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Creating Alternative Collections & Cataloging for items outside of the Library:

The Genesis G4 Program is built upon the principles of library standards; however, our program allows for practically any item outside of books to be cataloged. G4 provides the ability to create a custom easy every day cataloging template to be made for anything that needs to be inventoried.

So, what does this mean? Simple answer; templates can be created for any item; Equipment, computers (iPads, Chromebooks, Textbooks, shop equipment, sports items) practically anyone can create cataloging of materials by filing in the blanks within one of these templates.

This document will illustrate using a request to catalog and circulate material items not found or kept within the library. LRMS when asked will create or show staff how to create the Special requested template for cataloging these unusual types of materials.

There are multiple areas that require adjustment to allow for non-library materials to be cataloged and circulated. These are:

1. Create custom cataloging template or templates
2. Create Holding codes to allow for circulation
    a. Special Circulation codes to identify these materials
    b. Create circulation periods (length of Time)
3. Create independent collections for these materials
    a. Create collection restrictions
4. Create Usernames and permissions for those who will use these special collection(s) with restriction to only their own collection and limited Circulation rights so not to allow for an accidental change to the library cataloged materials.

Set-up is the more intense part of managing any item to be cataloged and circulated within a library program, LRMS is always available to assist.

How to Create a Non-Library Special Collection:

For this example, we will select a School Band of uniforms and equipment, keep in mind this method can be extended to Maintenance tools, Sports, Textbooks, Technology equipment, Student equipment, Classroom collections, College Books, Law books, Special Author collection, Genealogy materials, Video/Media items, etc.
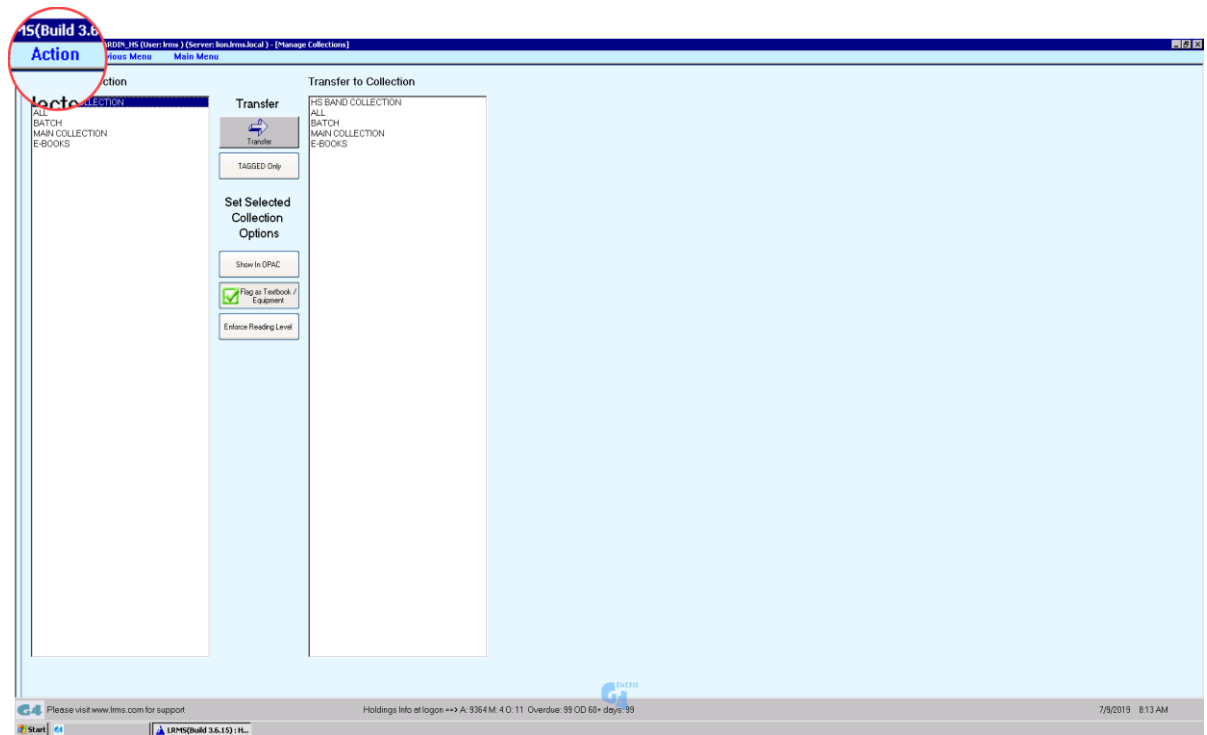
LRMS will want to know what your requirements are and we will assist you with reaching that goal.

