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SETTING UP YOUR SYSTEM FOR GENRES

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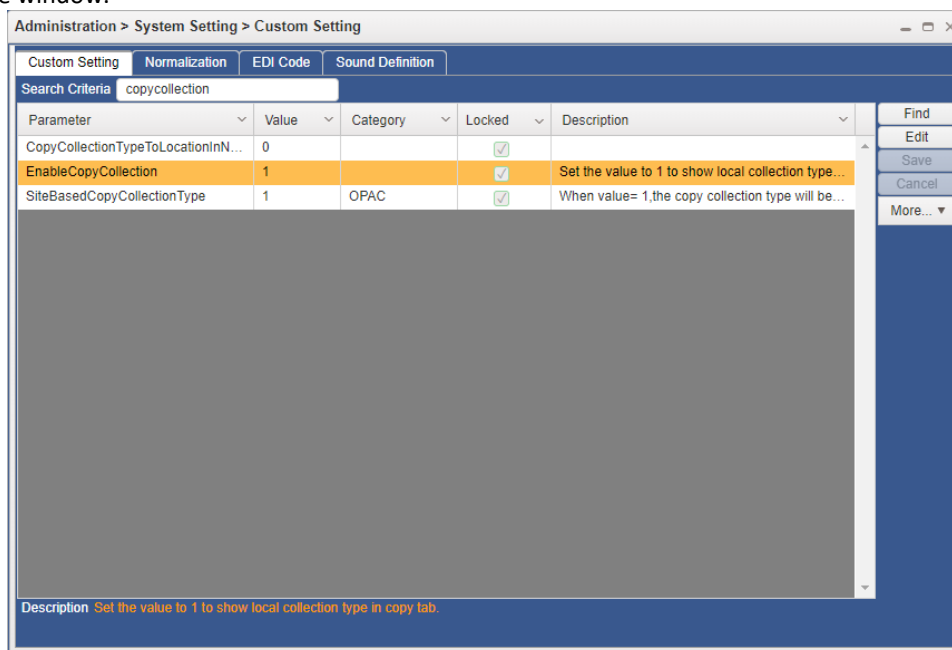
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FIRST TIME SETUP FOR GENRE SETTINGS FOR CATALOGING

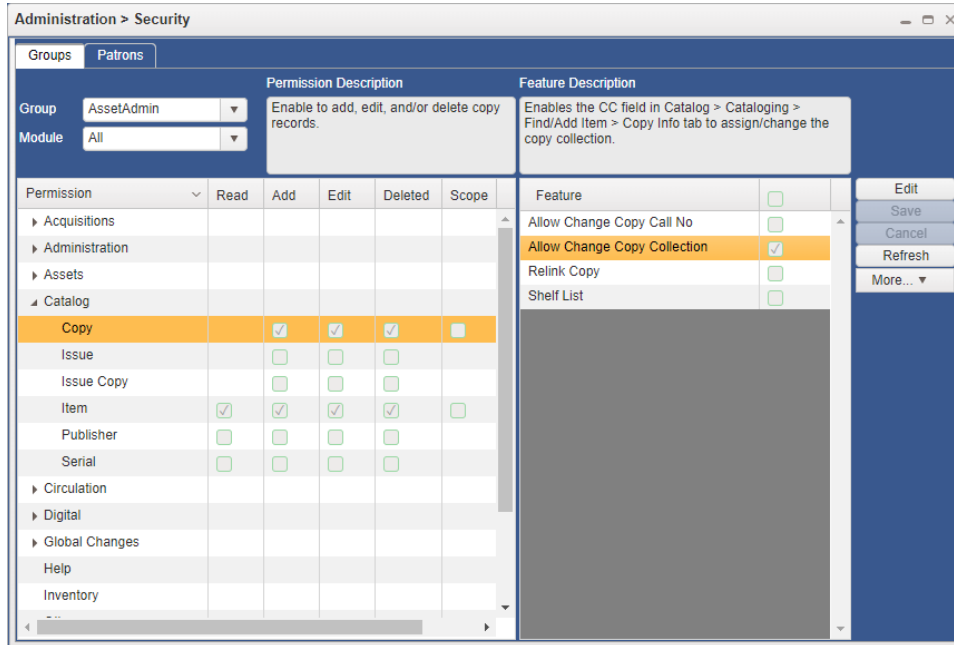
You must be logged in as Admin All.

