



FAVORITES LIST

The Simple and Advanced Search features have an option to save a list of titles to print, email, or share with other patrons.

CREATE A NEW FAVORITES LIST

1. Go to **Search > Simple** or **Search > Advanced**.
2. Click **New/Edit Fav. List**.
3. In the window that pops up, click **New**.
4. Enter a name for the Favorites List.
 - 4.1. **Readonly:** Check this checkbox if you do not want to allow other patrons to add to this Favorites List. They will only be able to view it.
5. Select the Share Option for the Favorites List.
 - 5.1. **Private:** Only you can view and add items to the Favorites List.
 - 5.2. **Public(Site):** This Favorites List can be viewed by all patrons who belong to your site.
 - 5.3. **Public(System):** This Favorites List can be viewed by all patrons in the whole system.
 - 5.4. **Patrons/Groups:** This Favorites List can only be viewed by patrons in the Patrons grid and/or in the Patron Groups selected in the bottom grid.
 - 5.4.1. To add a patron to the grid, click **Find**.
 - 5.4.2. Search for the patron.
 - 5.4.3. Check the checkbox beside their name.
 - 5.4.4. Click **OK**.
 - 5.5. Click **Save**.

New/Edit Fav. List

Favorites List: Cats ☒ Readonly

Share Options:

☐ Private ☐ Public(Site) ☐ Public(System) ☒ Patrons/Groups

Patrons: Find

	First Name	Last Name
<input checked="" type="checkbox"/>	John	Wickson

Patron Groups:

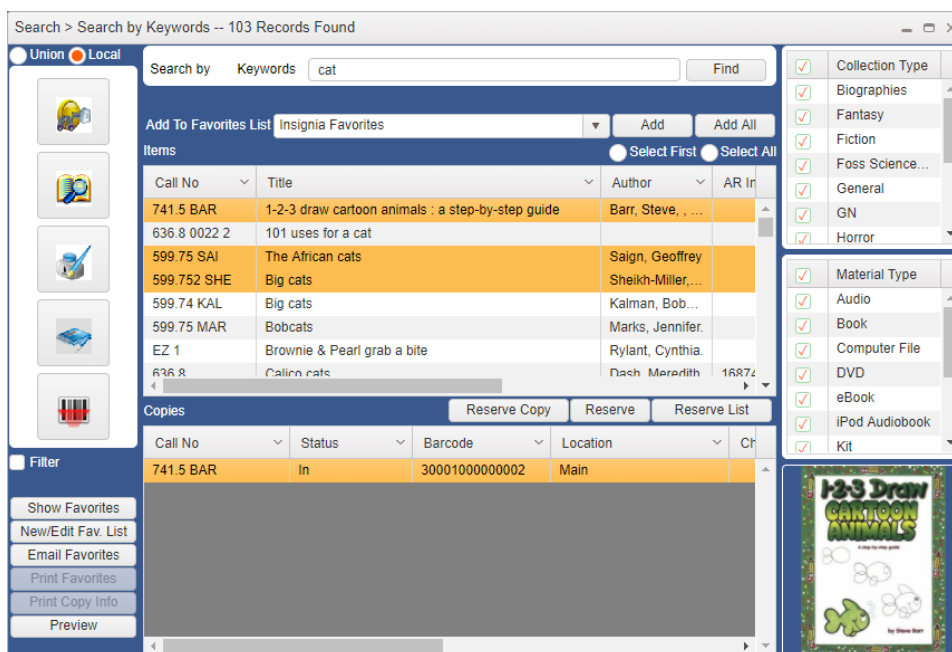
- ☐ AssetAdmin
- ☐ Assistant
- ☐ Director
- ☒ K12Lib
- ☐ Mediagraphy
- ☐ Public
- ☐ SelfCheckout
- ☐ Staff
- ☐ Standard Demo

Buttons: New, Edit, Delete, Save, Cancel



ADD ITEMS TO A FAVORITES LIST

1. Go to **Search > Simple** or **Search > Advanced**.
2. Search for the item.
3. Select the Favorites List you would like to add to from the Add To Favorite List dropdown menu.
4. Select the item(s) from the grid below.
 - 4.1. To select multiple items from the results, hold SHIFT and click to select a group starting from the first item selected.
 - 4.2. To select individual items from the results to add together (they may be interspersed in the results), click CTRL and click on each item.
5. Click **Add** to add the selected item(s). Click **Add All** to add all of the items in the results to the selected favorites list.

