Managing Citations

To manage citations, you must have one of the following roles:

- Course Reserves Operator/Manager
- Course Reserves Viewer (read-only access)
- Fulfillment Services Operator/Manager

Citations refer to items that students must view or read for a course. Citations appear in reading lists; a course may have multiple reading lists.

Citations can be web sites, uploaded documents, or books or articles in either electronic or physical format. Book or article citations must supply sufficient detail to uniquely identify the item. This includes author(s), date of publication, title, and page numbers. You can also use unique identifiers such as the International Standard Book Number (ISBN), a URL for a website, or specific volumes, articles, or other identifiable parts of a periodical.

Citations can be linked to repository/inventory items or not. Titles not linked to the repository are typically articles or videos on external web sites or faculty resources that are not part of the institution’s inventory.

You manage reading list citations from multiple reading lists on the Edit Citations page (Fulfillment > Course Reserves > Citations), or from a single reading list on the Citations tab of the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list or select Work on from the row actions list). Note that citations from archived reading lists do not appear on this page.

You can also access the Edit Citations page by searching for citations; see Searching in Alma.

You can also access the Edit Citations page with any of the citation tasks in the tasks list (see Tasks in the Task List). When accessed using the task list, one or more of the tabs and/or filters is pre-selected, according to the task you selected.

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**Note**

- Since book chapters, journal articles, and conference papers are parts of larger documents, their titles may be different than the title of the entire document. Similarly, the authors may be different from the author or editor of the entire document. Their citations include details regarding the sources in which they appear.

- Citations that are linked to active courses are published to Primo with course information included. The following can be retrieved by a Primo search: course IDs, course names, and instructor names. Note that for this information to be published to Primo, Course information enrichment must be selected in the Primo publishing profile.

- Adding or editing a citation may automatically trigger a purchase request (create a PO line); see Configuring Automatic Purchasing Requests from Citations.

- For information about Ex Libris's reading list/citation management system, see the Leganto Administration Overview.
  - Citations added using the Alma UI or the Alma Web service API are added to the default section of a reading list (sections are relevant only in Leganto).
  - Citations of type Note (citations whose material type is set to Note) are added by instructors in Leganto. They are used to provide information to the students who are viewing the reading list, and do not need to be fulfilled by the library staff.
When editing citations, you can click the link following **Reading List** to access the Edit Reading List page. For more information about editing your reading list, see Editing Reading Lists.

### Link to Edit Reading List Page

On the Edit Citations page, the citations appear as a record list, with the most recently created citations appear first. If you are using Leganto, you can select a sorting option using the **Sort by** filter. On the Edit Reading List page, citations appear in the order specified in the parameter `reading_list_citation_order`. For more information, see Configuring Other Settings.

Actions are available in several groups. Alerts, inventory information, and additional citation information appear in tabs beneath each citation; these tabs are initially collapsed. Select a tab to expand or collapse the information. If you want all physical, electronic, or other inventory information to appear expanded by default for all reading lists, select the relevant option for **Expand**. You must re-select this every time you log in to Alma. To view physical items and holdings, select **Items** in the row actions list.

Notes left by users are shown in **Details** located in the **Alerts** tab of a citation's brief information as **Last comment**.

The following figure shows the notes shown in the Details section of the Alma Citation Brief in Alma.
Notes Shown in Details in Alma Citation Brief Information

The following figure shows the notes shown in the Details section of the Alma Citation Brief in Leganto.

For more information about record lists, and for information about how to configure the arrangement of the fields and citation actions, see Record Lists.

The citation tabs in each row are:

- **Physical, Electronic, Digital** - See Viewing Inventory/Other Details. The physical tab includes the physical resource's call number (shelf number).
- **Other** - Other methods of viewing the citation source material, which includes (where relevant) OpenURL link resolver link, link to the uploaded file, or the original source or URL of the citation. A green dot appears in the tab if there is at least one method.
- **Citation Details** - Additional citation details, some of which may have originated from the repository item to which the citation is linked. See Viewing information about a citation.
- **Alerts** - Any alerts related to this citation. The number of alerts appears in the tab header. Select Delete to delete an alert, when available.
- **More Info** - Additional information, including repository item title, related records, orders related to this item, requests or work orders related to this item, and a link to the courses in which this item is in demand as a citation. See Viewing information about a citation.

**Note**

(Leganto only) This tab does not yet support reading lists associated with multiple courses. If the citation is associated to a reading list that is associated to multiple courses, the value for the Courses field may be incorrect.

Actions to perform on this page:

- You can filter the list of citations using filters (Edit Reading List page) or facets (Edit Citations page):
  - **Alerts** - Alert type connected with the citation (see Removing alerts from citations).
  - **Citation Status** - Citation (fulfillment) status of the citation. See Reading List and Citation Statuses. Not Complete matches any citation whose status is not Complete.
  - **Resource Locate** - Resource locate status of the citation. See Managing a Citation's Attachment to an Inventory Item (resource locate).
- **Material Type** - Primary or material type of the citation
- **Tags** - A tag set on the citation (appears as **Section Tags** and **Citation Tags** on the Edit Citations page; see [Adding Citation Tags](#)).
- **Copyright Status** - The copyright status of the citation (see below)

The following filter options is only available on the **Edit Reading List** page:

- **Citation Last Modification Date** (Leganto) - Enter a range of dates to match citations whose last modification is between these dates.

The following filter options are only available on the **Edit Citations** page. In addition, you can sort the citations on this page by last created date, last modification date, reading list name, or citation title.

