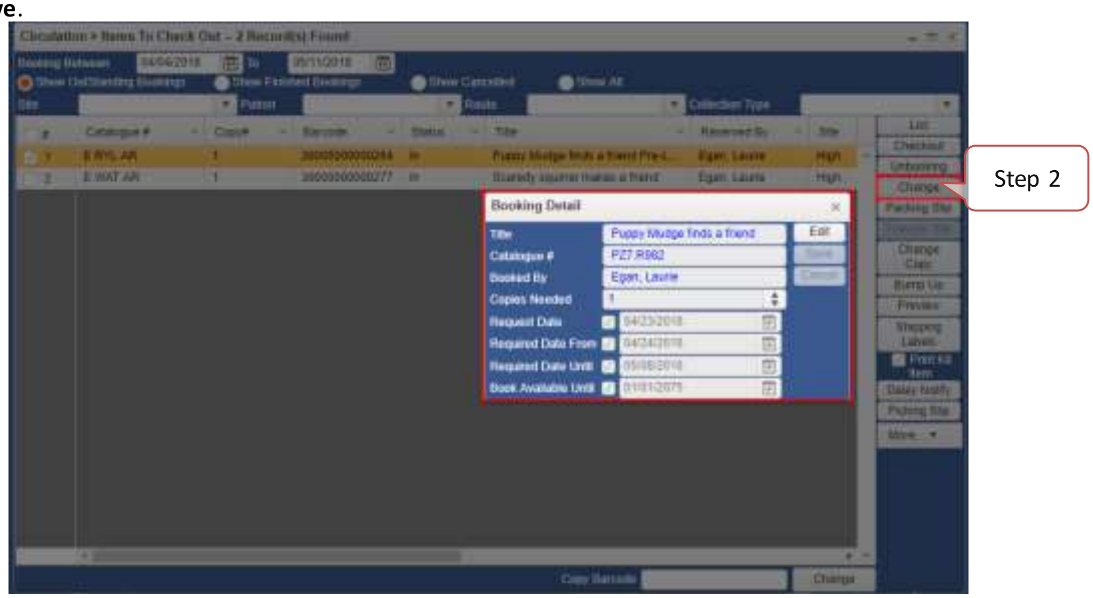


2. To change a booking, click **Change**. The **Booking Detail** window will display. Click **Edit** to make your changes and click **Save**.



3. To change the copy that will be used to fulfill the booking, click **Change Copy**. Select the copy to be used from the **Available Copy List** window and click **OK**.

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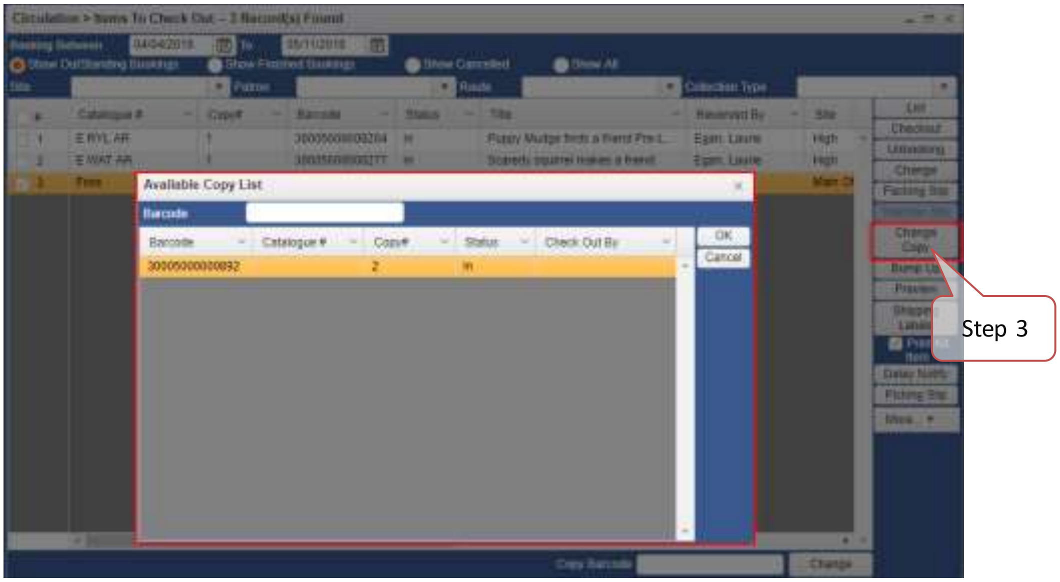
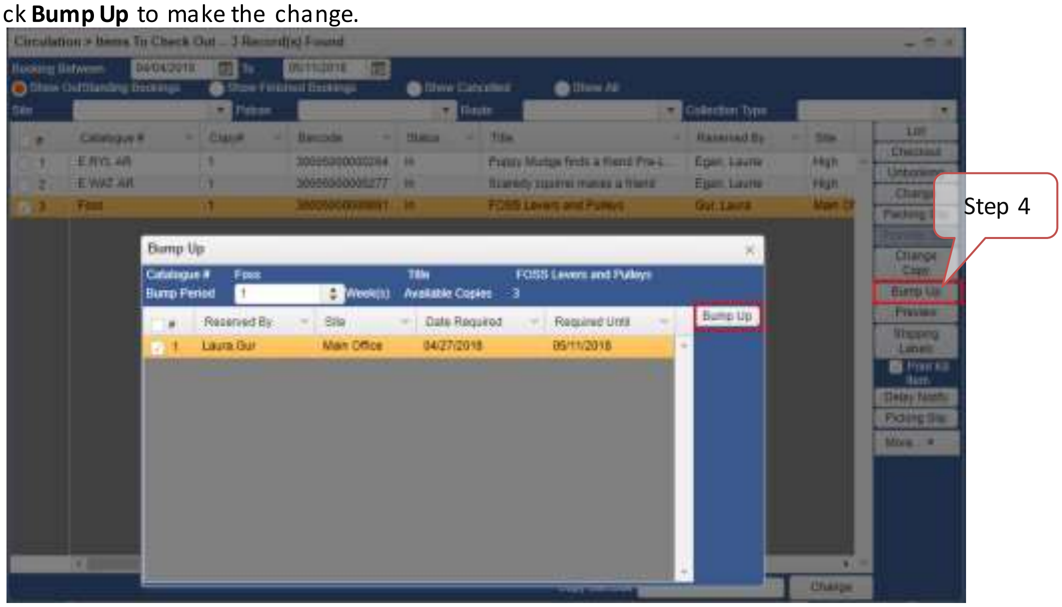


4. To move booking requests forward (e.g., due to a delay), click **Bump Up**. The **Bump Up** window will display, which allows you to use the checkboxes to select requests and have them bumped up by a specified number of weeks. Click **Bump Up** to make the change.



5. Insignia can automatically generate and send a delay notification to a patron expecting a resource to be delivered. If you would like to manually send a delay notification message, follow these steps:
   5.1. Select the delayed item by clicking on it in the grid.
   5.2. Click **Delay Notify**.
   5.3. A pop-up confirmation will display.

Note: The delay notification message can be set in **Administration > Library Setting > System Message**.

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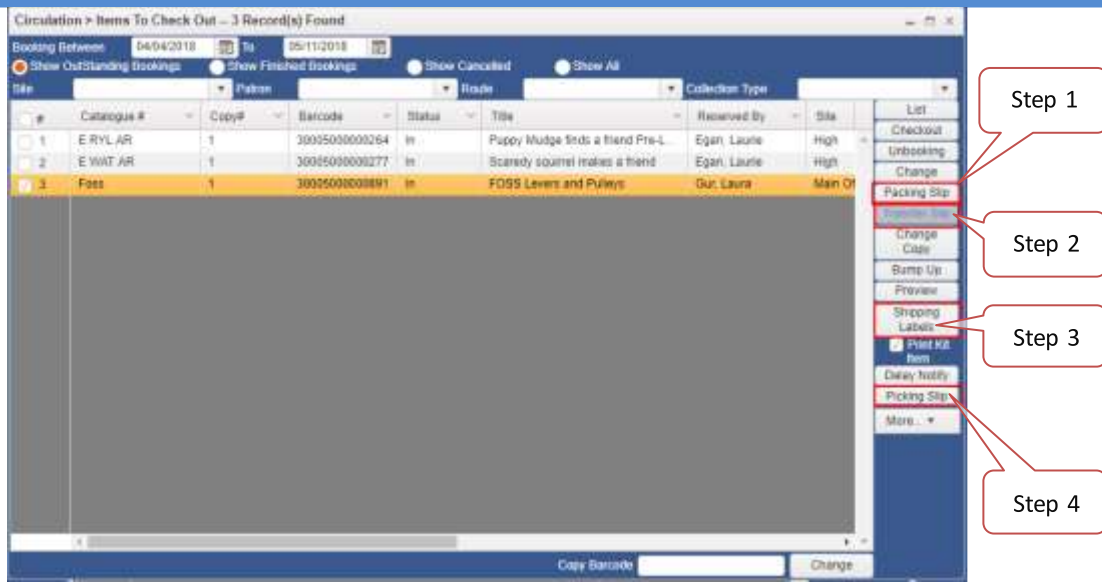
ITEMS TO CHECK OUT: PRINTING LABELS AND SLIPS



1. To print the packing slip to see the list of items to pack, click **Packing Slip**. This includes the delivery route, delivery location, requested date, due date, patron requesting the item, and copy summary information.
2. To print a slip for items to be picked up from one site and delivered to another to meet booking requests before coming back into the resource center, click **Transfer Slip**. In order to use this feature, the district must allow items to go out to more than one site before coming back to the resource center.
3. To print shipping labels to attach to the outgoing resources, click on **Shipping Labels**. The user can print labels for the items to be sent out with information including: patron, delivery site, item title, booking start date, due date, barcode number, and call number. Please see below for label layout:

Belhaus,Barbara (Preschool)	Last Name, First Name (Site Name)
Bad kitty	Item Title
05/29/2014	Date Required (Delivery Date)
06/05/2014	Due Date
120925013	Barcode Number
E BRU AR	Call Number

4. To print a list of the items that have been checked out and are ready to be picked up for delivery, click **Picking Slip**. You will be prompted to specify the date/time range for the list.

ITEMS TO CHECK IN

Items to Check In allows staff to quickly check in resources without having to scan them individually.

1. Go to **Circulation > Items to Check In**.

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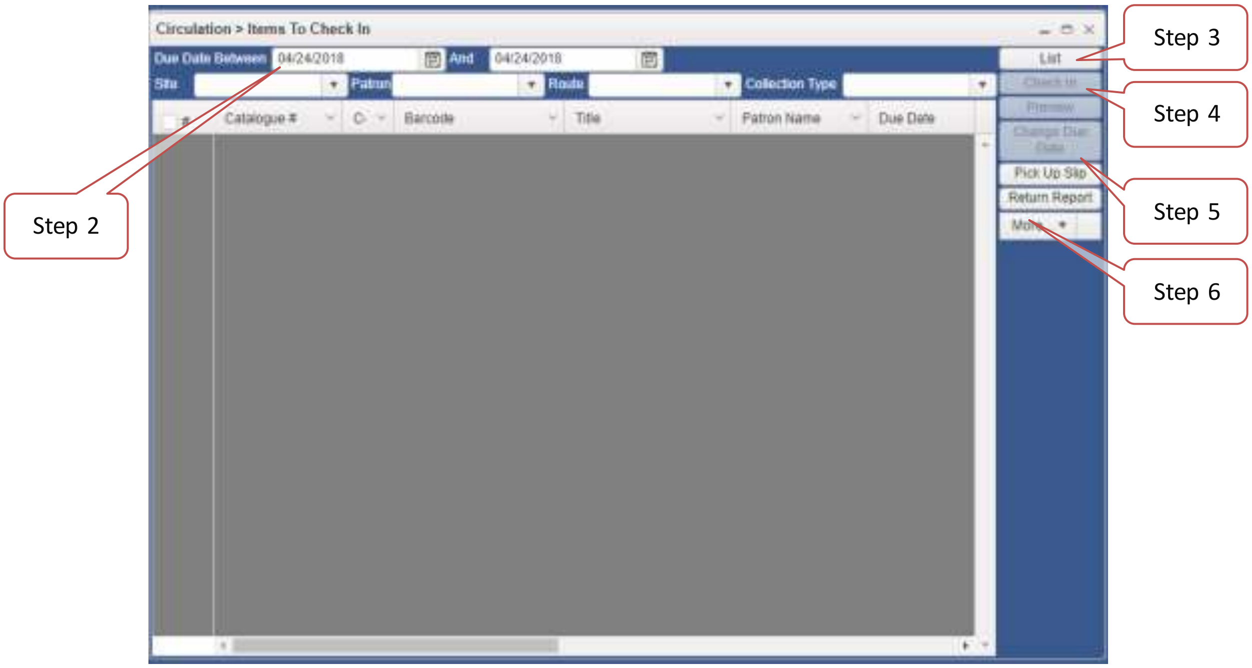
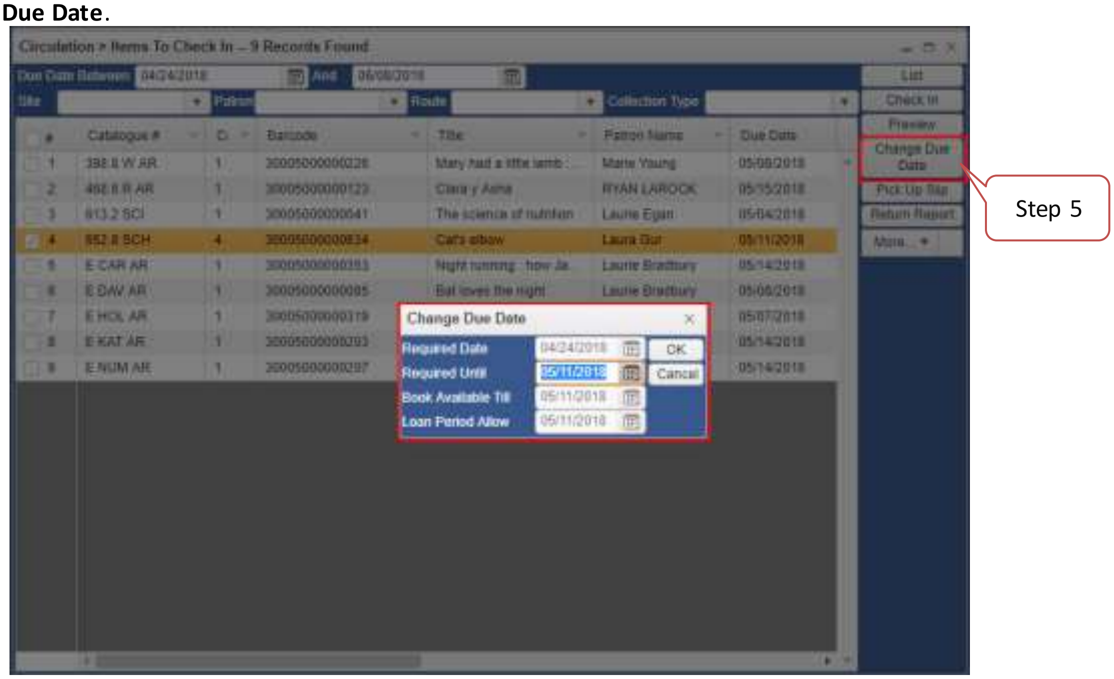


