Genrefication Best Practices

Contents

Overview of Genrefication

What is genrefication?
Genrefication is organizing a library by subject and genre, more like a bookstore, to enable students to find materials more easily and improve circulation.

The genres the library chooses can align with district suggestions or can support each school and its curriculum uniquely.

About this guide
This guide is a starting point for anyone planning to reorganize their library collection by genre. The goal is that you will come away with knowledge of the high-level planning involved, as well as helpful information and tips.

This guide consists of six sections:
- Overview of Do-It-Yourself Genrefication
- Popular Genres, Titles and Authors
- Planning Your Library Space
- Adding Genre Data to Destiny
- Using the Genre Collection Report
- DIY Genrefication Checklist

This guide is aimed at the Do-It-Yourself (DIY) genrefication scenario – where you plan to work on your own to organize your library collection by genre. The information provided is not intended to be all-inclusive, as each library has different goals to consider. Use this guide to help lay the groundwork for defining a plan for your library.

Getting help
Follett School Solutions (FSS) can help. Our services include:
- On-site Project management of the service
- Pre-project planning and assistance with genre mapping
- Staffing, resources and materials needed to perform the work
- Population of genre information into Follett Destiny® Library Manager
- Post-genrefication collection analysis using TitleWave®

Follett's services are customized to meet each library's unique needs. For more information and to get a price quote, contact your Follett School Solutions sales representative. If you don't know who your representative is, click the "Find Your Follett Team" link on the Follett School Solutions website (www.follettlearning.com).

What does a "typical" genrefication project entail?
The word "typical" is emphasized because it's important to know that genrefication projects will differ from library to library. While there can be some commonality in approach, the decisions made are unique to the individual collections and curriculum goals of each school/library. Here is a high-level list of what's typically involved:

- **Plan!**
  Having a plan is critical to success. Plan the work, then work the plan. Be ready to be firmly flexible when something unexpected comes up. Count on something unexpected to happen – it likely will.

- **Prepare!**
  Organize everything. Make guiding decisions up front, and adjust your details when a situation

requires it. Prepare and organize everything, from defining genres to planning materials needed to considering patron service interruptions.

- **Execute!**
  This is where you work your plan. As you begin doing the work, new details not identified when planning will surface. Sometimes, this means adjusting your plan. Be flexible in adjusting.

The remainder of this section dives a little deeper with information Follett School Solutions has gained in our experience flipping libraries to a genre organization. The details are still high level and provided for you to consider in planning your DIY genrefication project. This guide is not a template you can follow, but it will help you determine what to consider as you move forward. Your plan will reflect your library and your situation.

What do I need to include in my plan?

Define the purpose of genrefying
Ask yourself "Why do I want to genrefy my library?" This can be the most important question of the project. Here are some common reasons why libraries flip their collections to genre organization:

- To better tie the collection to and support the school curriculum
- To bring greater visibility to high-interest titles
- To help students and staff members more easily find reading materials they seek
- To expose students and staff to a more diverse selection of authors and reading
- To make students more independent library users, which saves staff time
- To motivate students to read more
- To increase circulation and support of school curriculum, which can help secure additional funding

Prepare and plan for the collection

Weed first!
Starting with a clean house is critical. Flipping a collection to be organized by genre is a lot of work. You don't want to spend time or money processing books that are severely out-of-date and no longer useful. A good weeding will give you an accurate view of your collection and will help you improve your collection going forward. Weeding can be done well in advance of starting the actual genre flip project.

But where to begin? Follett can help with a TitleWise® Collection Analysis. The TitleWise Collection Analysis report will show strengths and weaknesses in your collection, including copyright information. The analysis is a great way to start reviewing your collection for content that no longer provides value.

Decide what to genrefy
Most libraries choose to begin to genrefy their collection with fiction first. Genre organization can later be expanded to include nonfiction and/or picture books. This decision is often guided by the size of the collection and the staffing/timeframe to complete the work.

Identify what genres to use
Genres can be unique to an individual school library or a school district. District guidelines usually maintain an overall structure, but give individual libraries some flexibility to meet their unique needs.

Some questions to ask include:
- What genres best support the curriculum?
- What do my students/staff want to find in the collection?
- Are there sections of the collection that are underutilized and need more exposure?
- Do I use a pre-defined list of genres as a starting point?
- Are there district guidelines we should create or that I need to follow?

Follett worked with librarians from around the country to determine which genres are most commonly used at various grade levels. Use this as a reference when defining the genres you want to use. You may choose to use some or all the genres listed.

Elementary Fiction		Secondary Fiction	
Adventure	Scary Stories	Adventure	Quick Reads
Animal Stories (Tales)	Science Fiction	Classics	Realistic Fiction
Classics	Sports Fiction	Dystopian	Romance
Fantasy		Fantasy	Science Fiction
Graphic Novels		Graphic Novels	Sports Fiction
Historical Fiction		Historical Fiction	Story Collections
Humor		Horror	Supernatural
Mystery		Humor	Thriller
Realistic Fiction		Mystery	

Coming soon! Follett recommendations for Nonfiction and Picture Book genres. Please visit http://www.titlewave.com/main/about-follett-genres for more information.

Map the collection to your genres
Once you have defined the genres you will use, you must map all the books in your collection into the correct genre. Genre mapping the collection is one of the most challenging and time-consuming activities of the project. But it is a critical part of a smooth and successful genre flip project.

Genre mapping involves looking at every copy of every title you are genrefying and deciding what genre it belongs in. This occurs at the copy level, because you might choose to map some titles that you have multiple copies of into more than one genre.

You will find yourself challenged with the choice between genres for some titles. Sometimes, referring to your driving purposes can help you decide which genre to select. The weakness or strength of some sections of your collection can also influence this decision.

Follett provides a free resource called the Genre Collection Report to help assign genres to your collection. Created using data submitted for TitleWise analysis, this report is a spreadsheet listing all the copies in your collection. For most libraries, the collection can be genre-assigned using only the spreadsheet.

