

ExLibris
Part of Clarivate

IGOLU
International Group of Ex Libris Users

Document Delivery patron digitization requests setup and workflow

Explanation and Live Demonstration

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Senior Librarian

Introduction

Create a patron digitization request in Primo (patron initiated)

The Digitization Department

Processing the patron digitization requests in Alma

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Addendum: Patron digitization requests sent as an email attachment

Define the Digitization Request Copyright Declaration

Create a patron digitization request in Alma (staff initiated)



Introduction

Introduction

- A digitization request is a request by a patron to receive a digital copy of all or part of a physical item or electronic inventory.
- For example, the digitization request may be a specific article in a journal, chapter of a book, or an entire book.
- A digital version of what the patron is requesting does not yet exist, and therefore digitization needs to occur.

Introduction

- The digitization request may be supplied to the patron via either of the following methods:
 - Document delivery (as a link to the file or as an attachment)
 - Depositing the digital file in the repository and publishing it to Primo so that the patron (and other users) can access it. This option requires Alma-D.

Introduction

- The digitization request may be created either
 - By staff in the Alma interface on behalf of the patron. This is a "staff initiated" request.
 - By the patron in the Primo interface. This is a "patron initiated" request.

Introduction

- In addition to this presentation, it is recommended to see:
 - Requests in Alma
 - Digital Configuration
 - Configuring Copyright Management
 - Configuring Digital Fulfillment
 - Digitization Processing



The Digitization Department

The Digitization Department

- Digitization requests in Alma are handled via the digitization department
- Digitization departments are available from the fulfillment configuration menu under "Digital Fulfillment > Digitization Departments"
- Multiple digitization departments may exist for various combinations of libraries.

The Digitization Department

Configuring on level of institution

ExLibris Alma University

Configuring: Alma University ▾

Alma PRODUCTION

Market

Acquisitions

Resources

Discovery

Leganto

Fulfillment

SIP2 Bin Configuration

Locations

Remote Storage

Physical Fulfillment

Fulfillment Units

Terms of Use and Policies

Block Preferences

Auto Loan Renewal Rules

Item Policy

Advanced Policy Configuration

Overdue and Lost Loan Profile

Loan Recalls Configuration

Loan Status Name

Request Task Name

Request Cancellation Reasons

Request Pickup

User Block Description

User Block Definitions

User Demerits

Digital Fulfillment

Digitization Departments

Electronic Document Delivery Rules

Delivery Profiles Metadata

Alma Viewer Labels

Viewer Share Buttons

Courses

Processing Departments

Academic Departments

Additional Reading List

Citation Statuses

Citation Processing Rules

Course Terms

Citation Attributes Types

The Digitization Department

- We have created one digitization department

Configuring: Alma University 👤 ? 💬

Department List

1 - 1 of 1 🔍 + Add Department 📄 ⚙️

	↕Code	▲Name	↕Description	↕Owner	Managed by Circulation Desk
1	DIGL_DEPT_INST	Institutional Digitization Department	Main digitization department s...	Main Campus	<input type="checkbox"/> ⋮

The Digitization Department

- General Details tab

Department Details

Institutional Digitization Department

General Details | Served Libraries | Contact Information | Operators

Code* DIGI_DEPT_INST

Name* Institutional Digitization Department

Description Main digitization department serving entire university

Work Time(days) 2

Default Printer Digitization Dept. Printer

Additional Printers

Map

The amount of time the physical item will remain in the digitization department before it is expected to be returned to the location from where it came

The Printer to where the slips will be printed

The Digitization Department

- Served Libraries tab

< Served Libraries Cancel Save

Institutional Digitization Department >

General Details **Served Libraries** Contact Information Operators

1 - 1 of 1 Attach Library

▼Name	Description
1 Alma University	Alma University

We have defined that this department will serve the entire institution (and not just specific libraries)

The Digitization Department

- Served Libraries tab

We could have defined that this department will serve one or more specific libraries. Instead, we have it serve the entire institution (Alma University).

Cancel Save

Institutional Digitization Department

General Details **Served Libraries** Contact Information Operators

1 - 1 of 1

Name	Description
1 Alma University	Alma University

Attach Library

Library *

Look-up or select

- Education Library
- Engineering Library
- Jimmy Smith Library
- Landesbibliothek
- Law Library

Clarivate, 2023

The Digitization Department

- Contact Information tab

< Contact Information Cancel Save

Institutional Digitization Department >

General Details Served Libraries **Contact Information** Operators

Addresses

1 - 1 of 1 + Add Address 📄 ⚙️

	▲Preferred	Address	↕Created By	↕Creation Date	Type	
1	✓	613 Library Blvd Dimona New York USA	Alicia Chen	05/05/2022 10:21	Primary, Queries, Shipping	⋮

Phone Numbers

1 - 1 of 1 + Add Phone Number 📄 ⚙️

	▲Preferred	Phone Number	Created By	Creation Date	Type	
1	✓	1-248-365-6133	Alicia Chen	05/05/2022 10:22	Primary, Queries	⋮

Email Addresses

1 - 1 of 1 + Add Email Address 📄 ⚙️

	↕Preferred	Email Address	▲Created By	Creation Date	Type	
1	✓	yoel.kortick@clarivate.com	Alicia Chen	05/05/2022 10:22	Primary, Queries	⋮

The Digitization Department

- Operators tab

Cancel Save

Institutional Digitization Department

General Details Served Libraries Contact Information **Operators**

+ Add Operator

▲Name	
1 Alicia Chen	...
2 Bettina Schmid	...
3 Danny Green	...
4 Elia Zafrani	...
5 Flavia Deluca	...
6 Hannah Wagner	...

These are the staff users who can handle digitization requests in the digitization department.



Electronic Document Delivery Rules

Electronic Document Delivery Rules

- Electronic document delivery rules allow the institution to define under what circumstances a resources can be digitized.
- Electronic document delivery rules are available from the fulfillment configuration menu under "Digital Fulfillment > Electronic document delivery rules"

Electronic Document Delivery Rules

Configuring on level of institution

EXLIBRIS Alma University

Configuring: Alma University ▾

Alma PRODUCTION

Market

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Loan Recalls Configuration

Loan Status Name

Request Task Name

Request Cancellation Reasons

Request Pickup

User Block Description

User Block Definitions

User Demerits

Digital Fulfillment

Digitization Departments

Electronic Document Delivery Rules

Delivery Profiles Metadata

Alma Viewer Labels

Viewer Share Buttons

Courses

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Additional Reading List

Citation Statuses

Citation Processing Rules

Course Terms

Citation Attributes Types

Electronic Document Delivery Rules

- If all the input parameters of the rule are fulfilled (are true) then the output parameters section will be applied.
- The output parameters sections can be "true" or "false"
 - True = Document delivery is allowed
 - False = Document delivery is not allowed
- On the next slide we have a rule which states "if the user group is 'guest' then document delivery is not allowed"

Electronic Document Delivery Rules

Electronic Document Delivery Rules Editor Cancel Save

Electronic Document Delivery Rules Editor



Name* **If user group guest then not allowed**


Description **Document Delivery not allowed for user group guest**

Created By **Hannah Wagner** Created On **12/04/2020**

Updated By **Hannah Wagner** Updated On **05/05/2022**

Input Parameters

[+ Add Parameter](#)  

Name	Operator	Value	
1 User Group	=	Guest	

Output Parameters

IsAllowed* **False**

Electronic Document Delivery Rules

- This is the default rule which means "all cases true" (document delivery is allowed)

Electronic Document Delivery Rules Editor

Cancel Save

Electronic Document Delivery Rules Editor

Name* Default Electronic Document Delivery Rule

Description Default Electronic Document Delivery Rule

Created By System Created On 05/04/2023

Updated By Hannah Wagner Updated On 05/04/2023

Output Parameters

IsAllowed* True

Electronic Document Delivery Rules

- The rules are read top to bottom

Electronic Document Delivery Rules List

Rules Notes

Institution Rules List

Filter: All

+ Add Rule

	Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
1	<input checked="" type="checkbox"/>		▼	If user group guest then not allowed	Document Delivery not allowed for user group guest	Hannah Wagner	05/05/2022	⋮

Default Rule

	Rule Name	Description	Updated By	Update Date	
1	Default Electronic Document Delivery Rule	Default Electronic Document Delivery Rule	Hannah Wagner	05/04/2023	⋮

The only time document delivery will not be allowed is if the user group is "Guest"



Digitization and Copyright Rules

Digitization and Copyright Rules

- When digitization requests are created Alma checks digitization and copyright rules to determine how to handle the request.
- The Digitization and Copyright Rules are accessed at "Configuration > Fulfillment > Copyright Management > Digitization and Copyright Rules"

Copyright Management

Digitization and Copyright Rules

Access Rights

Copyright Declaration

Copyrights Statements - Digital

Digital Watermark

Resource Sharing

Copyright Declaration

Copyright Publishers

Citation Default Copyright Status

Leganto Copyright Settings

Copyright approval reasons

Copyright reject reasons

Digitization and Copyright Rules

- The digitization and copyright rules determine whether:
 - A. The request requires manual approval or is automatically approved.
 - B. The request requires manual copyright clearance, or the copyright is assumed to be automatically approved.
 - C. The delivery to the requester will be:
 - A. By a link in an email
 - B. By an attachment in an email
 - C. By adding the digitized document to the library's inventory (and then sending a link to the inventory by email)

Digitization and Copyright Rules

- In the example on the next slide, we have defined as follows:
- If the request is type "patron digitization request" then:
 1. Document delivery will be via a link in an email
 2. Approval of the digitization request is required
 3. Copyright clearance for the digitization request is required

Digitization and Copyright Rules

Digitization Workflow Rules List

Rules Notes

Institution Rules List

+ Add Rule

Filter: All Request Type Parameter: All

	Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
1	<input checked="" type="checkbox"/>		▼	Staff digitization Digital Inv representation	Staff digitization request which is not partial and user group not distance learner will be digital inventory representation and require approval and copyright clearance	Alicia Chen	02/11/2020	⋮
2	<input checked="" type="checkbox"/>	▲		Patron digitization doc deliv cc approval and cc	For patron digitization requests do document delivery with link and require approval and copyright clearance	Alicia Chen	05/04/2023	⋮

Default Rule

	Rule Name	Description	Updated By	Update Date	
1	Default Digitization Flow	Full Workflow	Alicia Chen	05/04/2023	⋮

⋮ Edit Duplicate Delete

We will now edit this existing rule which we already created

Digitization and Copyright Rules

< Digitization Workflow Setup Cancel Save

Digitization Workflow Rule Editor

Name* **Patron digitization doc deliv cc approval and cc**

Description **For patron digitization requests do document delivery with link and require approval and copyright clearance**

Created By **Alicia Chen** Created On **05/05/2022**

Updated By **Alicia Chen** Updated On **05/04/2023**

Input Parameters + Add Parameter

Name	Operator	Value
1 Request Type	=	Patron Digitization

Workflow Setup

DIGITIZED CONTENT MANAGEMENT

Select digitization target **Document delivery - link**

Maximum views **5**

If the request type = patron digitization

The file will be delivered via a link in an email. Other options include "Document delivery - attachment" and "Digital Inventory - representation". Note that "Digital Inventory - representation" requires "Alma D".