2. Specify the **Due Date Between** dates to view items in the due date range. If necessary, specify additional refinement options including: **Site**, **Patron**, **Route**, and **CollectionType**.
3. Click **List**. The resources that meet the criteria you specified will display.
4. Use the checkboxes to select the resources you would like to check in. Click **Check In**.
5. If you would like to change the due date for some resources, use the checkboxes to select them, and click **Change Due Date**.



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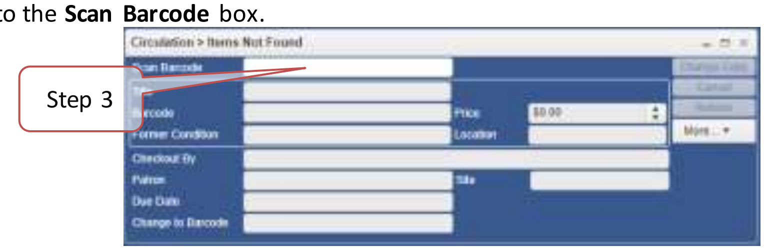
6. If you would like to view items that have the due date range specified in the Due Date Between area along with the subsequent booking, click **Return Report**. This report can be used as a confirmation of the items checked in for each shipment.

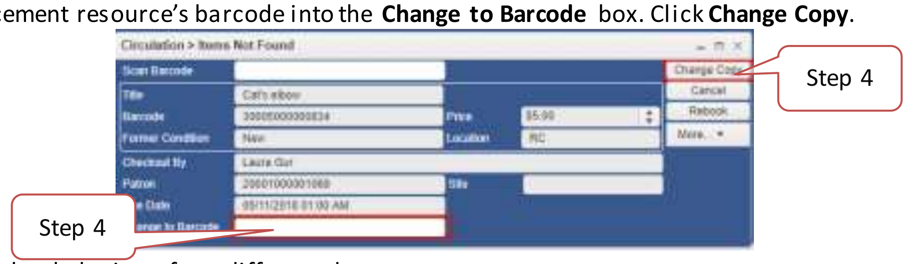
ITEMS NOT FOUND

The **Items Not Found** window is used along with the **Picking Slip** to assign a different copy of the same item or to rebook an item that could not be located at the resource center.

1. Print the **Picking Slip** from **Circulation > Items to Check Out** or **Report > Resource Manager**.
2. After being unable to locate that specific copy, pick a similar copy to fulfill the booking.
3. Go to **Circulation > Items Not Found**. Scan the barcode of the copy that you were unable to locate from the **Picking Slip** into the **Scan Barcode** box.

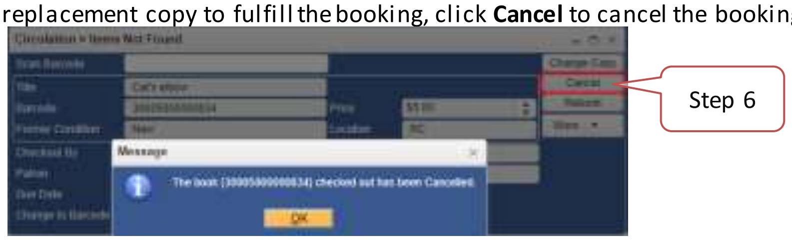


4. Scan the replacement resource's barcode into the **Change to Barcode** box. Click **Change Copy**.



5. Click **Rebook** to book the item for a different date.

6. If you are unable to find a replacement copy to fulfill the booking, click **Cancel** to cancel the booking.



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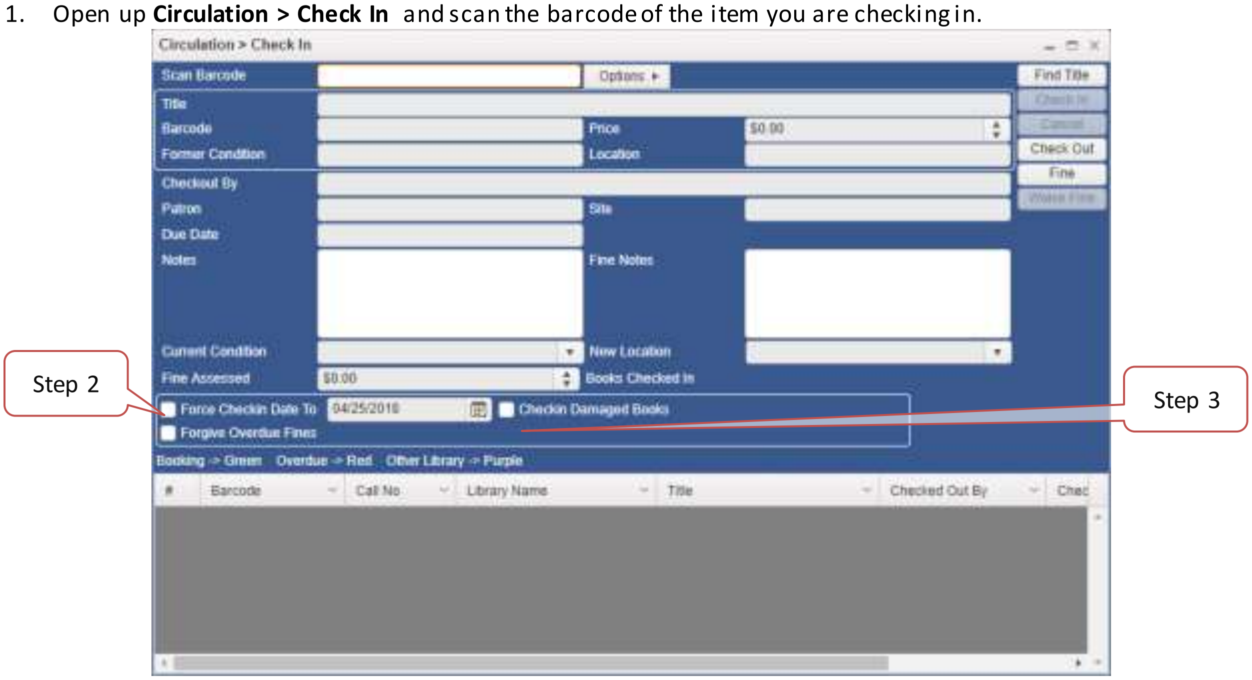
Standard Check Out

1. Open up **Circulation > Check Out** and search for patron in the **Patron Name/Barcode** box to load up their profile.

2. Scan the barcodes of the items you would like to check out.
3. Use the **Set Due Date To** checkbox if you would like to select a custom due date.

Standard Check In

1. Open up **Circulation > Check In** and scan the barcode of the item you are checking in.



2. Select the **Force Checkin Date to** checkbox if you would like to select a check in date that differs from today's date.

3. Select the **Check In Damaged Books** checkbox if you would like to scan in damaged items and have their copy status changed to *Damaged* and/or assess a replacement charge for the damage.

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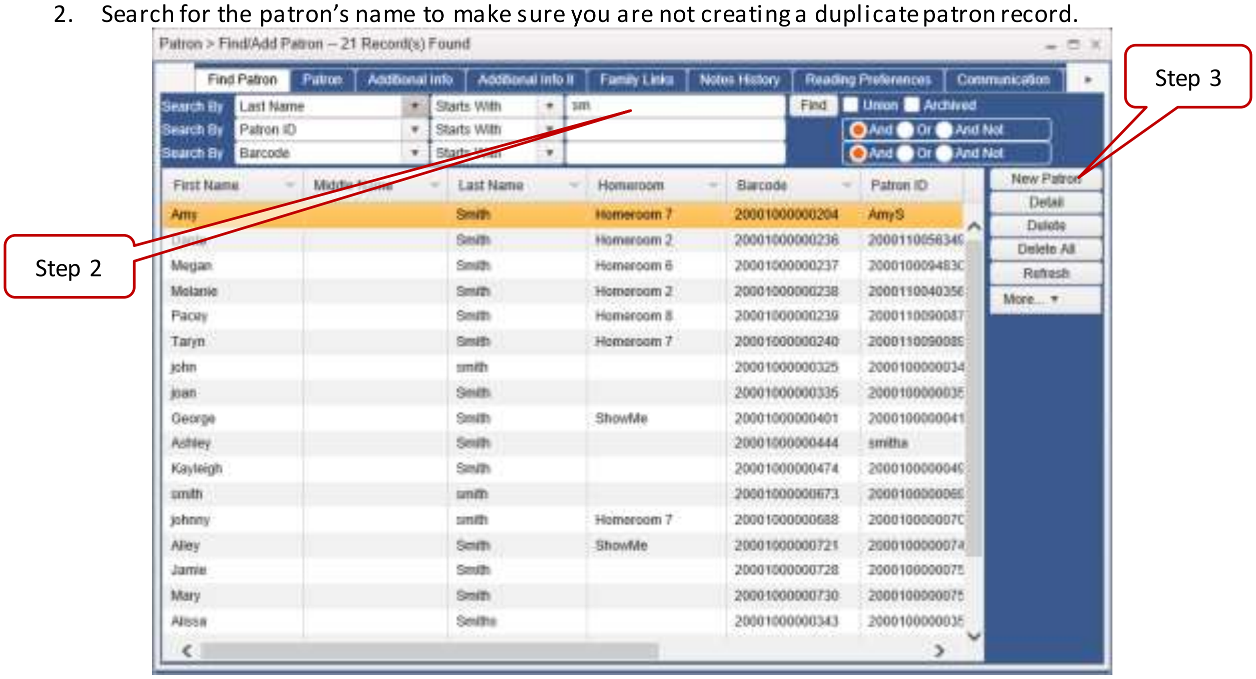
PATRON

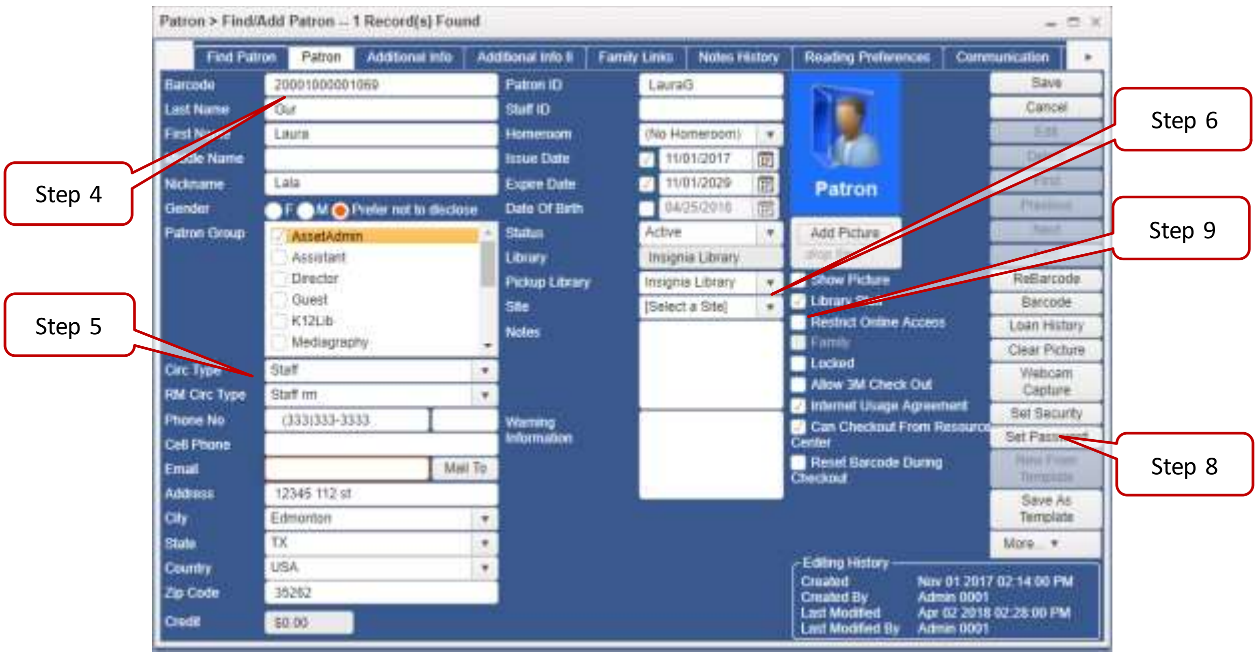
ADD A PATRON

To add a patron, follow these steps:

1. Go to **Patron > Find/Add Patron** or click **Find/Add Patron** from the Quick Toolbar.
2. Search for the patron's name to make sure you are not creating a duplicate patron record.