Start by selecting Catalog Management from the G4 Main Menu/Back Office.

See Advanced Functions:

Select Manage Collections
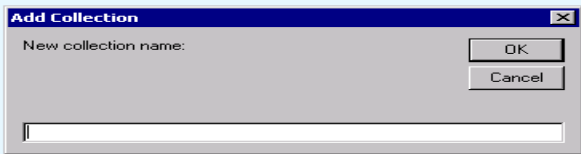
Select the "Action" menu

Select Add Collection

Add the Collection Name
Ex. HS Band Collection, do
not use any Special
characters such as *"/@ etc.

Upon completion Click the "OK" button, this will save the new collection to the list of G4 collections and will appear at the top of the list. Repeat this process to add additional collections.

G4 allows for the addition of multiple collections, adding of additional collections should be well thought-out, do not add collections that are never used or ageing because they are old archived collections that no longer server the library patron. Example some library may want to account for Lost books for the current year of operation which is fine and understandable, when moving to the next year run a report or spreadsheet of these Lost books to establish what items where lost and their value. Remove the items from this collection by deletion Through G4's "Mass Update" menu "Delete Entire Record".

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Once collections are created the option to restrict the use of adding cataloged items can be linked to a specific Username and Password setting within the "Advanced Settings – Manage Users". Here users can be added by assigning a G4 User name and Password with the applying of Permission's of "All Permissions" usually to Librarian Administrator to a more selective choice of allowed Permissions for non-administrators as shown.

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Let's establish a Custom Template:

Band Equipment Template

This is template building can be accomplished within the Catalog Management – Design Form Templates section of G4. When non-library Templates are designed, they will share certain common fields found within book cataloging, also there will be fields that are not commonly used within book cataloging which provides the design greater flexibility.

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Templates can include simple instruction as examples to assist the person who is cataloging by applying cataloging notes or examples behind each catalog description line. Templates when created properly will be intuitive so the fill in the blank fields are easy understood.

Band Uniforms Template

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All items that are cataloged do require identification, besides describing what is being cataloged it is necessary to create an identification number known as a barcode which can be printed on a label that is then attached to the item to allow circulation (Checkout or Check-in). This is accomplished in an area known as Holdings sometimes referred to as Copies.

Holdings contain the Barcode number that is assigned and also describes cost, owner, location and a circulation code that determines the period of time an item can be checked out to in days weeks months or long term to a specific calendar future date. For our band example let's say we have 7 (seven) identical Trumpets, G4 has a Multi-add feature within holdings that would allow one described item to automatically add all 7 items with a few clicks of the mouse (Pretty cool feature).

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Barcode Labels can be printed from the Labels and Cards menu of the library program, we suggest using the label printing option known as Dummy Labels. This type of label is basically a Generic label can contain up to four brief lines of information depending upon the size of the label being printed. Barcode numbers should not conflict with the number assignment used by the library for cataloging library materials. Example if the library has a standard of 13 or greater numeric digits in length 334031000031114.