The patron will be able to view the link 5 times

Digitization and Copyright Rules

The request will require approval before it can be "done", and it will appear in the "Approval Requests List" task list

APPROVAL/COPYRIGHT CLEARANCE PROCESSING

Approval

Copyright clearance

Approval/Copyright Clearance Management

- In parallel to digitization workflow
- Blocks digitization workflow
- Automatically approved

The request will require copyright clearance before it can be "done"



Define the Digitization Request Copyright Declaration

Define the Digitization Request Copyright Declaration

- To configure the copyright notice, navigate to "Configuration > Fulfillment > Copyright Management > Copyright Declaration"

Copyright Management

Digitization and Copyright Rules

Access Rights

Copyright Declaration

Copyrights Statements - Digital

Digital Watermark

Resource Sharing

Copyright Declaration

Copyright Publishers

Citation Default Copyright Status

Leganto Copyright Settings

Copyright approval reasons

Copyright reject reasons

Define the Digitization Request Copyright Declaration

- When a staff member makes a digitization request on behalf of a patron, he or she needs to check a box "Copyright Declaration Signed by patron".
- When a patron makes a digitization request in Primo for himself or herself, he or she must agree to the copyright declaration.
- The text of the copyright declaration which the patron agrees to in Primo can be defined in Alma and point to an external copyright-related page.

Define the Digitization Request Copyright Declaration

- Edit the "Digitization Request Copyright Declaration"

Configuration Files Back

You are configuring: **Alma University** [Change Organization Unit](#)

Customized	Filename	Description	Updated by	Update Date		
1	✓	DigitizationRequestCopyrightDeclaration.html	Digitization Request Copyright Declaration	Maud Arnaud	24/11/2017	⋮
2	✓	LegantoDigitizationRequestCopyrightDeclaration.html	Leganto Digitization Request Copyright Declaration	Maud Arnaud	24/11/2017	Edit
3	✓	copyrights.html	Default Copyrights	admin1	06/02/2012	Restore View Default
4	✓	copyrights/copyrights1.html	Law of the United States (Title 17, U.S. Code)	HannahW613	19/04/2020	⋮
5	✓	copyrights/copyrights2.html	Copyright details in Hebrew and English	HannahW613	19/04/2020	⋮
6	✓	copyrights/copyrights3.html	Brief Law of the United States (Title 17, U.S. Code)	HannahW613	19/04/2020	⋮
7	✓	copyrights/copyrights4.html	The YILIS Institute copyright	HannahW613	19/04/2020	⋮
8	✓	copyrights/copyrights5.html	Kentucky and Tennessee	HannahW613	19/05/2020	⋮
9	✓	resourceSharingCopyrights.html	Resource Sharing Copyrights	LauraJ613	04/11/2018	⋮

Define the Digitization Request Copyright Declaration

- Put desired text in the "Content" section and save. This can also be a hyperlink to an external page.

< Configuration File Cancel Save

DigitizationRequestCopyrightDeclaration.html i >

Filename

File Key

Description

Content





Create a patron digitization request in Alma (staff initiated)

Create a patron digitization request in Alma (staff initiated)

- In the example here a staff member will create a patron digitization request for patron Lillian Müller
- The request will be for an article titled "An evaluation of Taiwan's Library and Information Science Academic Journals" by Li-kueu Hsueh.
- The article appears in the "Journal of Library and Information Science Taipei", Vol 21 Iss. 2 Oct 1995 pp 61-80

Create a patron digitization request in Alma (staff initiated)

- We locate the item in the Alma repository and create a request

1  **Tu shu guan xue yu zi xun ke xue** **Journal of library & information science.** [Edit Item](#) [Request](#) 

Journal By Guo li Taiwan shi fan da xue. She hui jiao yu xue xi. ([Taipei], Guo li Taiwan shi fan da xue, she hui jiao yu xue xi 1975)

Barcode: AU65415

Library: Main Library

Creation Date: 12/04/2020 11:12

Modification Date: 10/05/2022 16:55

Expected Arrival Time: -

On Hold Expiration Date: -

Due Date: -

Needed By: -

Until: -

Permanent Location: General

[Other details](#)

Call Number: Z671 .T79

Call Number Type: Library of Congress classification

Status: Item in place

Due back: -

Material Type: Issue

Description: Vol. 21, Iss. 2, (Oct. 1995)

Item ID: 2355379980000121

Holdings ID: 2255380000000121

MMS ID: 99257111200121

Create a patron digitization request in Alma (staff initiated)

Create Request

Request Type* Patron digitization request

Requester* Lillian Müller

Part to Digitize

Partial Digitization

Full Chapter

Volume 21

Issue 2

Part

Publication Date Oct. 1995

Chapter/Article Title An evaluation of Taiwan's Library and Information Science Academic Journals

Chapter/Article Author Li-kueu Hsueh

Required Pages From 61 To 80

Managing Department* Institutional Digitization Department

Calculate Digitization Fee

Copyright Declaration Signed by Patron

For a specific patron

Specify that this is a partial digitization

This is the digitization department which will process the request

We will see that when the patron created this on his or her own in Primo, he or she confirms this by himself / herself.

Create a patron digitization request in Alma (staff initiated)

< Create Request Cancel **Submit**

Create Request

Request Type* Patron digitization request

Requester* Lillian Müller

Part to Digitize

Partial Digitization

Full Chapter

Volume 21

Issue 2

Part

Publication Date Oct. 1995

Chapter/Article Title An evaluation of Taiwan's Library and Information Science Academic Journals

Chapter/Article Author Li-kueu Hsueh

Required Pages From 61 To 80

Managing Department* Institutional Digitization Department

Calculate Digitization Fee

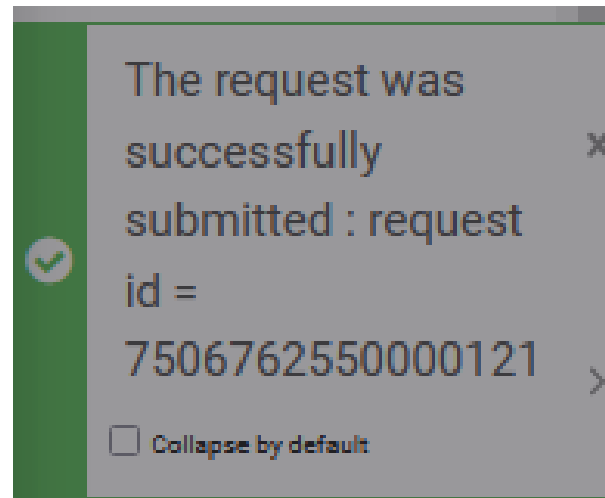
Copyright Declaration Signed by Patron

From To

Click "Submit" to complete the request

Create a patron digitization request in Alma (staff initiated)

- The request is submitted:



Create a patron digitization request in Alma (staff initiated)

- The resource request slip letter is printed

Destination: Institutional Digitization Department
Request Type: Patron digitization request
Expiration Date: 12/04/2023
System Notes: Specific item is requested.


Resource Request Slip <https://eu00.alma.exlibrisgroup.com/alma/downloadFile?printout=true>

Requested For : Lillian Müller


ExLibris
Alma University

Resource Request Slip Letter 05/04/2023

Please note: A specific item is specified in this request.



Request ID: 7506762550000121



Item Barcode: AU65415

Requested For: Lillian Müller

Tu shu guan xue yu zi xun ke xue. Journal of library & information science.
By: Guo li Taiwan shi fan da xue. She hui jiao yu xue xi.
Description: Vol. 21, Iss. 2, (Oct. 1995)
ISSN: 0363-3640
Imprint: [Taipei], Guo li Taiwan shi fan da xue, she hui jiao yu xue xi 1975

Location: General **Call Number: Z671 .T79**

Destination: Institutional Digitization Department
Request Type: Patron digitization request
Expiration Date: 12/04/2023
System Notes: Specific item is requested.

Main Library



Create a patron digitization request in Primo (patron initiated)

Create a patron digitization request in Primo (patron initiated)

- In the example here patron Lillian Müller will log into Primo and create a digitation request for herself
- The request will be for a chapter in a book titled "Taiwan" by authors Azra Moiz, Janice Wu and Debbie Nevins.
- The chapter which the patron wants digitized is called "Lifestyle" and appears on pages 66-77.