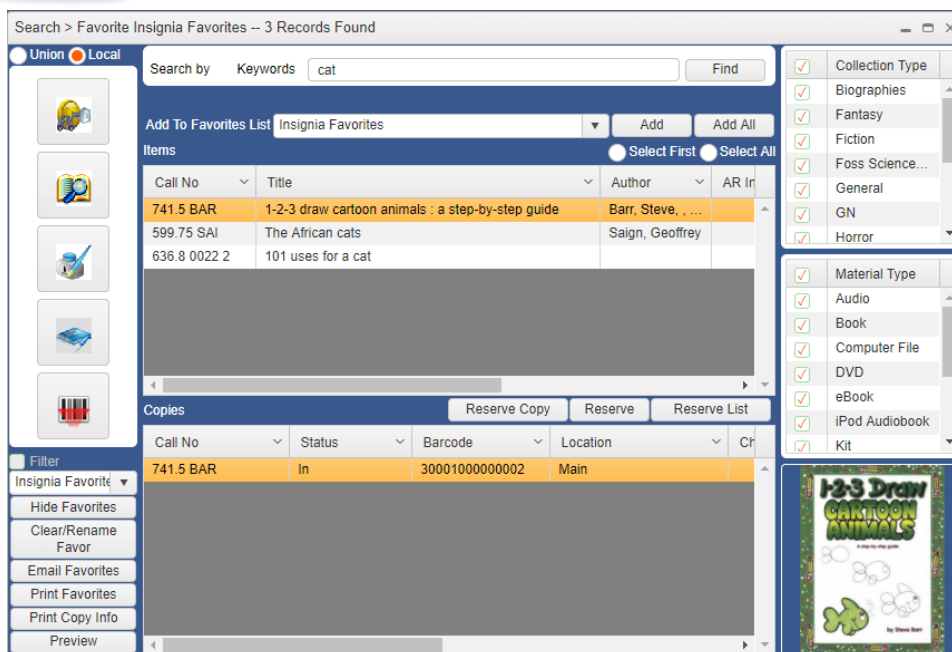


VIEW AND SHARE AN EXISTING FAVORITES LIST

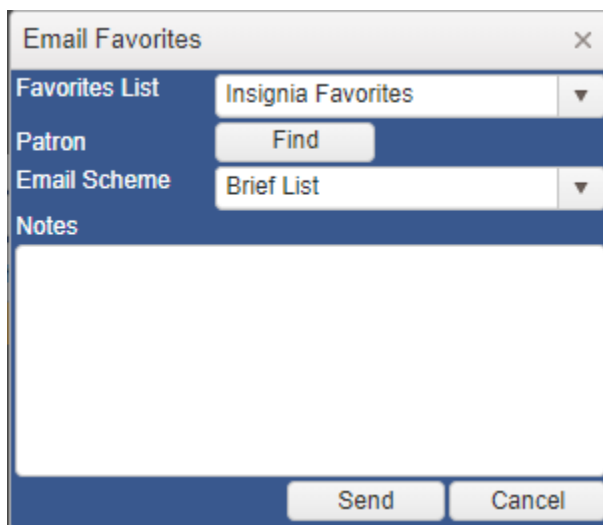
1. Go to **Search > Simple** or **Search > Advanced**.
2. Click **Show Favorites**.
3. Select a Favorites List from the dropdown menu. The items in it will appear in the results grid.
4. The options to Print Favorites and Print Copy Info will only appear once a Favorites List is selected at the bottom left of the window.
 - 4.1. To print the selected favorites list, click **Print Favorites**. This will show the title, subjects, basic information, and any notes.
 - 4.2. To print the copy information for the items in the favorites list, click **Print Copy Info**. This preview shows the title, call number, authors, copies, copy barcode, copy call number, location, status, and due date.
5. Click **Preview** to preview the results in the item grid (top grid) with the same columns that appear in the window.



#201 2544 Ellwood Drive, Edmonton, Alberta, Canada, T6X 0A9
insigniasupport@insigniasoftware.com
insigniasales@insigniasoftware.com
866-428-3997 or 780-428-3997
www.insigniasoftware.com



6. To email the favorites to a patron, you do not need to have a favorites list selected from the dropdown menu.
 - 6.1. Click **Email Favorites**.
 - 6.2. A window will pop up. Select the Favorites List you would like to email from the dropdown menu.
 - 6.3. Click **Find** and search for the patron to email it to.
 - 6.4. Select the email scheme (Brief List, Detail List, Bibliography, MLA, APA, or Chicago).
 - 6.5. Enter any notes as needed.
 - 6.6. Click **Send**.



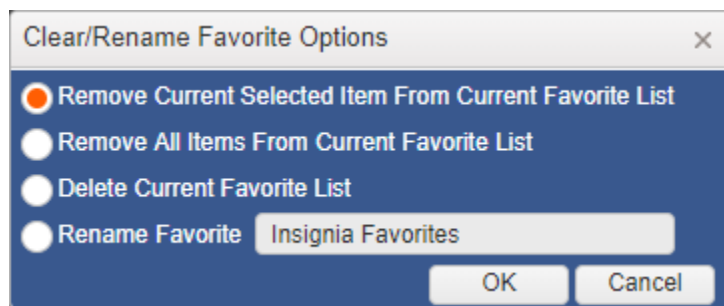
REMOVING AN ITEM FROM, CLEARING, OR RENAMING A FAVORITES LIST

1. Go to **Search > Simple** or **Search > Advanced**.
2. To clear the contents of a favorites list, click **Show Favorites**.
3. Select the favorites list from the dropdown menu.



#201 2544 Ellwood Drive, Edmonton, Alberta, Canada, T6X 0A9
insigniasupport@insigniasoftware.com
insigniasales@insigniasoftware.com
866-428-3997 or 780-428-3997
www.insigniasoftware.com

4. Click **Clear/Rename Favor.**
5. There are 4 options to select from:
 - 5.1. **Remove Current Selected Item From Current Favorite List:** This will remove only the highlighted item in the grid from the favorites list.
 - 5.2. **Remove All Items From Current Favorite List:** This will remove all items from the favorites list and clear it completely.
 - 5.3. **Delete Current Favorite List:** This will clear and delete the favorites list.
 - 5.4. **Rename Favorite:** Enter a new name for this favorites list.
6. Click **OK**.



VIEWING SHARED FAVORITES LISTS FROM THE DISCOVERY LAYER

1. Log on to the Discovery Layer.
2. Go to **My Account**, then click on **My Favorites**.
3. Your favorites lists and favorites lists shared with you will appear on the left.

