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DISCOVERY LAYER MANAGER

Insignia offers a fully customizable Discovery Layer for your library's OPAC. This is done by editing webpages using the Discovery Layer Manager.

To access the Discovery Layer Manager, go to your OPAC Site and click on **Insignia Discovery Layer Manager** at the bottom of the page.

©1999-2017 **Insignia Software** Database Version..8.0.5   Web Portal ..8.0.5   Insignia Discovery Layer Manager

Type in your administrator username and password. Click **Log In**.

PLEASE LOG IN

Insignia

Password

☐ Remember Me

○— LOG IN

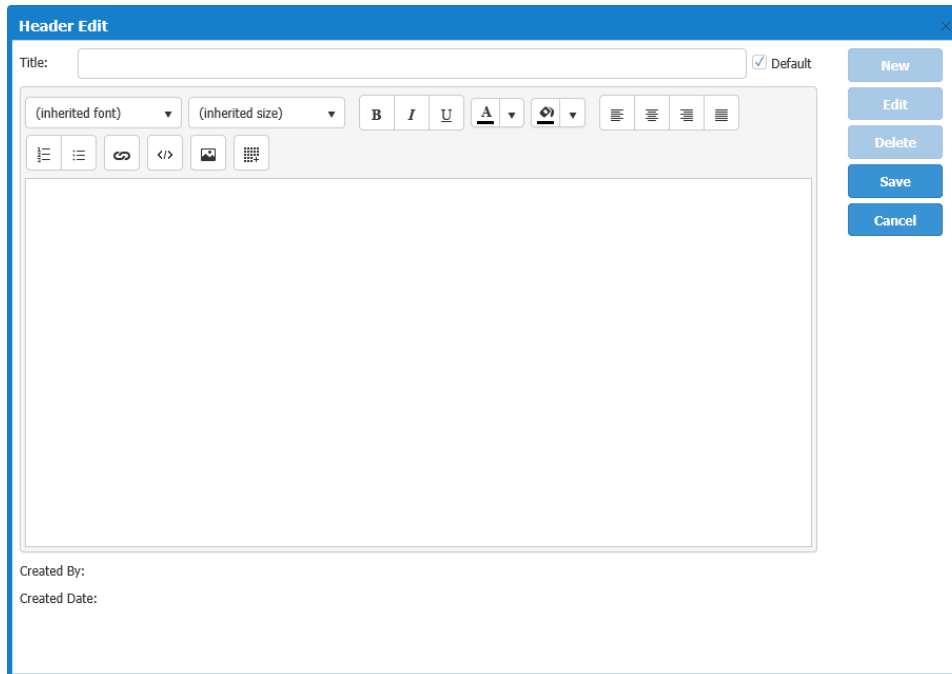Web Portal 8.0.5 Database Version 8.0.5

DESIGN

The Design section of the Discovery Layer Manager manages the look and feel of the website. It allows you to change the design and layout of the Header, Home Body, Left Banner, and Right Banner. For each of these elements, multiple designs can be created and you can select one to appear as the default design.

HEADER

The Header is the portion of the webpage that appears at the top of the page above the menu icons.

NEW

1. Go to **Design > Header.**
2. Click **New**.
3. Enter a title for the header.
4. If you want your header to always appear by default, check Default.
5. Create your custom header using the design window.
6. Click **Save** when finished.

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Header Edit

Title: ☑ Default

New
Edit
Delete
Save
Cancel

(inherited font) ▾ (inherited size) ▾ B I U A▾ ◇▾ ≡ ≡ ≡ ≡

Created By:
Created Date:

EDIT

1. Go to **Design > Header.**
2. Select the Header title to edit.
3. Click **Detail**.
4. If you want your header to always appear by default, check Default.
5. Edit your custom header using the design window.
6. Click **Save** when finished.

HOME BODY

The Home Body is the center part of your library's Discovery Layer.

NEW

1. Go to **Design > Home Body.**
2. Click **New**.
3. Enter a title for the Home Body.
4. If you want your home body to always appear by default, check Default.
5. Drag elements from the Content column on the left into the Design window on the right.
6. Rearrange elements in the design window by dragging and dropping them in.
7. Remove elements by clicking on the **X** in the top right corner.
8. Click **Save** when finished.

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Home Content Design

Title	☐ Default

Content | **Design**

Most Circulated

Most Circulated

News

News

New Titles

New Titles

Online Resources

Online Resources

Picture

[Save] [Cancel]

EDIT

1. Go to **Design > Home Body.**
2. Select the Home Body title to edit.
3. Click **Detail.**
4. If you want this home body to always appear by default, check Default.
5. Edit your custom home body using the design window.
6. Click **Save** when finished.

Tip: You can also choose your defaults by selecting the title and clicking **Set Default** in the main Discovery Layer manager window.

CONTENT CATEGORIES

This section provides explanations for all of the content categories available in the Home Body.

1. **Most Circulated:** Displays the covers of books that are the most circulated in the system.
2. **News:** Allows custom news stories to be added. The news stories are added under **Content > News** in the Discovery Layer Manager.
3. **New Titles:** Displays the covers of the recently cataloged books that were created in the ILS under **Catalog > Cataloging > Find/Add Item.**
4. **Online Resources:** Online resources organized by category can be entered in the ILS under the **Administration > Library Setting > Home Page > Online Resources** tab.
5. **Picture:** Pictures can be added to the Discovery Layer from the ILS under the **Administration > Library Setting > Home Page > Image** tab. This is useful if you would like to showcase an event at the library or an author visit.
6. **Recently Viewed:** Displays the covers of the books that have been viewed recently in the system.
7. **Recommended:** Displays the recommended titles entered in the ILS under **Catalog > Cataloging > Recommended List.**
8. **Top Rated:** Displays the covers of the top rated titles which received the highest star ratings from patron profiles that can log in to the Discovery Layer.