To request a Genre Collection Report, contact a Titlewave School Support Specialist or call 888.511.5114, extension 45051. Also, see the *Using the Genre Collection Report* section of this guide.

Decide how to indicate the genre on the shelves
Students and staff need to be able to find what they are looking for. It is important to clearly identify the genres on the physical materials. Common approaches include the use of genre labels, colored labeled genres and genre call number prefixes. See the Planning Your Library Space section for more details.

Decide how to identify genres in your library automation system
The capabilities of the automation system you use will influence how you present genre information to students and staff. Since organizing libraries by genre is becoming more popular, new features are being developed to better support genre-organized collections. It is important that the genre information is visible to students/staff on the search results screen. Consult your library automation system vendor for their recommendations on displaying genre information in their system.

Plan and prepare the physical library space

It is important to plan how you will arrange the new genre sections in your library. Ask yourself these questions:

- How do my existing traffic patterns in the library influence my genre locations?
- Do I need to create new traffic patterns?
- How does reorganizing my collection by genre affect my shelf space?
- With your collection reorganized, what kind of signage do you need to help students and staff find what they're looking for?

Plan and prepare the work of flipping the collection

The work of flipping the collection into genres is often described as the scariest part of the project. You are removing every book from its current shelf location and moving it to a new location within its target genre.

The following are considerations to include in your plan:

Time and timing:
- Is there a deadline for having the project completed? What drives this deadline?
- What hours can work be performed?
- Will books be in circulation during the project? How will books in circulation be handled?
- Can the library be shut down? If so, for how long?

Workspace:
- What space is available to work in? What space is needed?
- How close is the work space to the books?
- What is needed in the work space (tables, chairs, network access, air conditioning/heat, lighting)?

Staffing:
- Who will perform the work (volunteers, student helpers, paid workers/temp workers, other librarians in the district)?
- What level of commitment is required? How is that commitment maintained through the duration of the work?
- Who has decision authority for resolving issues or answering questions?

Tools: Book carts, computers, bookends, boxes

Supplies: Genre labels, color labels/protectors, Post-it notes, markers, pens, tape, shelf markers, new signage

Choose an approach

There are two general approaches to perform the work of flipping the collection to genre: you can do it gradually over a period of time or you can do it all at once. For either choice, please see our Genre Planning Checklist to help you organize and execute your library flip.

The "work over time" approach

This approach requires fewer resources than the all-at-once approach, and is typically influenced by funding and available staffing. There are many articles, blogs and videos on the internet from others who have genrefied a library. Following is a general sequence of activity to use as a starting reference.

Follett strongly encourages you to research how others have done this and build an approach that works best for you and your library. Unless indicated otherwise, each step can be completed as an independent activity leading up to the work of reorganizing the collection into genres.

The "all at once" approach
It is possible to label and reorganize into genres all at once. This requires more planning and coordination. The benefit is less disruption to providing library services overall. This is the general approach Follett uses when delivering genre-related services on-site with a project team.

There is a lot of activity happening at the same time. Following is a general sequence of activity to use as a starting point. Follett strongly encourages you to research how others have done this and build an approach that works best for you and your library.

Regardless of which approach you choose:

1. Start with the largest genre you have. Clear the estimated number of shelves you calculated for that genre. Using boxes or available surface areas, sort the copies being removed into their indicated genres as shelves are cleared.
2. After the shelves for that genre are cleared, continue to work through the collection pulling all copies in that target genre.
3. Route the copies for the target genre to a workstation, applying whatever means needed to indicate the genre on the copies. Do not mix genres at a workstation.
4. After the genre is indicated, the copies can be shelved in their new genre location.
5. As you complete one genre, move on to the next largest genre and repeat the process. Continue this until all books in the collection reflect their target genre and the copies are organized on the shelves by their genre. If you have books still in circulation, process them into their new genre location as they are returned.

Planning Your Library Space

It is important to consider how you will arrange the physical collection in your library. As with other aspects of this process, Follett recommends your decisions about your library space be driven by your genrefication objectives. Following are some questions about your library space that can help you with your planning.

- **What are the existing traffic patterns in the library?**
  Think about your traffic paths through the collection. How do they influence where you will locate your genres?

- **Do you want to change existing traffic patterns or create new traffic patterns?**
  The location of popular genres can influence traffic patterns in the library. Think about what genres you want to promote, which genres are in regular demand, and if you want to change the flow in your library.

- **How does reorganizing my collection by genre affect my shelf space?**
  Where you locate the genres and how much shelf space they require is an important part of planning. Adjusting the collection on the shelves is very time-consuming. As you shelve the collection, you want to avoid having to shift the collection on shelves as much as possible. Follett has devised a way to estimate where your genre sections will fit on your shelves. The result is only an estimate, but it can help minimize the amount of shifting.

This section of the guide includes information on the following:
- Genre-organized shelf planning
- Shelf-space calculations
- Indicating genre on the shelves
- Library signage

Genre-organized shelf planning
Here are some useful tips about shelf planning:
- Use sticky notes to label shelves with genres as a visual aid in planning the layout of the collection by genre. Sticky notes can easily be repositioned as your layout plan is defined.
- Measure your shelves. Standard library shelves measure 46 inches wide. Most libraries have some shelves of varied lengths. Measure and document how many shelves of each length you have and where they are located.
- Consider how much open space you want to have on your shelves. A common target is to plan to fill your shelves 75% full. This allows insertion of new materials in the future without the need to adjust your collection to make room. Some libraries do not have enough space to accomplish this. For those situations, identify a realistic target for your library that you will use in your planning.
- Different genres require different amounts of shelf space. Science Fiction genre books are generally thicker than Graphic Novels and thus have a higher "inches per book" requirement for space use. This is very important to consider while planning your genre locations in your library.

Shelf-space calculations
Collecting some information about your collection is critical to estimating the locations of genres in your library. The information is aided by using the sticky notes to visualize which shelves will house which genres. The following details the steps to perform some simple calculations to accomplish this.