Make your special collection numbering 4 numeric digits that is less (example starting with 1200). Your label scheme should never interfere or conflict with the library general book collections numbering, ask the Librarian.
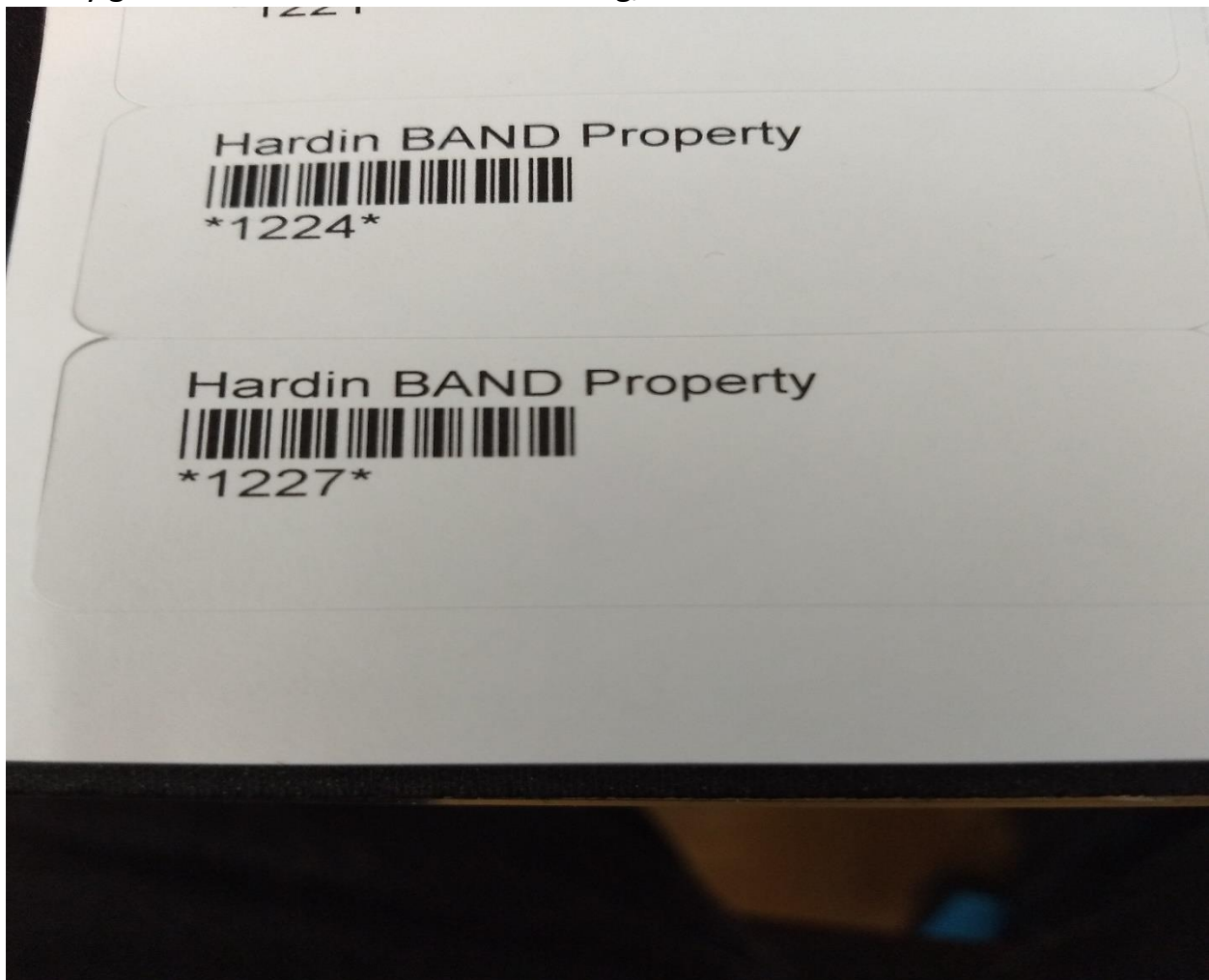
Create a method of how or where the barcode label is attached to the cataloged object, Standard label stock can be purchased as paper or as a foil label. Example a Uniform may be within a Garment bag. Tagging should be fixed so it will not be lost.

Suggestion Example:

Uniform Garment Bag identification label or card added to this item to allow circulation by scanning the Barcode Label to the student band member.
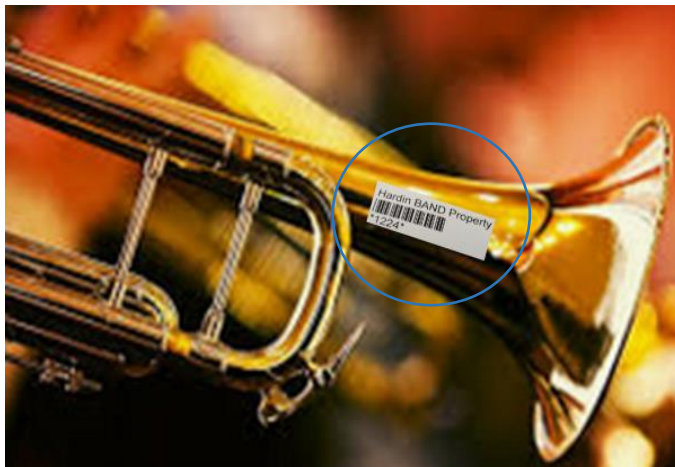
Determine where to add the Barcode label, foil labels would be best, add one label to the instrument and a second to the protective instrument case