- **Course Status** - **Active** or **Inactive**. If you are using Leganto and have enabled multiple courses for reading lists, the status matches a citation if any of its associated courses match the selected value.
- **Processing Department** - **Undefined** matches any citation from a reading list that does not have an associated course.
- **List Status** (Leganto) - The reading list's status
- **List Assigned to** - The user to whom the reading list is assigned.
- **Publication Status** (Leganto) - The publishing status of the reading list. See [Reading List and Citation_statuses](#).
- **License Type** (Leganto) - Self-declared, CLA, CCC, and so forth.

- To manage multiple (one or more) existing citations, select the check boxes next to the desired citations, or select the **Select All** check box, and then select one of the top actions on the page.
  - The citation status drop-down list - See [Changing a citation's status](#).
  - **Change Status** - See [Changing a citation's status](#).
  - **Change Copyright Status** - See [Manually Managing a Citation's Copyright Status](#).
  - **Remove Alerts** - See [Removing alerts from citations](#).
  - **Remove Citations** - See [Removing citations](#).

The following actions are only available on the **Edit Reading List** page:

- **Print Slip** - See [Printing Slips for Citations or Generating a Citation Print Slip Report](#).
- **Print Slip Report** - See [Printing Slips for Citations or Generating a Citation Print Slip Report](#).
- **Place Request** - See [Creating requests for citations](#).

- To manage a single existing citation, select one of the citation actions. The available actions depend on various factors, as described below.
  - **Edit** - See [Editing a citation](#).
  - **Resource Locate** - See [Managing a Citation's Attachment to an Inventory Item](#).
  - **Set Complete** - See [Changing a citation's status](#).
  - **Manage Fulfillment Options** - See [Managing Citation Fulfillment Options](#).
  - **Purchase Request** - See [Creating requests for citations](#).
  - **Resource Sharing Request** - See [Creating requests for citations](#).
  - **Portfolio List** - See [Viewing information about a citation](#).
  - **Items** - See [Viewing information about a citation](#).
  - **Remove** - See [Removing citations](#).
  - **Duplicate** - See [To add a citation by duplicating an exiting citation](#) in [Adding Citations to a Reading List](#).
  - **Print Slip** - See [Printing Slips for Citations or Generating a Citation Print Slip Report](#).
  - **Detach from Repository** - See [Managing a Citation's Attachment to an Inventory Item](#).
The only action available for citations of type **Note** are **Edit** and **Remove**.

To add a citation to a reading list on the Edit Reading List page, duplicate an existing citation or select one of the **Add** actions:

- **Add Repository Citation** adds a citation and connects it to an item in the repository
- **Add Non-Repository Citation** adds a citation that is not in the repository
- **Add Brief** adds an item to the repository, and then adds a citation that is connected to it

After making any changes on the Edit Reading List page, select **Save** to save the changes and return to the Reading Lists Tasks List page. You do not have to save after making changes on the Edit Citations page.

The following list presents the tasks associated with managing citations, and where to find more information.

### Managing Citations Tasks

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- **Recalculate Rules** - See [Automatically Managing a Citation's Copyright Status](#).
- **Associate to DCS / Enter DCS URL / View DCS / Remove DCS / Update DCS Status** - See [Attaching a Citation to the CLA Digital Content Store (UK Only)](#).
- **Manage Digital Representations** (Leganto only) - See [Managing a Citation's Digital Representations](#). Appears only if the Leganto customer parameter `display_digital_representations` is set to false; see [Configuring Digital Representation Display Options](#).
- **Other Formats and Editions** (Leganto only) - See [Configuring the Display of Other Formats and Editions of Citations](#).

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### Action | Procedure
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**Citation Fulfillment Options.**
- Alerts about the citation (see [Removing alerts from citations](#)).
- To view a citation’s items or portfolios, select the **Items** or **Portfolio List** citation action. The **List of Items** or **Portfolios List** page appears. For more information about the List of Items page, see [Working with the List of Items](#). For more information about the Portfolios List page, see [Working with the Portfolio List](#).
- (Leganto only) To view the original source of a citation, select the URL in the **Other** tab. This URL appears if **Source** is defined for the citation.
  - For citations added using Cite It, this is the original URL of the citation.
  - For citations added from Primo Central records, this is the uResolver link provided from Primo Central (the uResolver URL that is used for availability). To debug this link, see the knowledge article [Debugging Citation uResolver Links](#).
  - For all other citations, the source field is not defined.
- To view the uploaded file of a citation, select the file name in the **Other** tab. This link appears only if an uploaded file exists.
- To view the OpenURL link resolver results of an article or a digital object, select the link in the **Other** tab. For an article, this link appears if the link resolver found at least one matched resource. For a digital object, this link appears if there is an associated digital object. If you are using Leganto, you can turn off link resolving for all article citations using a customer parameter; see [Adding Citations to a Reading List](#).
- **(Note: The following procedure is temporarily disabled)** For CLA-enabled institutions in the UK, to view a popup with copyright information about the citation retrieved from the CLA, select the **Check CLA Permissions** citation action. A popup with the information appears. Select the type of work you intend to perform in the drop-down at the top of the popup.
  To enable CLA, set **copyright_region** to **UK**, see [Configuring Other Settings](#).

### Editing a citation
You can edit a citation, for example to improve its metadata.

To edit a citation, select the **Edit** citation action. The Edit Reading List Citation page appears. Modify the information in the **Citation** tab and other tabs as required, and select **Save**. For information on the fields in the **Citation** tab, see [Adding Citations to a Reading List](#). If you selected **Copyright Auditing Required** and would like to navigate immediately to the Approval Requests List, select **Save and manage approval**, instead.

If you edit any of the active fields listed in the Match by Fields table (see [Configuring Citation Matching Criteria](#)), you are prompted to perform a new resource locate. If the citation was previously located, and the new locate process does not find a match, the citation is detached from the repository. If your institution is implementing Leganto, see [Configuring Repository Locate Workflow](#) for information about configuring this workflow. If the citation is detached from the repository, **citation_detached_from_repository** is triggered; see [Configuring Default Statuses for Citations/Reading Lists](#).