9. **Video:** Displays a screenshot of each video that is playable on the homepage.

LEFT BANNER

The Left Banner manages the left side of your library's Discovery Layer.

NEW

1. Go to **Design > Left Banner.**
2. Click **New**.
3. Enter a title for the Left Banner.
4. If you want your left banner to always appear by default, check Default.
5. Drag elements from the Content column on the left into the Design window on the right.
6. Rearrange elements in the design window by dragging and dropping them in.
7. Remove elements by clicking on the **X** in the top right corner.
8. Click **Save** when finished.

EDIT

1. Go to **Design > Left Banner.**
2. Select the Left Banner title to edit.
3. Click **Detail.**
4. If you want this Left Banner to always appear by default, check Default.
5. Edit your custom banner using the design window.
6. Click **Save** when finished.

CONTENT CATEGORIES

This section provides explanations for all of the content categories available in the Left Banner.
1. **Announcements:** You can post announcements for your library. This can be done from the ILS under the **Administration > Library Setting > Home Page > Announcement** tab.
2. **Did You Know:** You can populate this box with interesting facts. This can be done from the ILS under the **Administration > Library Setting > Home Page > Quote** tab.
3. **Library Hours:** The library hours is populated with the hours from the **Administration > Library Setting > Library Info > Office Hours** tab selected and added to the **Library Information** tab.
   1.

RIGHT BANNER

The Right Banner manages the right side of your library's Discovery Layer.

NEW

1. Go to **Design > Right Banner.**
2. Click **New**.
3. Enter a title for the Right Banner.
4. If you want your right banner to always appear by default, check Default.
5. Drag elements from the Content column on the left into the Design window on the right.
6. Rearrange elements in the design window by dragging and dropping them in.
7. Remove elements by clicking on the **X** in the top right corner.
8. Click **Save** when finished.

EDIT

1. Go to **Design > Right Banner.**
2. Select the Right Banner title to edit.
3. Click **Detail.**

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4. If you want this Right Banner to always appear by default, check Default.
5. Edit your custom banner using the design window.
6. Click **Save** when finished.

CONTENT CATEGORIES

1. **Quote of the Day:** You can populate this box with interesting quotes. This can be done from the ILS under the **Administration > Library Setting > Home Page > Quote** tab.
2. **Weather:** Shows the local weather based on your library's location.

CONTENT

The Content section of the Discovery Layer Manager allows users to determine the content of the elements which appear in the web page.

TEMPLATE

The Template window is used to create and edit content that appears under the Content column of the design windows (Home Body, Left Banner, and/or Right Banner).

NEW

1. Go to **Content > Template.**
2. Click **New.**
3. Enter a title for your new content template.
4. Choose where the content will be located: Left Banner, Home Content, or Right Banner.
5. Choose an icon that will appear on the Discovery Layer next to the title of the content box.
6. Create your custom content using the design window.
7. Click **Save** when finished.

EDIT

1. Go to **Content > Template.**

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2. Select the Template title to edit.
3. Click **Detail**.
4. Edit your content template using the design window.
5. Click **Save** when finished.

MESSAGE

The Message window allows the user to create and edit messages that appear on the Discovery Layer for a fixed length of time. Messages show at the top of the homepage under the search box.

NEW

1. Go to **Content > Message.**
2. Click **New.**
3. Select a start and end date for the length of time you would like the message to appear for.
4. Use the design window to create your message.
5. Click **Save** when finished.

EDIT

1. Go to **Content > Message.**
2. Select the Message to edit.
3. Click **Detail.**
4. Edit your message using the design window.
6. Click **Save** when finished.

NEWS

The News window allows the user to add, edit, and delete news articles. Content saved in the news window is part of the New Content element in the Home Body design window.

NEW

1. Go to **Content > News.**
2. Click **New.**
3. Enter a title for the news article.
4. Create your news article using the design window.
5. Click **Save** when finished.

EDIT

1. Go to **Content > News.**
2. Select the News title to edit.
3. Click **Detail.**
4. Edit your news article using the design window.
5. Click **Save** when finished.

OFFICE HOURS

The Office Hours option allows you to set custom office hours to appear on the Discovery Layer. This is useful if your library has hours such as 9:00 AM-12:00 PM, 2:00 PM-4:00 PM.

1. Go to **Content > Office Hours**.
2. Click **Edit**.
3. Edit your office hours using the design window.
4. Click **Save** when finished.

CONFIGURATION

MENU CUSTOMIZED

The Menu Customized window allows the user to choose which parts of the site menu appear on the Discovery Layer.

HIDE/UNHIDE MENU ITEMS

1. Go to **Configuration > Menu Customized.**
2. Click **Edit.**
3. Check the menu items you want to be displayed.
   3.1. Uncheck the menu items that you want to hide.
4. Click **Save**.

ADD A NODE

1. Go to **Configuration > Menu Customized.**
2. Select the menu that you want to add a note to.
3. Click **Add Node.**
4. Enter a name for the new node.
5. If you are using an existing URL, ensure that the URL button is selected and paste in the URL.
6. If you are not using an existing URL, you can create content using the HTML design window.
7. Click **OK** then click **Save**.