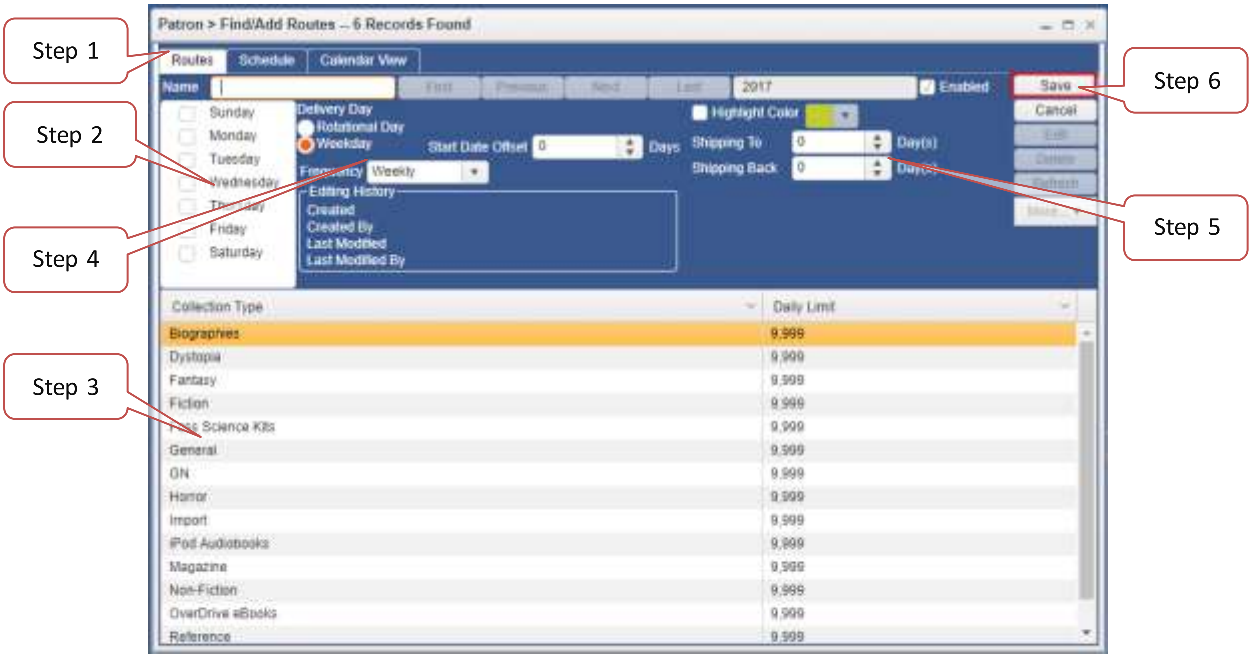


3. Click **New Patron**.
   3.1. Scan a preprinted barcode number if you use library cards or leave the barcode field blank for the system to assign one.



4. Enter the patron's information in the available fields.
    4.1. Required information is last name, first name, group and circulation type.
5. Select the proper Circulation Type and RM Circ Type from the dropdown list and Group from the checklist.
6. Select the Site from the dropdown list.
7. Click **Save**.
8. To set a password, click **Set Password**, specify a password, and click **Change**.
    8.1. The default password is configured in **Administration > Library Setting > Administration > Patron tab**.
    8.2. To automatically generate and send a password to the patron click on **Email Random**.
9. If too many attempts are made with a wrong password, the system will disable the account, to enable it uncheck the Restrict Online Access checkbox.

ADD A NEW ROUTE



1. Open up **Patron > Find/Add Route** and click **New.** Choose a name for the new route.
2. Select which days of the week it will operate.
3. Select a daily limit for each collection type available.
4. Choose specific details for the Delivery days:
   4.1. Select between **Rotational Day** or **Weekday**.
   4.2. Select the **frequency** of the route.
   4.3. Select an (optional) **Start Date Offset**.
5. Select the amount of days it will take to ship the item to the site, and how many it will take to ship the item back.
6. Click **Save** to create the new route.

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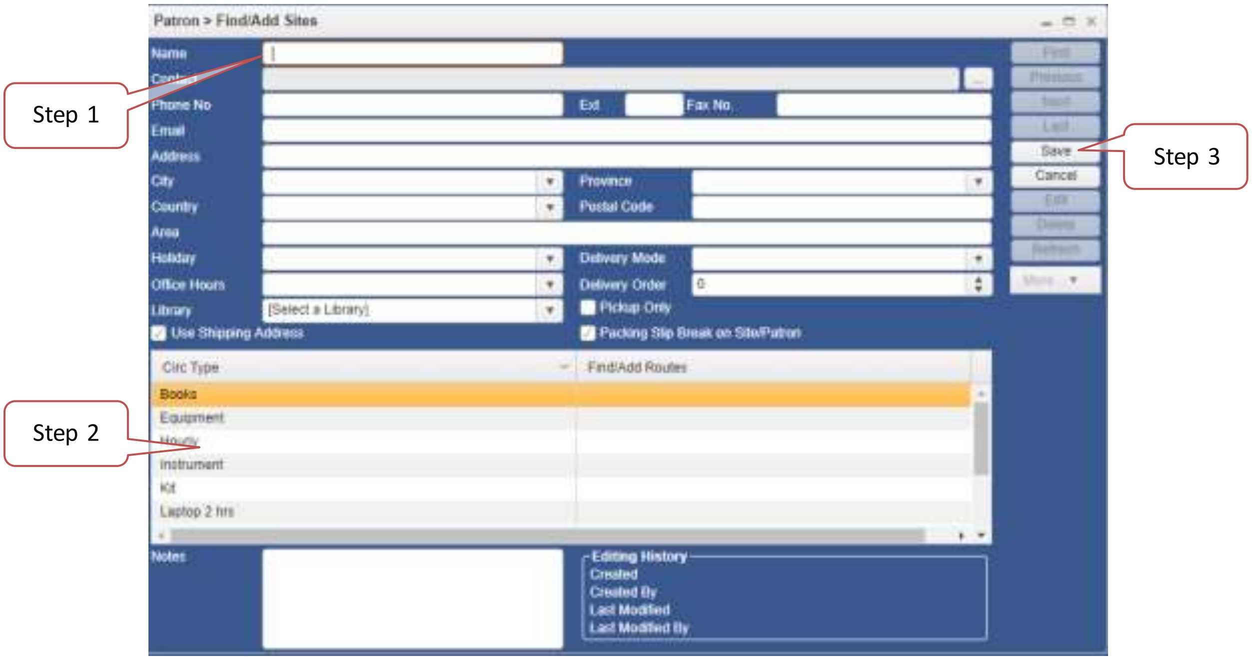
ADD A NEW SITE



1. Open up **Patron > Find/Add Sites** and click **New.** Choose a name for the new site. Fill in the contact information for the new site, including: Contact, email, address, office hours, etc.
2. Pair the item circ types with routes.
3. Click **save** to create the new site.

CATALOGING

ADD COPIES TO AN EXISTING TITLE

1. Go to **Catalog > Cataloging > Find/Add Item**.
2. Search for an item using the search parameters you wish to use and click **Find**.
3. Select the title record from the results and click **Add Copy**.

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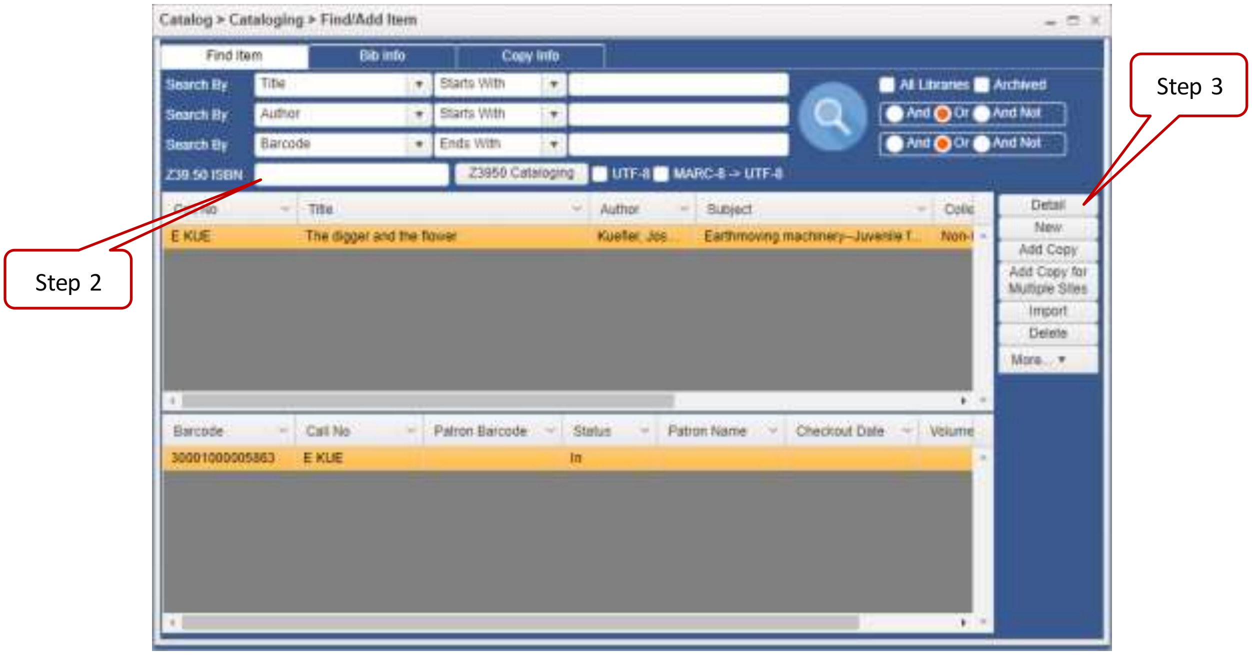
4. Specify the number of copies you want to add and click **OK**.
   4.1. If you are adding more than 1 copy, you will be prompted to select how you would like to set the barcodes*. You can have barcodes generate automatically, set them individually (if they are pre-printed), or create successive barcodes starting from a particular barcode number.
   4.2. Specify the **Price**, **Call No**, and **Circulation Type** for the copies. Everything else is optional.
   4.3. If you have a preprinted barcode, scan it into the barcode field or leave it blank to let the system generate a barcode automatically.
   4.4. Click **Save**.

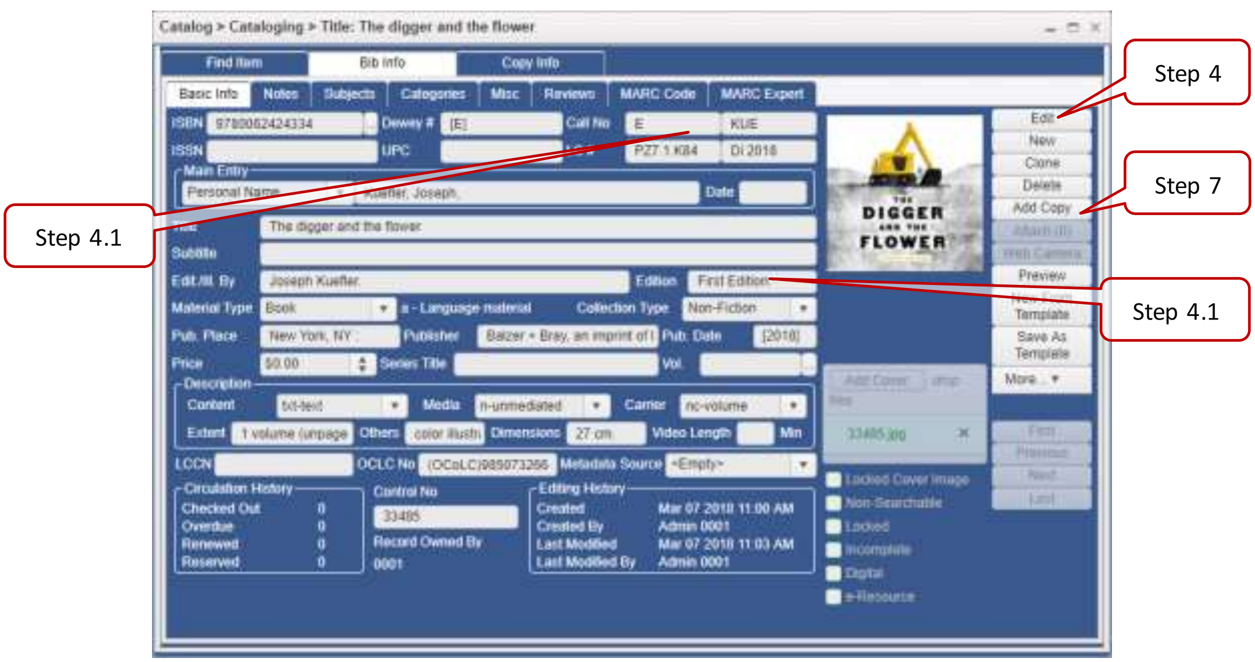
*Insignia recommends you let the system generate the barcodes for you, unless you use preprinted barcodes.