Add, edit, or delete notes in the **Notes** tab. For more information about this tab, see [Notes Tab](#). Select an option in the **Update Notes** table action to mark notes as unread (**Activate Notes**) or read (**Dismiss Notes**). When you add a library note type, only other librarians can see the note. When you add an instructor type note, also instructors can see the note, in Leganto (Leganto users only). You cannot change the note type after creating the note.

### Adding citation tags
**Public** tags appear when a patron views the citation in Leganto (Leganto customers only) and Primo. **Instructor-Library** tags are viewable by librarians, and, in Leganto, by instructors creating the reading list. **Library-Internal** tags are visible only in Alma by librarians. **Internal** tags are added by Leganto or Alma, are visible by librarians (and instructors in Leganto), and cannot be added, edited, or removed. They are typically the result of a Leganto or Alma feature.

To add or edit citation tags, select the **Tags** tab while editing a citation, add or delete tags as required, select **Save**, and select **Go**. You can filter using these tags on the Edit Reading List page. To configure the available citation tags and their type, see [Configuring Citation and Section Tags](#).
<table>
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<tr>
<td>Managing a citation’s fulfillment options</td>
<td>See <a href="#">Managing Citation Fulfillment Options</a>. To see alternate edition suggestions for citations, run the Citation Alternate Suggestions job.</td>
</tr>
<tr>
<td>Attaching citation attributes to a citation</td>
<td>See <a href="#">Attaching Citation Attributes to Citations</a>. Also see Editing a citation above for adding tags to a citation.</td>
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</tr>
<tr>
<td>Changing a citation’s status</td>
<td>Changing a citation status does not change the reading list status, and vice versa. A citation status is also different from the citation resource locate status.</td>
</tr>
<tr>
<td></td>
<td>To change citation statuses, select the citations, select the status from the drop down to the left of the Change Status top action, and select Change Status.</td>
</tr>
<tr>
<td></td>
<td>Alternately, to set a single citation’s status to complete, select the Set Complete citation action.</td>
</tr>
<tr>
<td></td>
<td>Alma comes with predefined statuses that cannot be changed. For information on configuring additional citation statuses, see Configuring Reading List Citation Statuses. For the default list of citation statuses, see Reading List and Citation Statuses in the Leganto Administration Guide.</td>
</tr>
<tr>
<td>Changing a citation’s copyright status</td>
<td>See <a href="#">Managing a Citation’s Copyright Status</a></td>
</tr>
<tr>
<td>Changing the representations that appear for a digital citation in Leganto</td>
<td>(Leganto only) See <a href="#">Managing a Citation’s Digital Representations</a></td>
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<tr>
<td>Creating requests for citations</td>
<td>You can place institution requests on one or more citations in order to move the items (permanently or temporarily) or to</td>
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**Tags Tab**

After adding tags, they are visible in the list of citations on the Edit Reading List page. You can filter citations by tags.

**Edit Reading List Page**
digitize them. You might place a bulk move request if, for example, the reading list's due-back date changes. To create a bulk requests, select the citations and select the Place Request top action. The Create Request page appears (see Create Request Page). Select a request type, fill in the remaining fields (as described in Creating a Request), and select Submit.

The requests are:

- **Library physical digitization request** - Only one open digitization request can exist for a citation. For information about digitization see Digitization Processing.
- Move permanently
- Move temporarily

When enabled for your institution by Ex Libris, you can create a purchase request directly from a citation. To create a purchase request for a citation, select the Purchase Request citation action. For more information see Purchase Requests.

When enabled for your institution by Ex Libris, you can create a resource sharing borrowing request directly from a citation. To create a resource sharing borrowing request for a citation: select the Resource Sharing Request citation action. The Resource Sharing Borrowing Request form appears. For more information see Creating a Borrowing Request. The form is prefilled with the citation information, as well as the parameter values of parameters starting with citation_rs_default_; see Other Settings.

Removing alerts from citations

If the inventory items are geographically far and/or you have no access to the shelves on which they are located, use the fulfillment options to place and then view requests. (See Managing Citation Fulfillment Options.)

For each step in the citation request workflow, an alert is generated – for example, Citation Digitization Request In Process, Citation Digitization Request Completed. You can use the Alerts filter to monitor the status of physical items that you have requested to move to reserved areas or material that you have requested in digital format. For example, you can use the Alerts filter to view only those citations whose request processing has been completed (in order to mark their status as Complete). An alert also appears if an instructor added a library note to the citation or marked a resource link as broken in Leganto.

The possible alerts are:

- Citation Resource Sharing Request Created
- Citation Resource Sharing Request Received
- Citation Resource Sharing Request Rejected
- Citation Resource Sharing Request Sent
- Citation Purchase Request Approved
- Citation Purchase Request Rejected
- Citation Purchase Request Submitted
- Citation Move Request In Process
- Citation Move Request Cancelled
- Citation Move Request Completed
- Citation Digitization Request In Process
- Citation Digitization Request Cancelled
- Citation Digitization Request Completed
- Citation has a New Note
- Citation Link Reported as Broken (Leganto only; see Enabling Broken Link Reporting)
- DCS extract creation failure - When DCS returns a failure. See Attaching a Citation to the CLA Digital Content Store (UK Only).
- List has a New Note (appears only in the facet on the Reading List Tasks List page)
### Adding Citations to a Reading List

Add a citation using one of the three workflows or by duplicating an existing citation and editing the copy.

**Note**

You can also create a citation by scanning in an item and selecting the appropriate reading list in the Change Item Information tab. The item is added as a citation to the selected reading list. For details on the Change Item Information tab, see [Changing Item Information](#).