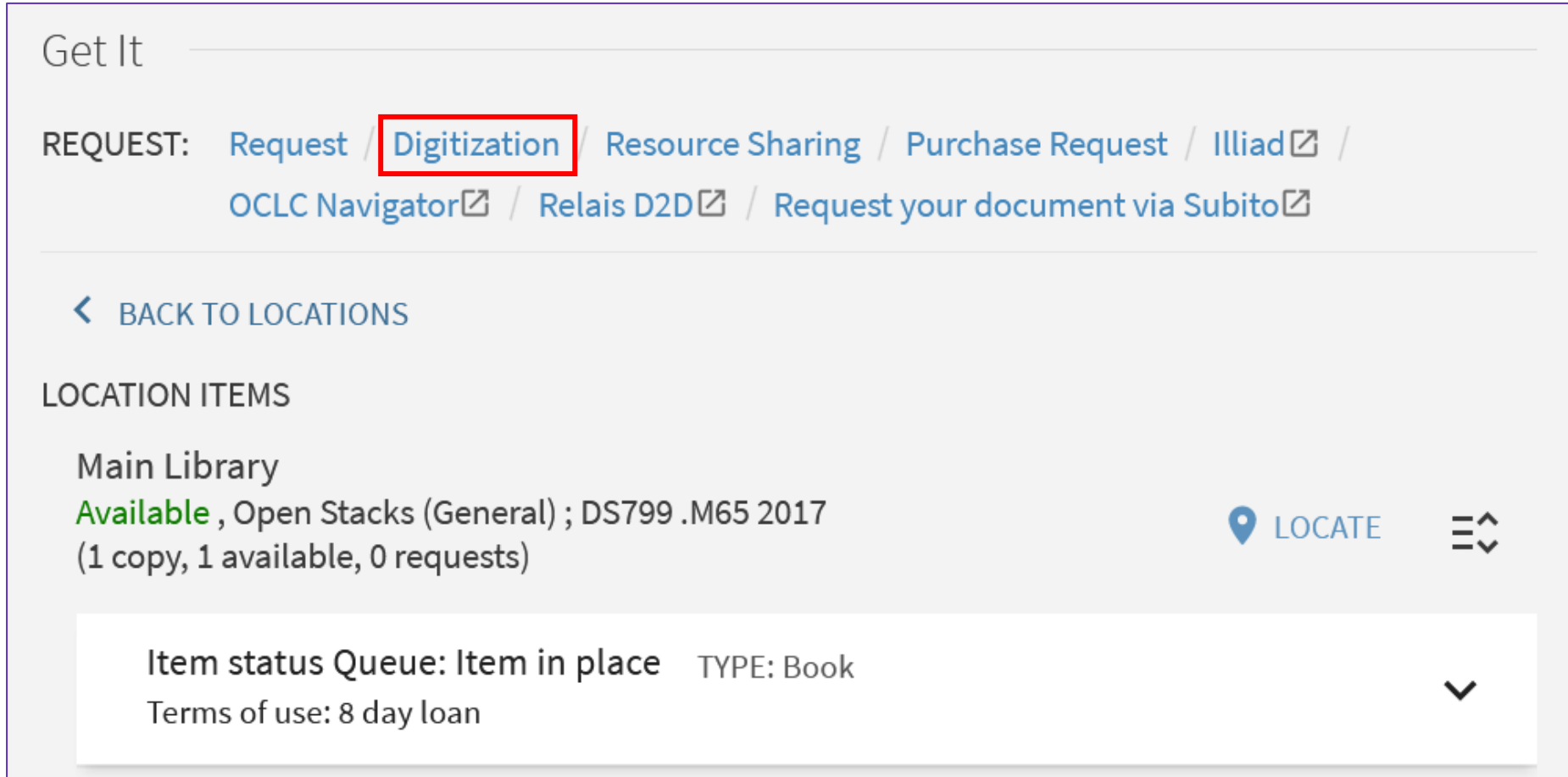
Create a patron digitization request in Primo (patron initiated)

- The patron logs in and locates the record and checks availability.

The screenshot displays the ExLibris Primo library catalog interface. At the top, the ExLibris logo is on the left, and navigation tabs for LIBRARY SEARCH, COLLECTION DISCOVERY, DATABASE SEARCH, JOURNAL SEARCH, CITATION LINKER, and BROWSE are in the center. On the right, there is a QR code icon, a pin icon, and the user name 'Lillian Müller'. Below the navigation is a search bar containing 'Taiwan Azra' and a 'Library Catalog' dropdown menu. To the right of the search bar is an 'ADVANCED SEARCH' link. Below the search bar, there are options for '0 selected', '1-1 of 1 Results', and a 'Save query' button. The search results list a single book entry: 'Taiwan / Azra Moiz, Janice Wu and Debbie Nevins. Includes introductory essay by Alicia Chen'. The book is published by Moiz, Azra, 1963-; Wu, Janice, author.; Nevins, Debbie, author.; Chen, Alicia. in 2017. The availability information is highlighted with a red box: 'Available at Main Library Open Stacks (General) (DS799 .M65 2017) >'. The book cover image shows a woman wearing a traditional Taiwanese headscarf.

Create a patron digitization request in Primo (patron initiated)

- From the "GetIt" tab the patron clicks "Digitization"





Get It

REQUEST: [Request](#) / **[Digitization](#)** / [Resource Sharing](#) / [Purchase Request](#) / [Illiad](#) / [OCLC Navigator](#) / [Relais D2D](#) / [Request your document via Subito](#)

[← BACK TO LOCATIONS](#)

LOCATION ITEMS

Main Library
Available, Open Stacks (General) ; DS799 .M65 2017
(1 copy, 1 available, 0 requests) [LOCATE](#) 

Item status Queue: Item in place TYPE: Book
Terms of use: 8 day loan 

Create a patron digitization request in Primo (patron initiated)

Digitization Request

Partial

Chapter/Article Title
Lifestyle

Chapter/Article Author

Start page
66

End page
77

Full Chapter?

Comment

Not needed after

You must read and acknowledge the following statement before submitting your request.

***** Copyright Notice *****
I **officially** hereby agree to abide by all rules of the copyright laws as they apply to **Alma University**.
The terms were agreed upon **5 April 2023**.

RESET FORM

SEND DIGITIZATION REQUEST

Patron fills in details and sends digitization request

In the "Digitization and Copyright Rules" in the section "Approval / Copyright Clearance Processing" we checked the box "Copyright Clearance", so this is mandatory.

This is the "Digitization Request Copyright Declaration" that we defined

Submit the request

Create a patron digitization request in Primo (patron initiated)

- The request has been submitted

TOP

SEND TO

GET IT

DETAILS

VIRTUAL BROWSE

LINKS

TAGS

EXPLORE

Get It

REQUEST: [Request](#) / [Digitization](#) / [Resource Sharing](#) / [Purchase Request](#) / [Illiad](#) / [OCLC Navigator](#) / [Relais D2D](#) / [Request your document via Subito](#)

< BACK

Request placed. Place in queue is 0

Details

Title [Taiwan](#) / [Azra Moiz](#), Janice Wu and Debbie Nevins. Includes introductory essay by Alicia Chen

Creator [Moiz, Azra, 1963-](#) author. >
[Wu, Janice](#), author. >
[Nevins, Debbie](#), author. >
[Chen, Alicia](#). >



Processing the patron digitization requests in Alma

Processing the patron digitization requests in Alma

- Patron Lillian Müller sees the requests in her Primo Library Card

The screenshot shows the 'My Library Card' interface with the 'REQUESTS' tab selected. Two digitization requests are listed:

Request ID	Title	Status	Pick up location	Action
1	Taiwan / Azra Moiz, Janice Wu and D... Moiz, Azra, 1963- author.	DIGITIZATION. In Process	Main Circulation Desk	CANCEL
2	Tu shu guan xue yu zi xun ke xue. Jo...	DIGITIZATION. In Process	Institutional Digitization Department	CANCEL

Processing the patron digitization requests in Alma

- In Alma, at the circulation desk which is associated with the location of the items in which the requests were made, the requests appear in the "Pick from shelf" task list

Resource Requests

Pick From Shelf

Scan In Items

Expired Hold Shelf

Active Hold Shelf

Manage In Process Items

Deliver Digital Documents

Approval Requests List

Monitor Requests & Item
Processes

Processing the patron digitization requests in Alma

Pick Up Requested Resources (1 - 2 of 2)

Select All Sort by : **Call Number - Asc** ▾

1



Taiwan / Azra Moiz, Janice Wu and Debbie Nevins. Includes introductory essay by Alicia Chen

Author: Moiz, Azra, 1963- author.

ISBN: 9781502618467

Imprint: New York : Cavendish Square, 2017

Location: General

Call Number: DS799 .M65 2017

Requests: 1

2



Tu shu guan xue yu zi xun ke xue. Journal of library & information science.

ISSN: 0363-3640

Imprint: [Taipei], Guo li Taiwan shi fan da xue, she hui jiao yu xue xi 1975

Location: General

Call Number: Z671 .T79

Description: Vol. 21, Iss. 2, (Oct. 1995)

Requests: 1

Processing the patron digitization requests in Alma

- Note that from the pick from shelf list the request can be edited and, for example, the “Managing Department” can be changed

We will choose “Institutional Digitization Department”

Taiwan / Azra Moiz, Janice Wu and Debbie Nevins. Includes introductory essay by Alicia Chen

Create Request

Request Type* Patron digitization request

Requester* Lillian Müller

Part to Digitize

Partial Digitization

Full Chapter

Volume

Issue

Part

Publication Date

Chapter/Article Title Lifestyle

Chapter/Article Author

Required Pages From 66 To 77

Managing Department*

Copyright Declaration Signed

Institutional Digitization Department

Main Circulation Desk

Processing the patron digitization requests in Alma

- At the circulation desk both items are scanned in and automatically changed to "in transit" to the digitization department.
- At the digitization department the items arrive from the circulation desk and are scanned in.
- The requests will be approved and checked as conforming to copyright clearance.
- The relevant part of the resource will be scanned and attached to the request
- The staff will change the requests to "done" and the patron will receive notification that the request is done and get a link to the resource.
- Finally, the items will be transited back to the permanent location and reshelved.

Processing the patron digitization requests in Alma

- Both items are scanned in at the circulation desk and have destination "Institutional Digitization Department"

Scan In Items Clear List Manage In Process Items

Scan in Items Change Item Information

Place directly on hold shelf Yes No

Automatically print slip Yes No

Register in-house use

Work Order Type

Scan item barcode* Create Item


Scan request ID

1 - 2 of 2

Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In
1 Tu shu guan xue yu zi xun ke xue. Journal of library & information science.	Institutional Digitization Department	AU65415	⚠ Patron digitization request	Lillian Müller	LillianM613	1	...
2 Taiwan / Azra Moiz, Janice Wu and Debbie Nevins. Includes introductory essay by Alicia Chen	Institutional Digitization Department	AU65416	⚠ Patron digitization request	Lillian Müller	LillianM613	1	...