Step 1: Determine how full you want your shelves to be. A 46-inch shelf that is 75% full uses 35 inches of space for books. Where shelves differ in width or where you do not have space for 75% shelf use, use the information for your situation to determine how much book space you have on your shelves. Noting where any off-sized shelves will be helpful in later steps. Noting the size on sticky notes can help with this activity.

Step 2: Determine the average "inches per book" for each of your genres. To determine this, collect a good-sized representative sample of titles from each genre. Position them as they would be on a shelf, between bookends, and measure how many inches of space they use. Divide the number of inches by the number of books and you get the average "inches per book" for that genre. Note this number for use in future steps.

To aid this process, Follett has collected data on how many inches of space a book consumes, on average, within several common genres in library collections. This data reflects measurements from multiple libraries for the indicated genre. We provide this data as a reference to assist in your calculations.

Since every library collection is different, we suggest you collect some data from your collection for improved accuracy. To do this, collect and organize a random sample set of books from the genre.

Count how many books there are and measure how many inches of space they consume on a shelf. Divide the space consumed by the number of books to get the average inches per book value. This value is used in the next steps to help estimate the shelf space the genre will require.

Elementary School Genres				
Genre	Average Inches per Book	# of Books 46" Shelf @ 75% full	# of Books 34" Shelf @ 75% full	# of Books 28" Shelf @ 75% full
Adventure	0.7589	45	34	28
Animals	0.3925	88	65	54
Biographies	0.4104	84	62	51
Fairy Tales	0.4670	74	55	45
Fantasy	0.9251	37	28	23
Graphic Novel	0.4517	76	56	46
Historical Fiction	0.7114	48	36	30
Holiday	0.4620	75	55	45
Humor	0.5870	59	43	36
Math (Non-Fiction)	0.3182	108	80	66
Mystery	0.6644	52	38	32
Folklore	0.8624	40	30	24
Picture Books	0.4359	79	58	48
Realistic Fiction	0.7061	49	36	30
Scary Stories	0.6426	54	40	33
Science Fiction	0.7180	48	36	29
Spanish	0.3482	99	73	60
Sports	0.5596	62	46	38
Science (Non-Fiction)	0.4127	84	62	51

Middle School Genres				
Genre	Average Inches per Book	# of Books 46" Shelf @ 75% full	# of Books 34" Shelf @ 75% full	# of Books 28" Shelf @ 75% full
Adventure	0.7894	44	32	27
Fantasy	1.1566	30	22	18
Graphic Novel	0.6492	53	39	32
Historical Fiction	0.9097	38	28	23
Horror	0.8572	40	30	24
Humor	0.8027	43	32	26
Mystery	0.9343	37	27	22
Realistic Fiction	0.9023	38	28	23
Science Fiction	1.1186	31	23	19
Sports	0.9023	38	28	23

High School Genres				
Genre	Average Inches per Book	# of Books 46" Shelf @ 75% full	# of Books 34" Shelf @ 75% full	# of Books 28" Shelf @ 75% full
Adventure	1.1616	30	22	18
Dystopian	1.1761	29	22	18
Fantasy	1.2549	27	20	17
Graphic Novel	0.7584	45	34	28
Historical Fiction	1.0372	33	25	20
Horror	1.1528	30	22	18
Humor	0.9840	35	26	21
Mystery	1.0265	34	25	20
Poetry	1.0380	33	25	20
Realistic Fiction	0.9643	36	26	22
Romance	1.0417	33	24	20
Science Fiction	1.2101	29	21	17
Sports	0.9171	38	28	23

Step 3: Determine how many copies exist in each genre. Calculate the number of inches of shelf space required for that genre by multiplying the number of copies by the average "inches per book" value for that genre.

The Follett Genre Collection Report can help estimate how much shelf space a genre will require. The Genre Collection Report is mentioned in our "Basic Steps for a DIY Genrefication Project" document. It is a spreadsheet tool used to map the copies of your collection into your target genres. Through this tool you can sort the list by genre and calculate how many copies are in that genre. Using the number of copies in the genre and the average "inches per book" value for the genre, you can calculate an estimated amount of shelf space a genre will require. Further calculations based on your shelf sizes then estimate how many shelves the genre requires.

The following is an example of estimating the required shelf space for a genre:
- The library shelves are 34 inches wide.
- The desire is to have shelves 75% full. A 34-inch shelf, 75% full, has 25.5 inches of space for books.
- The Genre Collection Report indicates the Fantasy genre includes 1,559 books. Sample book measurements indicate an average thickness of 1.090 inches per book.

Calculations:
Number of books in genre X Inches per book = Inches required for books in genre.
1,559 X 1.090 = 1,700 inches of books.

Inches per book ÷ Available book space per shelf = Number of shelves to hold the genre.
1,700 ÷ 25.5 = 67. It will take approximately 67 shelves to hold the Fantasy books.

Step 4: Using the shelf estimate you just calculated, write the genre name on sticky notes and apply to the shelves for that genre. Repeat this step for each genre until all genres are reflected on your shelves. This lets you visualize your library organized by genres and adjust as you need. Moving the sticky notes around is much easier than adjusting shelves of books later. Follett has found it generally easier to work from the largest genre to the smallest when doing this. Having the sticky notes on the shelves can also help with coordinating workers to shelve the books correctly.

Follett School Solutions is here to help. Call your Sales Representative or a School Support Specialist with any questions.

Indicating genre on the shelves
Students and staff need to be able to find what they are looking for. It is important to clearly identify the genres on the physical materials. Common approaches include the use of genre labels, color association with genres and genre call number prefixes.

Genre labels and Color Labels:
Each genre has an identifying label design that is applied on or near the spine to indicate which genre that copy is in. Some libraries choose to create their own labels and design. There are many options for labeling books: Follett Genre labels, Demco Genre labels, and colored label protectors. Please check follettlearning.com to explore all options.

Genre call number prefixes:
This approach indicates the genre or a genre code as a prefix in your copy call number. Note that this can increase the physical work required to genrefy, since you must add the prefix values to your automation system data, print new spine labels and apply these labels to the collection.

Library signage
With your collection reorganized, students and staff need signage to find the materials they are looking for. Signage is important!