Catalog a Title by ISBN

1. Go to **Catalog > Cataloging > Find/Add Item**.
2. Scan the ISBN at the top, under the search fields, and click **Z3950 Cataloging**:
   2.1. Insignia will search for the ISBN and if it finds a match, it will import the MARC record.
   2.2. Repeat step 2 for all items to be cataloged.
3. Select the title and click **Detail**.
4. Click **Edit** to make changes:
   4.1. Make sure the call no, audience type, and collection type are according to your standard.
5. If you like to limit searching of the item to a particular group, select the group from the Misc tab.
6. Click **Save**.
7. To add copies, click **Add Copy** in the Basic Info tab:
   7.1. Specify the quantity and click **OK**.
      7.1.1. If entering more than one copy, specify the quantity and click **OK**.
         7.1.1.1. Select how you would like to generate the barcodes and click **OK**.
         7.1.1.2. Specify **Price**, **Call No**, and **Circulation Type**. Everything else is optional.
      7.1.2. If adding a single copy, enter the 1 as the quantity and click **OK**.
         7.1.2.1. If you have a preprinted barcode, scan it into the barcode field or leave it blank to let the system generate a barcode automatically.

7.2. Click **Save**.





CATALOG BY CLONING

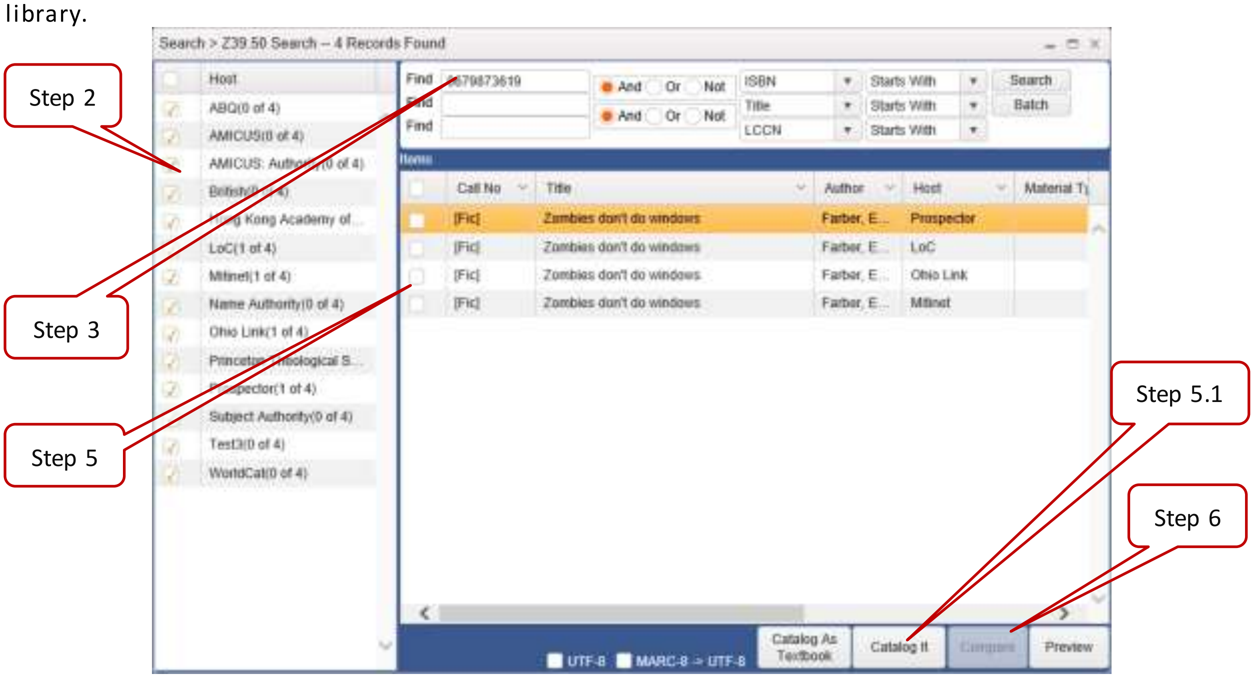
The Clone feature allows staff to clone a record from another site or clone an existing record to make minor changes and save it as another record.

1. Go to **Cataloging > Find/Add Item** or click **Find/Add Item** in the Quick Toolbar.
2. Select the Union option to search for records from other libraries in the district.

3. Specify the search parameter and click **Find**.
4. Select the title.
5. Click **Detail**.
6. Click **Clone**.
7. Make any changes necessary, such as call no, and click **Save**.
8. Click **Add Copy** to add your copy/copies.

CATALOG USING Z39.50

The Z39.50 search allows you to search other libraries for MARC records and import them into your system. When searching for MARC records using the Z39.50 interface, staff can choose which record to import, and from which library.



1. Click **Catalog > Cataloging > Z39.50** or click **Z39.50** in the Quick Toolbar.
2. Select the Z39.50 host to search:
    2.1. We strongly recommend that you do not pick more than three or four Z39.50 hosts to load results quickly.
3. Enter the search term such as title, author and the criteria to search by and click **Search**.
4. The system will return titles matching the search criteria:
    4.1. To see more details of the title, double click on the title in the grid.
5. If you wish to import the MARC record, select the checkbox for the item in the grid.
    5.1. If you would like to add the record to your catalog, click **Catalog It**.
    5.2. Click **Add Copy** to add your copy/copies.
6. You can compare two MARC records by selecting the checkbox for two records and then clicking **Compare.**

ORIGINAL CATALOGING

Original cataloging involves creating a new title record using the cataloging guidelines followed by your library. Original cataloging is often necessary when you are unable to find a suitable record for an item at another library (e.g., a different branch or through Z39.50) and the record has not been supplied by a vendor.

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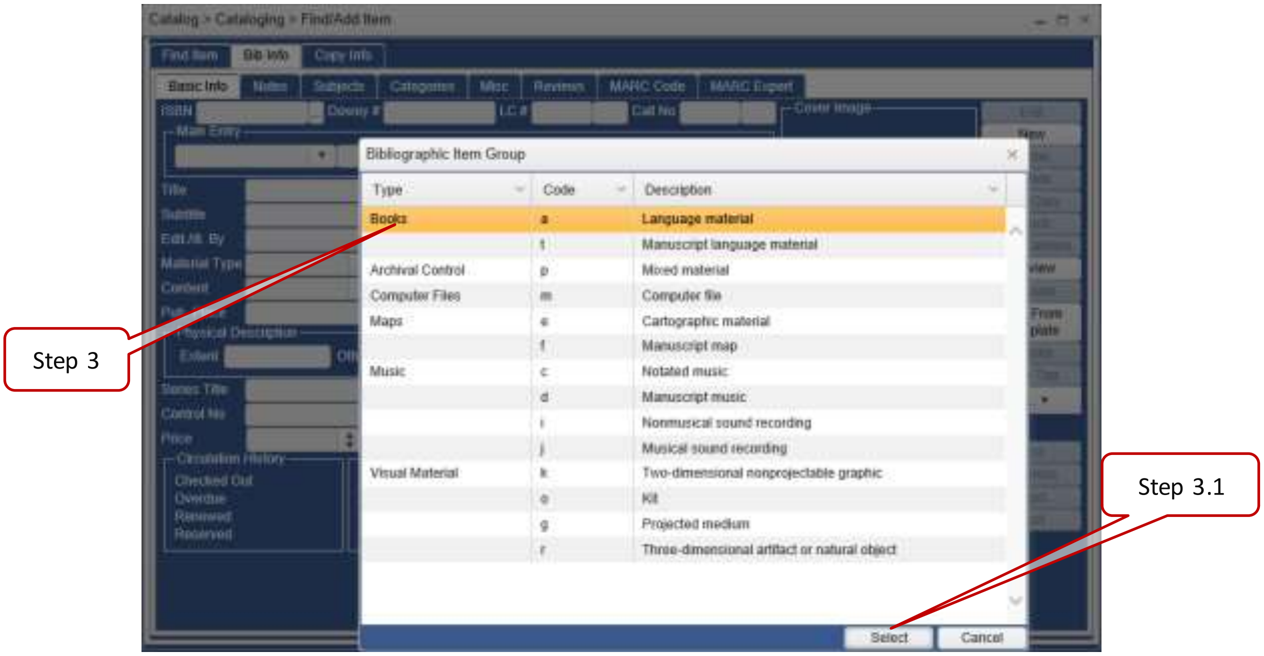
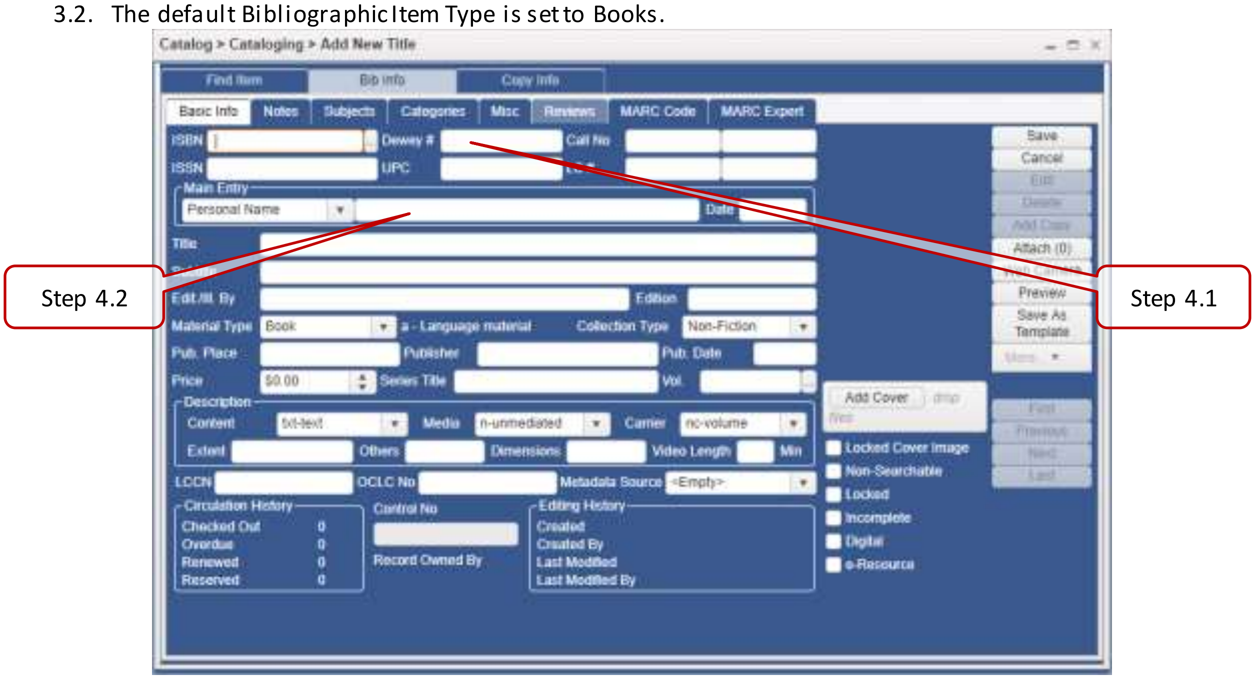


1. Go to **Catalog > Cataloging > Find/Add Item** or click **Find/Add Item** in the Quick Toolbar.
2. Click **New**.
3. Select the Bibliographic Item Type for the item you are cataloging (e.g., Books, Maps, Music).
   3.1. Click **Select**.
   3.2. The default Bibliographic Item Type is set to Books.



4. Enter all the information available about the title in the Basic Info, Notes, and Subjects tab.
   4.1. The top of the Basic Info tab contains essential information such as ISBN, Call No, and Dewey #.
   4.2. Remember the author's name is entered as "Last Name, First Name." in the Main Entry.