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SOCIAL MEDIA INTEGRATION IN THE DISCOVERY LAYER

In this social media integration guide, you will learn how to create a template in the Discovery Layer Manager and embed content from the following social media sites:

1. Facebook
2. Twitter
3. Flickr
4. Pinterest
5. Instagram

CREATING A TEMPLATE

To add embedded social media to your OPAC, you will need to know how to create a template in the Discovery Layer Manager.

1. In the Discovery Layer Manager, click **Template** under the Content heading.
2. Click **New**.

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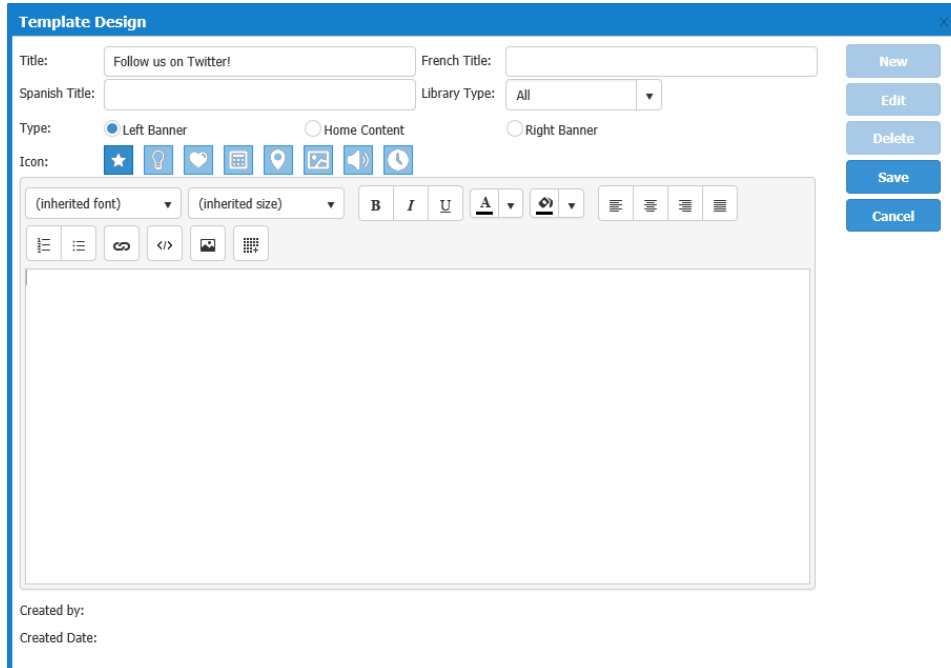
3. Enter a title for your template (e.g. "Follow us on Twitter!")
4. Choose where on the page you want this template to display (Left Banner, Home Content, or Right Banner).
5. Click **Save**.

FACEBOOK

1. Go to https://developers.facebook.com/docs/plugins/page-plugin
2. Enter your Facebook page URL (e.g. https://www.facebook.com/InsigniaSoftwareInc).
3. Follow the steps to create a Page Plugin.
   3.1. When selecting a width for your timeline, enter 220px for the left and right banners and 500px if you want to display the timeline in the middle (home content) section of the OPAC.
      3.1.1. The Facebook Page Plugin will display best in the Home Content section.
   3.2. Height is dependent on how much space you want the feed to take up.
4. Once you are finished personalizing your plugin, copy the code Facebook provides.
   4.1. Facebook offers two forms of code (JavaScript SDK, and iFrame), both of which work in the Discovery Layer. If you choose the JavaScript SDK option, you must copy both sections of code. You may want to paste these one after the other into Notepad until you are ready to use it.
5. Create a Template using the steps outlined at the beginning of this guide.
6. Click the **View HTML** button </> .

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View HTML ✕

```
<div id="fb-root"></div><script>(function(d, s, id) {
  var js, fjs = d.getElementsByTagName(s)[0];
  if (d.getElementById(id)) return;
  js = d.createElement(s); js.id = id;
  js.src = "//connect.facebook.net/en_US/sdk.js#xfbml=1&version=v2.7";
  fjs.parentNode.insertBefore(js, fjs);
}(document, 'script', 'facebook-jssdk'));</script><div class="fb-page" data-adapt-
container-width="true" data-height="500" data-hide-cover="false" data-
href="https://www.facebook.com/InsigniaSoftwareInc" data-show-facepile="false" data-small-
header="false" data-tabs="timeline" data-width="500"><blockquote
cite="https://www.facebook.com/InsigniaSoftwareInc" class="fb-xfbml-parse-ignore"><a
href="https://www.facebook.com/InsigniaSoftwareInc">Insignia
Software</a></blockquote></div>
```

[Update] [Cancel]

7. Paste the code you copied from Twitter into the View HTML window.
8. Click **Update**.
9. Click **Save** to close the design window.
10. Under the Design heading, click the location you chose for your template (e.g. Home Content).
11. Select your default design and click **Detail**.
12. Find your new template under the content heading and drag it to the position you would like it to appear under the design heading.
13. Click **Save**. Your Facebook Page's feed will now be visible on your home page.

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TWITTER

1. Go to https://publish.twitter.com/.
2. Enter your handle (e.g. @insigniasftware).
3. Follow the steps to create an embedded timeline.
    3.1. When selecting a width for your timeline, enter 220px for the left and right banners and 500px if you want to display the timeline in the middle (home content) section of the OPAC.
    3.2. Height is dependent on how much space you want the feed to take up.
4. Once you are finished personalizing your widget, copy the code Twitter provides.
5. Create a Template using the steps outlined at the beginning of this guide.
6. Click the **View HTML** button .

