How to Use the Q&S “Derive Genres” Functionality

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Summary of Q&S Derive Genres

- Uses whatever pre-existing Tags, if any, that exist for each book in your Q&S Library.
- If a book has zero Tags, then its Author may be used in lieu of Tags.
- Tag Rules are used to determine Genres by comparing the Rules to the Tags.
- Tag Rules are defined by you based upon your language, Genre naming scheme, types of books in your Q&S Library, and personal preferences.
- A working set of both Tag Rules and Author Rules are provided as examples.
- A Calibre custom column is required for this to function. The standard QuarantineAndScrub add-on database comes standard with a Custom Column of “genre”. However, Q&S configuration allows you to change which Custom Column is updated by the Q&S DG function. You may choose another Custom Column to suit your needs. The default in Q&S configuration is “#genre” because that Custom Column already exists in Q&S.
Tag Rules for Deriving Genres

- Tag Rules are defined in 2 different Q&S DG user-maintained tables: _dg_genre_tag_rules_factual and _dg_genre_tag_rules_fiction.

- 10 columns are predefined in each table, as shown on the right. Only 2 columns are “required” for a Tag Rule to function: new_genre, and tag_keyword_1. The remaining columns are optional, but necessary for further narrowing of to derive a very detailed new_genre.

- There should be no Blanks. Use “NONE” instead. The default of the table values is “NONE”, so that should be easy.
• Rules for Factual books are defined in table `_dg_genre_tag_rules_factual`, and rules for Non-Factual are defined in table `_dg_genre_tag_rules_fiction`.
• Each Rule is a Row in the Tag Rule tables, and will derive a Genre from a book’s Tags if the conditions (if any) in the remaining 9 columns are satisfied.
• Tag Rule Keywords are matched to Tags via the logic of “is the Keyword equal to the Tag?” Direct equality matters. Werewolf is not equal to Werewolves.
• Fiction (i.e., Not Factual) books do not need any tag_keyword identifying them as “Fiction”. If a book is Not Factual, then by default it is either Fiction or Poetry. Poetry (non-Prose) is handled just like Fiction.
• Factual (i.e. Non-Fiction and Non-Poetry) rules must have a “Non-Fiction Keyword” in tag_keyword_1. Those “Non-Fiction Keywords” also exist in Q&S DG table `_dg_nf_language_keywords` and can be tailored to your personal language and tastes. A fully functional set comes with Q&S DG. Refer to the images below. You may safely delete the rows that you will never personally use as a Real Tag within your Q&S library.
• These nf_keywords are used by Q&S DG to categorize each book as Factual or Not Factual. That distinction is critical when selecting between the Author Rule fiction_genre and factual_genre. Delete the nf_keywords that you will never use, as doing so will speed processing.

• To specify a Factual Tag Rule, update Q&S DG table _dg_genre_tag_rules_factual. An nf_keyword MUST be in that table in tag_keyword_1. That same keyword must also be in a Tag in every book that is Factual and for which you want to derive a genre.
Author Rules for Deriving Genre

- You do not have to use Author Rules unless you wish.
- Author Rules are only searched if no Tag Rule were found for a particular book. Tag Rules take priority over Author Rules. Of course, Tag Rules require Tags, so any book with zero (or meaningless) Tags will by default have to try to use Author Rules.
- It is totally optional as far as Q&S DG is concerned, but if you wish to mass-edit your Tags for
any reason, by far the most efficient manner in Calibre is the Category Editor for Tags. The menu path is: “Alter Tag Browser (lower left corner) > Manage Authors, Tags, etc. > Manage Tags”. This is a powerful and easy-to-use Tag editor.

- Optionally too, Authors may be managed by the Category Editor for Authors.

- If you wish, you may use a SQL Database Manager such as shown to the right to import the SQL file (after it is unzipped) into your Q&S library metadata.db database. The SQL file will add the 10,000 genre author rules to table _dg_genre_author_rules automatically. You may then edit their default Fiction and Factual genres as you wish, as well as adding new authors to that table.
All Available Boolean Logic Equations for Tag Rules

- The following Table of Boolean Equations has been implemented. Your Tag Rules are limited to these choices.
- Important: The Operator NOT may never appear to the LEFT of either AND or OR in the Tag Rules. Once you use a NOT, only more NOTs (or NONEs) may be used to its right side.

(continued on the next page)
• These equations reflect the Operator Precedence of: AND; OR; and last NOT.
• For a Tag Rule to “pass” a test for applicability for a particular book, its Tags must comply with the logic within each Tag Rule.
• Multiple Tag Rules may “pass” this test, and become candidates for bestowing their Genres on the respective book. In the case of multiple Candidates, the Tag Rule with the longest Genre wins. If they were all the same length, then the first one found (based on imported spreadsheet row sequence) would “win”, and the book would be given that Rule’s Genre. The concept is that the longer a Genre, the more detailed and specific it would be. Fiction:Romance-Paranormal is longer than Fiction:Romance, and is also more specific.
Special Wildcard Symbol in Tag Rules

- Tag Rules have a “wildcard”, which is the Asterisk: *
- The Asterisk must always be preceded by the NOT Operator. The plugin will overwrite any Operator other than NOT to the immediate left of the Asterisk. Obviously, tag_keyword_1 can never be the wildcard because there is no Operator to its left.
- The Asterisk always means “and nothing else”. That means that the Tag Keywords to the LEFT of the “NOT *” wildcard operator/keyword combination become the ONLY Tags that a book may have for that specific Tag Rule to “pass” the logic. Once you use the Wildcard, no other Operators or Keywords (except NONEs) may be used in that particular Tag Rule for the remainder (to the RIGHT) of that Wildcard within that specific Tag Rule.
Example Annotated Results of Plugin Job

Default Tag Rule
For Fiction

Tag Rules

Author Rules
(factual_genre)

Tag Rules
Example Jobs Results

Q&S Derive Genres is controlled by 4 DC tables within Q&S that are User-Maintained:

- _dg_nf_language_keywords
- _dg_genre_tag_rules_factual
- _dg_genre_tag_rules_fiction
- _dg_genre_author_rules

Q&S DC uses Real Tags, not Work Tags, so finalise Real Tags prior to execution.

Q&S DC adds missing Tag Rule Combinations to DC table _dg_missing_tag_rules.

You should use table _dg_missing_tag_rules to help you create new Tag Rules.

You should delete rows in table _dg_missing_tag_rules that no longer are useful to you.

Q&S Configured Custom Column #Name to be used is: #genre

Number of Selected Books to Process: 22
Number of Rules for Fiction/Poetry Processed: 129
Number of Rules for Factual Processed: 111
Number of Rules for Authors Processed: 10278
Number of Multi-Language Factual Keywords: 50
Number of Books for Which Tags Were Gathered: 22
Number of Factual Books Identified: 0
Number of Non-Factual Books Identified: 22
Number of New Genres Derived from Rules: 16
Number of Books With No Applicable Rules: 6
Number of Missing Tag Rules in _dg_missing_tag_rules: 94

Genre Derivation ended normally
Tag Combinations Missing Tag Rules

This table is automatically updated whenever a book fails to find a match for any Tag Rules. Its purpose is to allow you to easily determine what new Tag Rules you need to add to the appropriate Factual or Fiction Tag Rules tables. After you add the new Tag Rules, you should delete the entries within this table.

Remember that Q&S DG uses Real Tags, not Work Tags. Be sure to always use the Q&S “Copy Work Tags to Real Tags” prior to running Q&S DG.