



CREATING CATALOG SUBSETS AND COPY SUBSETS

SUBSETS: GROUPING ITEMS

Subsets can be used to group together different **items** that need to be processed together. For example, subsets can be useful in generating reports and making global changes.

1. Go to **Catalog > Cataloging > Find/Add Item**.
2. Search for the items to be added to the subset.
3. Click **Subset All** if all items on the list are to be added to the Subset. If the button is not visible, enable it by checking the option off in the **More...** menu.
 - 3.1. Select an existing subset from the **Select From** dropdown. You can also use **Create New** for a new subset, name it, and click **OK**.
4. Individual or multiple records can be selected by holding down the *Ctrl* key and clicking on each item. Click **Subset**.
 - 4.1. Select an existing subset from the **Select From** dropdown. You can also use **Create New** for a new subset, name it, and click **OK**.

REMOVE AN ITEM FROM SUBSET

1. Go to **Catalog > Cataloging > Find/Add Item**.
2. Use the dropdown to Search By Subset and select the subset from the list.
3. Select the item from the grid.
4. Click **Remove**.

DELETE A SUBSET

1. Go to **Catalog > Cataloging > Find/Add Item**.
2. Use the dropdown to Search By Subset and select the subset to be deleted from the dropdown list.
3. Click **Clear**.
4. Click **Yes** to confirm the deletion.

COPY SUBSETS: GROUPING COPIES

Copy Subsets are like item subsets but refer to copies, not item records. Copy subsets can be used in printing barcode/spine labels, making changes through **Catalog > Change > Status**, and making global changes. **When batch deleting copies, Insignia recommends using Copy Subsets instead of Item Subsets.**

1. Go to **Catalog > Change > Copy Subset**.
2. Use the radio button **Search** and then specify the criteria and click **Find** to locate the copies for the subset.
3. Use the radio button **Scan Barcodes** to scan all of your Copy Subset into a list.
 - 3.1. Use Import From File to import a list of copies from a Notepad (.txt) file saved on your computer.
4. Click the first record and hold **Ctrl** while clicking to select multiple copy records in the grid.
5. Click **Subset** to subset the highlighted copies.
6. Click **Subset All** to include all the copies displayed in the grid.
7. Click **Clear Grid** to clear the bottom grid and start another search for copies to add to the copy subset.
 - 7.1. If **Clear Grid** is not clicked, new search results will appear alongside previous search results.

REMOVE A COPY FROM A COPY SUBSET

1. Go to **Catalog > Change > Copy Subset**.
2. Use the dropdown to Search By Copy Subset and select the copy subset from the list. Click **Find**.
3. Select the copy from the grid. To remove multiple copies, hold CTRL on your keyboard and click the ones you want to remove.
4. Click **Remove**.



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DELETE A COPY SUBSET

1. Go to **Catalog > Change > Copy Subset**.
2. Use the dropdown to Search By Copy Subset and select the copy subset from the list. Click **Find**.
3. Click **Delete Subset**.