What kind of signage do I need? Common needs include poster/wall signs, genre section signs, and individual shelf signs. If you are using genre codes, such as a call number prefix, consider providing a reference table by your workstations.

Using the Genre Collection Report

The Genre Collection Report is a valuable tool from Follett that aids in the planning, genre mapping and work execution of a library genrefication project. We recommend that you have your account set up with your desired genres first, as this will enable us to recommend genres for you to use at the title level.

Elements of the report

The lines
Each line in the spreadsheet reflects a copy that is in the MARC file submitted to Titlewave for analysis. Where there is more than one copy of a title, there is a line for each copy. Each line will have a unique barcode and possibly call number if any copies have differing call numbers.

MATCHED	FLRID	BISACS	SUBJECTS	CCSSTAGS	My Genre
Y	05379W1	JUVENILE FICTION / Family / General (see also headings under Social Themes);JUVENILE FICTION / People & Places / United States / General;JUVENILE FICTION / School & Education;JUVENILE FICTION / Social Themes / Death & Dying;JUVENILE FICTION / Social Theme	Asperger's syndrome Fiction.;Death Fiction.;Empathy Fiction.;Family life Virginia Fiction.;School shootings Fiction.;Schools Fiction.;Virginia Fiction.	Disabilities & Disabled Persons;Family;Grief & Loss;Making Connections (Comprehension);Realistic Fiction;Reluctant Reader	Realistic Fiction
Y	05379W1	JUVENILE FICTION / Family / General (see also headings under Social Themes);JUVENILE FICTION / People & Places / United States / General;JUVENILE FICTION / School & Education;JUVENILE FICTION / Social Themes / Death & Dying;JUVENILE FICTION / Social Theme	Asperger's syndrome Fiction.;Death Fiction.;Empathy Fiction.;Family life Virginia Fiction.;School shootings Fiction.;Schools Fiction.;Virginia Fiction.	Disabilities & Disabled Persons;Family;Grief & Loss;Making Connections (Comprehension);Realistic Fiction;Reluctant Reader	Realistic Fiction
Y	17363Q5	JUVENILE FICTION / People & Places / United States / General;JUVENILE FICTION / Social Themes / Friendship	Friendship Fiction.;Polish Americans Fiction.	Friendship;Realistic Fiction	Realistic Fiction
N					** Book in Hand
Y	24698L6	JUVENILE FICTION / Art & Architecture;JUVENILE FICTION / Family / General (see also headings under Social Themes);JUVENILE FICTION / Family / Siblings;JUVENILE FICTION / People & Places / United States / General	Brothers and sisters Fiction.;Connecticut Fiction.;Family life Connecticut Fiction.;Museums Fiction.;Vacations Fiction.	Family	Realistic Fiction
Y	38223V7	JUVENILE FICTION / Animals / Dogs;JUVENILE FICTION / Family / Siblings	Brothers and sisters Fiction.;Dogs Fiction.	Classic Literature;Mystery	Animal Tales

The columns

Each column has an identified purpose (see table). All data comes from the MARC records submitted to Titlewave for analysis.

Column Heading	Description	Source of Data
#	Original sort order number; added by Follett for this spreadsheet	--
CALLNUM	Copy Call Number	Customer's MARC
BARCODE	Barcode Number	Customer's MARC
BUCKET	In the TitleWise analysis setup, classifications and buckets are set up per call number prefix grouping. This field reflects those selections. When nonfiction is included, the bucket will reflect the Dewey section for the title.	MARC/Titlewave
TITLE	Title reflects the data in the MARC record	Customer's MARC
AUTHOR	Author reflects the data in the MARC record	Customer's MARC
MATCHED	Matched means the MARC title matched a title in Titlewave. Titles that are matched can display data in the remaining column headings.	MARC/Titlewave
FOLLETT NUM	Follett's product number for the title	Titlewave
BISAC	The Book Industry Standards and Communications Category provided by the publisher for the title	Titlewave
SUBJECTS	Library of Congress Subject Headings for the title	Titlewave
FOLLETT TAGS	Follett applied tags reflecting genres, subjects, and themes	Titlewave
PRIMARY GENRE	Primary Follett Genre of the title applied by Follett	Titlewave
SECONDARY GENRE	Secondary Follett Genre of the title applied by Follett	Titlewave
CUSTOMER CHOICE	Blank or the Customer's Genre. If you have a Genre Profile that is mapped to Follett Genres, the system can pre-populate the customer's genre.	Titlewave
THICKNESS	Thickness of title in millimeters. This information can help when planning shelving space.	Titlewave
PUBYEAR	Publication Year	Titlewave
INTEREST LEVEL	Follett Interest Level Range	Titlewave
LOW AGE LEVEL	Follett Low Age Level	Titlewave
HIGH AGE LEVEL	Follett High Age Level	Titlewave

ATOS READING LEVEL	ATOS® (Advantage -TASA Open Standard) Book Level – Accelerated Reader data is provided by Renaissance Learning	Titlewave
RC READING LEVEL	Reading Counts Reading Level – data provided by Houghton Mifflin Harcourt	Titlewave

How to use the Genre Collection Report

One of the more challenging tasks when organizing a library by genre is defining which genre the title belongs in. The Genre Collection Report lets you see information about a title that is helpful in making this determination.

A large portion of a collection can be genre-mapped from the Genre Collection Report, without pulling individual titles from the shelves to review. However, there will be titles that require getting the book in hand, looking it over and reading about the story to decide.

To use the Genre Collection Report:
1. Always save a backup copy of your Genre Collection Report spreadsheet. Doing so will prevent the loss of a large amount of work due to an error.

2. For each line, review the information provided and compare them with the genres you have identified you will use in your library. The information in the BISACS, SUBJECTS and CCSSTAGS columns will reflect the themes of each title. Type the destination "genre" into the cell for that line in Column L.

3. For the titles where you're unable to determine a genre without looking at the book, you can highlight the line and place text in column L to indicate the need to pull the book for review. Doing this makes it easy to sort the list by genre, then Call Number, and combine all the books to pull together, providing a list to work from. In the example provided on Page 11, the yellow highlight and text "**Book in Hand" is used to indicate one of these titles.