Processing the patron digitization requests in Alma

- Both items are scanned in at the circulation desk and are now in “Transit”

1  Taiwan / Azra Moiz, Janice Wu and Debbie Nevins. Includes introductory essay by Alicia Chen

Book By Moiz, Azra, (New York : Cavendish Square, 2017)
Barcode: AU65416
Library: Main Library
Creation Date: 12/04/2020 11:31
Modification Date: 05/04/2023 11:38


Call Number: DS799 .M65 2017
Call Number Type: Library of Congress classification
Status: Item not in place
Due back: -
Material Type: Book

Requests: 1
Item ID: 2355379950000121
Holdings ID: 2255379970000121
MMS ID: 99257111100121

Process type: Transit
To Library: Alma University/Institutional Digitization Department
Expected Arrival Time: 05/04/2023

On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: General

[Other details](#)

1  Tu shu guan xue yu zi xun ke xue. Journal of library & information science.

Journal By Guo li Taiwan shi fan da xue. She hui jiao yu xue xi. ([Taipei], Guo li Taiwan shi fan da xue, she hui jiao yu xue xi 1975)
Barcode: AU65415
Library: Main Library
Creation Date: 12/04/2020 11:12
Modification Date: 05/04/2023 11:30

Call Number: Z671 .T79
Call Number Type: Library of Congress classification
Status: Item not in place
Due back: -
Material Type: Issue
Description: Vol. 21, Iss. 2, (Oct. 1995)

Requests: 1
Item ID: 2355379980000121
Holdings ID: 2255380000000121
MMS ID: 99257111200121

Process type: Transit
To Library: Alma University/Institutional Digitization Department
Expected Arrival Time: 05/04/2023

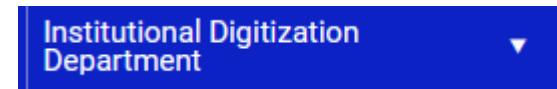
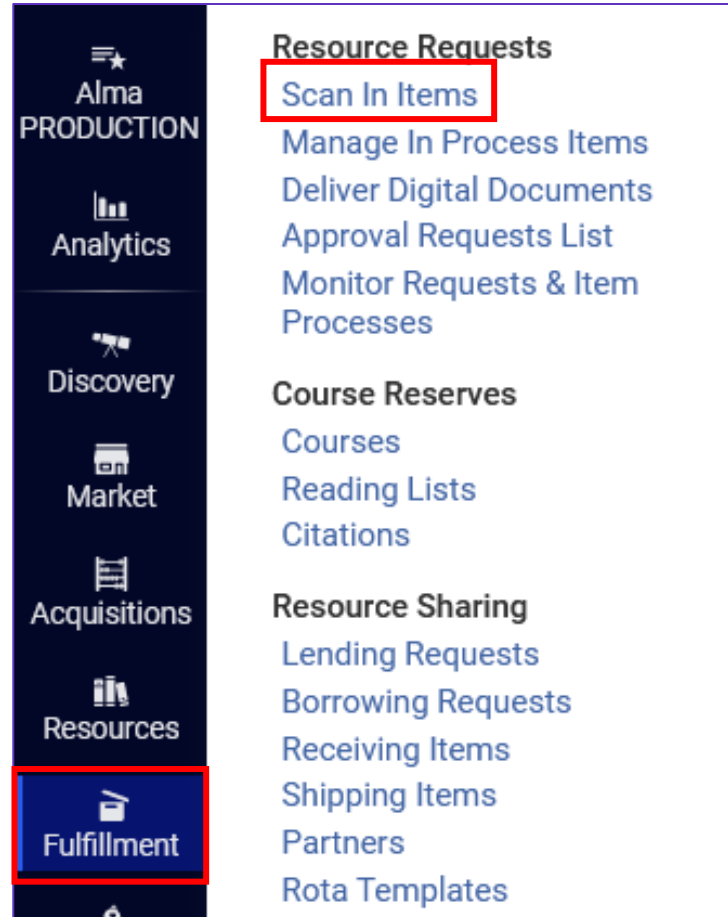
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: General

[Other details](#)

After being scanned, in the items become in transit to the digitization department

Processing the patron digitization requests in Alma

- At the digitization department the items arrive from the circulation desk and are scanned in.



Processing the patron digitization requests in Alma

- Each item has been scanned in at the digitization department

Scan In Items

Clear List Manage In Process Items Shipping Items Receiving Items

Scan in Items Change Item Information

Automatically print slip Yes No

Register in-house use

Done Yes No

Scan item barcode*

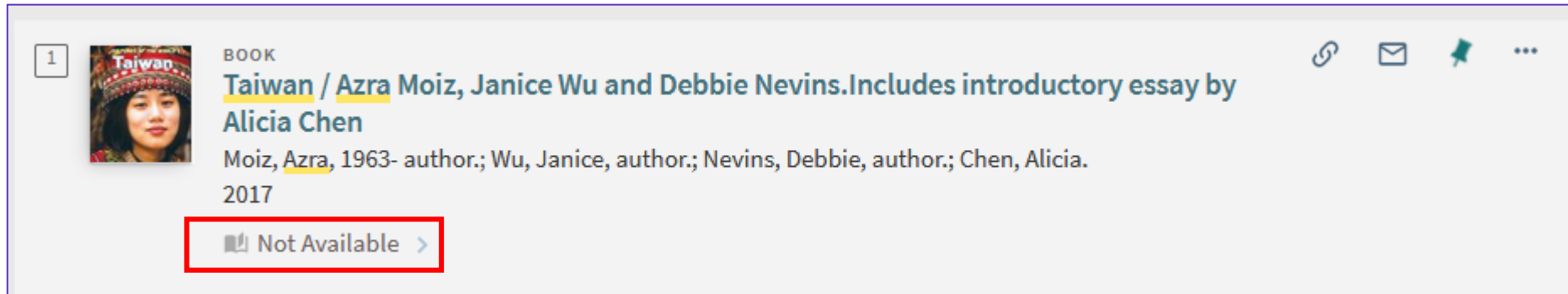
Scan request ID


1 - 2 of 2

	Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In	
1	Tu shu guan xue yu zi xun ke xue. Journal of library & information science.	Digitization	AU65415	⚠ Patron digitization request	Lillian Müller	LillianM613	1		
2	Taiwan / Azra Moiz, Janice Wu and Debbie Nevins.Includes introductory essay by Alicia Chen	Digitization	AU65416	⚠ Patron digitization request	Lillian Müller	LillianM613	1		

Processing the patron digitization requests in Alma

- In Primo the items appear as not available



1  BOOK
Taiwan / Azra Moiz, Janice Wu and Debbie Nevins. Includes introductory essay by Alicia Chen
Moiz, Azra, 1963- author.; Wu, Janice, author.; Nevins, Debbie, author.; Chen, Alicia.
2017
Not Available >


First example in Primo



LOCATION ITEMS
Main Library
Out of library, Open Stacks (General) ; DS799 .M65 2017
(1 copy, 0 available, 1 request) [LOCATE](#) 
Item status Queue: In process of Patron digitization request until 07/04/2023 TYPE: 
Terms of use: 8 day loan Book

Processing the patron digitization requests in Alma

- In Alma the items appear as not available

1  **Taiwan / Azra Moiz, Janice Wu and Debbie Nevins. Includes introductory essay by Alicia Chen** Edit Item Request ...

Book By Moiz, Azra, (New York : Cavendish Square, 2017)
Barcode: AU65416
Library: Main Library
Creation Date: 12/04/2020 11:31
Modification Date: 05/04/2023 12:09
Process type: Patron digitization request (IN_PROCESS)
Expected Arrival Time: -
At: Institutional Digitization Department
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: 07/04/2023
Permanent Location: General

Call Number: DS799 .M65 2017
Call Number Type: Library of Congress classification
Status: Item not in place
Due back: -
Material Type: Book

Requests: 1
Item ID: 2355379950000121
Holdings ID: 2255379970000121
MMS ID: 99257111100121

[Other details](#)

First example in Alma

Processing the patron digitization requests in Alma

- In Primo the items appear as not available

1  JOURNAL    



圖書館學與資訊科學.; Tu shu guan xue yu zi xun ke xue. Journal of library & information science.

Guo li Taiwan shi fan da xue. She hui jiao yu xue xi.; Mid-west Chinese American Librarians Association.; 國立臺灣師範大學. 社會教育學系.
1975

 Not Available >


Second example in Primo

LOCATION ITEMS

Main Library
Out of library , Open Stacks (General) ; Z671 .T79
from:21 1995 until:21 1995  LOCATE 

Item status Queue: In process of Patron digitization request until 07/04/2023 (1 request)


Terms of use: 8 day loan
Item description: Vol. 21, Iss. 2, (Oct. 1995)
TYPE: Issue

[Request / Digitization](#) 

Processing the patron digitization requests in Alma

- In Alma the items appear as not available

Second
example in
Alma

1  **Tu shu guan xue yu zi xun ke xue. Journal of library & information science.** Edit Item Request ...

Journal By Guo li Taiwan shi fan da xue. She hui jiao yu xue xi. ([Taipei], Guo li Taiwan shi fan da xue, she hui jiao yu xue xi 1975)

Barcode: **AU65415**

Library: Main Library

Creation Date: 12/04/2020 11:12

Modification Date: 05/04/2023 12:09

Process type: Patron digitization request (IN_PROCESS)

Expected Arrival Time:

At: Institutional Digitization Department

On Hold Expiration Date: -

Due Date: -

Needed By: -

Until: 07/04/2023

Permanent Location: General

[Other details](#)

Call Number: Z671 .T79

Call Number Type: Library of Congress classification

Status: Item not in place

Due back: -

Material Type: Issue

Description: Vol. 21, Iss. 2, (Oct. 1995)

Requests: 1

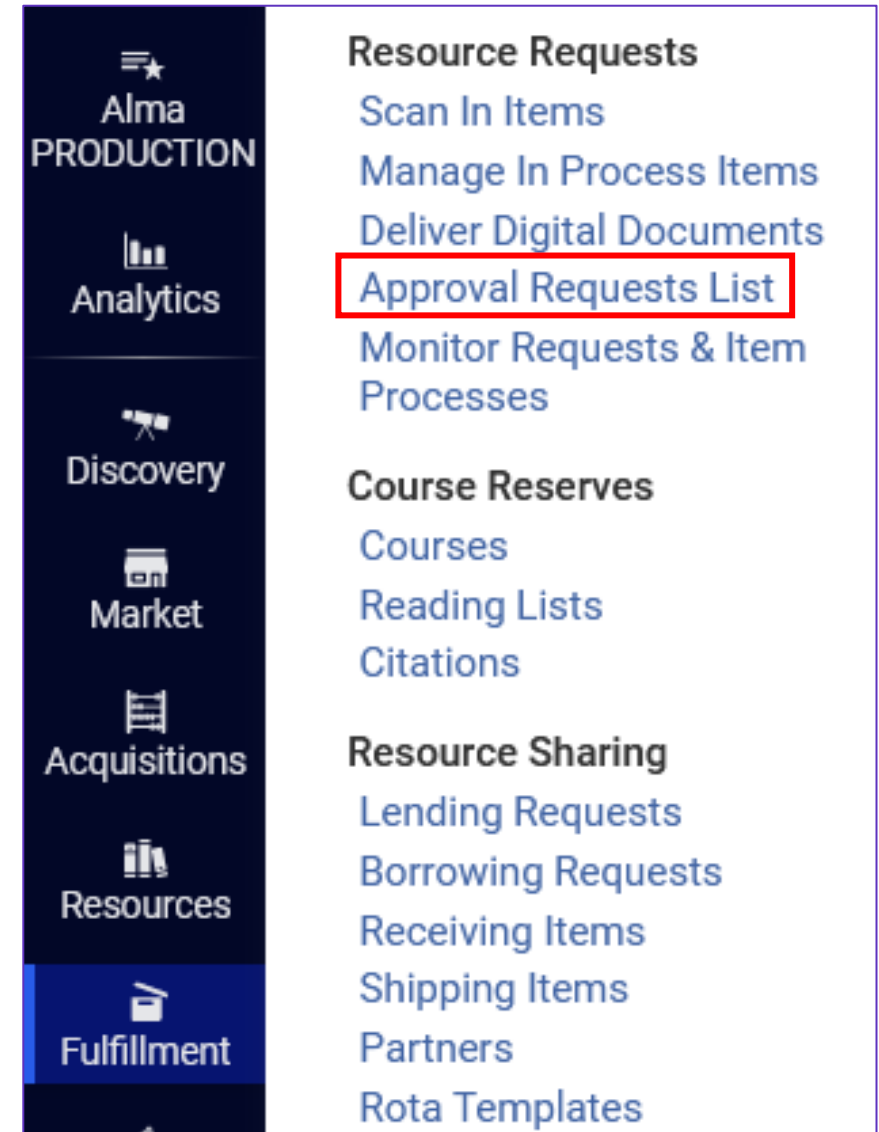
Item ID: 2355379980000121

Holdings ID: 2255380000000121

MMS ID: 99257111200121

Processing the patron digitization requests in Alma

- The requests will be approved and checked as conforming to copyright clearance.
- This is done from the Approval requests task list.
- This is accessible from both the circulation desk and the digitization department.



