Categories (Library Manager)

Follett Shelf™ Integration

After you successfully complete the Follett Shelf integration you can:
- access Follett Shelf directly from Destiny when your login to Destiny is authenticated. There is a Follett Shelf button in the left panel in Library Manager (Basic and Power tabs) and Textbook Manager (Basic and Copy Categories tabs).

How do I manage and use categories?

Categories allow you to group your copies for many different purposes. These include supporting curricula, tracking vendors and funding sources, producing bibliographies and reading lists, and promoting special collections or new materials.

District catalogers can create and use their own categories as well. District categories are only visible at the district.

The Copy Categories list includes all your categories. To sort the list, click any column heading. Click again to invert the order.

To view the contents of a category, click View.
To assign copies to a category, click the plus icon.
To change the name of the category or restrict its viewing, click the edit icon. To delete a category, click the delete icon.

How do I create a category?
How do I assign copies to a category?
How do I remove copies from a category?
How do I delete a category?
How do I add a category to a Resource List?
How does Import Titles handle incoming categories?
How does Export Titles handle outgoing categories?
What are some ways I can use a copy category?

How do I create a category?

Open the Copy Categories tab of Library Search, Media Search, or Textbook Search, in the Catalog.
1. Next to Add Copy Category at the top of the page, enter a unique name of up to 30 characters.
2. If you want this category available to your patrons, clear the Restricted check box.
3. Click Save.
The copy category appears in the Copy Categories list.
You can also create categories when adding or editing copies by clicking Update adjacent to Copy Categories on the copy record.
Except for any categories created during a MARC import, there are no default or built-in categories.

How do I assign copies to a category?

You can assign copies to categories in either of the following ways:

A. From Copy Categories, click the plus icon.
   Or
   If you have opened the category, click Add to this category.
   On the Add Copies to Category page that appears, you can add the contents of a Resource List or specify a date range that the copies were added.
   As a school library or textbooks manager, you can also upload a barcode file or create a list of barcodes.
   Please note that adding the contents of a Resource List adds only the copies in your collection, not all the copies of a shared title.
B. In Add Copies or Edit Copy, click Update adjacent to Copy Categories.

In Library Manager or Media Manager, you have three additional methods:

A. Duplicate icon an existing copy. Destiny® automatically includes any categories the duplicated copy has.
   If you are a district cataloger, Destiny duplicates your district categories; if you are a school library manager, Destiny duplicates your school categories.
B. In Individual Update in Update Copies, select a category and scan the copy barcodes. For example, if you maintain a category for items purchased using funds from Title VI, you can quickly assign an entire box of items to the appropriate category.

As a district cataloger, you can assign categories from any school (not the district). Destiny displays the categories belonging to the school you choose.

C. In Global Update in Update Copies, you can move copies from one category to another.

As a district cataloger, you can update copies based on school categories (not district categories).

How do I remove copies from a category?

To remove certain copies from a category

1. In Copy Categories, click View adjacent to the category.
2. On the Search Results page that appears, click Show More icon beneath the title.
   Note: This title may have additional copies that are not in this category. To view all the title's copies, click Details and then See all....
3. To remove all the copies of this title from the category, click Remove All.
   To remove a particular copy, click Remove.

Another way to remove all the copies is to delete the category (see next).

How do I delete a category?

In Copy Categories, click Delete adjacent to the category, and then click Yes on the confirmation message.

Destiny first removes the category from the copy records, and then deletes the category itself.

How do I add a category to a Resource list?

1. If desired, add a new List in Resource Lists.
2. Open Copy Categories.
3. Click View All adjacent to the category.
4. Verify that the correct List appears next to Selected List.
5. To add all the titles and all their copies, click Add page.
   To add an individual title and all its copies, click its Add to this List.

How does Import Titles handle incoming categories?

Destiny accepts incoming categories in 852_xFSC@b subfields. The subfield is repeatable and contains a number or name of up to 30 characters. There is no limit on the number of categories per copy.

If an incoming copy contains a category name or number that does not already exist, Destiny creates a category and enters the name or code number from the MARC record as the category name. After the import, you can change this name to something meaningful to your collection.

You can also assign the incoming copies to existing categories in the Assign Copy Information section of Import Titles.

How does Export Titles handle outgoing categories?

You can assign a copy in your collection to any number of categories. Upon export, however, only the first 8 categories are included in the MARC record.

What are some ways I can use a copy category?

Supporting curricula

By using categories to provide lists for your students, you can quicken their search process.

For example, you could create a category for the books on Mr. Smith's biology class reading list. If you make the category unrestricted, the students can view its contents on the Copy Categories tab. You could also print it out. The list can then be distributed to Mr. Smith's students, who can take it to the shelves to find the books on their reading list.

Another example of a curriculum-based category might be Books about presidents. You can selectively assign books that contain presidential biographies to this category. When students are searching for report topics, the category can save them time when finding the books they need.

For younger students, you can create an appropriate category and then configure a Visual Search button to display its contents.
In Textbook Manager, you can create copy categories for departments or special needs, or group together student materials or lab kits.

Maintaining your collection

Globally updating copies

In Global Update in UpdateCopies, you can change the contents of one of the following fields of every copy in a category: Call Number Prefix, Category, Circulation Type (not available for Media Manager), Description, Funding Source, Sublocation, or Vendor. (not available for Textbook Manager)

Exporting by category

In Export Titles, you can export just the contents of a category. (not available for Textbook Manager)

Printing and reporting

**Generating a category statistics report**

You can limit the Collection Statistics - Historical report in Reports to the statistics for one or more categories. This allows you to monitor the use of your categories by your patrons. (not available for Textbook Manager)

**Printing copy labels** On the Library page of Reports, you have the option of printing barcode, spine, and pocket labels for just the copies in a category.

Generating a Title and Copy List

In Library Manager and Media Manager You can limit the report to the titles in one or all of your categories. If you choose all categories, the report groups the titles by category. If you include copies in the list, you can include the category names and the circulation statistics for each copy.

In Textbook Manager You can limit the report to the titles in one of your categories.

Using all the Resource List functions

Because you can add the contents of a category to a Resource List (and vice versa), you can take advantage of all the uses for the Lists.

For Library Manager or Media Manager, these include generating a bibliography or citation list, publishing or emailing the List, and exporting the records.

For Textbook Manager, these include publishing or emailing the List, transferring the textbooks, and exporting the records.

Please note that a Resource List helps you manage the title records and includes all their copies, while a Copy Category contains certain copies and their associated titles.