

Configuring Courses

Note

This page describes how to configure courses including course terms, citation matching criteria, reading list statuses, etc.

For links to all the main fulfillment documentation pages see [Fulfillment](#).

For additional configuration tasks related to course reserves, see:

- [Configuring Digitization and Copyright Rules](#)
- [Configuring the Citation Default Copyright Status](#)
- [Translating Notifications](#)

Configuring Processing Departments

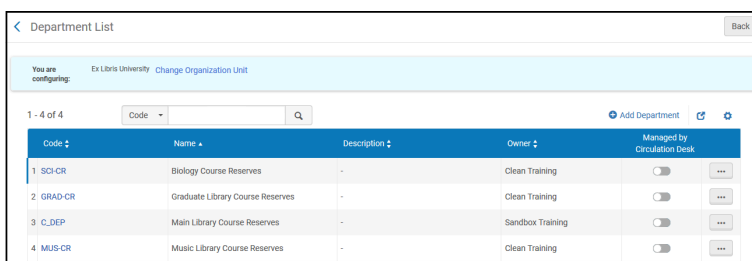
To configure processing departments, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Processing departments are the internal/staff units that are responsible for managing course reading lists and citations. This field is mandatory when creating a course (see [Adding a Course](#)), but it is (currently) for informational purposes only.

Each Alma institution or library can include many processing departments. Each processing department that you define at the institution level is available to the libraries within the institution.

You configure processing departments from the Department List page (**Configuration Menu > Fulfillment > Courses > Processing Departments**).



Code	Name	Description	Owner	Managed by Circulation Desk
1 SCI-CR	Biology Course Reserves	-	Clean Training	<input type="checkbox"/>
2 GRAD-CR	Graduate Library Course Reserves	-	Clean Training	<input type="checkbox"/>
3 C-DEP	Main Library Course Reserves	-	Sandbox Training	<input type="checkbox"/>
4 MUS-CR	Music Library Course Reserves	-	Clean Training	<input type="checkbox"/>

Department List Page

This page is the same as that used for configuring digitization departments. For instructions on adding, editing, and deleting processing departments, see [Configuring Digitization Departments](#).

Configuring Academic Departments

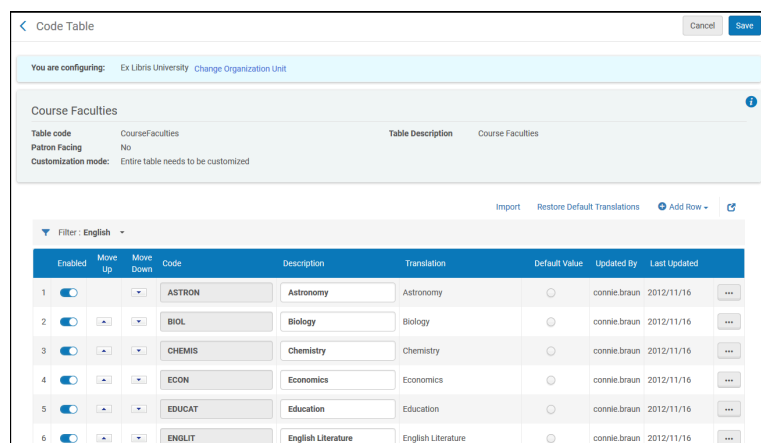
To configure academic departments, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Alma lets you define academic departments with which you can associate courses (see [Adding a Course](#)). For example, you can create an academic department for **Exact Sciences**. You can then associate a particular course (for example, **Introduction to Chemistry**) with this academic department. Note that you can define academic departments at the institution level only.

Academic departments may be either enabled or disabled. By default, all new academic departments are enabled. The defined academic departments appear in all **Academic department** drop-down lists in Alma, in the same order in which they are listed on the Code Table page on which you define them. Only enabled academic departments appear in the **Academic department** drop-down lists.

You configure academic departments from the Course Faculties code table ([Configuration Menu > Fulfillment > Courses > Academic Departments](#)). For more information about code tables, see [Code Tables](#).



Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>			ASTRON	Astronomy	Astronomy	<input type="radio"/>	connie.braun	2012/11/16
<input checked="" type="checkbox"/>			BIOL	Biology	Biology	<input type="radio"/>	connie.braun	2012/11/16
<input checked="" type="checkbox"/>			CHEMIS	Chemistry	Chemistry	<input type="radio"/>	connie.braun	2012/11/16
<input checked="" type="checkbox"/>			ECON	Economics	Economics	<input type="radio"/>	connie.braun	2012/11/16
<input checked="" type="checkbox"/>			EDUCAT	Education	Education	<input type="radio"/>	connie.braun	2012/11/16
<input checked="" type="checkbox"/>			ENGLIT	English Literature	English Literature	<input type="radio"/>	connie.braun	2012/11/16

Course Faculties Page – Academic Departments

Most of the details are system-generated and cannot be edited.

You can add, enable or disable departments, or select one as the default selected department in the drop-down list.

You can import academic departments information using the Import tab in the Course Faculties code table, as follows:

To import academic departments information:

1. Export the file using **Export > Excel** (see [Export to Excel](#)).
2. Make your changes and save the file. Note that there should be no duplicate lines in the Excel file.
3. Select **Import** on the relevant page.
4. In the **File** field, select **Browse** to locate the file on your computer.
5. Select the file you wish to upload, then select **Open**.
6. When the document is loaded, select **Upload File**.

Configuring Additional Reading List Citation Statuses

To configure reading list citation statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

While managing reading list citations, you can assign a status to the citation (see [Managing Citations](#)). Alma comes with a number of predefined citation statuses (see [Reading List and Citation Statuses](#) in the Leganto Administration Guide). You can configure additional citation statuses. Note that you cannot remove Alma's predefined statuses.

You define additional citation statuses on the Additional Reading List Citation Statuses code table ([Configuration Menu > Fulfillment > Courses > Additional Reading List Citation Statuses](#)). For more information about code tables, see [Code Tables](#).

See also [Configuring Reading List Statuses](#).

Code	Description	Translation	Managed in Network	Updated By	Last updated
1	Being Prepared	Being Prepared	-	-	-
2	Ready For Processing	Ready For Processing	-	-	-
3	Being Processed	Being Processed	-	-	-
4	Complete	Complete	-	-	-
5	Inactive	Inactive	-	-	-
6	Declined	Declined	-	-	-

Additional Reading List Citation Statuses Page

You can add, edit, and delete additional citation statuses on this page. You cannot edit or delete any system-defined statuses (which do not appear on this table). You can select a status as the default selected status in the drop-down list.

Configuring Automatic Purchasing Requests from Citations

You can configure rules to automatically create purchase requests for citations based on criteria associated with the citation, reading list, and/or course. These rules are run whenever a citation is saved (note that citation status is one of the criteria that can be checked). For more information on purchase requests, see [Purchase Requests](#).

The rules are created on the Purchase Workflow Rules List page ([Configuration > Fulfillment > Courses > Citation Processing Rules](#)). For more information about rules tables, see [Rules Tables](#).

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date
<input checked="" type="checkbox"/>	-	-	Default	-	Team, Documentation	2017/07/11

Purchase Workflow Rules List Page

Rules are checked from top to bottom and only the first matching rule applies. If no rules match, a purchase request is not created. You can enable and disable rules, change their order, edit, duplicate, or delete them. For more information about working with rules, in general, see [Configuring Digitization and Copyright Rules](#).

The parameter **MARC_incomplete_field_indicator** ([Configuration > Leganto > General > Settings](#)) enables you to flag MARC records that are created from a citation, for example, when submitting a purchase request, to easily enable you to

find the record and review it later. When the **MARC_incomplete_field_indicator** parameter is configured, the field indicated in the parameter is recorded on the MARC record. The parameter format is <MARC field number>.<subfield>.<text>. For example, if you want MARC records created from a citation to contain a **591 subfield a** with the value **INCOMPLETE**, set the parameter to 591.a.INCOMPLETE.

Note

The **MARC_incomplete_field_indicator** parameter value is added to bibliographic records created from both manual and automated purchase requests.