The screenshot displays the Alma navigation menu on the left and a list of options on the right. The 'Approval Requests List' option is highlighted with a red border. The navigation menu includes: Alma PRODUCTION, Analytics, Discovery, Market, Acquisitions, Resources, and Fulfillment. The options on the right are: Resource Requests (Scan In Items, Manage In Process Items, Deliver Digital Documents, Approval Requests List, Monitor Requests & Item Processes), Course Reserves (Courses, Reading Lists, Citations), and Resource Sharing (Lending Requests, Borrowing Requests, Receiving Items, Shipping Items, Partners, Rota Templates).

Processing the patron digitization requests in Alma

- Here are the two digitization requests waiting for approval.
- The requests will be approved and checked as conforming to copyright clearance.

Approval Requests List Cancel

1 - 2 of 2

Status: Active Associated With Course: All

◆Title	▼Creation date	◆Expiration Date	Requester	▲Digitization Type	◆Status	▲Approval Date	Total Required Pages	Warning	Copyright Declaration	
1 Tu shu guan xue yu zi xun ke xue. Journal of library & information science.	05/04/2023	07/04/2023	Lillian Müller	Partial	Waiting for CC	-	-	Title is waiting for Copyright Clearance.	Copyright Declaration Not Signed by Patron	...
2 Taiwan / Azra Moiz, Janice Wu and Debbie Nevins.Includes introductory essay by Alicia Chen	05/04/2023	07/04/2023	Lillian Müller	Partial	Waiting for CC	-	12	Title is waiting for Copyright Clearance.	Copyright Declaration Signed by Patron	...

Processing the patron digitization requests in Alma

- We will work on them

Approval Requests List

1 - 2 of 2 Title [Search]

Status: Active Associated With Course: All

	Title	Creation date	Expiration Date	Requester	Digitization Type	Status	Approval Date	Total Required Pages	Warning	Copyright Declaration	
1	Tu shu guan xue yu zi xun ke xue. Journal of library & information science.	05/04/2023	07/04/2023	Lillian Müller	Partial	Waiting for CC	-	-	Title is waiting for Copyright Clearance.	Copyright Declaration Not Signed by Patron	...
2	Taiwan / Azra Moiz, Janice Wu and Debbie Nevins.Includes introductory essay by Alicia Chen	05/04/2023	07/04/2023	Lillian Müller	Partial	Waiting for CC	-	12	Title is waiting for Copyright Clearance.	Copyright Declaration Signed by Patron	...

View
Work On
Update Expiry
Filter by this record
View Rule
View hidden

Processing the patron digitization requests in Alma

- Give each a CC Number and CC Approval date and approve

< Approval Request

Taiwan / Azra Moiz, Janice Wu and Debbie Nevins. Includes introductory essay by Alicia Chen

Digitization Request

CC Number 613

CC Order Date 05/04/2023

CC Approval Date 05/04/2023

Note

Order Confirmation

File Name

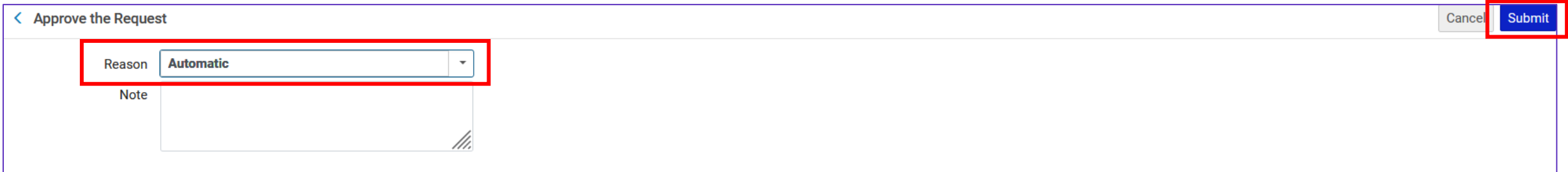
+ Add Attachment

No records were found.

An attachment
can be added

Processing the patron digitization requests in Alma

- Choose a reason, optionally add a note, and submit the approval



< Approve the Request Cancel Submit

Reason **Automatic**

Note

Processing the patron digitization requests in Alma

- After approving the requests, in the Digitization Department we will "Manage In Process Items"

The screenshot displays the Alma system interface. On the left is a dark navigation sidebar with icons and labels for various modules: Alma PRODUCTION, Analytics, Discovery, Market, Acquisitions, Resources, and Fulfillment. The 'Fulfillment' module is highlighted with a red box. To the right of the sidebar is a white menu listing options under several categories: Resource Requests (Scan In Items, Manage In Process Items, Deliver Digital Documents, Approval Requests List, Monitor Requests & Item Processes), Course Reserves (Courses, Reading Lists, Citations), Resource Sharing (Lending Requests, Borrowing Requests, Receiving Items, Shipping Items, Partners, Rota Templates), and Institutional Digitization Department (highlighted with a blue box and dropdown arrow).

Processing the patron digitization requests in Alma

- We will move both requests to "Next Step"

Typically, this is done when the request is being scanned or has been scanned.

In Process Items Scan In Items

1 - 2 of 2

Step : All Request Type : All

	▲Title	Requester	↕Status	↕Request/Process Type	Notes	↕Date received for department	↕End of Activity	
1	Taiwan / Azra Moiz, Janice Wu and Debbie Nevins.Includes introductory essay by Alicia Chen	Lillian Müller	Digitization	Partial	Chapter article title:Lifestyle; Start page:66; End page:77.	05/04/2023	07/04/2023	⋮
2	Tu shu guan xue yu zi xun ke xue. Journal of library & information science.	Lillian Müller	Digitization	Partial	Chapter article title:An evaluation of Taiwan's Library and Information Science Academic Journals;	05/04/2023		⋮

Edit

Next Step

Cancel Request

Change to Electronic Digitization

View hidden

Processing the patron digitization requests in Alma

- The status has changed from "Digitization" to "Document Delivery"

< In Process Items Scan In Items



1 - 2 of 2 🔍 ⚙️

Step: All Request Type: All

	▲Title	Requester	↕Status	↕Request/Process Type	Notes	↕Date received for department	↕End of Activity	
1	Taiwan / Azra Moiz, Janice Wu and Debbie Nevins.Includes introductory essay by Alicia Chen	Lillian Müller	Document Delivery	Partial	Chapter article title:Lifestyle; Start page:66; End page:77.	05/04/2023	07/04/2023	⋮
2	Tu shu guan xue yu zi xun ke xue. Journal of library & information science.	Lillian Müller	Document Delivery	Partial	Chapter article title:An evaluation of Taiwan's Library and Information Science Academic Journals;	05/04/2023	07/04/2023	⋮

Processing the patron digitization requests in Alma

- The staff of the digitization department has already scanned the documents and they are ready.

Name	Date modified
 An evaluation of Taiwans Library and Information Science Academic Journals	4/5/2023 12:05 PM
 Taiwan Azra Moiz p 66-77 chapter Lifestyle	4/5/2023 12:04 PM

Processing the patron digitization requests in Alma

- So now we can "Attach documents" to each request.

In Process Items Scan In Items

1 - 2 of 2

Step: All Request Type: All

	▲Title	Requester	↕Status	↕Request/Process Type	Notes	▲Date received for department	↕End of Activity	
1	Taiwan / Azra Moiz, Janice Wu and Debbie Nevins. Includes introductory essay by Alicia Chen	Lillian Müller	Document Delivery	Partial	Chapter article title:Lifestyle; Start page:66; End page:77.	05/04/2023	07/04/2023	⋮
2	Tu shu guan xue yu zi xun ke xue. Journal of library & information science.	Lillian Müller	Document Delivery	Partial	Chapter article title:An evaluation of Taiwan's Library and Information Science Academic Journals;	05/04/2023		⋮

Edit

Attach Documents

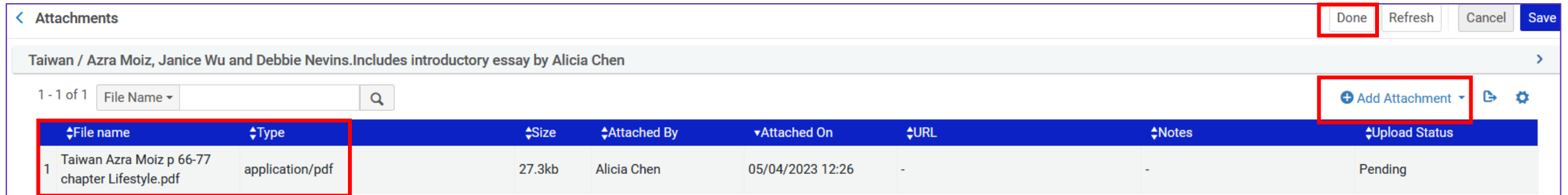
Cancel Request

Change to Electronic Digitization

View hidden

Processing the patron digitization requests in Alma

- Add the attachment and click "Done" (or click "save" now and "done" later)



The screenshot shows the Alma Attachments interface. At the top right, there are buttons for "Done", "Refresh", "Cancel", and "Save". Below this is a breadcrumb trail: "Taiwan / Azra Moiz, Janice Wu and Debbie Nevins. Includes introductory essay by Alicia Chen". A search bar shows "1 - 1 of 1" and "File Name" with a search icon. To the right of the search bar is a red box containing a "+ Add Attachment" button. Below the search bar is a table with the following columns: File name, Type, Size, Attached By, Attached On, URL, Notes, and Upload Status. The table contains one row with the following data: 1, Taiwan Azra Moiz p 66-77 chapter Lifestyle.pdf, application/pdf, 27.3kb, Alicia Chen, 05/04/2023 12:26, -, -, Pending. A red box highlights the first two columns of this row.