### Adding an Item or Citation to My Collection from the Menu

To add an item or citation to My Collection from the menu:

1. At the reading list, section, or citation level, click the ellipsis and select **Import**. The export **Type** drop down menu is displayed.

   ![Creating New Lists Using Additional Formats](image.png)

2. Select an import type.

3. Drag files or browse your hard drive to import a file or folder.

4. When you have included all of the required files, click **Create**.

5. Define the reading list Title.
Your new list is created with a default section that you need to edit.

Importing a folder extracts the metadata from files located in the folder you selected.

You can abort all uploads by clicking Abort all uploads, or abort individual uploads.

Adding a Citation Already in the Repository

To add a citation already in the repository:

1. On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Add Repository Citation add action. The Repository Search page appears.
2. Search for a title; see Searching in Alma.
3. Select one or more titles to add and select Select. The items are added as citations.

To add copyright clearance information or to configure other citation information (see To add a citation that is not in the repository (without adding it to the repository), you must edit the citation after adding it. See Editing a Citation.

Adding a Citation Not in the Repository Without Adding it to the Repository

Non-repository citations allow you to represent items that are not part of the library’s resources and therefore are listed only in Course Reserves. For more information, see Non-Repository Citations.

Note
Since non-repository citations are not published, they will not appear in Primo and Primo VE.

To add a citation that is not in the repository (without adding it to the repository):

1. On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Add Non-Repository Citation add action. A dialog box to select the citation type appears.
2. Select the type of citation (book or article) and select Choose. The Edit Reading List Citation page (for non-repository citations) appears, containing the fields for the selected citation type (see the following images).

![Edit Reading List Citation Page (for non-repository citations) for a Book](image-url)
3. In the **Resource Information** area, enter the necessary information in the fields. A description of the fields appears in the Resource Information Fields table in *Adding a New Book or Journal Article*.

**Note**

A citation’s call number refers to the Library of Congress call number (field 050), which is not necessarily the call number associated with the citations associated physical resource, which is its shelf number.

4. If you are using Leganto, then in the **Additional Resource Information** area, you can manually add additional sources for the citation (in addition to the source in the **Resource Information** area). These links appear in the **Links & Availability** section when viewing a citation in Leganto.

5. In the **File Upload** area, select a file for the citation, if relevant. For example, an image for a digital citation or a PDF for a document. You can only upload one file. A progress bar appears while the file is uploading. To view the uploaded file, select the file name (if you are editing this page at a later time, select **Download File** in the row actions menu). To delete the file, select **Delete** in the row actions menu (if you are editing this page at a later time, select **Delete** in the row actions menu). The label field currently has no effect.
6. In the Copyright Attributes tab (edit only):

- For more information on the Copyright Status field, see Manually Managing a Citation's Copyright Status. When using Leganto, an administrator can make the Source for Copyright field mandatory and select its default value, see copyright_source in Configuring Leganto Copyright-Related Procedures.
- Select Copyright Auditing Required to add intended usage information and have Alma manage the citation's copyright status automatically (see Automatically Managing a Citation's Copyright Status). When selected, fill in the additional fields that appear. For information on most of these fields, see staff digitization request in Creating a Request.

7. In the Citation Parameters area, optionally select:

- Disable Resolving (Leganto only, appears for article citations added using Cite It! with library coverage) - Select to hide the OpenURL link resolver results for a citation from Leganto users. Instead of a dropdown, only a View link appears in Leganto for this citation. For additional information, see Disabling Availability Links for Primo Central Records with No Full Text.
- Material Type - Select an available option. This list can be configured in the Reading List Citation Secondary Types table. See Configuring Citation Material Types. This list is not the same as the one described in Configuring Physical Item Material Type Descriptions.
- If you have not already selected a copyright clearance type (self-declared, Creative Commons, and so forth), you can select a Creative Commons clearance in the Creative Commons License field. The options available in this field depend on the customer parameter copyright_region; see Configuring Other Settings. For more information about Creative Commons, see here.
- In Resource Locate Status, you can manually select a resource status; see Managing a Citation's Attachment to an Inventory Item.
- In Originating System ID, you can optionally enter the ID that this resource had in a previous system if the record was migrated to Alma; see Managing a Citation's Attachment to an Inventory Item.
- Public Note (Leganto customers only; edit only) - Edit a public note that appears in Leganto, if relevant.
- Due Date - Enter the date by which students should read/view the materials.

8. Select Save or Save and Manage Approval, and select Go. The new citation appears on the Edit Reading List page.

Alma checks if a single inventory item matches the citation, and if so the citation is automatically linked to that inventory item. You can select Detach from Repository to remove this attachment. See Managing a Citation's Attachment to an Inventory Item. You can turn this feature off using the reading_list_auto_locate_citation_upon_creation customer parameter; see Configuring Other Settings.

If you select Save and Manage Approval, the Approval Requests List appears. For more information, see Approving/Rejecting a Request for Digitization.

If you are editing the citation, you can also select Save and Activate Notes. See Editing a Citation.
9. Optionally select the **Resource locate** citation action on the Edit Reading List page to locate a resource for the new citation. For more information, see [Managing Citation Fulfillment Options](#).

---

**Adding a Citation Not in the Repository While Adding it to the Repository**

To add a citation that is not in the repository and also add it to the repository:

1. On the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; select the reading list) in the **Citations** tab, select the **Add Brief** citation action.

2. In the dialog box that appears, select the type of citation you want to create—physical book/article or electronic book/article—and select **Choose**. The Quick Cataloging page appears.

![Quick Cataloging Page – For Physical Book](image)

3. Configure resource and item information (for information on the fields, see [Adding a New Book or Journal Article](#)). In the **Citation Parameters** area, optionally select the **Copyright Status** (for more information, see [Changing a citation’s copyright status](#)) and **Material Type** from the available options.