1. Go to **Administration > System Setting > Custom Setting**.
2. In the search field, enter in “copycollection”.
3. Click **Edit**.
 - 3.1. Change the following settings to a value of “1”.
 - 3.2. EnableCopyCollection
 - 3.3. SiteBasedCopyCollectionType - This will change the genre types so they are unique to each library.
4. Click **Save**.
5. Close the window.



FOR CATALOGING ABILITY

1. Go to **Administration > Security**.
2. From the “Group” dropdown, select the Patron Group of the person who will be adding/editing Genres in the Copy Record.
3. Click the arrow next to “Catalog” in the Permissions column to expand it.
4. Click on “Copy”
5. Make sure “Allow Change Copy Collection” is checked.
6. If not:
 - 6.1. Click **Edit**.
 - 6.2. Select the checkbox.
 - 6.3. Click **Save**.



FOR WEB OPAC

To set this up, you may log into Insignia with your usual login ID.

1. Go to **Administration > Library Setting > Configuration**.
2. In the search field, enter in "Genre".
3. Click **Edit**.
4. To make it so that Genre will show up in the Simple Search criteria:
 - 4.1. Click the arrow next to "Others (OPAC IV)".
 - 4.2. Select the checkbox for "Web OPAC Search By Genre Enabled".
 - 4.3. Adjust any other settings as needed.
5. To add Genre to the Refinement Filter Sidebar:
 - 5.1. Click the arrow next to "Refine Search Type".
 - 5.2. Select the checkbox for "Genre Enabled".
 - 5.3. Adjust any other settings as needed.
6. Click **Save**.



The screenshot shows a web application window titled "Administration > Library Setting > Configuration". At the top, there is a "Module" dropdown set to "All" and a "Search" input field containing "genre". Below this is a table of settings. The table has two columns: "Settings" and "Value".

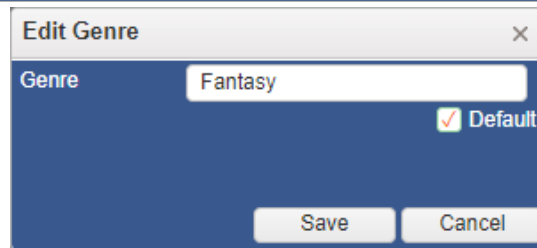
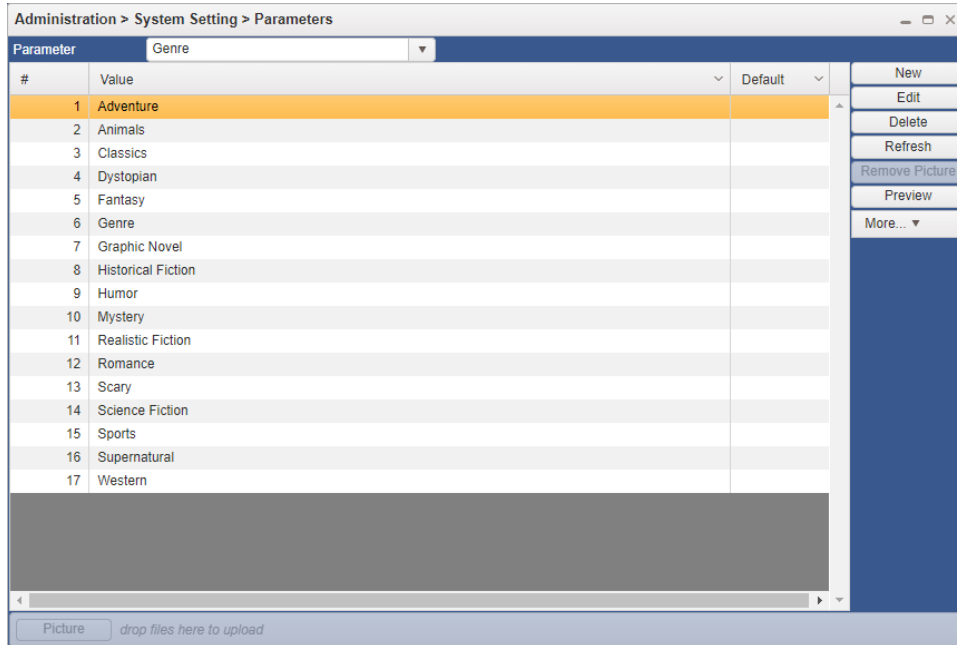
Settings	Value
OPAC	
Others (OPAC IV)	
Web OPAC Search By Genre Enabled	<input checked="" type="checkbox"/>
Web OPAC Search By Genre Match	Any Match
Web OPAC Search By Genre Order	13
Refine Search Type	
Genre Enabled	<input checked="" type="checkbox"/>
Genre Expanded	<input checked="" type="checkbox"/>
Genre Order	2

On the right side of the table, there are buttons: "Edit", "Save", "Cancel", "Refresh", and "More...". Below the table is a "Setting Description" section which is currently empty.