File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status
1 Taiwan Azra Moiz p 66-77 chapter Lifestyle.pdf	application/pdf	27.3kb	Alicia Chen	05/04/2023 12:26	-	-	Pending

Processing the patron digitization requests in Alma

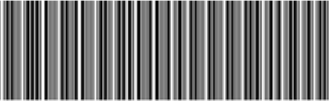
- After clicking “Done” the item goes into transit back to the owning library

ExLibris
Alma University

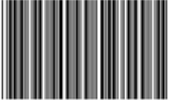
Transit Letter

05/04/2023

Print Date: 05/04/2023- 12:27



Request ID: 7506775620000121



Item Barcode: AU65416

We are transferring the item below
From: Alma University - Institutional Digitization Department
To: Main Library
Transfer Date: 05/04/2023
Transfer Time: 12:27
Expiration date: 06/04/2023
Material Type: Book
System Notes:

Request Note:

Taiwan /
By: Moiz, Azra,
Owning Library: Main Library

Main Library

Processing the patron digitization requests in Alma

- Lillian has received a letter with a link to the document

Notification Item Letter

Your.Department@organization.com
To Yoel Kortick

Wed 4/5/2023 1:28 PM

ExLibris
Alma University

Notification Item Letter 05/04/2023

Lillian Müller

Main Library
Primary Dept. 237 Center Street Main Library
237 Center Street Main Library 2nd Floor
Cen

Your request to create a digital version of the following material has been completed.

Title: Taiwan /

To download the resource:
For local/LDAP users [click here.](#)

For SAML users (add idpCode if needed) [click here.](#)

For CAS users [click here.](#)

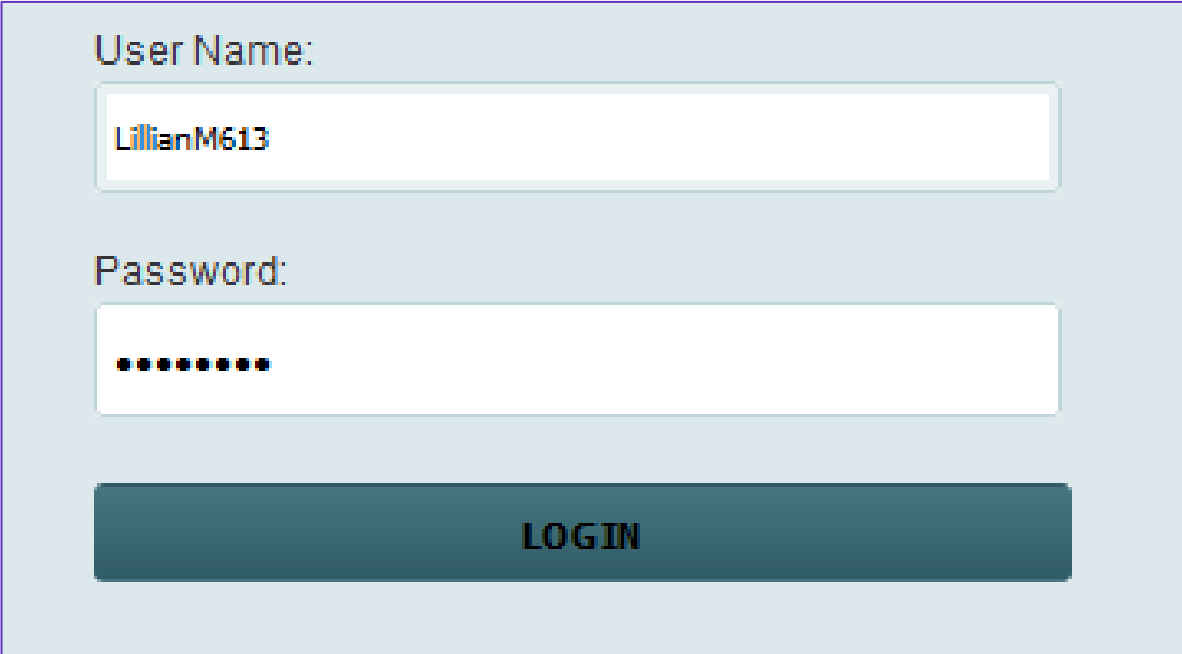
For your information, the maximum number of views of the resource is 5.

Sincerely

We will click this link

Processing the patron digitization requests in Alma

- Lillian clicks the link and logs in



User Name:
LillianM613

Password:
.....

LOGIN

Processing the patron digitization requests in Alma

- The file automatically downloads (how it downloads or automatically is viewed may depend on browser settings)




Download completed successfully

If the file does not download automatically, click this [link](#) to download

Processing the patron digitization requests in Alma

- The items get transited back to the owning library circulation desk, scanned in and reshelved

1  **Taiwan / Azra Moiz, Janice Wu and Debbie Nevins. Includes introductory essay by Alicia Chen** Edit Item Request ...

Book By Moiz, Azra, (New York : Cavendish Square, 2017)
Barcode: AU65416
Library: Main Library
Creation Date: 12/04/2020 11:31
Modification Date: 05/04/2023 12:36
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: General

Call Number: DS799 .M65 2017
Call Number Type: Library of Congress classification
Status: Item in place
Due back: -
Material Type: Book

Item ID: 2355379950000121
Holdings ID: 2255379970000121
MMS ID: 99257111100121

[Other details](#)



Reporting on digitization requests

Reporting on digitization requests

- As we have seen there is no need for the staff user to manually run a report of all items which require copyright clearance and approval, because Alma automatically puts these items in the task list.
- There is also no need to manually run a report of all items which are in the digitization department and awaiting processing, because Alma automatically puts these items in the "Manage in process Items" list when at the Digitization Department

Reporting on digitization requests

- It is also possible to use Alma Analytics.
- On the next slide, for example, we state that we retrieve all requests which are active and the "request type" is "Digitization".
- This is done in the "Requests" subject area.
- We display the title, barcode, enumeration a, chronology i and the description

Reporting on digitization requests

The screenshot shows a reporting tool interface with the following components:

- Criteria** (selected), Results, Prompts, Advanced
- Subject Areas** (expanded): Requests
 - Request Measures
 - Request Measures (Average)
 - Request Process Measures
 - Request Details
 - Booking Request Details
 - Move Request Details
 - Digitization Request Details
 - Requester
 - Request Type
- Selected Columns**
 - Bibliographic Details: Title
 - Physical Item Details: Barcode, Enum A, Chron I, Description
- Filters**
 - Active Request Flag is equal to / is in Yes
 - AND Request Type Description is equal to / is in Patron digitization request

Reporting on digitization requests

- Here is part of the results in Alma Analytics

Title	Barcode	Enum A	Chron I	Description
At the cross roads of art and religion : imagination, commitment, transcendence /	AU31705			
Historical demography,	1109-10			
Jane Austen /	3014-10			
Taiwan /	AU65416			
Tu shu guan xue yu zi xun ke xue. Journal of library & information science.	AU65415	21	1995	Vol. 21, Iss. 2, (Oct. 1995)



Addendum: Patron digitization requests sent as an email attachment

Addendum: Patron digitization requests sent as an email attachment

- Due to audience requests we will also add here an example whereby the document delivery is done with an email attachment.
- In the example previously used here the patron digitization request was sent to the patron as a link.
- It is also possible to send the request as an email attachment.

Addendum: Patron digitization requests sent as an email attachment

- Previously when we defined the Digitization and Copyright Rule called "Patron digitization doc deliv approval and cc" we defined the "Digitization target" as "Document Delivery - Link".
- See the section "Digitization and Copyright Rules" for the example.

2	<input checked="" type="checkbox"/>	<input type="text" value="▲"/>	Patron digitization doc deliv cc approval and cc	For patron digitization requests do document delivery with link and require approval and copyright clearance	Alicia Chen	05/05/2022	⋮
---	-------------------------------------	--------------------------------	---	--	-------------	------------	---

Default Rule

- Edit
- Duplicate
- Delete

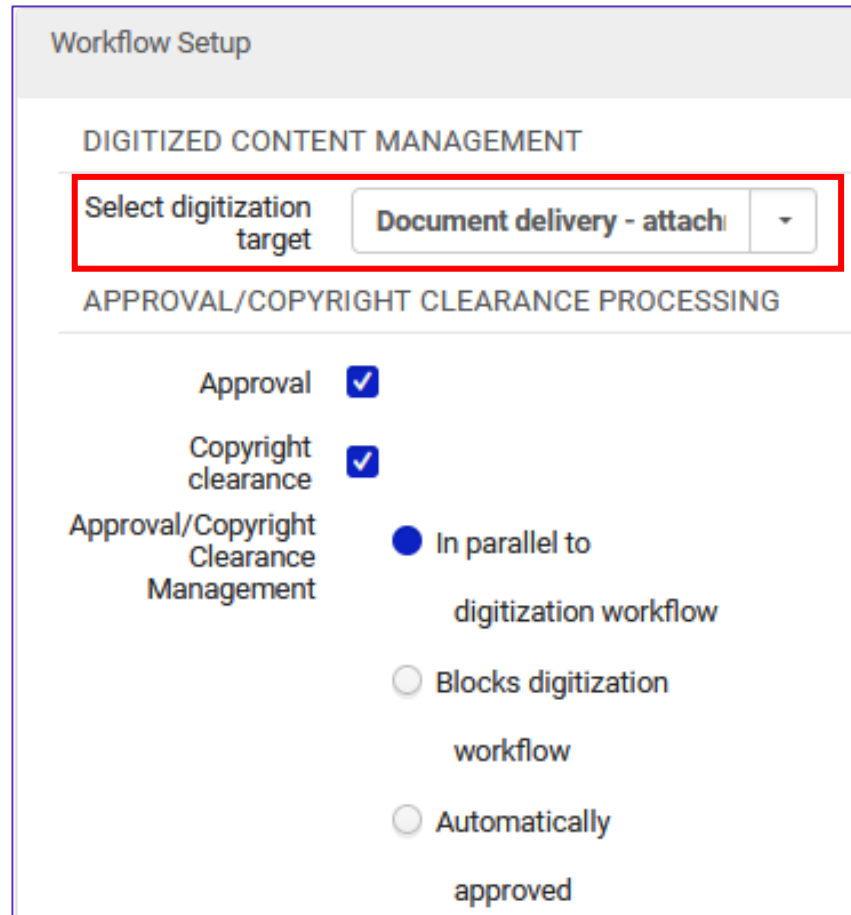
DIGITIZED CONTENT MANAGEMENT

Select digitization target

Document delivery - link

Addendum: Patron digitization requests sent as an email attachment

- We will now change the "Digitization target" to "Document Delivery - Attachment".