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View HTML   ✕

```
<a class="twitter-timeline" data-width="220" data-height="500" data-link-color="#2B7BB9"
href="https://twitter.com/InsigniaSftware">Tweets by InsigniaSftware</a> <script async
src="//platform.twitter.com/widgets.js" charset="utf-8"></script>
```

Update   Cancel

7. Paste the code you copied from Twitter into the View HTML window.
8. Click **Update**.
9. Click **Save** to close the design window.
10. Under the Design heading, click the location you chose for your template (e.g. Left Banner).
11. Select your default design and click **Detail**.
12. Find your new template under the content heading and drag it to the position you would like it to appear under the design heading.
13. Click **Save**. Your Twitter feed will now be visible on your home page.

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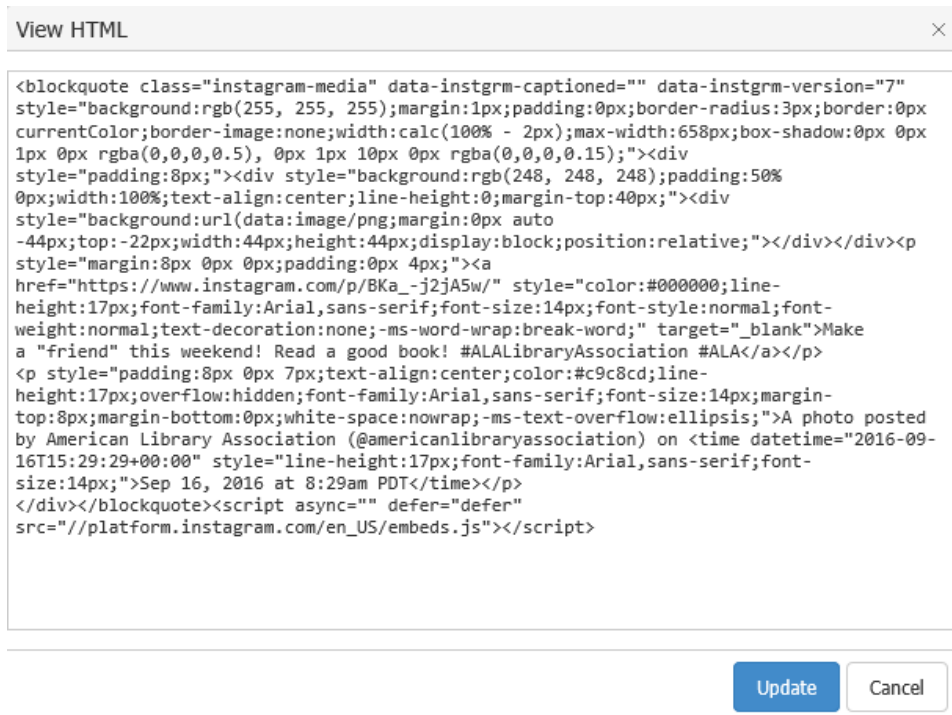866-428-3997 or 780-428-3997
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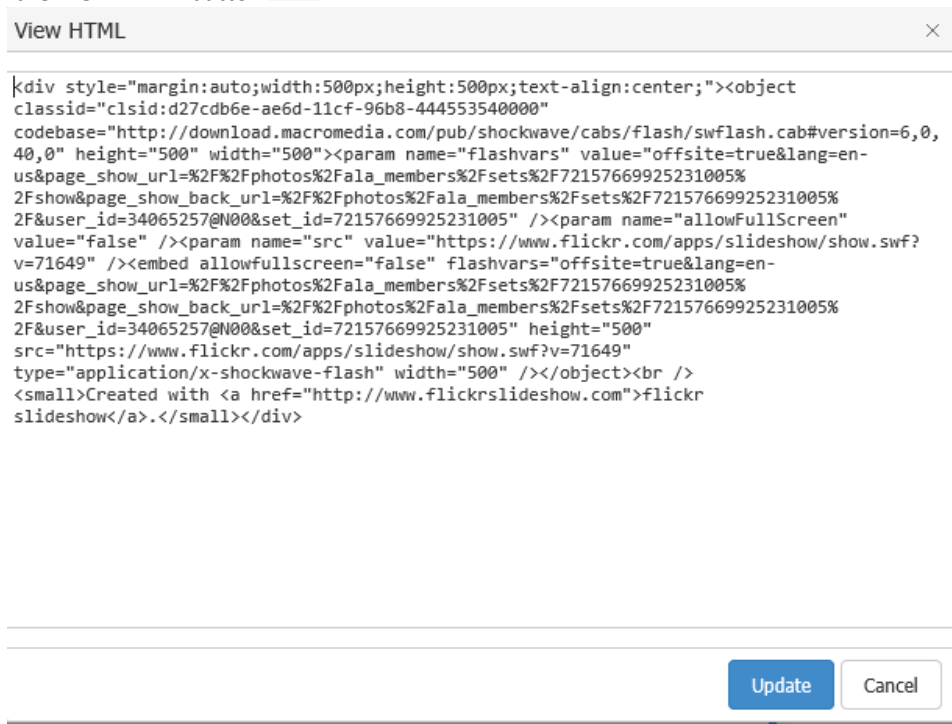
FLICKR

Flickr no longer offers official tools for adding a widget to your website. You will need to use a 3rd party to build a widget. We recommend using Flickr Slideshow or Flickr Badge.

1. Go to http://www.flickrslideshow.com/ or http://www.flickrbadge.com/.
2. Enter the URL of the Flickr album you want to showcase.
3. Follow the steps to create a Flickr widget.
   3.1. When selecting a width for your widget, enter 220px for the left and right banners and 500px if you want to display the timeline in the middle (home content) section of the OPAC.
   3.2. Height is dependent on how much space you want the feed to take up.
4. Once you are finished personalizing your widget, copy the code the website provides.
5. Create a Template using the steps outlined at the beginning of this guide.
6. Click the **View HTML** button.

