

SETTING UP YOUR SYSTEM FOR GENRES

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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.

Administration > System Setting > Custom Setting								
Custom Setting Normalization	EDI Code	Sound Definition						
Search Criteria copycollection								
Parameter ~	Value ~	Category ~	Locked	~	Description ~		Find	
CopyCollectionTypeToLocationInN	0						Edit	
EnableCopyCollection	1				Set the value to 1 to show local collection type		Cancel	
SiteBasedCopyCollectionType	1	OPAC	\checkmark		When value= 1,the copy collection type will be		More v	
Description Set the value to 1 to show	local collection	type in copy tab.				-		
Description set the value to 1 to show tocal collection type in copy tab.								

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.



Permission Description						Feature Description					
roup AssetAdmin	v	Enable	to add, e	edit, and/or d	elete cop	у	Enables the CC field in Catalog > Cata				
odule All	Y	recoras.					copy collection.				
Permission	~ Read	Add	Edit	Deleted	Scope		Feature		Edit		
Acquisitions						*	Allow Change Copy Call No	^	Save		
Administration							Allow Change Copy Collection		Refresh		
Assets							Relink Copy		More •		
Catalog							Shelf List				
Сору											
Issue											
Issue Copy											
Item	\checkmark	\checkmark		\checkmark							
Publisher											
Serial											
Circulation											
Digital											
Global Changes											
Help											
Inventory											

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.



Administ	ration > Library Setting > Configuration				- • ×
Module	All				
Search	genre			_	
Settings		~ Value			Edit
▲ OPAC				^	Cancel
⊿ Oth	ers (OPAC IV)				Refresh
١	Neb OPAC Search By Genre Enabled	\checkmark			More 🔻
١	Neb OPAC Search By Genre Match	Any Match	T		
١	Neb OPAC Search By Genre Order	13	*		
⊿ Ref	ine Search Type				
C	Genre Enabled	\checkmark			
(Genre Expanded				
C	Genre Order	2	*		
				-	
Setting De	scription				

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**.



Administra	tion > System Sett	ing > Parameters							_ = ×
Parameter	Genre								
#	Value				~	Default	~		New
1	Adventure								Edit
2	Animals							[Delete
3	Classics							[Refresh
4	Dystopian								Remove Picture
5	Fantasy								Preview
6	Genre							ſ	More v
7	Graphic Novel								
8	Historical Fiction								
9	Humor								
10	Mystery								
11	Realistic Fiction								
12	Romance								
13	Scary								
14	Science Fiction								
15	Sports								
16	Supernatural								
17	Western								
4								-	
Picture	drop files here to	o upload							
		Edit Genre			>	<			
		Genre	Fanta	sy					
					🗸 Defau	ilt			
				Save	Cancel				

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.
- 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.



Administr	ation > Library Setting > Configuration			_ = ×
Module Search	All copy default			
Settings		Value		Edit
⊿ Catalog				Save
Barc	ode Spine Label			Cancel
▶ Other	rs			More v
⊿ Othe	rs (Catalog II)			WOIG
A	dd Default Value For Copy Collection Type			
System			- 1	
			*	
Setting Des	cription			
When enab	led, new copies will have the copy collection type s	at as the item's collection type.		

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.



852 Field Mapping									
Format Type:	Genre								
		Subfield	SplitField	Subfield	SplitField	Subfield		Save	
Barcode							*	New	
Price								Edit	
CallNo								Delete	
Vendor								Cancel	
Location									
CircType									
CirculationDat	e								
Volume									
CopyNo									
Condition									
Notes									
Budget									
PONumber									
Status									
CollectionType	e								
Replacement	Cost								
LibraryID									
CheckinNotes									
CheckoutNote	s								
Genre		b					÷		