The screenshot displays the 'Workflow Setup' configuration page. It is divided into two main sections: 'DIGITIZED CONTENT MANAGEMENT' and 'APPROVAL/COPYRIGHT CLEARANCE PROCESSING'. In the 'DIGITIZED CONTENT MANAGEMENT' section, the 'Select digitization target' dropdown menu is highlighted with a red border and is currently set to 'Document delivery - attach'. The 'APPROVAL/COPYRIGHT CLEARANCE PROCESSING' section contains three items: 'Approval' (checked), 'Copyright clearance' (checked), and 'Approval/Copyright Clearance Management' (radio button selected). The 'Approval/Copyright Clearance Management' section has three options: 'In parallel to digitization workflow' (selected), 'Blocks digitization workflow' (unselected), and 'Automatically approved' (unselected).

Addendum: Patron digitization requests sent as an email attachment

- Now we will go through the same flow whereby a patron digitization request is created, approved and completed.
- We will then check the email which the requester receives from Alma.

Addendum: Patron digitization requests sent as an email attachment

- Lillian Müller logs into Primo and makes a digitization request on item "A book that was lost and other stories by S.Y. Agnon".

The screenshot shows a library system interface with the following elements:

- Get It** section with navigation links: [Request](#), [Digitization](#) (highlighted with a red box), [Resource Sharing](#), [Purchase Request](#), [Illiad](#), [OCLC Navigator](#), [Relais D2D](#), and [Request your document via Subito](#).
- LOCATION ITEMS** section for **Main Library**, showing the item is **Available** (General PJ5053.A4 A26 1995) with 1 copy, 1 available, and 0 requests. A **LOCATE** button and a menu icon are present.
- Item status: **Item status Queue: Item in place**, **TYPE: Book**, and **Terms of use: 14 Days**.
- Details** section with a red border around the title: **Title** A book that was lost and other stories / by S.Y. Agnon ; edited with introductions by Alan Mintz and Anne Golomb Hoffman.

Addendum: Patron digitization requests sent as an email attachment

- Lillian requests a digitization of the short story "Fable of the goat" from page 199 to 202 and checks the copyright notice

Digitization Request

Partial

Chapter/Article Title
Fable of the Goat

Chapter/Article Author

Start page
199

End page
202

Full Chapter?

Comment

Not needed after

Pickup Date

You must read and acknowledge the following statement before submitting your request.

***** Copyright Notice *****
I hereby agree to abide by all rules of the copyright laws as they apply to [Alma University](#)

RESET FORM

SEND DIGITIZATION REQUEST

Addendum: Patron digitization requests sent as an email attachment

- The request is placed and appears in the “Pick from shelf” list.

Facets <<

Request Date
Today (1)



Request/Process Type
Patron digitization re... (1)


Location
General (1)

Call Number
PJ5053.A4 A26 1995 (1)

Pick Up Requested Resources (1 - 1 of 1)

Select All Sort by : Call Number - Asc ▾

[Print Slip](#) [Cancel](#)  

1 <input type="checkbox"/>		A book that was lost and other stories / by S.Y. Agnon ; edited with introductions by Alan Mintz and Anne Golomb Hoffman. Author: Agnon, Shmuel Yosef, 1887-1970. ISBN: 9780805241204 Edition: 1st ed. Imprint: New York : Schocken, ©1995.	Location: General Call Number: PJ5053.A4 A26 1995 Requests: 1	Cancel Request Mark as Missing ...
----------------------------	---	--	--	--

Addendum: Patron digitization requests sent as an email attachment

- The item (barcode AU65512) is scanned in at the digitization department.

The screenshot displays the ExLibris Alma Institutional Digitization Department interface. The top navigation bar includes the ExLibris Alma University logo, a search bar with 'Physical items' and 'Keywords' filters, and the 'Institutional Digitization Department' label. The left sidebar contains a navigation menu with icons for Alma, Discovery, Market, Acquisitions, Resources, and Fulfillment. The 'Fulfillment' menu item is highlighted with a red box. The main content area is divided into three columns. The first column lists 'Resource Requests' (with 'Scan In Items' highlighted in a red box), 'Course Reserves', and 'Resource Sharing'. The second column lists 'Advanced Tools - Requests', 'Advanced Tools - Reading Lists', and 'Advanced Tools - General'. The third column shows a 'Scan In Items' section with a 'Fulfillment' link, a 'by Library - Bar Graph' chart, and a 'Primo Basic Search' chart. The 'Scan In Items' section is highlighted with a red box.

Addendum: Patron digitization requests sent as an email attachment

Scan In Items Clear List Manage In Process Items Exit

Scan in Items Change Item Information

Automatically print slip Yes No

Register in-house use

Done Yes No

Scan item barcode * OK

Scan request ID OK

[Create Item](#)

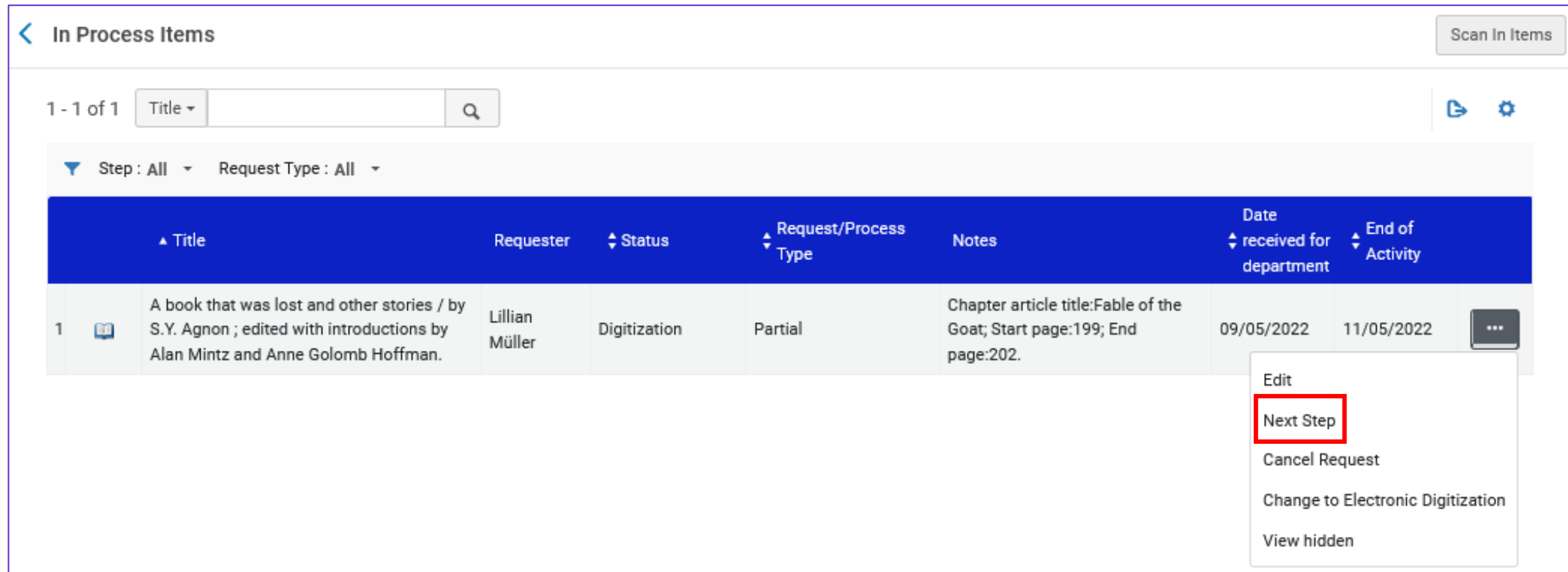
1 - 1 of 1

Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In
1 A book that was lost and other stories / by S.Y. Agnon ; edited with introductions by Alan Mintz and Anne Golomb Hoffman.	Digitization	AU65512	Patron digitization request	Lillian Müller	LillianM613	1	

The item is scanned in, and we will "Manage In Process Items". We can also "Manage In Process Items" from the "Fulfillment > Resource Requests" menu.

Addendum: Patron digitization requests sent as an email attachment

- Now we will choose "Next Step" and scan the item.



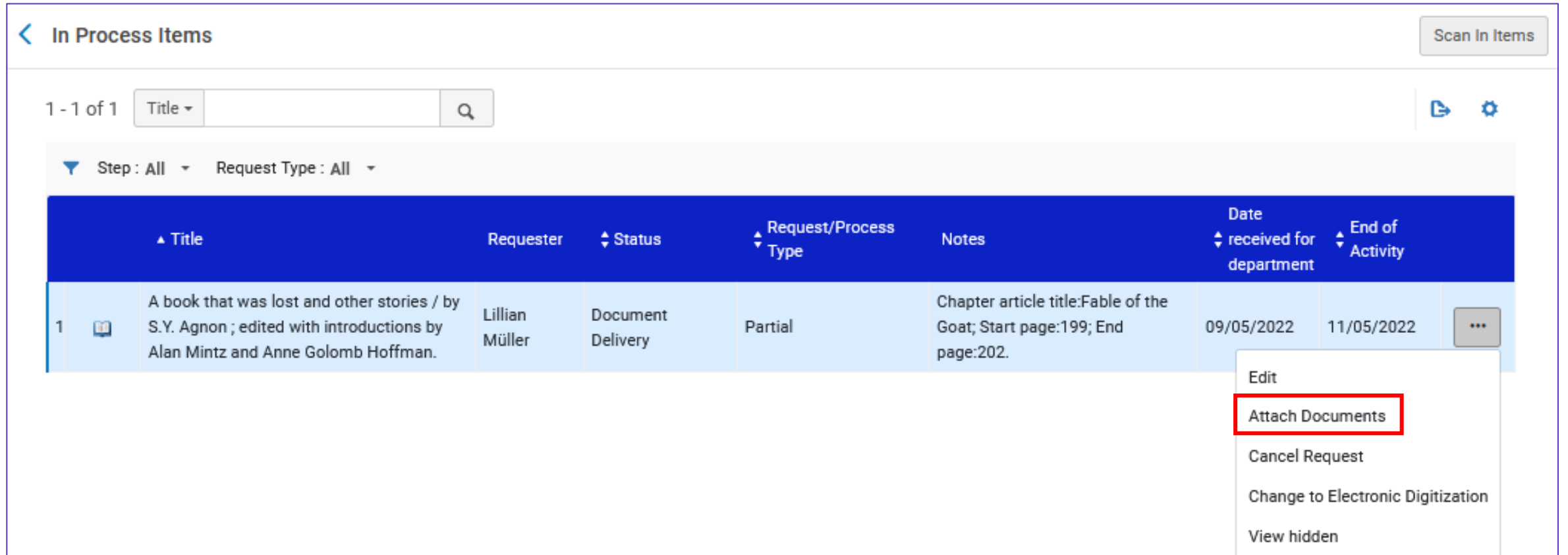
The screenshot shows a web interface for managing digitization requests. At the top, there is a header 'In Process Items' with a back arrow and a 'Scan In Items' button. Below the header is a search bar with '1 - 1 of 1' results and a search filter set to 'Title'. There are also icons for sharing and settings. Below the search bar, there are filters for 'Step : All' and 'Request Type : All'. The main content is a table with the following columns: Title, Requester, Status, Request/Process Type, Notes, Date received for department, and End of Activity. A single row is visible with the following data: Title: 'A book that was lost and other stories / by S.Y. Agnon ; edited with introductions by Alan Mintz and Anne Golomb Hoffman.', Requester: 'Lillian Müller', Status: 'Digitization', Request/Process Type: 'Partial', Notes: 'Chapter article title:Fable of the Goat; Start page:199; End page:202.', Date received for department: '09/05/2022', and End of Activity: '11/05/2022'. A dropdown menu is open for the first item, showing options: 'Edit', 'Next Step' (highlighted with a red box), 'Cancel Request', 'Change to Electronic Digitization', and 'View hidden'.