   Note: Should you encounter a title or line you are unsure about, flag it as one needing hands-on review. There are many ways to flag these lines, including shading the line with a color fill, making it easy to find later. The Call Number in the line makes it easier to retrieve that title from the shelves later. Continue this process until all lines in the Genre Collection Report have been mapped to a genre.

4. The Genre Collection Report is provided as a spreadsheet to take advantage of the filtering and sorting capabilities available. How you use the Genre Collection Report from this point can vary based on your approach to reorganizing the collection into genres.

   - Filter the list for titles that failed to match the Follett Database. Now you can easily find those titles on the shelves and determine which genre they map to.
   - Sort the list by Genre. Now you can count how many copies there are in each genre. This information can help you understand the size of each genre, plan shelf usage and plan the genre layout of your library.
   - Sort the list by Call Number. The list can be used to go through your shelves and apply your genre identifiers on the individual titles before reorganizing the collection into genres.
   - Sort the list by Genre first, with a sub-sort of Call Number. The list can be used to shelve the copies within their genre, and then organized by Call Number within the genre.
   - Print individual pages of the list to assign tasks to workers or volunteers. The pages can help with organizing the work and tracking what has been completed.

The flexibility of being able to organize the Genre Collection Report information many ways makes it a valuable aid in a genrefication project.

Adding Genre Data to Destiny

This section provides instructions for populating genre data into the MARC records of Destiny.

Note: Before proceeding with these steps, all work of mapping your materials into their genres – including the shelving of the collection into their genre groups – should be completed. This is necessary to ensure accuracy.

The changes you make in your data are based on the materials on the shelf. There may be more than one way to accomplish some of the steps described. Also, steps presented are the easiest to describe using equipment most commonly available to all Destiny customers.

Create barcode list files

The first step in adding genre data to your Destiny records is to create a list of barcodes that are contained in each genre. This is accomplished by placing a laptop on a rolling cart and using a scanner to scan all the barcodes on the books in the genre into a text file. Follett recommends creating a separate file for each genre and do all the scanning of a genre on one laptop. You can scan multiple genres at the same time using multiple laptops and barcode scanners.

Equipment needed:
- Microsoft Windows® laptop computer with barcode scanner attached
- Rolling cart (such as an AV cart)
- USB flash drive (optional, if the laptop has internal storage)

1. Determine which genre will be scanned. Place the laptop on the movable cart and proceed to that area. Optional: Insert the USB flash drive into the computer.

2. Click the **Windows Start** icon in the lower-left corner of the Windows interface.

3. Click **All Programs** | **Accessories** | and select **Notepad**. The Notepad application opens.

4. In Notepad, click **File** | **Save As**. You will be prompted for the location you want to save the file. You can save it to the Desktop or, if using a USB flash drive, save the file to that location. For the **filename**, use the name of the genre you will be scanning. Click **Save**.

5. Click on the blank page in the Notepad application. The cursor should be at the top leftmost position. Begin scanning barcodes on the materials in that genre. The scanner should automatically insert a carriage return after the scan, so you end up with a list of barcodes numbers. Duplicate scans are not a problem, so if you are not sure you scanned a barcode, scanning it again causes no harm. If you are interrupted while scanning, save the file and turn a book sideways where you left off so you can easily resume scanning.

6. After you have scanned a shelf of books, save the file. This is done by clicking **File** | **Save** in the Notepad application. Pressing **Ctrl** + **S** on the keyboard at the same time will also save the file.

7. After you have scanned all the books in the genre, save the file again. You are now ready to scan the next genre. It's important to follow the next steps so you do not overwrite the file you just completed.

8. Open a new file in the Notepad application. This is done by clicking **File** | **New**. A blank page will open in Notepad. As before, click **File** | **Save As,** and choose the same location for this file to be saved. Be sure to use the next genre you are scanning as the **filename**.

9. Repeat these steps for each genre until all materials in all genres have been scanned into the file named for the genre.

10. After all genres have been scanned, collect the Notepad text files onto a single USB drive. You should have one file for each genre in your collection. Each file should contain all barcode scans for the materials in that genre.
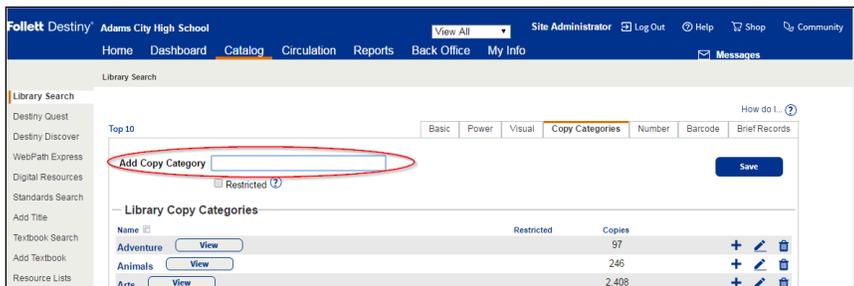
Create Copy Categories in Destiny

Next, we will populate your genres into the Copy Category field of your copy records in Destiny. Doing this groups your copies by the genre, including searching, producing bibliographies and reading lists, and promoting materials. Copy Categories can also be used to create historical collection statistics reports. We will also use the categories we add here to add your genres as Sublocations in Destiny. Sublocations display the Genre name on the search results displays in Destiny.

1. Log in to Destiny as a user that has Library Administrator or higher access rights.

2. Click the **Catalog** tab **> Library Search** option. Then click the **Copy Categories** sub-tab.
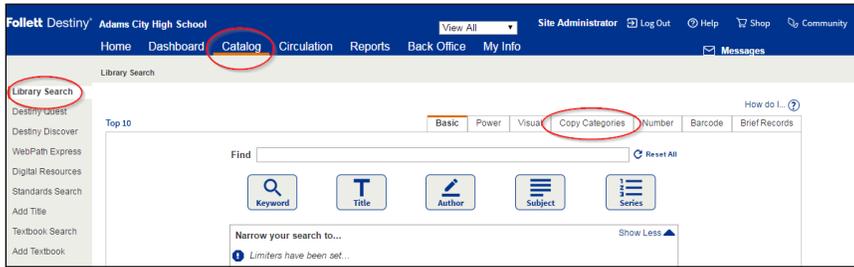
3. You will see the Add Copy Category display with the cursor in the **Add Copy Category** field. Type your first genre name. Immediately below the genre name you just typed, deselect the checkbox that says **Restricted**. Click **Save**.