4. Select **Save**. New inventory is created and the new citation appears in the **Citations** tab of the Edit Reading List page.

To add copyright clearance information or to configure other citation information (see **To add a citation that is not in the repository (without adding it to the repository)**), you must edit the citation after adding it. See [Editing a Citation](#).

---

**Note**

The `course_restricted_bib_data_will_be_deleted` parameter (see [Configuring Other Settings](#)) determines whether the published course data created in this process is deleted (**true**) or suppressed (**false**, by default) from Primo when the course becomes inactive.

If you have enabled the RFID integration profile (see [RFID Support](#)), you can select **Write to RFID and Save** to save the new inventory to RFID.
Contributing Instructor Resources to a Reading List

Alma permits instructors to lend their personal copies of items to the library for circulation. This allows the library to catalog instructor-owned copies, track which instructor owns the item, and re-use previous items easily in subsequent terms.

When enabled, library staff can indicate that an item is a personal copy when creating a Brief Citation (Add Citation > Add Brief) and enter the instructor’s name. Alma will store information about all instructor-owned copies using dedicated personal copy locations. Locations in the library are automatically created when the instructors' copies are cataloged, with one location per instructor. All items deposited by the instructor will be created in that same location.

Personal copy locations indicate that the items are owned by the instructor, and also allow the library to track items that are not physically in the library at that time, but rather, in the instructor’s possession. All personal copy locations and the items in them will be suppressed. When the instructor lends the item to the library, the item can be moved to a temporary location representing a non-personal copy location in the library, where it will circulate according to standard fulfillment rules. For example, library staff may move the item to the temporary location of “Course Reserves” with a due back date of the end of the term. The item will temporarily circulate as part of the library collection, but with the instructor’s name stored as the permanent location, indicating the person to which the item should be returned at the end of the term.

When the item is moved back to its permanent location, which is the personal copy location, it will automatically be suppressed. The item can then be returned to the instructor, but the record does not need to be deleted and can be easily re-used in subsequent terms by following the workflow above.

To contribute instructor resources to a reading list:

1. Open the Reading Lists Task List page (Fulfillment > Course Reserves > Reading Lists).

2. Select a citation code.
3. Select Add Citation and select Add Brief.

4. Select Physical Book and select Choose.

5. Specify all necessary fields for the item (such as Title). For more information, see Managing Physical Resources.

6. In the Item Information section, specify the following fields:
   - Personal copy – Select this field to enable the Personal copy of field.
   - Personal copy of – Specify the instructor’s name, which will be used for the item’s location.

7. Select Save. The book item is created and displayed in the Physical tab.

8. Continue with the fulfillment process.

---

Adding a Citation by Duplicating an Existing Citation

To add a citation by duplicating an existing citation:

On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Duplicate citation action. The Edit Reading List Citation page appears. Modify the parameters as needed and save the new citation. See the above add procedures for details.

If you are using Leganto, you can add a citation that is an alternative format or edition of an existing citation. See Configuring the Display of Other Formats and Editions of Citations.

---

Managing a Citation’s Attachment to an Inventory Item

When you create a citation, you can create it attached to an already existing physical inventory item, or you can create the inventory item at the same time and have the citation attached to the new inventory item.

Alternately, you can create a citation without an attachment to an inventory item. When you create a citation without any attachment to an inventory item, Alma tries to locate a matching inventory item. If a single item is discovered, Alma automatically attaches the citation to the inventory item. For more information, see Configuring Citation Matching Criteria. You can turn this feature off using the reading_list_auto_locate_citation_upon_creation customer parameter; see Configuring Other Settings.

You can configure Leganto to locate citations based on any or all the fields indicated in the Locate Citations By Fields mapping table (Fulfillment Configuration > Courses > Locate Citation By Fields), using the new resource_locate_mode field in the Other Settings table (Fulfillment Configuration > General > Other Settings).

- If you set the value of the resource_locate_mode field to "OR", then Leganto will locate citations based on any of the fields in the Locate Citations By Fields mapping table.
- If you set the value of the resource_locate_mode field to "AND", then Leganto will locate citations based on all of the fields in the Locate Citations By Fields mapping table.

You can also configure Leganto to locate citations based on specific material types, by entering in the codes for the material types into the new resource_locate_by_type field in the Other Settings table (Fulfillment Configuration > General > Other Settings), separated by commas. For more information, see Configuring Other Settings.

When attaching a citation to an inventory item, Alma adds missing information to the citation; for more information, see...
Note

- If the article is in a journal held by the library, in order for the article information to appear in Primo, the information must be in the inventory record attached to the citation (the MMS record); the citation information is not published to Primo.
- (Leganto only) Alma may be configured to overwrite citation information added from Cite It! See Configuring Repository Locate Workflow.
- Note that the process of attaching a citation to a physical item in the inventory has nothing to do with OpenURL link resolving for an electronic article, which is about finding links to external instances of the article. However, ...
- ... although attaching a citation to inventory is for physical items only, a citation's locate status also reflects whether the OpenURL link resolver is able to locate an electronic article for the citation. A citation is located if Alma finds a physical and/or electronic resource for the citation. The bulk location job described in Process and Enrich Citations in Bulk also checks the link resolver for this purpose.
- This job also validates URL citations by attempting to access the URLs and checking for valid HTTP responses.

To remove this attachment, select the Detach from Repository citation action. After performing this action, the citation is not connected to any inventory.

If you have detached the citation from an inventory item, or the inventory could not be located automatically, you can try to attach the citation to an inventory item manually. To do this for one citation, see below. To do this in bulk, see Process and Enrich Citations in Bulk.