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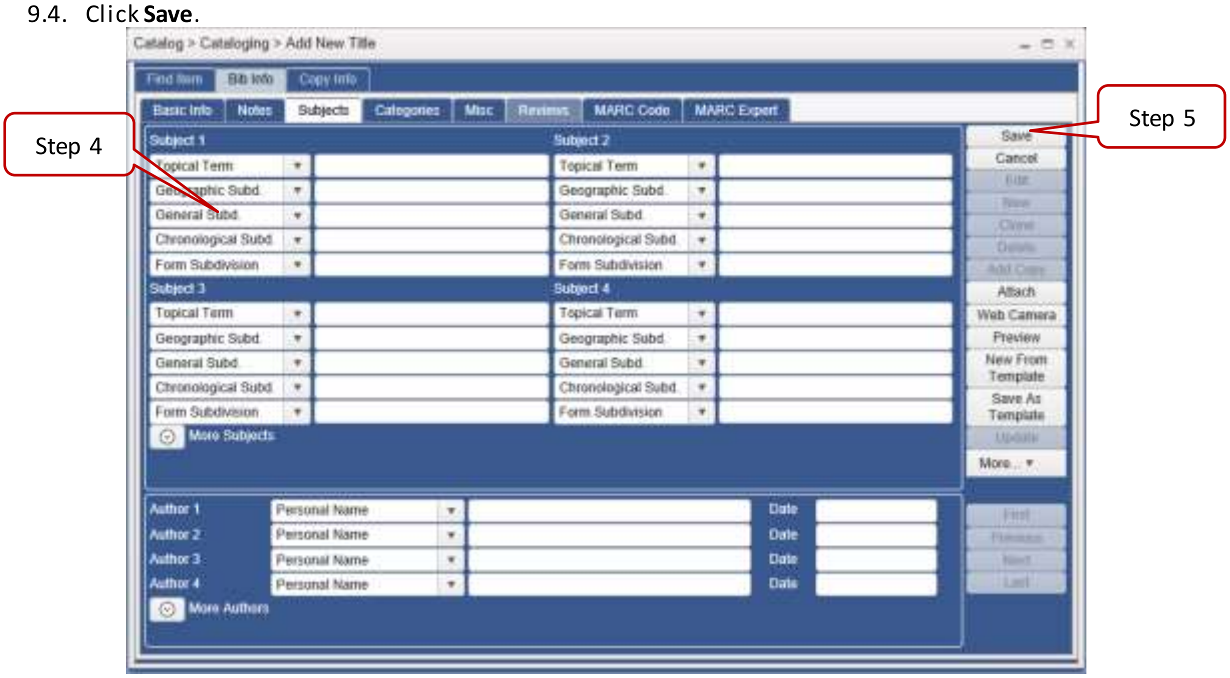
4.3. Authority records, standardized form of names and subjects (e.g., Author and Subject Heading), can be integrated into the cataloging system. As you begin typing into authority fields, you will see a dropdown list of authority records that may match for the field you are completing with Authorized in brackets.
4.4. If the title should be restricted to being searchable by a specific group, use the checkbox to select the groups allowed to search for it in the Misc tab.
4.5. Specify General Note, Content Notes, and Summary Notes in the Notes tab.
4.6. If the title is digital content, enter the URL in the Notes tab to allow patrons to click on the link from the Discovery Layer.
4.7. If applicable, specify the Categories that the title will display under in the Kids view in your Discovery Layer in Kiosk mode.

5. Click **Save** when all information has been entered.
6. Enter in the Subject Headings for your title.
7. Click **Save** when all the information for your record has been entered.
8. To add copies to a title in your catalog, click **Add Copy** on the right side of any Cataloging tab when you have a record open.
9. Specify the number of copies you want to add and click **OK**.

9.1. If you are adding more than 1 copy, you will be prompted to select how you would like to set the barcodes. You can have barcodes generate automatically, set them individually (if they are pre-printed), or create successive barcodes starting from a particular barcode.
9.2. Specify **Price**, **Call No**, and **Circulation Type**. Everything else is optional.
9.3. If you have a preprinted barcode, scan it into the barcode field or leave it blank to let the system generate a barcode automatically.
9.4. Click **Save**.



CATALOG MARC RECORDS FROM A FILE

MARC records within a file can be imported into your catalog.

1. Go to **Catalog > Cataloging > Find/Add Item**.
2. Click **Import**.

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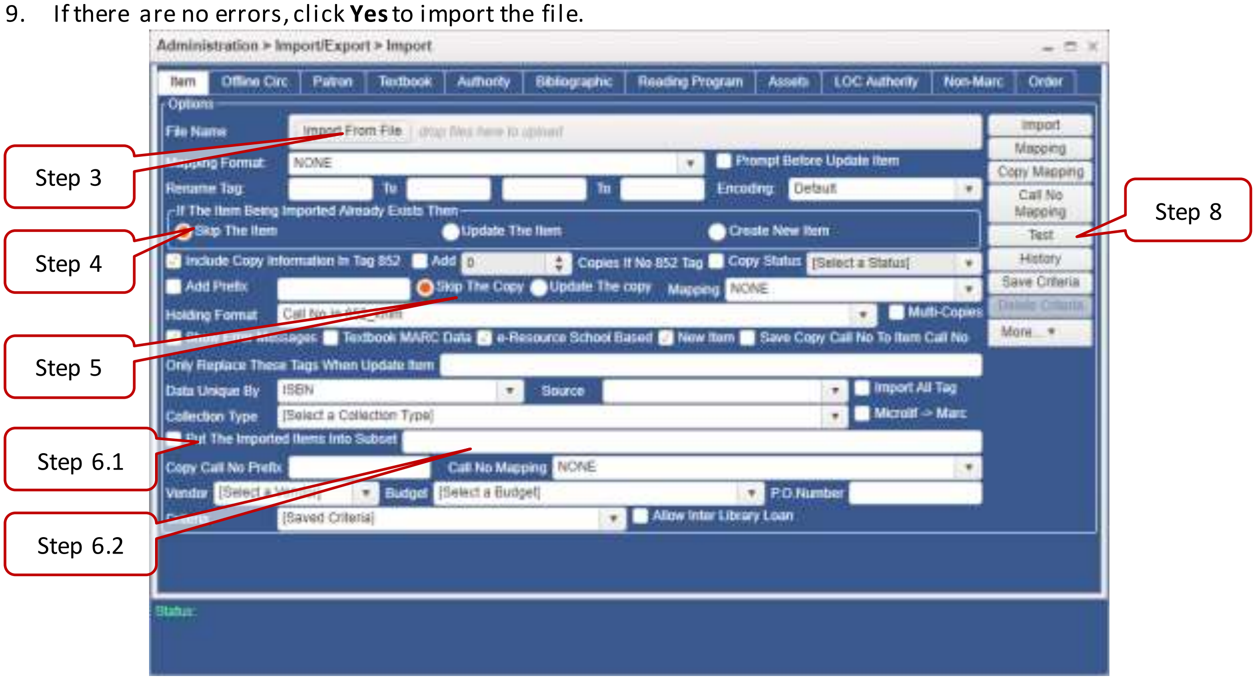
3. Click **Import From File** and select the file from your computer.
4. If the item being imported already exists in your catalog, you can choose to Skip The Item, Update The Item, or Create New Item.
5. If the copy being imported already exists in your catalog, you can choose to Skip The Copy or Update The Copy.
6. We recommend putting the imported items into a subset so you can review the items and make changes to them easily.
    6.1. Check the checkbox for Put The Imported Items Into Subset.
    6.2. Enter a name for the subset.
7. Enter any other information as needed.
8. Click **Test** to test if the file has any errors.
9. If there are no errors, click **Yes** to import the file.



ADD A TEMPORARY RECORD

Temporary records can be created through **Catalog > Cataloging > Quick Cataloging** or by clicking the **Temporary** button in **Circulation > Check Out.** This is useful if the item needs to be circulated prior to a complete record being created for it. It can also be used to create Temporary items within the system. When a temporary record is checked in, you will be prompted to finish cataloging it.

1. Go to **Catalog > Cataloging > Quick Cataloging.**
2. Click **New**.
3. To manually catalog an item:
    3.1. Check Temporary if it is a temporary item.
    3.2. Enter the information available.
    3.3. Add a cover image by clicking **Add Cover** and selecting the image from your computer.
    3.4. Click **Save**.
4. To Auto Catalog by ISBN:
    4.1. Select to search the Consortium or Z39.50.

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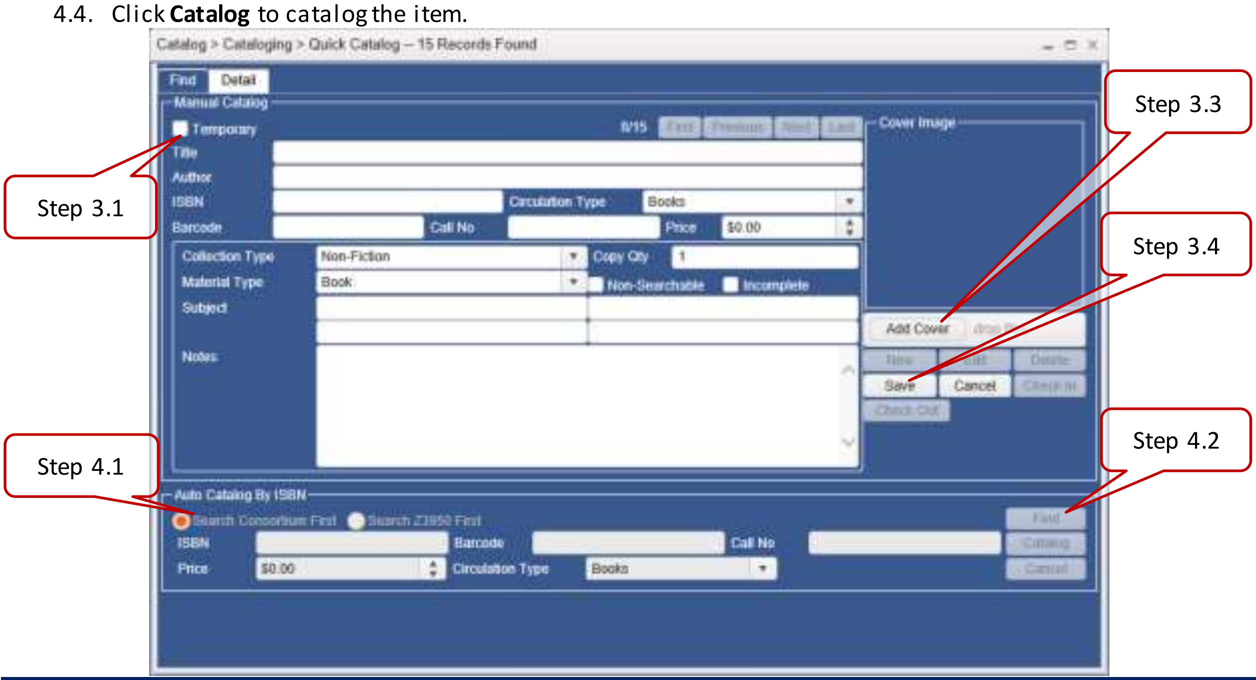
4.2. Scan or enter the ISBN and click **Find**.
4.3. Fill in the remaining fields as needed.
4.4. Click **Catalog** to catalog the item.



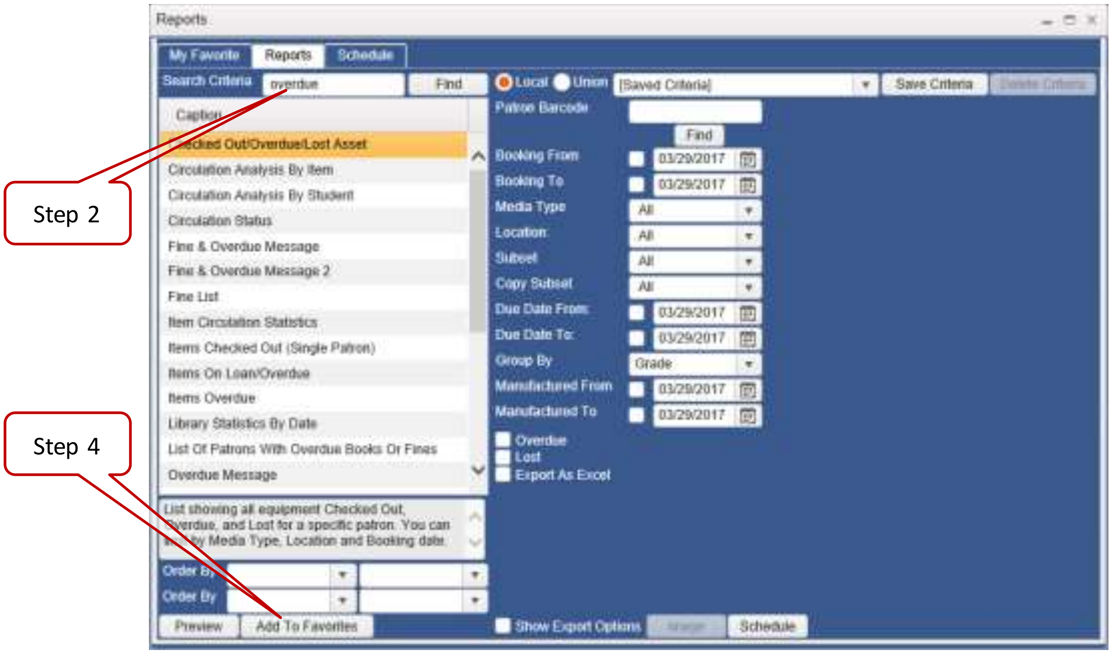
REPORTS

PRINT COMMON REPORTS

1. Go to **Report > Reports** or click **Reports** in the Quick Toolbar.
2. Search for a report in the Search Criteria field.
3. You can set up the report's criteria and parameters to output.
4. Click **Preview** to view a PDF of the report in a new tab.

ADD REPORTS IN FAVORITE LIST

1. Go to **Reports > Reports**.
2. Search for a report in the Search Criteria field and click **Find**.
3. Select a report such as Overdue/Checkout List.
4. Click **Add To Favorites**.
5. Repeat the above steps to add your important reports to the favorites list.
6. Next time the report is needed, simply go to the **My Favorites** tab.