7. Paste the code you copied from the website into the View HTML window.
8. Click **Update**.
9. Click **Save** to close the design window.
10. Under the Design heading, click the location you chose for your template (e.g. Left Banner).
11. Select your default design and click **Detail**.
12. Find your new template under the content heading and drag it to the position you would like it to appear under the design heading.
13. Click **Save**. You Flickr album will now be visible on your home page.

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PINTEREST

1. Go to https://developers.pinterest.com/tools/widget-builder/.
2. Enter your Pinterest URL.
3. Follow the steps to create an embedded Pinterest widget.
    3.1. When selecting a size for your widget, choose one with a width of 200px or smaller for the left and right banners and 500px or smaller if you want to display the widget in the middle (home content) section of the OPAC.
    3.2. Height is dependent on how much space you want the widget to take up.
4. Once you are finished personalizing your widget, copy the code Pinterest provides.
5. Create a Template using the steps outlined at the beginning of this guide.
6. Click the **View HTML** button .

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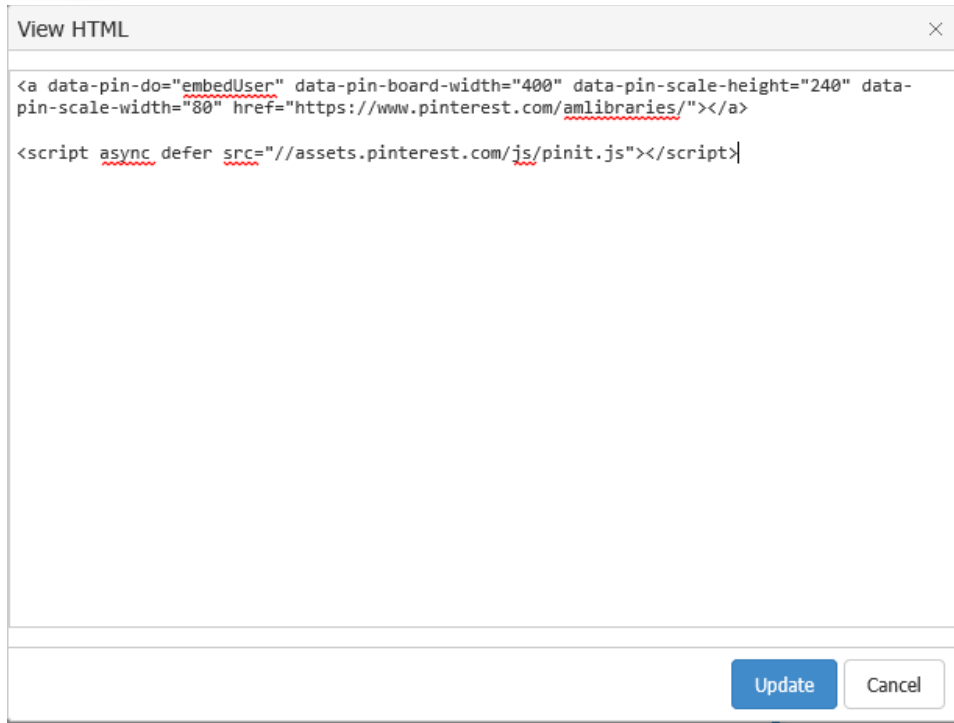
7. Paste the code you copied from Pinterest into the View HTML window.
8. Click **Update**.
9. Click **Save** to close the design window.
10. Under the Design heading, click the location you chose for your template (e.g. Left Banner).
11. Select your default design and click **Detail**.
12. Find your new template under the content heading and drag it to the position you would like it to appear under the design heading.
13. Click **Save**. Your Pinterest feed will now be visible on your home page.
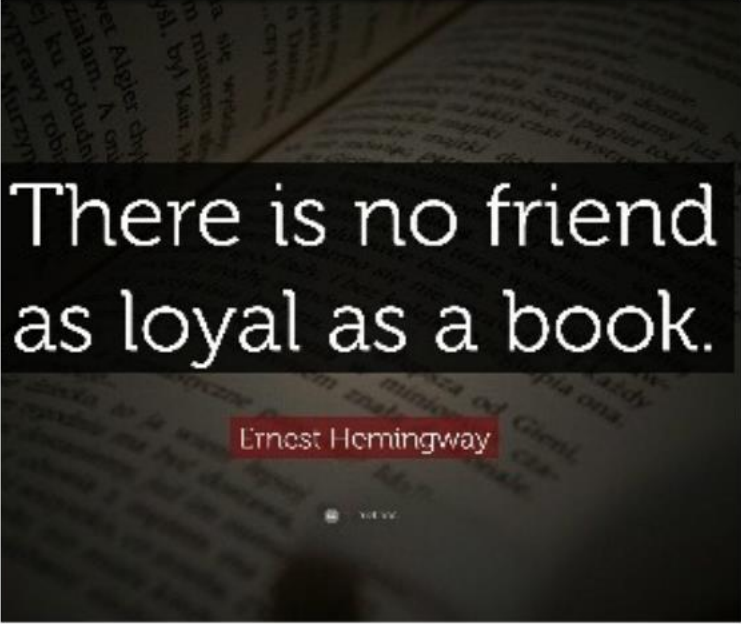
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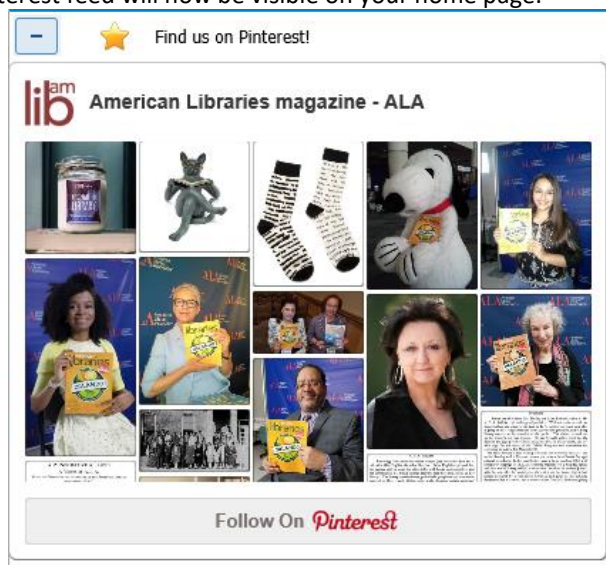
INSTAGRAM