ADD GENRE PARAMETERS

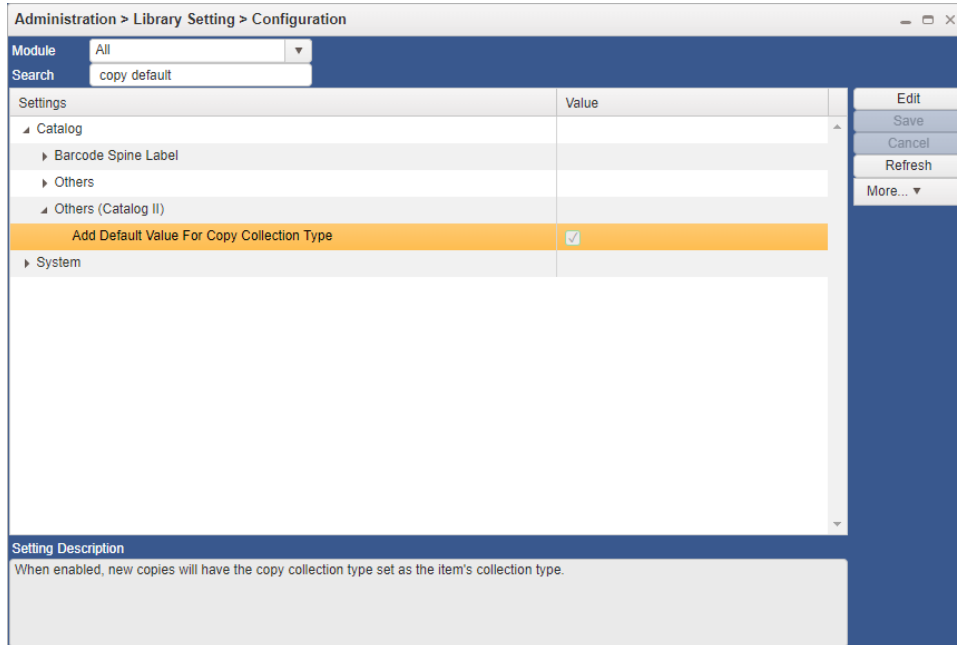
Genre parameters will appear in all dropdown menus for Genres.

1. Go to **Administration > System Settings > Parameters**.
2. From the "Parameter" dropdown, click and select Genre.
3. Click **New**.
4. Type in the Genre.
5. Click **Save**.
6. Repeat steps 3-5 until you have entered all your Genre Types in.
7. To set a Genre as the default copy genre, double click the genre in the list and select the checkbox for Default, then click **OK**.



SET A DEFAULT GENRE FOR NEW COPY RECORDS

1. Go to **Administration > Library Settings > Configuration**.
2. In the Search Box, enter "Copy Default".
3. In the Settings column, click arrow next to "Others (Catalog II)".
4. Click **Edit**.
5. If you want to Assign the default Genre to copies
 - 5.1. Select the checkbox for "Add Default Value For Copy Collection Type".
6. Click **Save**.



ASSIGN GENRE TYPE UPON IMPORT

Specify what MARC 852 subfield in the Copy Record you use to hold Genre information from your Vendor:

1. Go to Administration > Import/Export > Import.
2. Select the Item Tab.
3. Click **Copy Mapping**.
4. Click **New**.
5. In the Format Type box, give this template a name such as "Genre".
6. In the first column, locate "Genre".
7. Click in the cell to the right of it, in the Subfield column.
8. Pick your subfield from the list (scroll down until you see the letters).
9. Click **Save**.



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852 Field Mapping					
Format Type: Genre					
	Subfield	SplitField	Subfield	SplitField	Subfield
Barcode					
Price					
CallNo					
Vendor					
Location					
CircType					
CirculationDate					
Volume					
CopyNo					
Condition					
Notes					
Budget					
PONumber					
Status					
CollectionType					
ReplacementCost					
LibraryID					
CheckinNotes					
CheckoutNotes					
Genre	b				

- Save
- New
- Edit
- Delete
- Cancel