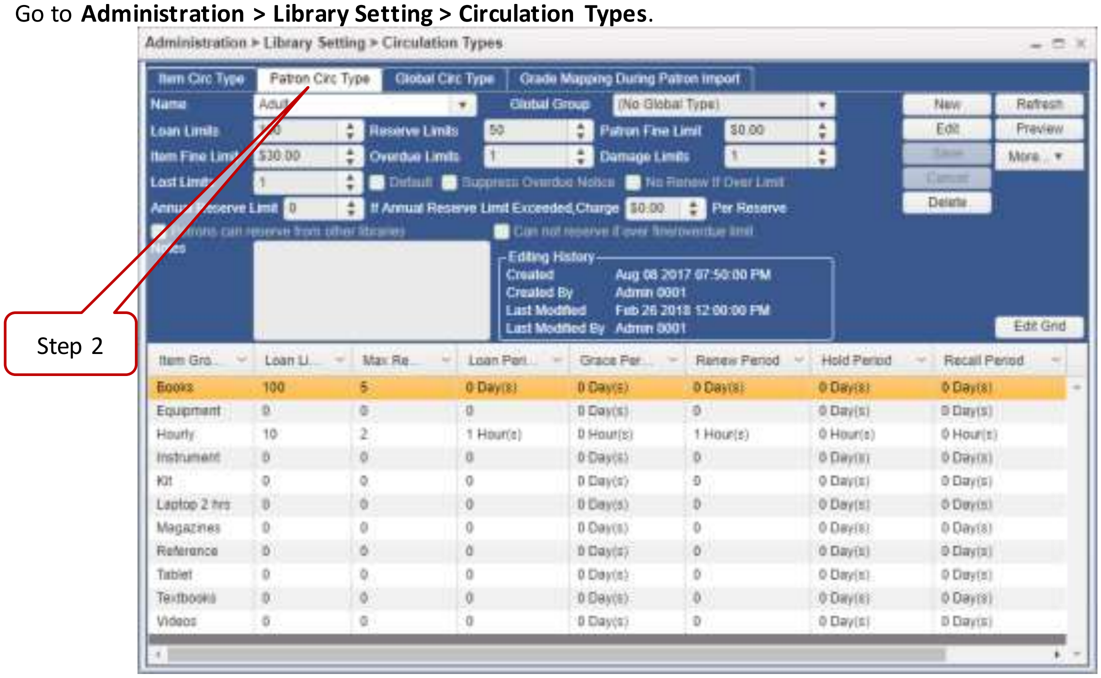


Administration

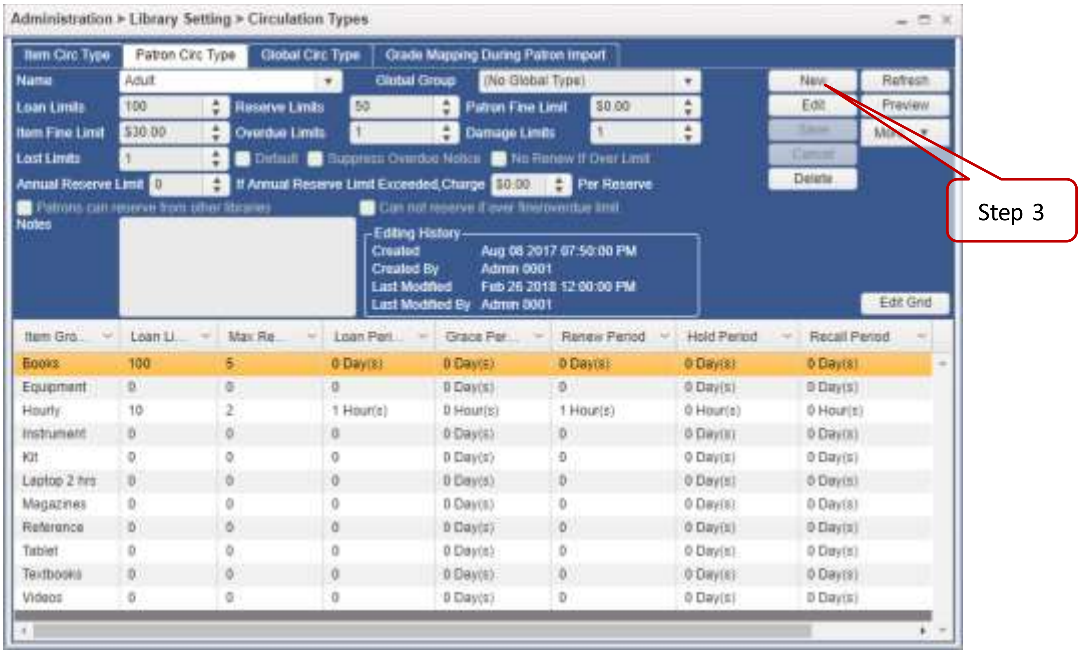
Library Settings

Configure Patron Borrowing Policies

1. Go to **Administration > Library Setting > Circulation Types**.



2. Click on the **Patron Circ Type** tab.

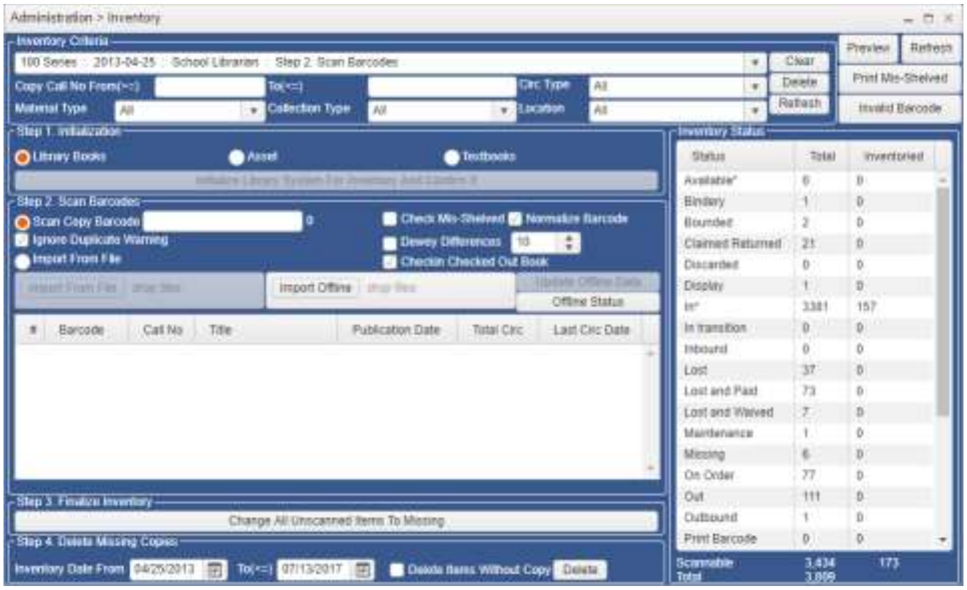


3. Select a Patron Circ Type from the **Name** dropdown list. Click on **New** to create a new Circ Type or **Edit** to modify an existing Circ Type.
4. Specify borrowing policies for that type of patron (e.g., Adult or Juvenile).
   4.1. Loan limits – the maximum number of items that a patron can have checked out at once.
   4.2. Overdue Limits – the maximum number of overdue items the patron may have before borrowing privileges are denied and require an override from staff.
   4.3. Reserve Limits – the maximum number of reserves (holds) that can be placed by an individual patron in the Circ Type.
   4.4. Lost Limits - the maximum number of items a patron type can lose (without paying) before borrowing privileges are denied.
5. Select specific item types in the grid and click **Edit Grid** to specify circulation limits for each for the selected patron circulation type.
6. Click **Save**.

INVENTORY

In the ILS, inventory is a four step process. The inventory process can be applied to the entire library or a part of it. Inventory may be completed over several days.

Items can be scanned directly into the Inventory window by bringing the items to the computer, using a laptop to move around shelves on a cart, or with a wireless scanner. If a wireless scanner is used, the barcodes may be scanned into a Notepad file (1 barcode per line). The scanner should be setup with a carriage return which will drop the barcode to one barcode per line. After the file is saved, it can be imported using the Import From File button. This way, incoming records held in the import file are compared with the current shelf collection to discover unexpected lost copies.



STEP 1. INITIALIZATION

SPECIFY CRITERIA

This step will either prepare specific sections of records or all of your records in your library for inventory.

1. Go to **Administration > Inventory**.
2. Choose to inventory the entire library or part of it.
   2.1. To do a partial inventory, specify the criteria for it. You can specify call number range, circulation type, material type, collection type, and/or Location.
   2.2. To do a complete inventory, leave all criteria as <ALL> and leave the call number fields blank.
3. Button options:
   3.1. **Clear:** Click to clear the selected inventory. This is useful if you want to view another inventory or start a brand new one.
   3.2. **Delete:** Click to delete the currently selected inventory.
   3.3. **Refresh:** Click to refresh the inventory numbers for the selected inventory.

Tip: Use the Shelf List window under **Catalog > Cataloging > Shelf List** to help you block off call number ranges. Note the number of characters of the longest call number and include that length of characters in your call number range (i.e. 100.34 - 110.89 can become the range 100.00 to 110.99 in inventory). You can also exclude collection types, such as magazines, from your inventory by going to **Administration > Library Setting > Configuration** and looking under Inventory.

INITIALIZATION

1. Use the radio buttons to select if you are doing an inventory for Library Books, Assets, or Textbooks.
2. Click **Initialize Library System For Inventory And Confirm It**. The Initialization button **should only be clicked on once at the beginning of the inventory cycle each year** when inventorying the entire library or until the section is completed.
3. Enter a name that will appear in the Inventory Criteria dropdown when reopening the Inventory.

4. Please note any prompt that describes the number of copies in your inventory range. This number should match the number of books that need to be scanned. The prompt will also remind you to check your reserve shelf for copies included in your inventory.

STEP 2. SCAN BARCODES

This step contains multiple settings that will organize your scanned barcodes and create specific inventory statistics and pop-ups during your inventory process.

1. **Scan Copy Barcode:** This radio button will allow individual barcodes to scan into the system one at a time. Ensure you have your speakers on, as the system plays a confirmation sound when an item has been successfully scanned into inventory.
2. **Ignore Duplicate Warning:** Check this checkbox to disable any pop-ups warning that a barcode has been scanned in twice. This situation may occur often in your inventory process and it does not impact the inventory statistics.
3. **Import From File:** When this radio button is selected, it enables the import area below it so Notepad files containing multiple barcodes can be imported.
   3.1. Click **Import From File** to browse your computer for the notepad file containing the barcodes. Alternatively, drag and drop the file into the *drop files* area.
4. **Check Mis-Shelved:** Check to view the mis-shelved items during the inventory process.
5. **Dewey Differences:** The number entered will determine a specific number of spaces that a copy can be misplaced by to provide a more efficient check for copies that have been mis-shelved.
6. **Checkin Checked Out Book:** Copies checked in while performing inventory can have their status changed to "In" if they were previously checked out to a patron.
7. **Upload Offline Data:** Click this button to allow barcodes scanned into inventory in Offline Circulation to be included in the inventory.
8. **Offline Status:** Click this button to select a date range when the inventory was being conducted offline to be uploaded into your current inventory section.
9. **Import Offline:** Click the Import Offline button to browse your computer for the file containing barcodes scanned in Offline Circulation. Alternatively, drag and drop the file into the *drop files* area.
10. The information entered into the Inventory window is automatically saved and can be continued at another time.
11. The next time a user works on the inventory, select the Inventory name from the dropdown list. **Do not click the Initialize button again.**

Tip: If the copy scanned did not belong to the initialized section and the copy is modified to match the criteria after the inventory is initialized, the system will automatically include the copies updated in the inventory.

STEP 3. FINALIZE INVENTORY

This step will change the status of all copies that have not been scanned in to Missing, unless they have been marked as another appropriate status indicating that the barcode could not be scanned in inventory. For example, items that are currently checked out do not need to be re-scanned.

1. To finalize the inventory process and change the status to Missing, click **Change All Unscanned Items To Missing.**
2. A checklist of missing copies will appear. If a missing copy has been found from this list, deselect the checkmark beside the copy title and it will not be marked as missing. When finished, click **Mark Missing**.
3. Once the inventory is complete, click **Print Mis-Shelved** to print a list of all the items that were Mis-shelved. User must select the Check Mis-Shelved checkbox from the Step 2 area in order to retrieve a complete list.

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4. You can also view a printable list of barcodes scanned as invalid by clicking **Invalid Barcode.**
5. To view all of the copies marked missing, click **Preview.** This report will also provide inventory statistics at the bottom of the list.

Step 4. Delete Missing Copies

Please note that this step can wait up to two years after completing your inventory process to prevent deleted records of missing copies from being cataloged again if materials are found.