1. Go to your Instagram page (e.g. https://www.instagram.com/americanlibraryassociation).
2. Click to expand the first photo on your timeline.
3. Click the **…** button in the bottom right-hand corner.
4. Click **Embed**.
5. Copy the code Instagram provides.
6. Create a Template using the steps outlined at the beginning of this guide.

7. Click the **View HTML** button ⟨/⟩ .

View HTML   ✕

```
<blockquote class="instagram-media" data-instgrm-captioned="" data-instgrm-version="7"
style="background:rgb(255, 255, 255);margin:1px;padding:0px;border-radius:3px;border:0px
currentColor;border-image:none;width:calc(100% - 2px);max-width:658px;box-shadow:0px 0px
1px 0px rgba(0,0,0,0.5), 0px 1px 10px 0px rgba(0,0,0,0.15);"><div
style="padding:8px;"><div style="background:rgb(248, 248, 248);padding:50%
0px;width:100%;text-align:center;line-height:0;margin-top:40px;"><div
style="background:url(data:image/png;margin:0px auto
-44px;top:-22px;width:44px;height:44px;display:block;position:relative;"></div></div><p
style="margin:8px 0px 0px;padding:0px 4px;"><a
href="https://www.instagram.com/p/BKa_-j2jA5w/" style="color:#000000;line-
height:17px;font-family:Arial,sans-serif;font-size:14px;font-style:normal;font-
weight:normal;text-decoration:none;-ms-word-wrap:break-word;" target="_blank">Make
a "friend" this weekend! Read a good book! #ALALibraryAssociation #ALA</a></p>
<p style="padding:8px 0px 7px;text-align:center;color:#c9c8cd;line-
height:17px;overflow:hidden;font-family:Arial,sans-serif;font-size:14px;margin-
top:8px;margin-bottom:0px;white-space:nowrap;-ms-text-overflow:ellipsis;">A photo posted
by American Library Association (@americanlibraryassociation) on <time datetime="2016-09-
16T15:29:29+00:00" style="line-height:17px;font-family:Arial,sans-serif;font-
size:14px;">Sep 16, 2016 at 8:29am PDT</time></p>
</div></blockquote><script async="" defer="defer"
src="//platform.instagram.com/en_US/embeds.js"></script>
```

Update   Cancel

8. Paste the code you copied from Twitter into the View HTML window.
9. Click **Update**.
10. Click **Save** to close the design window.
11. Under the Design heading, click the location you chose for your template (e.g. Left Banner).
12. Select your default design and click **Detail**.
13. Find your new template under the content heading and drag it to the position you would like it to appear under the design heading.
14. Click **Save**. Your Instagram feed will now be visible on your home page.

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DISCOVERY LAYER CONFIGURATION IN THE ILS

To configure the settings for the Discovery Layer and OPAC, please follow these steps. It is recommended to use the Configuration II feature for this as it is easier to navigate through the grids.

1. Go to **Administration > Library Setting > Configuration II.**
2. See below for an explanation of the most important settings.
3. Click **Edit** to change the setting(s).
4. Click **Save** when finished.