Once items are cataloged and labeled, Circulation can be accomplished through the Circulation Management/Circulate menu or by use of the G4 Self-Circulation options within G4.
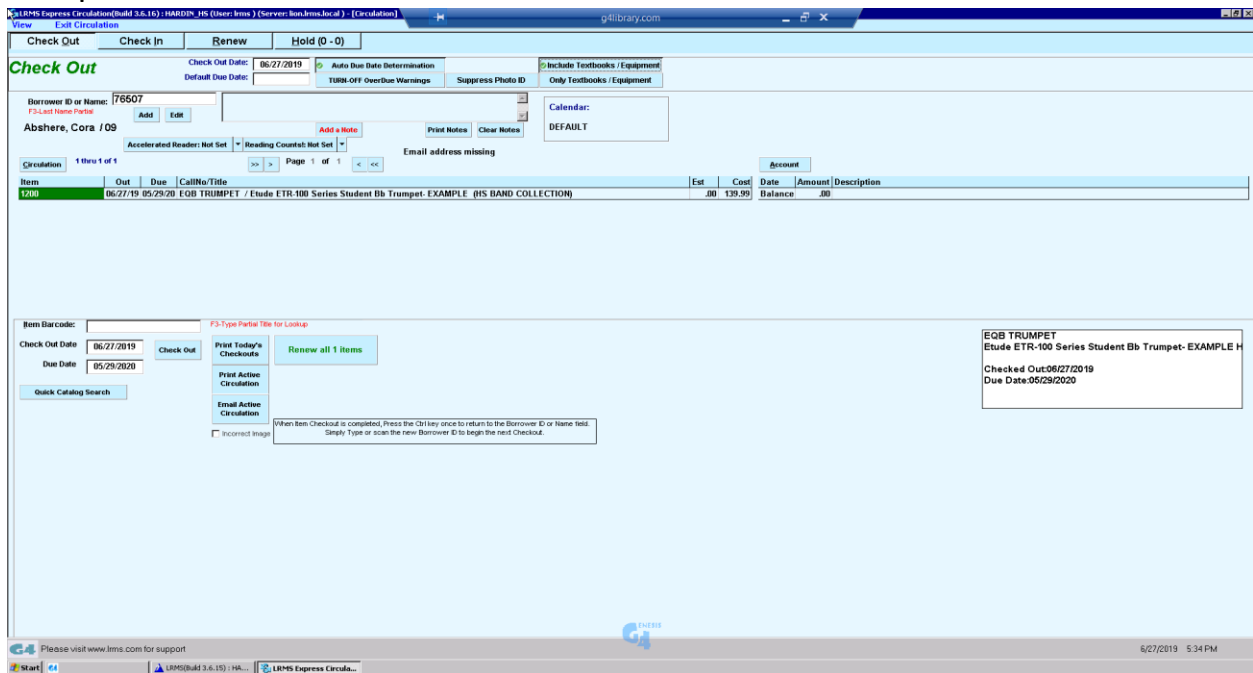
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Administration Circulation option:

Checkout of a Trumpet to a student example: using the administration Circulate G4 option.

Check-in can be accomplished using this same Circulate option by selecting the Check-in Tab at the top and or Renewing an items circulation checkout length.

How to understand and manage the Administrative Circulation document assistance Link & Video Link

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Anyone Circulation method:

A second option for circulation is to use the Self Circulation G4 feature where any registered individuals within G4 can Check-in items as well as Checkout or Renew Checked out items to extend circulation.

Check-in example using Self-Circulation:

Check-in is simple whether using the administration Circulate option or the Self Circulation option, all that is required is that the Check-in mode is active by selecting the Check-in option followed by the scanning or typing in the barcode label numbers of the returning item.

How to Manage Self Circulation document assistance Link.