	▲ Title	Requester	↕ Status	↕ Request/Process Type	Notes	↕ Date received for department	↕ End of Activity	
1	A book that was lost and other stories / by S.Y. Agnon ; edited with introductions by Alan Mintz and Anne Golomb Hoffman.	Lillian Müller	Digitization	Partial	Chapter article title:Fable of the Goat; Start page:199; End page:202.	09/05/2022	11/05/2022	⋮

- Edit
- Next Step**
- Cancel Request
- Change to Electronic Digitization
- View hidden

Addendum: Patron digitization requests sent as an email attachment

- Now we will choose "Attach Documents".



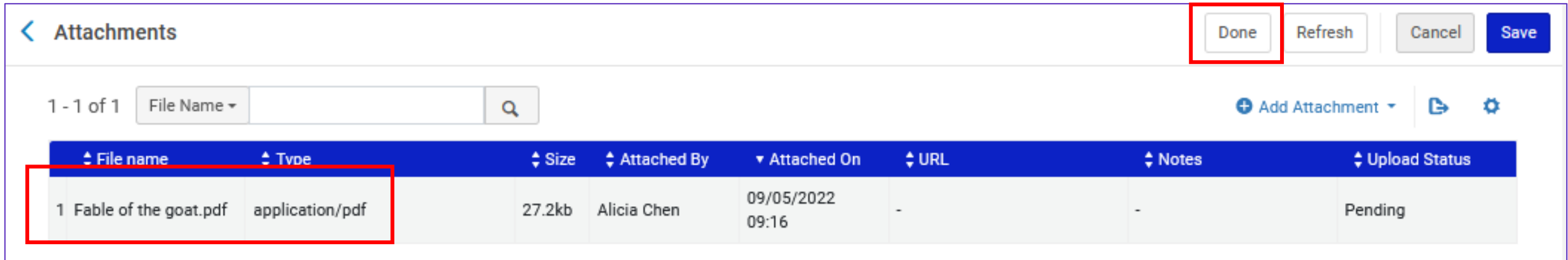
The screenshot shows the 'In Process Items' interface. At the top, there is a search bar with '1 - 1 of 1' and a search icon. Below the search bar, there are filters for 'Step: All' and 'Request Type: All'. The main content is a table with the following columns: Title, Requester, Status, Request/Process Type, Notes, Date received for department, and End of Activity. The first row of the table is highlighted in blue and has a dropdown menu open. The dropdown menu contains the following options: Edit, Attach Documents (highlighted with a red box), Cancel Request, Change to Electronic Digitization, and View hidden.

	▲ Title	Requester	◆ Status	◆ Request/Process Type	Notes	◆ Date received for department	◆ End of Activity	
1	A book that was lost and other stories / by S.Y. Agnon ; edited with introductions by Alan Mintz and Anne Golomb Hoffman.	Lillian Müller	Document Delivery	Partial	Chapter article title:Fable of the Goat; Start page:199; End page:202.	09/05/2022	11/05/2022	⋮

- Edit
- Attach Documents**
- Cancel Request
- Change to Electronic Digitization
- View hidden

Addendum: Patron digitization requests sent as an email attachment

- File is attached and we will click "Done"



The screenshot shows a web interface for managing attachments. At the top right, there are buttons for "Done", "Refresh", "Cancel", and "Save". The "Done" button is highlighted with a red box. Below the buttons, there is a search bar with "1 - 1 of 1" and "File Name" dropdown. A table lists the attachments with columns: File name, Type, Size, Attached By, Attached On, URL, Notes, and Upload Status. The first row is highlighted with a red box and contains the following data:

File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status
1 Fable of the goat.pdf	application/pdf	27.2kb	Alicia Chen	09/05/2022 09:16	-	-	Pending

Addendum: Patron digitization requests sent as an email attachment

- From the "Approval Requests List" we will approve the request

Approval Requests List Cancel

1 - 1 of 1

Status : Active Associated With Course : All

Title	Creation date	Expiration Date	Requester	Digitization Type	Status	Approve Date	Total Required Pages	Warning	Copyright Declaration	
1 A book that was lost and other stories / by S.Y. Agnon ; edited with introductions by Alan Mintz and Anne Golomb Hoffman.	09/05/2022	11/05/2022	Lillian Müller	Partial	Waiting for CC	-	-	Title is waiting for Copyright Clearance.	Copyright Declaration Signed by Patron	...

- View
- Work On
- Update Expiry
- Filter by this record
- View Rule

Addendum: Patron digitization requests sent as an email attachment

- We give it a "CC Number" and a "CC Approval Date" and Approve

Approval Request Reject Cancel Approve

Digitization Request

CC Number: 3 CC Order Date: 09/05/2022 CC Approval Date: 09/05/2022

Note:

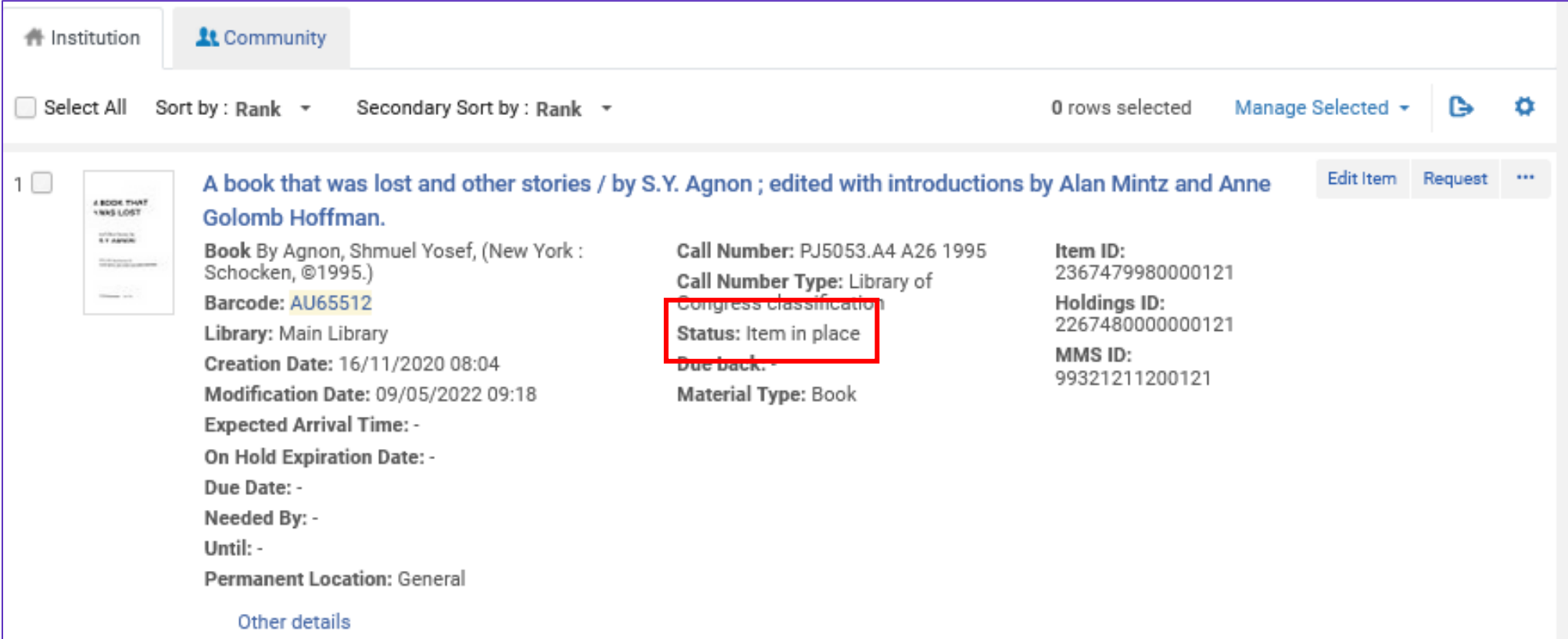
Order Confirmation

File Name: + Add Attachment


No records were found.

Addendum: Patron digitization requests sent as an email attachment

- Item has been scanned in at the circulation desk and is back in place



The screenshot shows a library catalog record for a book. The record is displayed in a table-like format with columns for item details, call numbers, and identifiers. The status 'Item in place' is highlighted with a red box.

Item	Call Number	Item ID
<input type="checkbox"/> 1  A book that was lost and other stories / by S.Y. Agnon ; edited with introductions by Alan Mintz and Anne Golomb Hoffman. Book By Agnon, Shmuel Yosef, (New York : Schocken, ©1995.) Barcode: AU65512 Library: Main Library Creation Date: 16/11/2020 08:04 Modification Date: 09/05/2022 09:18 Expected Arrival Time: - On Hold Expiration Date: - Due Date: - Needed By: - Until: - Permanent Location: General Other details	Call Number: PJ5053.A4 A26 1995 Call Number Type: Library of Congress classification Status: Item in place Due back: - Material Type: Book	Item ID: 2367479980000121 Holdings ID: 2267480000000121 MMS ID: 99321211200121

Addendum: Patron digitization requests sent as an email attachment

- Now Lillian gets an email with an attachment instead of a link

Notification Item Letter 09/05/2022

Lillian Muller

Main Library
Primary Dept. 237 Center Street Main Library
237 Center Street Main Library 2nd Floor
Centreville

Your request to create a digital version of the following material has been completed.


Material:
A book that was lost and other stories /

The request relates to external request id of .

Request Type: Digitization

Sincerely
Circulation Department

Main Library

 Fable of the goat.pdf

ExLibris
Part of **Clarivate**

IGOLU
International Group of Ex Libris Users

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