OPAC TAB
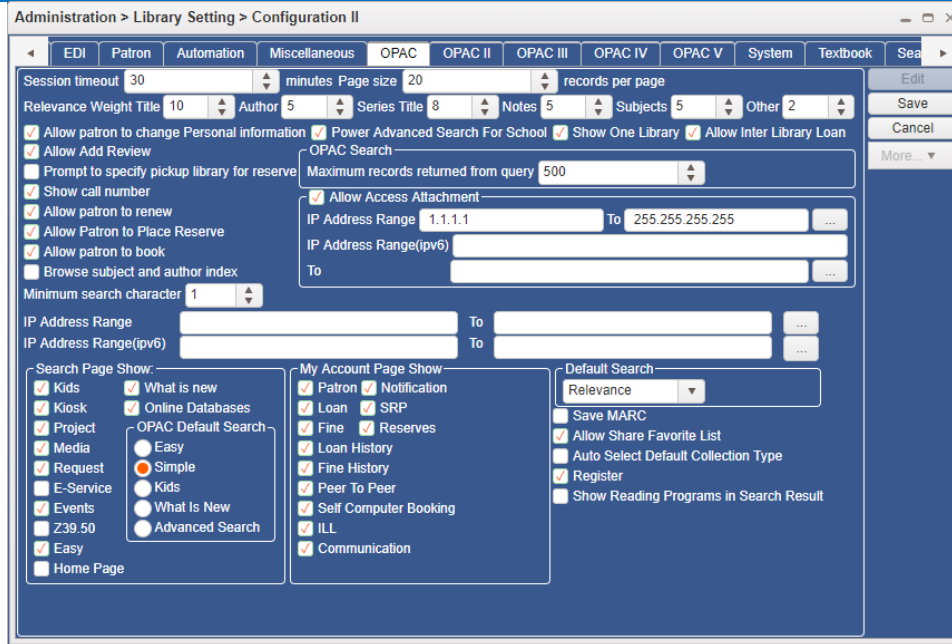
1. **Session Timeout:** Specify the number of minutes of inactivity to elapse before the system requires patrons to log in agan.
2. **Page Size [ ] Records Per Page**: Specify the default number of records to show per page of search results.
3. **Relevance Weights:** Specify how the system prioritizes title, author, notes, subjects, and other when searching by relevance on the OPAC.
4. **Allow Patron To Change Personal Information:** When enabled, patrons can change their personal information through My Account in the discovery layer.
5. **Allow Add Review:** When enabled, patrons are allowed to add reviews of items in the discovery layer. By default, reviews will not be visible until approved by library staff in Catalog > Cataloging > Book Review.
6. **Prompt To Specify Pickup Library For Reserve:** When enabled, patrons will be prompted to specify a pickup library for the reserve they are placing. When disabled, the pickup library will be set to the patron's library in their profile.
7. **Show Call Number:** When enabled, patrons will be prompted to specify a pickup library for the reserve they are placing. When disabled, the pickup library will be set to the patron's library in their profile.
8. **Allow Patron To Renew:** When enabled, patrons can renew checked out items through My Account in the discovery layer.
9. **Allow Patron To Place Reserve:** When enabled, patrons can make reserves through the discovery layer.
10. **Allow Patron To Book:** When enabled, patrons can make bookings through the discovery layer.

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11. **Browse Subject And Author Index:** When enabled, subject and author searchers display the subject index and author index of results matching the query, respectively, allowing the patron to click to display results matching specific terms. When disabled, subject and author searches display all matching titles.
12. **Show One Library:** When enabled, other libraries will not be selectable from the library dropdown when a patron is logged in or is detected at being at a specific library based on the device's IP.
13. **OPAC Search – Maximum Records Returned From Query:** Specify the maximum number of results to display for searches submitted in the discovery layer.
14. **Allow Access Attachment IP Ranges:** Add IP ranges of devices that are allowed to access attachments through the OPAC.
15. **Minimum Search Character:** Specify the minimum number of characters needed for searches to be submitted in the discovery layer.
16. **IP Address Ranges:** Add IP ranges of devices that will load the selected default search when accessing the discovery layer.
17. **Default Search:** Select the default search type that will be selected for patrons when they load the discovery layer.
18. **Save MARC:** When enabled, patrons will be able to download MARC records for your library's items through the discovery layer by clicking Save MARC.
19. **Allow Share Favorite List:** When enabled, patrons can share lists created in My Favorites with other patrons at their library or make them public. Please note: Since this feature allows patrons to look up other patrons to share their lists with, it should not be enabled if patron privacy is a concern.
20. **Auto Select Default Collection Type:** When enabled, the default collection type will be selected when patrons perform an advanced search in the discovery layer.
21. **Show Reading Programs In Search Result:** When enabled, reading program information such as AR, Lexile, etc. will be included in search results in each record.

OPAC II TAB

1. **Default Search Sort:** Select how the system should sort search results in the discovery layer.
2. **Default Reading Program:** Select the default reading program for filtering search results in the discovery layer.
3. **Default Discovery Theme:** Select the discovery layer's color theme.

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4. **Reading Program:** Enable reading programs to show in the title details on the discovery layer and set the order in which the reading programs appear.
5. **Show Local Notes:** When enabled, local notes will display in the discovery layer.
6. **Refine Search Type:** Select which search refining options are shown in the left side of the OPAC search results, the order they appear in, if they should be automatically expanded, and if they should expand to show all options under the filter or have the option to show more.

OPAC III

1. **Kids Search Setting In Discovery:** Select which buttons to enable when using the Kids Search option on the OPAC and which order they appear in, as well as set how it is displayed in other languages.
2. **RDA Setting In Discovery:** Select to enable RDA settings and set the order in which they appear.
   2.1. **Content:** When enabled, the RDA carrier type from the 338 tag will display in the discovery layer.
   2.2. **Media:** When enabled, the RDA media type from the 337 tag will display in the discovery layer.
   2.3. **Carrier:** When enabled, the RDA carrier type from the 338 tag will display in the discovery layer.
3. **Buttons To Show In Search:** Select the buttons which will display beside search results in the OPAC.
4. **Search Setting In Discovery:** Select the types of searches available to toggle between from the discovery layer.
5. **Discovery Default Search:** Select the search interface that will load by default for your discovery layer.
6. **Discovery Default Search By IP:** Select the search interface that will load by default for the discovery layer for the specified IP range.
7. **Buttons To Order In Search Result:** Set the button order for the buttons which display beside the search results.

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OPAC IV

1. **Discovery Default Search By Grade:** Select the default search type and how the favorites list appears for different grade levels.
2. **Search Setting By Grade:** Select which search options are available for students depending on their grade.
3. **Show In Advanced(*: only the top 4 will show):** Show which filtering options are available in the Advanced Search window. Please note, only the top 4 in the order will show.
4. **Standalone Home Page Setting:** When enabled, you can specify that the current library's discovery layer layout can be uniquely set even if the custom setting DistrictBased is set to make the environment system-based.
5. **Online Registration Valid Period [ ] Days:** Specify the number of days that accounts created through online registration should remain active before expiring.
6. **Online Resources IP Mapping:** Select the IP ranges that can load online resources by default.