See also Finding Alternate Resource Suggestions for Citations.

A citation's resource locate status indicates the status of this process. The possible resource locate statuses are:

- **Information Incomplete** - Not enough information was entered to perform a resource locate. The minimum information is a) ISSN, volume, issue, start page, and publication year, or b) ISBN, or c) DOI.
- **Locate Failed** - A locate was attempted but failed to complete for some reason.
- **Locate Not Run** - A locate was not attempted.
- **Multiple Resources Located** - A locate was attempted and multiple resources were found.
- **No Resource Located** - A locate was attempted but no resource was found.
- **Not Complete** - A locate attempt is in process.
- **Resource Located** - A locate was attempted and a single resource was found.

If for some reason you want to set the resource locate status manually, you can do so when adding or editing the citation on the Edit Reading List Citation page; see Adding Citations to a Reading List.

**To locate a resource manually:**

On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Resource Locate citation action. Alma attempts to locate inventory that matches the citation and if a single inventory match (in any format) is found, Alma attaches it automatically.

If Alma could find no matches, Alma displays a page allowing you to edit the search criteria. If Alma finds multiple matches, Alma displays a screen enabling you to select one of the matches and/or edit your search criteria. For more information, see Searching in Alma.
Managing Citation Fulfillment Options

To check how the citation can be made available to students, on the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Manage Fulfillment Options citation action.

- If the inventory items are geographically far and/or you have no access to the shelves on which they are located, use the fulfillment options to place and then view requests. (see below.)

  In this case, for each step in the citation request workflow, an alert is generated — for example, Citation Digitization Request In Process, Citation Digitization Request Completed. You can use the Alerts filter to monitor the status of physical items that you have requested to move to reserved areas or material that you have requested in digital format.

- If the inventory items are geographically nearby and/or you have access to them, you can fetch the items from the shelves by selecting the Print slip citation action to print a slip for the specific citation. Use the Change Item Information tab to temporarily change the item location, as described in Changing Item Information.

- If the item is not in your library's inventory, or if you would like the library to purchase additional copies, consider making a purchase request by selecting the Purchase Request citation action. For more information, see Purchase Requests.

To manage fulfillment options for a resource:

On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Manage Fulfillment Options citation action. The Manage Resource Options page appears with the Resource Options tab pre-selected.

The link is available only if a resource was specified.
Manage Resource Options Page

The summary header includes information about the resource, including title, author, ISBN/ISSN, and so forth, as well as any alerts on the citation. The following fields appear on this page:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course Information Tab – Course Information</strong></td>
<td></td>
</tr>
<tr>
<td>Course Code</td>
<td></td>
</tr>
<tr>
<td>Section</td>
<td>The course section</td>
</tr>
<tr>
<td>Course Name</td>
<td></td>
</tr>
<tr>
<td>Number of Participants</td>
<td>The number of participants in this course</td>
</tr>
<tr>
<td>Reading List Name</td>
<td></td>
</tr>
<tr>
<td>Campus</td>
<td></td>
</tr>
<tr>
<td>Demand for X courses with overall Y participants</td>
<td>The number of participants in all courses in which this citation appears</td>
</tr>
<tr>
<td><strong>Course Information Tab – This Record in Other Lists – Information about the bibliographic record of the citation as it appears in other reading lists. See actions for this area below.</strong></td>
<td></td>
</tr>
<tr>
<td>Course Code</td>
<td>Course code of the other reading list</td>
</tr>
<tr>
<td>Course Name</td>
<td></td>
</tr>
<tr>
<td>Section Id</td>
<td>The course section</td>
</tr>
<tr>
<td>Academic Department</td>
<td></td>
</tr>
<tr>
<td>Processing Department</td>
<td></td>
</tr>
<tr>
<td>Instructor</td>
<td>The reading list owner, or <strong>Multiple</strong> if there are multiple owners.</td>
</tr>
<tr>
<td>Start Date</td>
<td>The start date for this course</td>
</tr>
<tr>
<td>End Date</td>
<td>The end date for this course</td>
</tr>
<tr>
<td>Number of Participants</td>
<td>The number of participants in this course</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Reading List Name</td>
<td></td>
</tr>
<tr>
<td>Reading List Status</td>
<td></td>
</tr>
<tr>
<td>Section Name</td>
<td>The reading list section name</td>
</tr>
<tr>
<td>Citation Status</td>
<td></td>
</tr>
</tbody>
</table>

**Resource Options Tab – Electronic Services – Electronic fulfillment information for the citation**

**Resource Options Tab – Digital Services – Digital fulfillment information for the citation**

**Resource Options Tab – Physical Services – Physical fulfillment information for this citation. See actions for this area below.**

**Resource Options Tab – Requests existing – Requests for the bibliographic record associated with this citation. Some requests are specific to a reading list. Select the reading list from Filter Requests By Records in Other Lists filter to view only requests for that reading list. For more information about the fields and actions in this section, see Managing Requests and Work Orders.**

The following actions are available for physical services:

- View the items – Select View items in the row actions list. The List of Items page appears; see Working with the List of Items.
- Create a request – Select Request in the row actions list, or select Place Request in the top actions list. The Create Request page appears (see Creating a Request). Select a request type (as described in Creating a Request) and select Submit.
- Update the item’s due back date so that it matches the due back date of the reading list (when the reading list’s due back date is later than that of the item) – Select Update move expiry in the row actions list, or select Update Move Expiry in the top actions list. You can also manually update a citation’s due back date when adding or editing a citation; see Adding Citations to a Reading List.

If any requests are active for the resource, including any initiated by an instructor in Leganto, they appear in the Requests area. While a work order operator can approve or reject requests on the Approval Requests List page (see Approving/Rejecting a Request for Digitization), you can edit or cancel the request in this area. This area presents a record list; for more information about these lists, see Record Lists.