4. Repeat these steps for each of your genres until all genres have a Copy Category created for them.

Assign Copy Categories to your copies in Destiny
Next, use the text files of scanned barcodes to assign the Copy Category genre to the copies in that genre. In your computer, insert the USB flash drive containing all the scanned text files to allow it to initialize. After it has initialized, confirm you can browse to and see the files on the flash drive.

1. Log in to Destiny as a user that has Library Administrator or higher access rights.

2. Click the **Catalog** tab **> Library Search** option. Click the **Copy Categories** sub-tab to the right half of the display.

3. Find your first genre in the **Library Copy** Categories listing. Click the **Plus sign** to the right of that genre name. This opens the **Add to "[Genre Name]" Copy Category** display.

4. In the **Select by** drop-down, select **Barcode List.**

5. In the **Select a barcode file** field, click **Choose File**. Use this pop-up to browse to the genre text file that aligns with the genre category name you are creating. Following these instructions, this location would be the USB flash drive you inserted into the computer at the beginning of this process. In this pop-up, select the barcode scan file that matches the **"[Genre Name]" Copy Category** you are working with. Be sure the barcode file and the genre name are the same genre. Click **Open**. The full

path to the file appears in the **Select a barcode file** field.
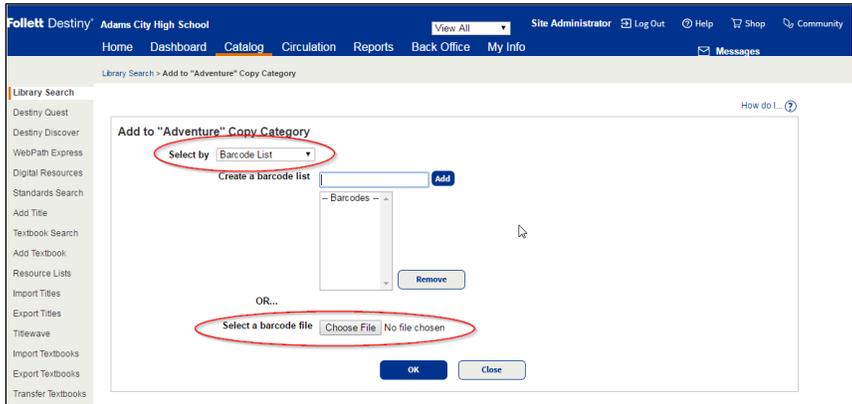
6. Click **OK**. A box indicates the number of copies added to this category. These copies now have this genre category assign to them.

7. Repeat these steps for the remaining genres, ensuring you select the correct barcode file that matches each genre until all genres are completed.

Add Genre Sublocation Values to Destiny

With the genre categories created, you can now use Destiny features to create genre sublocations on the copies so the genre name appears in search results. First, you must create all the genre sublocation names in Destiny.

1. Log in to Destiny as a user that has Library Administrator or higher access rights.

2. Click the **Catalog** tab **> Library Search** option.

3. Search for a copy:
   a. Click the **Basic** sub-tab to search for the copy by its **Title**.
   b. Click the **Barcode** sub-tab to search for the copy by its Barcode Number.
   c. Enter or scan in the Barcode Number.

4. Click the **Edit** icon [icon] to edit the copy.

5. In the **Sublocation** field, click the **Other** button.

6. In the **Add Sublocation** field, type the name of your first genre. Click **Save**.
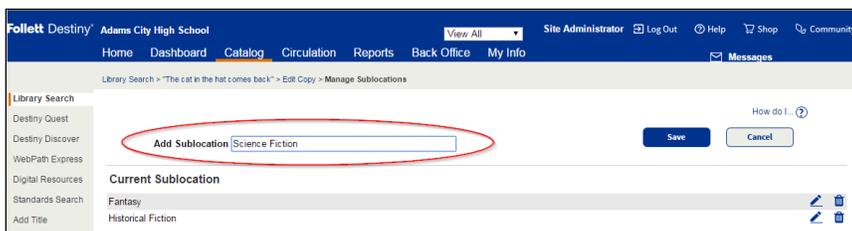

7. Repeat Steps 5-6 until you have added all your genre names as Sublocations. The Copy Edit page appears.

8. In the **Sublocation** field, click the **Sublocation** drop-down, and select the correct genre for this copy.

9. Click **Save Copy**.

Globally update Sublocations based on genre category

Now that the genre names are entered as Sublocation values, you can use Destiny's global update capabilities to quickly populate the correct genre Sublocation value on the copies based on the genre categories created earlier.

1. Log in to Destiny as a user that has Library Administrator or higher access rights.

2. Click the **Catalog** tab **> Update Copies** option.

3. Click the **Global Update** sub-tab.

4. In the **With** fields:
   a. Select **Category** from the first drop-down. Once you make this selection, the second field becomes a drop-down.
   b. Select your first genre category name from the second drop-down.