OPAC V

For details on OPAC V tab, please read the section on Discovery Layer Online Resources on the next page.

DISCOVERY LAYER ONLINE RESOURCES

If you have subscriptions to online resources, Insignia can integrate with several databases to show the eResources in the Insignia OPAC search results. The search results can either be included with the regular search results, or in separate tabs (Catalog/eBooks, e-Resources, Online). To enable the tabs and set them up, please follow these steps.

ENABLE TAB SETTING

1. Log in as Admin All.
2. Go to **Administration > System Setting > Custom Setting**.
3. In the search criteria, enter "OPACSearchResultTabLayout".
4. Click **Edit**.
5. Click into the Value column for the OPACSearchResultTabLayout parameter and set it to "1".
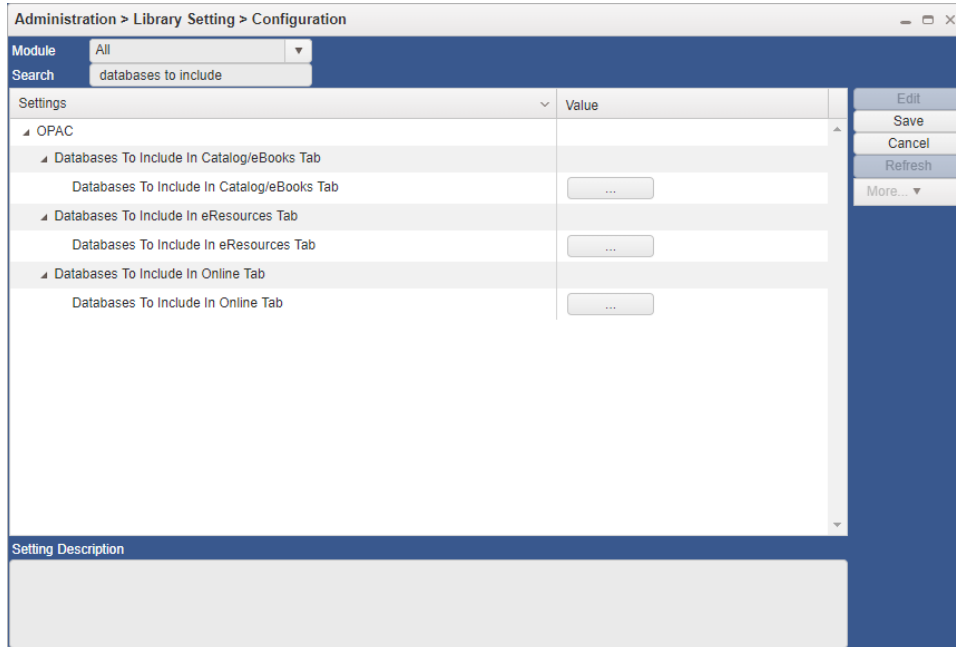6. Click **Save**.

ADD METADATA SOURCES

1. Go to **Administration > System Setting > Parameters**.
2. Use the Parameter dropdown menu to select Metadata Source.
3. Click **New** to add a new metadata source (i.e. Curio, EBSCO, OverDrive, etc.).
   3.1. Enter the name of the Metadata Source.
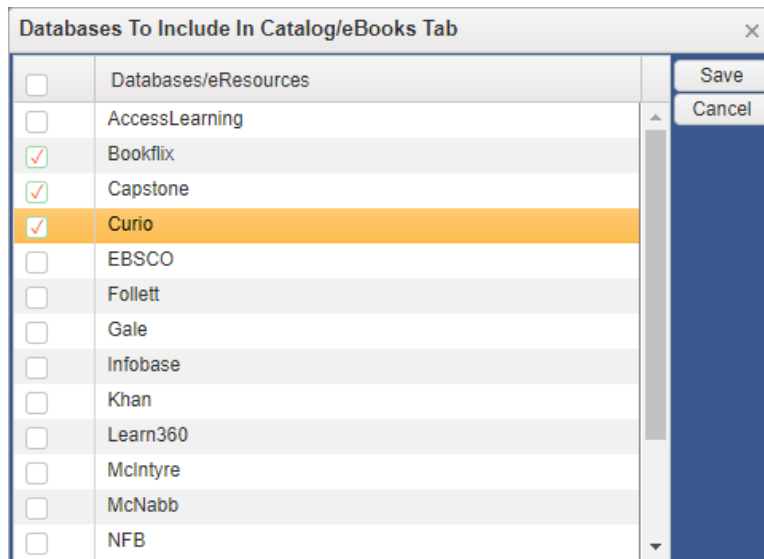4. Click **Save**.
5. Repeat to add all of the metadata sources.

ADD METADATA SOURCES TO TABS

If the OPAC is district-based, remain logged in as Admin All. If the OPAC is site-based, where each site has their own custom Discovery Layer, log in to your own library and make these changes.

1. Go to **Administration > Library Setting > Configuration**.
2. In the search field, enter "databases to include".
3. Use the small arrows to expand the Databases To Include In Catalog/eBooks Tab, Databases To Include In eResources Tab, and Databases To Include In Online Tab settings.

4. Click **Edit**.
5. Click **...** beside each setting, which will pop-up with a grid listing the metadata sources.
    5.1. Select the databases/eResources you would like to include in the selected tab option.
    5.2. Click **Save**.

6. Click **Save** when finished adding resources to each tab category. If no resources are selected for a specified tab, the tab will be hidden from the OPAC.