The actions available for each request are:

- **Cancel** – Cancel the request. You are asked to confirm with the following options:
  - Cancellation reason – Select the reason for the cancellation.
  - Cancellation note – Add an optional note.
  - Notify user – If you do not select this, the cancellation note and reason is store in Alma but not sent by email to the user. Select this to send a note to the user about the cancellation.
  - Keep citation’s copyright information (if this was a DCS request, the field is Keep citation’s DCS request) – Select this to preserve any copyright record / request / DCS request that was made simultaneous with the digitization request. Clear this to also remove the copyright record or request. For more information on DCS requests, see Attaching a Citation to the CLA Digital Content Store (UK Only).
- Print Slip – Print the request to the default printer.
- Edit – Edit the request. You cannot change the request type.
- Update Expiry – Edit the request’s expiration date.
- Mark as Missing – Mark the item associated with the request as missing.
- View Title in Search – Search in Alma for the resource title.
- View Audit Trail – See history related to the resource on the Request Processing Audit Trail page.
• **Change to Electronic Digitization** – Change the digitization of a physical item to digitization of an electronic item. Can be changed only when there is an electronic item in the inventory that can fulfill the request.

• **Change to Physical Digitization** - Change the digitization of an electronic item to digitization of a physical item. Can be changed only when there is a physical item in the inventory that can fulfill the request.

The following actions are available for citations that also appear in other reading lists:

• View the other reading list – Select View in the row actions list. The other reading list appears.

• Create a request for the other reading list – Select Place Request in the row actions list. The Create Request page appears (see Create Request Page). Select a request type (as described in Creating a Request) and select Submit.

---

**Managing a Citation's Digital Representations (Leganto Only)**

By default, all digital representations appear in Leganto for citations attached to digital resources. This is because the customer parameter display_digital_representations is set to true by default; see Configuring Digital Representation Display Options. When this parameter is set to false, no representations appear unless you configure them to: the citation action Manage Digital Representations appears on the Edit Reading List page for these types of citations. You must manually select which representations you want to appear in Leganto.

To select which representations appear when representations do not appear by default:

1. On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Manage Digital Representations citation action. The Digital Resource Editor page appears. For more information, see Editing Representation Metadata and Content. Each representation appears with a check box.

2. Select the check boxes for the representations that you would like to appear in Leganto and select Select. The selected representations appear in Leganto.

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**Attaching a Citation to the CLA Digital Content Store (UK Only)**

If you are a UK customer (set copyright_region to UK, see Configuring Other Settings), and have implemented a Digital Content Store (DCS) integration profile (see Integrating with the UK’s Digital Content Store (DCS)), you can manage the citation’s attachment to a DCS item.

To automatically attach a citation to the DCS store:

1. On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Associate to DCS citation action. The DCS Search page appears with the matching item or a list of matching items.

2. If required, use the secondary search to search for all or part of an author, title, DCS item ID (GUID), or identifier (ISBN / ISSN).
3. The next step depends on whether you already have a digital copy of the material:

1. If a digital copy already exists in the DCS and is approved, find the required item and select **Associate** in the row actions list. The citation is attached to the selected item and additional citation actions become available.

2. If you have a digital copy of the material but have not uploaded it to the DCS, select **Copyright** and complete a copyright request (see [Automatically Managing a Citation's Copyright Status](#)). The request goes through your institution's copyright rules (see [Configuring Digitization and Copyright Rules](#)), which may automatically send the request to the DCS. Log in to the DCS, create or locate your request, and upload the digital copy.

3. If you do not yet have a digital copy, but the citation has a valid MMS ID, select **Digitization** and place a digitization request (see [Creating a Request](#)). The request goes through your institution's digitization and copyright rules (see [Configuring Digitization and Copyright Rules](#)), which may automatically send the request to the DCS. After you have a digital copy, log in to the DCS, create or locate your request, and upload the digital copy.

When a DCS request is in process, you see its status in **DCS Status** as well as an internal tag. Select the row action **Remove DCS** to remove the request. This status is updated daily based on a scheduled job (**DCS Synchronize**). You can select **Update DCS Status** to update the status of the request manually.

When a DCS request is approved, you can also select **View DCS** to view the digital copy on the DCS site.

**To view the citation in the DCS:**

On the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; select the reading list) in the Citations tab, select the **View DCS** citation action. The DCS web site opens, displaying the attached item.

**To remove the citation's attachment to a DCS item or URL:**

On the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; select the reading list) in the Citations tab, select the **Remove DCS** citation action. The citation is no longer attached to the DCS item.

---

**Attaching Citation Attributes to Citations**

To configure the available citation attributes, see [Configuring Citation Attribute Types](#), [Configuring Citation Attributes](#), and [Mapping Citation Attributes to Citation Attributes Types](#).

**To attach citation attributes to citations:**

1. Edit the citation (see **Editing a Citation**). The Edit Reading List Citation page appears. Select the **Citations Attributes** tab.

2. In the **Citation Attributes** section, select **Add**, select a citation attribute type and the citation attribute you want to map, and select **Add Citation Attribute**. The selected values appear in a table.
3. Select **Save**. The added citation attribute appears in the reading list information on the Edit Reading List page.

---

**Printing Slips for Citations or Generating a Citation Print Slip Report**

If inventory items are geographically nearby and/or you have access to them, you can fetch the items from the shelves by printing a slip for the citations. On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the **Citations** tab:

- Select the **Print Slip** citation action.
- Select one or more citations and select the **Print Slip** top action. A print slip is generated for each citation.

For information about the print slip, see the Ful Citation Slip Letter in Configuring Alma Letters.