5. In the **Make** fields:
   a. Select **Sublocation** from the first drop-down. Once you make this selection, the second field becomes a drop-down.
   b. Select the same genre name as you selected in step 4b from the second drop-down.
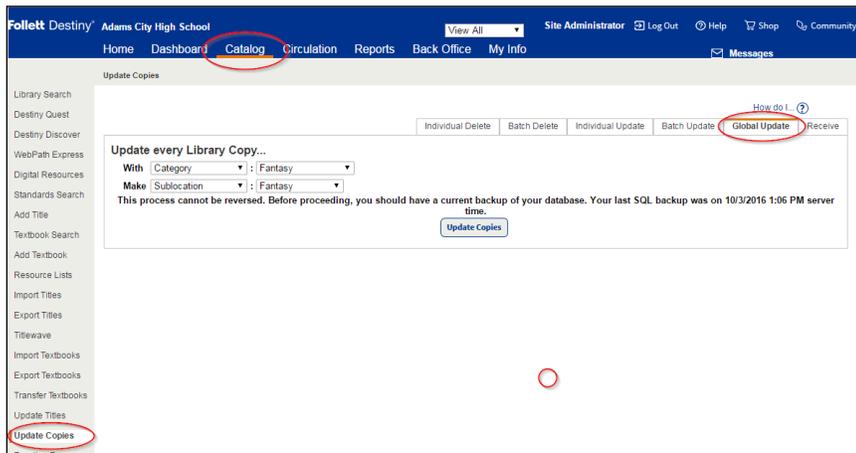
6. Verify that the genre values selected in both second drop-downs match. Click **Update Copies**. You will see a warning that the process cannot be reversed. If you want to proceed, click **Yes**.

7. The Job Manager page lists the job as **Global Update Copies**. The status will indicate **Pending**. Click the **Refresh List** link near the top center of the display. When the job status shows **Completed**, you can click the **View** link to see the results of the job.

8. A report appears, indicating the number of copies that were updated and if any of the copies to be updated were skipped. Use this report to verify that all the copies were updated. If any were skipped, the details about which record was skipped and the reason appear below the **Summary** information. You may need to resolve any issues and assign a genre Copy Category and/or Sublocation to a single copy. The next section explains how to do this.

Assign a genre Copy Category and Sublocation to a single copy

You may need to assign a genre Copy Category and/or Sublocation to a single copy in your collection.

1. Log in to Destiny as a user that has Library Administrator or higher access rights.
2. Click the **Catalog** tab **> Library Search** option.
3. Search for the copy you want to add the genre information to.
   a. Click the **Basic** sub-tab to search for the copy by its Title.
   b. Click the **Barcode** sub-tab to search for the copy by its Barcode Number.
4. Click the **Edit** icon to edit the copy.

To add a genre Copy Category:
1. In the Copy Categories section, click **Update**. Find the genre name you want to assign to this copy in the list. Towards the right of the display, select the **Assigned** checkbox aligned with that genre name.

2. Click **OK**. That genre name now appears in the Copy Categories section.

To add a genre Sublocation:
1. Find the **Sublocation** drop-down towards the bottom of the display. Click the drop-down field.

2. Select the desired genre name you want to assign to this copy.

3. Click **Save Copy**.

If the desired genre name is not in the list of values in the Sublocation drop-down, click **Other**.
1. In the **Sublocation** field, click **Other**.

2. In the **Add Sublocation** field, type the name of the genre you want to add. Click **Save**.

3. The genre name appears in the **Sublocation** drop-down.

4. Click **Save Copy**.

Genre Planning Checklist

Plan			
Task	**Person(s) responsible**	**Date completed**	**Notes**
Define the goals or accomplishments that drive why you are reorganizing the collection by genre.			
Speak with other librarians to determine best practices and problem areas.			
Define what in the collection you will reorganize by genre.			
Define what genre groupings you will use. Consider any unique needs you want to address.			
Define how you will identify the genres on the materials and shelves.			
Define the organization and location of the genre groupings in the library.			
Define the plan and process you will use to manage and perform the physical work of reorganizing the collection.			
Consider if you can benefit from any of the Follett Managed Genrefication Services.			

Prepare			
Task	**Person(s) responsible**	**Date completed**	**Notes**
Use goals/accomplishments to guide decision-making throughout your preparation.			
Weed the collection (can be done up to a year in advance).			
After weeding, submit your data to Titlewave and request the Genre Collection Report.			
Use the Genre Collection Report to map your collection into your defined genres.			
Obtain labels, color protectors, signage or other materials used to identify the genres on the shelves.			
Temporarily label library shelves to reflect where the genres will be after the collection is reorganized. Adjust as needed.			
Create instructions to guide volunteers/workers in the tasks to be performed.			
Obtain commitments from volunteers/workers to perform the work.			
Organize the physical work space to support volunteers/workers in completing the work.			
Obtain any equipment and supplies needed to perform the work.			
Schedule the work.			

Execute			
Task	**Person(s) responsible**	**Date completed**	**Notes**
Document (at least in outline form) all the aspects of your plan.			
Use your plan, decisions and tools like the Genre Collection Report to aid in organizing the work as it progresses.			
Frequently spot-check the work results. Make sure the workers are completing the work correctly. Coach and train as needed.			
Once the collection is reorganized by genres, populate the genre data into Destiny.			
Put your signage in place so students and staff can find what they are looking for.			
Celebrate and promote the changes and benefits with your library patrons and school staff.			
Track the library activity, looking for changes resulting from the new organization of the collection.			

Popular Fiction Genres, Titles and Authors

This section is a guide for individuals organizing a library collection by genre groupings. The genres reflected are examples of popular genres used in the grade levels indicated.

Reviewing these characteristics can help in deciding into which genre a title best maps. Genre selection can be very subjective and for some books there may be more than one genre to consider for a title. The specifics of your collection and curriculum can equally influence your decisions.