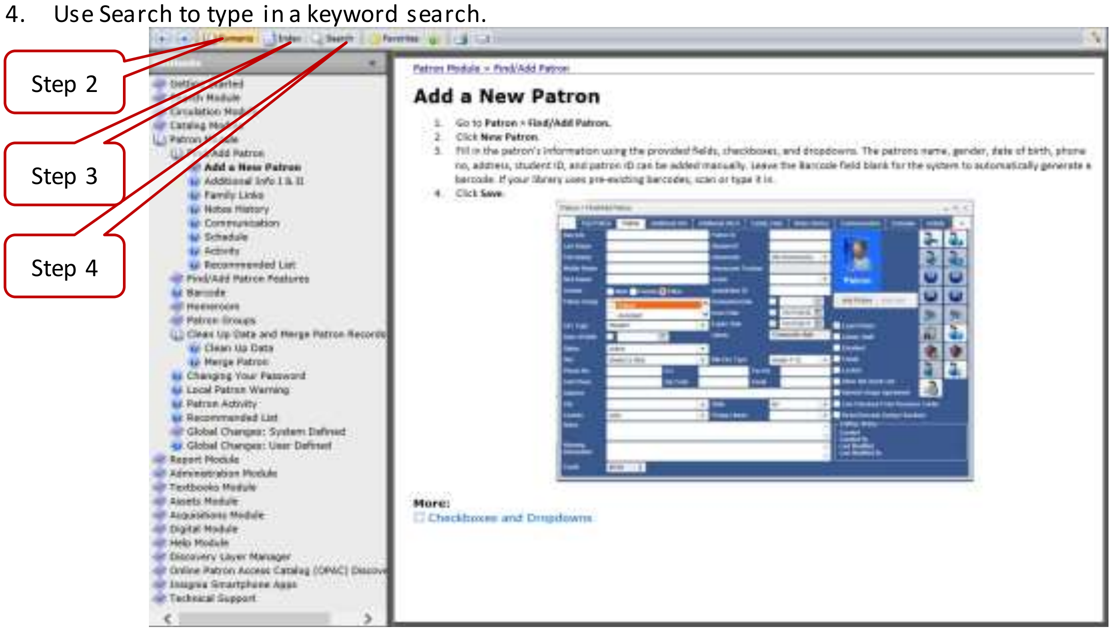
1. Choose a date range when inventory was completed where the system will delete copies.
2. Select the Delete Items Without Copies checkbox if item records also need to be deleted.
3. Click **Delete**.

Help

Show Help

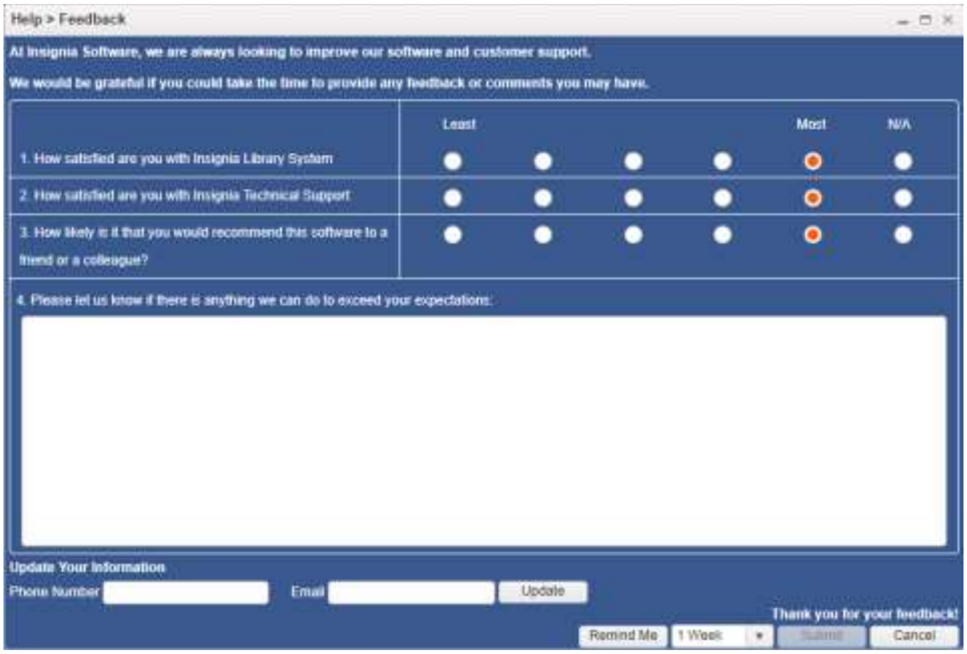
The Show Help feature allows you to search for information found in the user manual.

1. Go to **Help > Show Help**.
2. Use Contents to view the table of contents and click to navigate throughout.
3. Use Index to view an index layout.
4. Use Search to type in a keyword search.



Feedback

The Feedback feature will allow you to send feedback to Insignia Software. Please fill out all the fields as completely as possible.

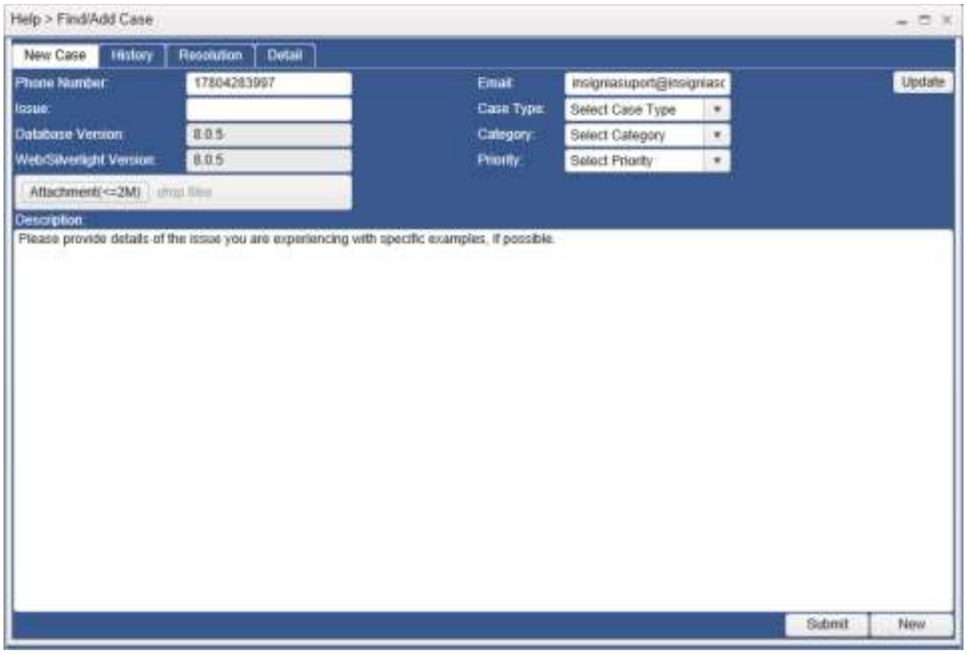


Find/Add Case

Create a New Case

The New Case tab will allow you to alert Insignia Software of a technical issue or request.

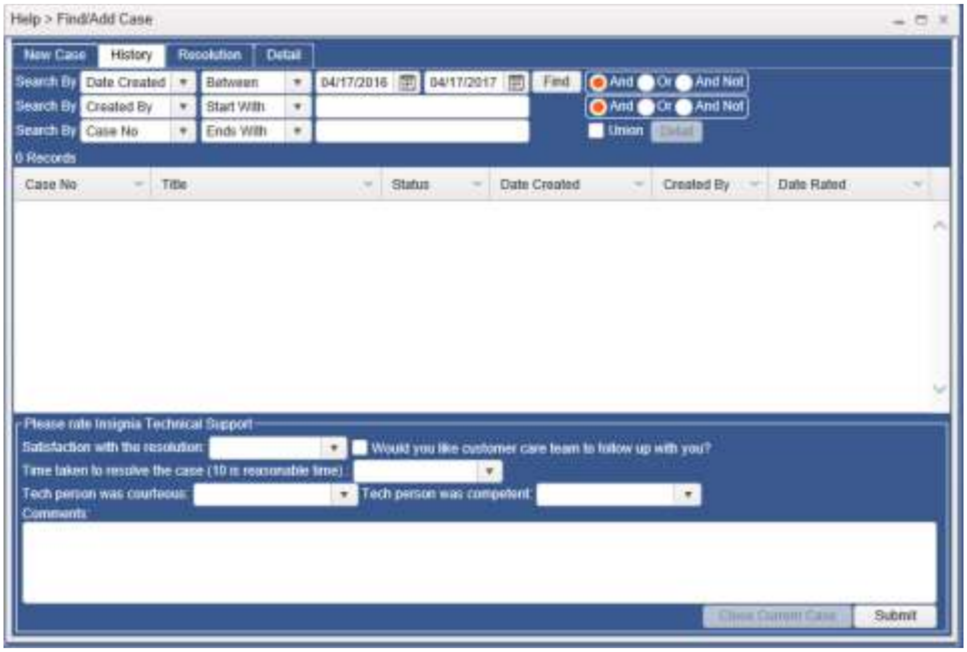
1. Go to **Help > Find/Add Case.**
2. To submit a case, enter all applicable information.
3. Select a Case Type, Category, and Priority using the dropdown menus.
    3.1. To include a screenshot or document with your case, click **Attachment(<=2M)** and browse for the file on your computer. Alternatively, drag and drop the file into the *drop files* area. The file must be less than 2MB in size.
4. Click **Submit.**



View Case History

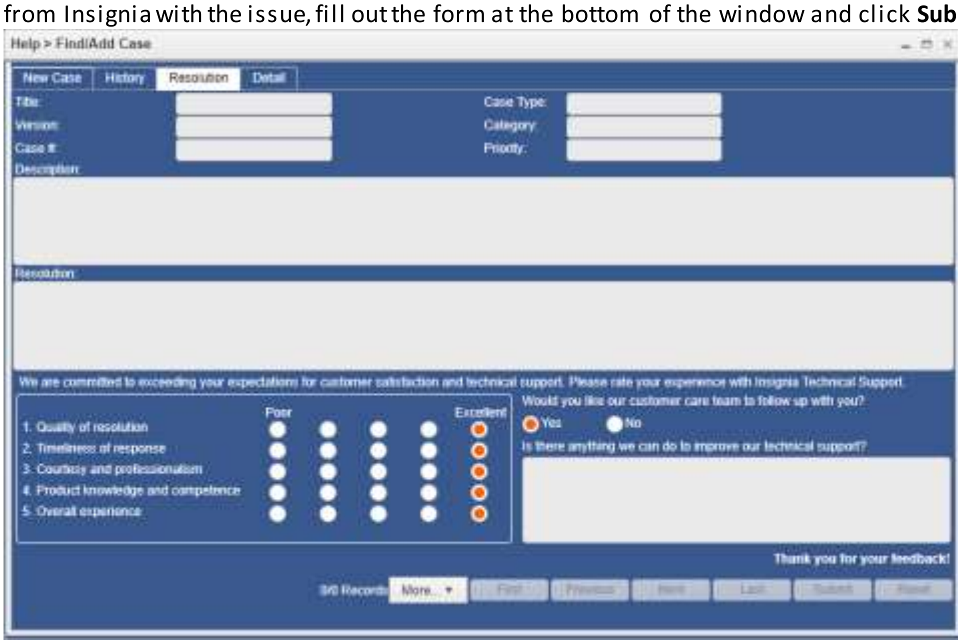
The History tab allows you to view previous cases that were either submitted or created from Insignia Support.

1. Go to **Help > Find/Add Case**.
2. Select the History tab.
3. Search for a case by using the search criteria options.
4. To rate the support received on this issue, select the case and fill out the form at the bottom.
   4.1. Click **Submit**.
5. To close a case, select the case and fill out the form at the bottom. Click **Close Current Case**.



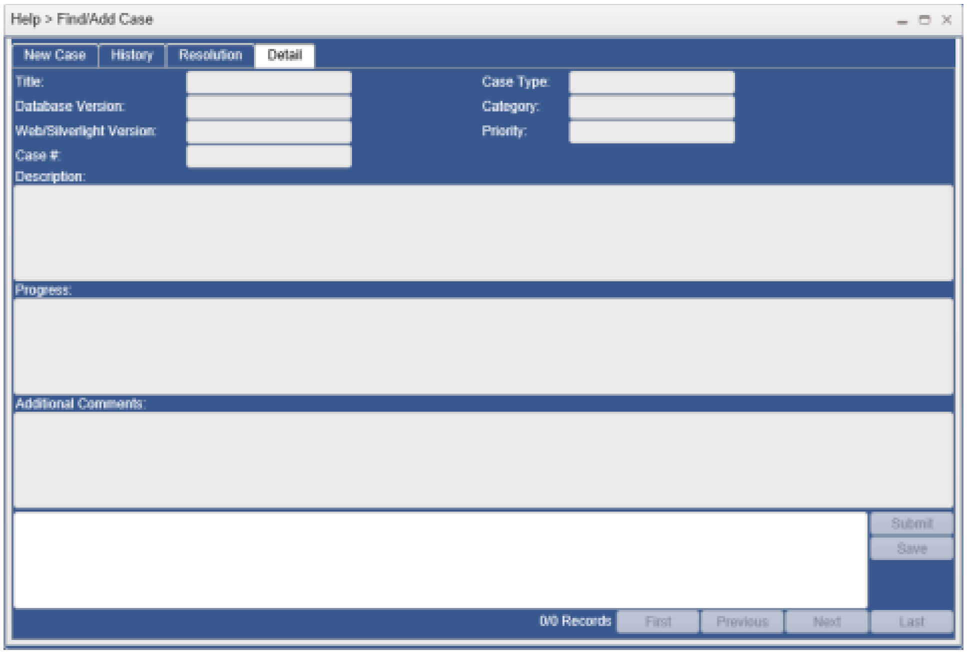
Resolution and Feedback

The Resolution tab shows the resolution given on a selected case. The resolution shows the steps Insignia Technical Support took to resolve the issue or answer the question submitted. To provide feedback on the support you received from Insignia with the issue, fill out the form at the bottom of the window and click **Submit**.