You can also generate a print slip report that is sent to a printer or email address, or can be downloaded to a local machine. The report is an Excel file that contains the citations and their information, including Title, Author, Location, Call Number, ISBN/ISSN, Edition, Imprint, Availability, Electronic Availability, and Digital Availability.

**To generate an Excel print slip report for citations:**

1. On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the **Citations** tab, select the citations and select the **Print Slip Report** top action. The Print Slip Report dialog box appears.

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**Manage Citations Print Slip Report Dialog Box**

2. Select whether to send the report by email (**Email** or **User** or to a printer (**Printer**).
3. Select the destination:
   ◦ If sending by email, enter the email address in the Email field or the Alma user in the User field. The email letter used is the Ful Citations Slip Letter. For more information on the letter, see Configuring Alma Letters.
   ◦ If sending to the printer, select the printer in the Printer field.
4. Optionally download the report by selecting Download.
5. To send the report to the selected destination, select Send.

Managing a Citation's Copyright Status

You can manage a copyright's status manually or using Alma's copyright approval system.

• When you manage a citation's copyright status manually, the citation's copyright status is for informational (UI) and record-keeping purposes only; except as noted below, the citation's status has no workflow effect in Alma, and it's status does not change its visibility in Leganto or Primo. The status is managed manually if Copyright Auditing Required is not selected on the Edit Reading List Citation page, and no other copyright licensing is declared for the citation (self-declared, Creative Commons).

• When you manage a citation's copyright status using Alma's copyright approval system (select Copyright Auditing Required on the Edit Reading List Citation page), the ability to manage the copyright status manually is disabled. New citations, and citations whose copyright information is changed, are passed through an automatic copyright approval process (configured using copyright approval rules); when required, citations are sent to an operator for manual approval.

The available copyright statuses for a citation are:

• Approved - In you are implementing Leganto, you can have Alma automatically change the citation's status when a citation's copyright status is set to Approved. See Configuring Default Statuses for Citations/Reading Lists.
• Declined
• Not Determined
• Not Required
• Required
• Self Declared - The instructor indicates that no copyright clearance is required; for example, for material written and uploaded by the instructor.
• Waiting for Approval - An approval task is waiting for manual operator intervention. When the citation has this copyright status, you can resubmit the citation for automatic approval/rejection by selecting Recalculate Rules beneath the citation on the Edit Reading List page.
• Waiting for CC - Waiting for copyright clearance. When the citation has this copyright status, you can resubmit the citation for automatic approval/rejection by selecting Recalculate Rules beneath the citation on the Edit Reading List page.
• Fair Use

You can configure the copyright status that is selected by default for a new citation. See Configuring the Citation Default Copyright Status.

If you are using Leganto, an instructor can initiate an copyright or digitization request, self-declare a citation’s copyright, or select a Creative Commons license in Leganto.

Manually Managing a Citation’s Copyright Status

To manage a copyright manually, you can set the copyright status for multiple citations on the Edit Reading List page or for one citation on the Edit Reading List Citation page while editing a citation.
If you are using Leganto, also see Clearing Copyrights Through the Copyright Clearance Center (CCC).

To change the copyright status of one or more citations:

On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the citations, select the Change Copyright Status top action, select the status in the Change Copyright Status pop-up that appears, and select Change Copyright Status.

All selected citations that are not managed automatically by Alma are updated to the selected citation. All selected citations that are managed automatically by Alma are not affected.

Automatically Managing a Citation Copyright Status

When a citation is marked for automatic management of its copyright status, users cannot set the copyright status of the citation manually.

To send the citation for automatic copyright clearance:

When editing a citation (see Editing a Citation), in the Copyright Attributes tab, select Copyright Auditing Required and enter information in the Copyright Attributes area. For information on most of these fields, see staff digitization request in Creating a Request. If you are implementing Leganto, an administrator can make the Source for Copyright field mandatory and select its default value, see copyright_source in Configuring Leganto Copyright-Related Procedures.

Note

Unlike when directly creating a request for a resource, when entering the copyright attributes for a citation, the field Resource Total Pages may be filled in automatically by the contents of the resource's bibliographic record 300 field. In this case, Alma tries to normalize the field's value (which may contain multiple ranges, including roman numerals) with a total page count, but, if unsuccessful, Alma copies the 300 field as-is to Resource Total Pages. Ensure that the value in Resource Total Page contains only regular digits before saving the citation.

Alma uses digitization and copyright rules to automatically set the copyright status of a new citation (or an existing citation whose copyright attributes are changed) to Approved or Declined, or to send an approval task to an operator. For more information, see Configuring Digitization and Copyright Rules. For information about approving or rejecting the requests as an operator, see Approving/Rejecting a Request for Digitization.

When a citation's copyright status is Waiting for Approval or Waiting for CC, you can resubmit the citation for automatic approval/rejection by selecting Recalculate Rules beneath the citation on the Edit Reading List page. This is useful, for example, when you change the digitization and copyright rules, or when a citation's copyright attributes changed but the citation was not automatically resubmitted for automatic approval/rejection.

Once a reading list is associated with a course, approved copyright records may be fully or partially locked for accounting purposes. In a reading list associated with a course, if you make any changes to the fields, then, depending on the timing and status of the existing copyright request, you may be offered to update the request or make a new request. If the new/updated request is not automatically approved, Alma creates an approval task for manual handing by a librarian. If you delete a citation with an approved copyright request (by a licensing agency; not self-declared or by Creative Commons), what happens to the record depends on the deletion date:
• Before the course starts - The copyright record is deleted.
• During the course - The copyright record's end date is changed to the date that the citation is deleted. The end date of an automatically approved copyright cannot be set to earlier than the current date.
• After the course - The copyright record is preserved. This is also the case if you change the copyright management from automatic to manual.