For each genre, there is:
- A brief description of titles that likely map into this genre
- The common characteristics found in titles that likely map into this genre
- Examples of popular titles/authors that are often found in the genre

Adventure
Common characteristics:
- Epic journeys or quests
- Action/danger/violence
- Survivals

Example titles/authors:
- *Nim's Island* by Wendy Orr
- *The Call of the Wild* by Jack London
- *If We Survive* by Andrew Klavan

Animal Stories
Common characteristics:
- Often stories where the animals can talk or wear clothes
- Often stories about a person's relationship or adventures with an animal

Example titles/authors:
- *Clifford the Big Red Dog* series
- *Curious George* series

Classics
Common characteristics:
- Published frequently, including internationally
- Frequently used texts in the classroom
- Frequently adapted

Example titles/authors:
- *Johnny Tremain* by Esther Forbes
- *The Adventures of Huckleberry Finn* by Mark Twain
- *Charlotte's Web* by E.B. White

Dystopian
Common characteristics:
- Often takes place after an apocalyptic event in the future
- Obstacles include attacking aliens, robots, zombies, etc. and/or survival in an apocalyptic wasteland, including disease outbreaks, or totalitarian governments
- The protagonists' goals are usually to help themselves and others survive or overthrow the antagonists

Example titles/authors:
- *Empty World* by John Christopher
- *Divergent* series by Veronica Roth

Fantasy
Common characteristics:
- Epic quests
- Good versus evil
- Imaginary worlds and imaginary creatures
- Magic
- Human characters that interact with nonhuman characters
- Books featuring a monster from mythology, such as a minotaur or harpies, as a main plot element without any mention or reliance on their birth mythology

Example titles/authors:
- *The Harry Potter* series by J.K. Rowling
- *Where the Mountain Meets the Moon* by Grace Lin
- *The Fellowship of the Ring* by J.R.R. Tolkien

Graphic Novel
Common characteristics:
- Can be one story or a story collection focusing on a particular characters or settings
- Can feature multiple authors and illustrators
- Often feature superheroes
- Original work or collection of previously published stories from comic magazine issues

Example titles/authors:
- *The Unbeatable Squirrel Girl* series
- *Captain America* series
- *Bleach* series by Tite Kubo

Historical Fiction
Common characteristics:
- Set in the past
- Fictional characters in a real setting
- Notable historical figures as characters
- Historical events used as plot elements

Example titles/authors:
- *Sarah, Plain and Tall* by Patricia MacLachlan
- *Bud, Not Buddy* by Christopher Paul Curtis
- *The Glory Field* by Walter Dean Myers

Horror/Scary Stories
Common characteristics:
- Death/the afterlife
- Suspense
- Unexpected incidents/surprise
- Dark and evil forces
- May have characters that are zombies, vampires, ghosts, werewolves, monsters, etc.

Example titles/authors:
- *Coraline* by Neil Gaiman
- The *Goosebumps* series by R.L. Stine
- *The Graveyard Book* by Neil Gaiman
- *Miss Peregrine's Home for Peculiar Children* by Ransom Riggs

Humor

Common characteristics:
- Humor may be blatant or subtle
- Outrageous situations and characters
- Parodies of existing books or other media
- Contains frequent jokes

Example titles/authors:
- *Captain Underpants* series by Dav Pilkey
- *Diary of a Wimpy Kid* series by Jeff Kinney
- *Middle School* series by James Patterson

Mystery

Common characteristics:
- Missing persons/objects
- Clues/evidence
- Crime/murder
- Detectives/investigators/amateur detectives
- Suspects

Example titles/authors:
- *39 Clues* series by Rick Riordan
- *Flush* by Carl Hiaasen
- *Paper Towns* by John Green

Mythology

Common characteristics:
- Includes gods, heroes, monsters and other elements from mythology of any culture
- May feature stories taking place during the time of early mythology or contemporary characters dealing with characters and elements from mythology

Example titles/authors:
- *Percy Jackson* series by Rick Riordan
- *Hunters of Chaos* series by Crystal Velasquez
- *Hit the Road, Helen!* by Kate McMullan

Poetry

Common characteristics: Picture books that rhyme or juvenile one-story poems or retellings of famous poems

Example titles/authors:
- *Martin Rising: Requiem for a King* by Andrea Davis Pinkney
- *Out of Wonder: Poems Celebrating Poets* by Kwame Alexander
- *The Firefly Letters* by Margarita Engle

Realistic Fiction
Common characteristics:
- Believable situations featuring fictional characters
- Tackles issues that reflect contemporary life

Example titles/authors:
- *Because of Winn-Dixie* by Kate DiCamillo
- *Wonder* by R.J. Palacio
- *The Fault in Our Stars* by John Green

Romance
Common characteristics:
- Emotionally satisfying and/or optimistic conclusion
- Love triangles
- Forbidden love

Example titles/authors:
- *A Very Large Expanse of Sea* by Tahereh Mafi
- *Everything, Everything* by Nicola Yoon

Science Fiction
Common characteristics:
- Alien life, robots, machines
- Space exploration
- Imagined science/technology concepts
- Set in outer space, a fabricated world or different planets/universes

Example titles/authors:
- *The Wild Robot Escapes* by Peter Brown
- *Leviathan* by Scott Westerfeld
- *Scythe* by Neal Shusterman

Sports Fiction
Common characteristics:
- Main character participates in the sport
- Often has the main character faced with a moral issue related to the sport
- Antagonists play or are involved with the sport

Example titles/authors:
- *Jake Maddox JV* series
- *Football Genius* by Tim Green
- *Booked* by Kwame Alexander

Questions and Answers

As you begin thinking and planning about how to categorize your collection, here are some questions and answers you might find helpful.

Our library has a lot of series titles. Our students like to read through the series of popular titles. How do I make it easy for them to find series titles when organized by genre?

Look at your challenge and ask, "What is the simplest solution that addresses the need?" At Follett, we have arranged series titles in order within the main genre. Consider the advantages and disadvantages of that approach against your driving purposes. An alternate approach is to create a series genre section located directly next to the main genre. For example, a library with a "Science Fiction" genre section would define a "Science Fiction Series" genre section right next to it. If a driving purpose is to make it easier for students to find the materials they want, consider an approach that best supports that goal.

Our library has a lot of foreign language materials. How do I organize foreign language materials in genres?

In a manner similar to the previous Series situation, consider your driving purposes and what organization of your Foreign Language titles best accomplishes what you want. Follett has used similar approaches for Foreign Language materials as we have for Series.

Our library serves students in Grades K-5. Our younger students like picture books. Our older students like chapter books. How do we organize the collection to meet both their needs?

We at Follett have seen Picture Books as their own genre section, separating them from chapter books, and we have seen Picture Books in the genre sections with the chapter books. If you have a particularly large Picture Book collection and choose to make them their own genre section, consider how to organize them within the genre section so students can find what they're looking for.