View Case Detail and Progress

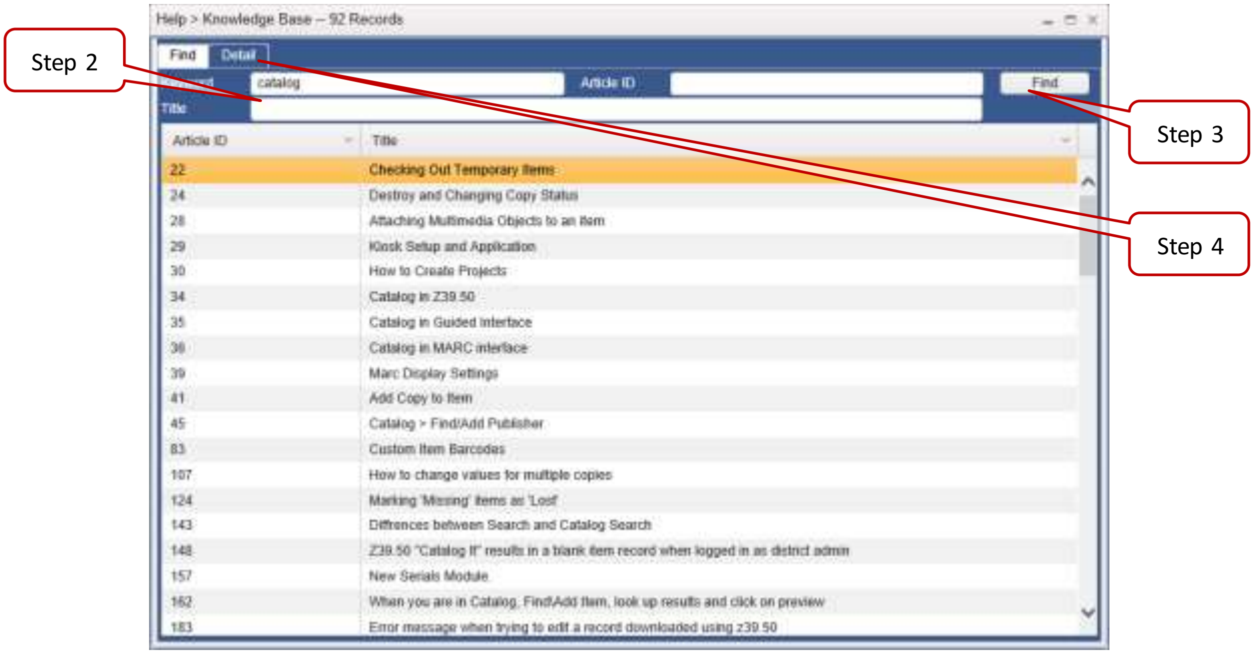
The Detail tab shows the current progress and notes on a selected case.



KNOWLEDGE BASE

The Knowledge Base is a searchable database which provides answers to common questions and issues.

1. Go to **Help > Knowledge Base**.
2. Search by Keyword, Title, or Article ID number.
3. Click **Find**.
4. Select the article you would like to read and click the **Detail** tab to view the answer.
5. You can also rate the answer by writing in the Comments field and giving it a score between 1-10 and clicking **Rate It**.



Release Notes

The Release Notes feature allows you to view release notes for current and previous versions of Insignia Library System. Release Notes explain differences between new versions of the software and the previous version. New release notes also appear in a pop-up message when Insignia provides an update.

1. Go to **Help > Release Notes**.
2. Specify the search criteria. Click **Find**.
3. Click on a release note title to select. The details of that release note will display in the bottom of the window.
4. To print the selected release notes, click **Preview**.

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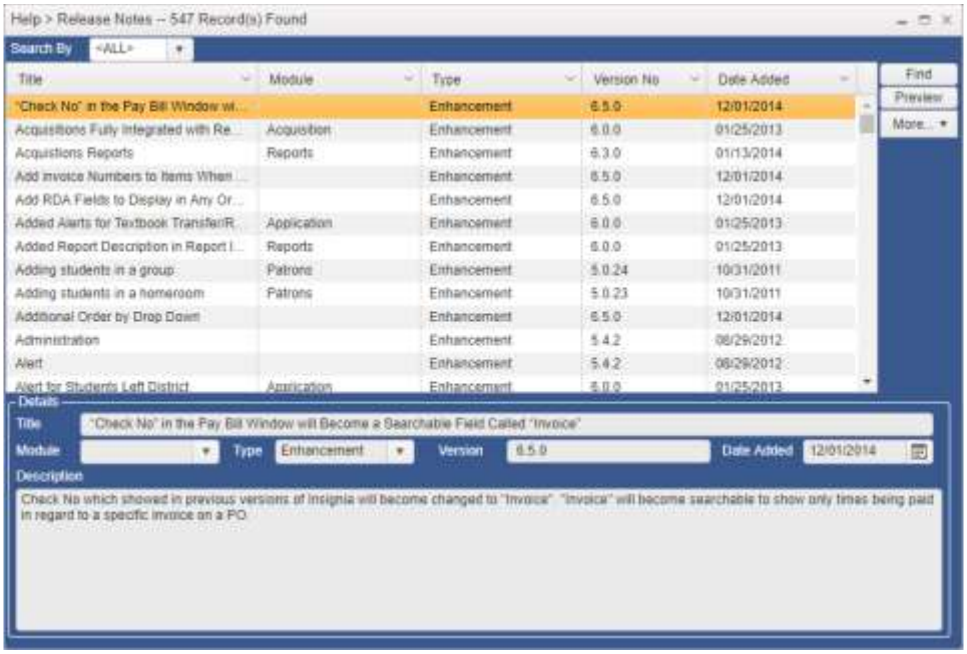
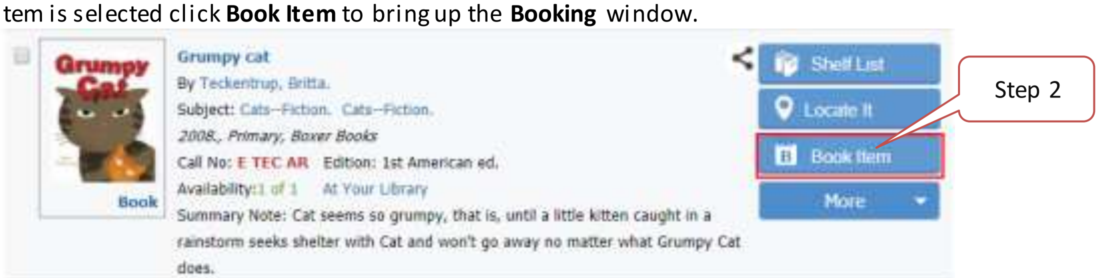


OPAC/Discovery Layer

Booking from the OPAC

1. Login to your patron account and start a new search in the search bar.
2. Once an item is selected click **Book Item** to bring up the **Booking** window.



3. Type in a new booking title at the top of the window.
   3.1. Select the number of copies to book.
   3.2. Select a date range for the booking.
   3.3. Select a method of collection (Delivery or pickup).
   3.4. Select Book Item(s) to create the booking.

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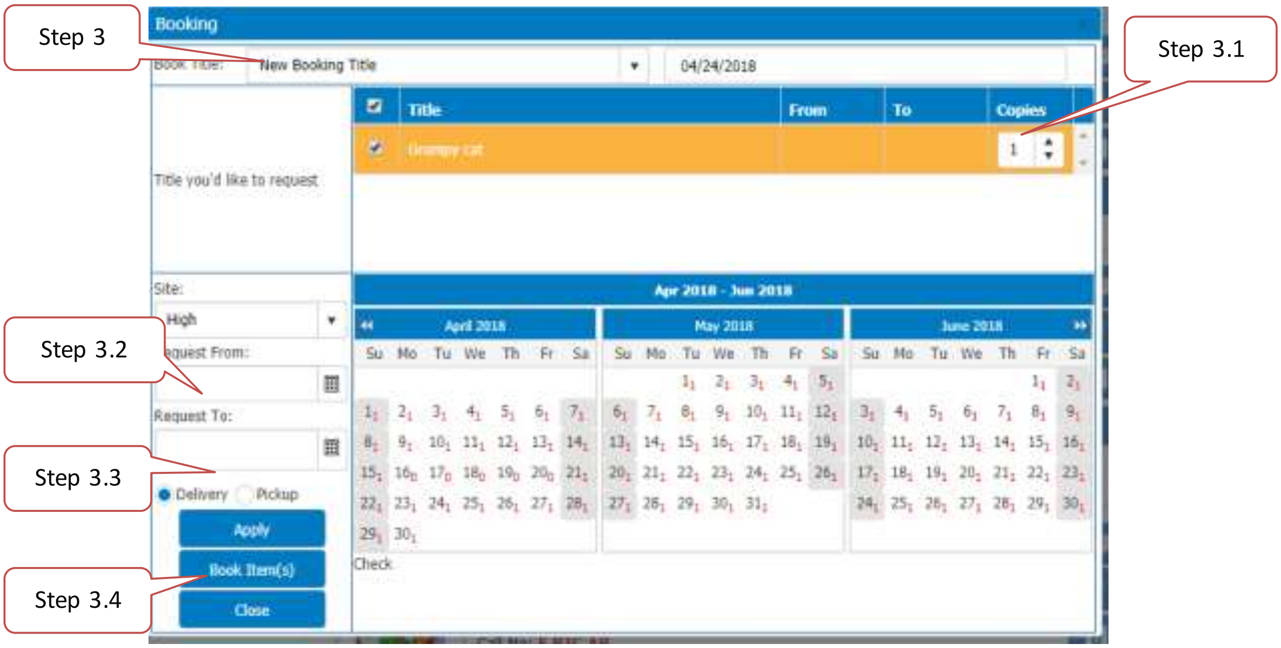


VIEW PATRON BOOKINGS IN THE OPAC

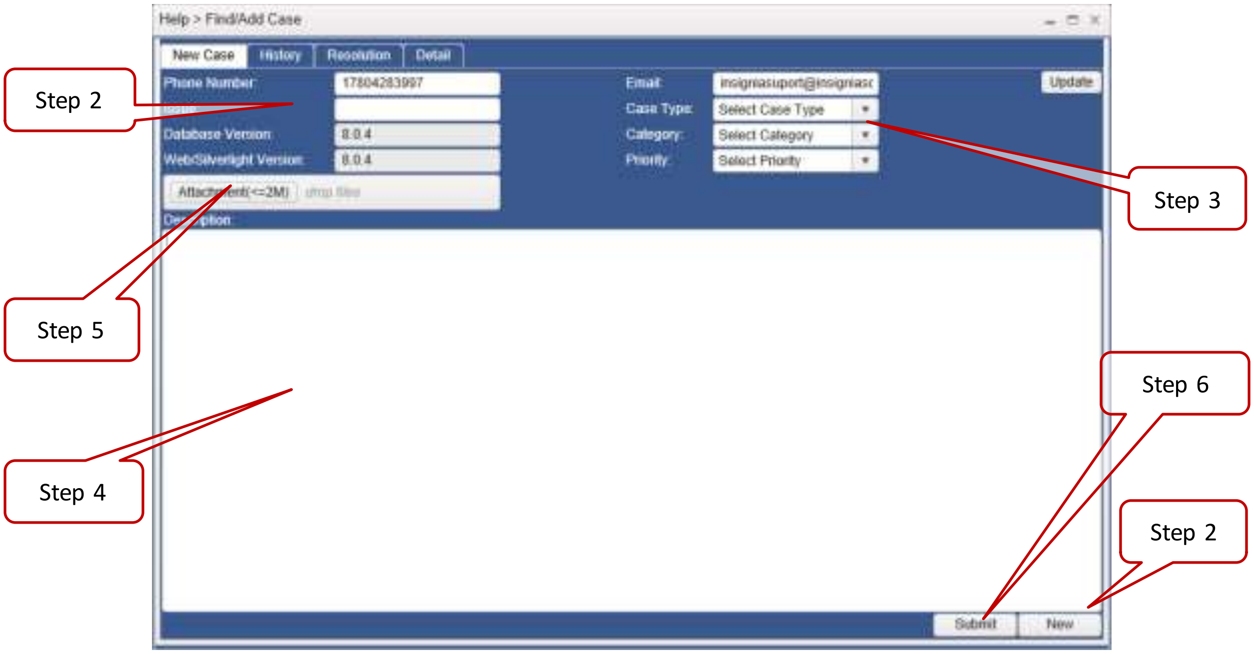
1. To view patron bookings in the OPAC, go to **My Account > My Borrowing > Booking**.
2. Select a date range and click search to view bookings within a specific time frame.

TECHNICAL SUPPORT

Emails are monitored all the time (including holidays and after hours), and is the most reliable means of contacting Insignia Technical Support.

SUBMIT A QUESTION OR ISSUE

To submit a case, you must have your email address and phone number in your profile in the patron record.



1. Go to **Help > Find/Add Case**.
2. Enter a **Title** to identify the issue concisely.
3. Fill out additional details including **Case Type**, **Category**, and **Priority**.
4. **Description:** Provide specific examples of the issue(s) you are experiencing. For example, instead of stating "I cannot checkout a book", specify which patron (name/barcode), and which book (title/barcode) you cannot checkout.
5. To upload an attachment, click on **Attachment**.
6. Click on **Submit**.
7. If you need to call us with additional information, please provide us with the Case No. you have been assigned (the last 4 digits).

Online Technical Support Meeting

When we are not able to help you over the phone we may ask you to start an online meeting. To start an online meeting please follow these steps:

1. Go to **Help > Online Meeting**.
2. When you prompted to Run or Open, do so. You may have to do that twice depending on your browser.
3. It may ask you if you trust the program, click **Yes.**
4. The window as shown below will popup, please give us the meeting ID and password that you see here.

5. Once we finish helping you, you can close the above screen

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