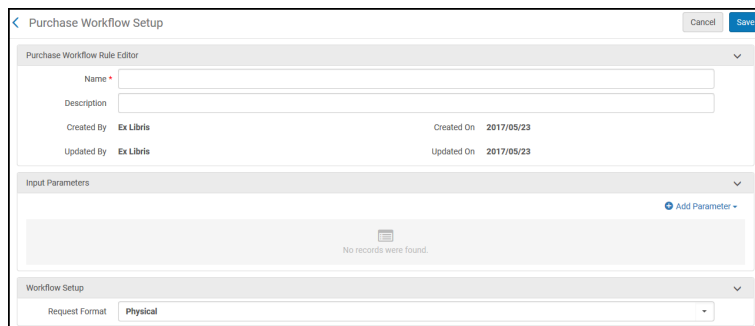
The new purchase request is "created by" the user that added or edited the citation.

A purchase request is not created if:

- A purchase request already exists for the citation's resource
- The reading list is not associated with a course
- No rules match the criteria

To create an automatic citation processing rule:

1. On the Purchase Workflow Rules List page, select **Add Rule**. The Purchase Workflow Setup page appears.



Purchase Workflow Rule Editor Page

2. Enter a name (mandatory) and description for the rule.
 3. Enter the criteria for the rule and select **Add Parameter** (repeat as required; all criteria must match for the rule to trigger). Criteria are composed of the following elements:
 - **Name** - Select one of:
 - Academic Department - Whether the course has one or none of the selected academic departments
 - Available in Electronic - Whether the citation's resource is already available electronically
 - Citation Status - Whether the citation's status matches one or none of the selected statuses
-

Note

A citation's status can only trigger a rule when the citation is created; the rule will not trigger if the citation's status is edited manually.

- Citation Tag - Whether the citation's tag matches one or none of the selected types. To use these options, tags must be defined.
 - Citation Type - Whether the citation's material type matches one or none of the selected types
 - In Repository - Whether the citation's resource is already in Alma's repository
 - Item to Student Ratio - Whether the percentage of requested items / the number of participants is higher, lower, equal to, or not equal to a certain value. The value must be between 0 and 1. For example, 0.1 means 1 copy per 10 students.
 - Number of Students - Whether the number of students is higher, lower, equal to, or not equal to a certain value
 - Reading List Status - Whether the reading list's status matches one or none of the selected statuses
 - Total Copies - Whether the total copies requested is higher, lower, equal to, or not equal to a certain value
 - **Operator** - Select the relevant comparison operator, depending on the criteria selected for **Name**.
 - **Value** - Select one or more values, or enter a value, for the criteria, depending on the criteria selected for **Name**.
4. After entering one or more criteria, select in **Request Format** whether the requested purchase should be physical or electronic.
 5. When you are done, select **Save**.

Adding Citation Tags

Use the DSC system tags to create rules to auto-generate a purchase request:

- Digitisation Approved
- Digitisation Rejected
- Digitisation Removed
- Digitisation Sent
- Digitisation In Progress

Configuring Course Terms

To configure additional reading list statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Course terms appear in the **Terms list** field when adding a new course on the Manage Course Information page. For more information, see [Managing Courses](#).

You manage course terms on the Course Terms code table page ([Configuration Menu > Fulfillment > Courses > Course Terms](#)). It is not possible to add or delete course terms; however, you can customize the course term descriptions and enable/disable the terms. For more information about code tables, see [Code Tables](#).

Enabled	Code	Description	Translation	Updated By	Last Updated
<input checked="" type="checkbox"/>	AUTUMN	Autumn	Autumn	-	-
<input checked="" type="checkbox"/>	EARLY_AUTUMN	Early Autumn	Early Autumn	-	-
<input checked="" type="checkbox"/>	SEMESTER1	Semester 1	Semester 1	-	-
<input checked="" type="checkbox"/>	SEMESTER2	Semester 2	Semester 2	-	-
<input checked="" type="checkbox"/>	SPRING	Spring	Spring	-	-
<input checked="" type="checkbox"/>	SUMMER	Summer	Summer	-	-

Course Terms Page

Configuring Citation Attribute Types

To configure citation attribute types, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

When working with citations, you can add attributes to the citations (see [Attaching Citation Attributes to Citations](#)). Each attribute has a name and a type.

You can configure additional attribute types that you will then be able to map to attributes on the Citation Attributes Types Code Table page (**Configuration Menu > Fulfillment > Courses > Citation Attributes Types**). For more information about code tables, see [Code Tables](#).

Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
		Requested_format	Requested format	Requested format		-	-

Citations Attributes Types Page

Note

The **Default value** field is not relevant in this table.

Alma comes configured out-of-the-box with the citation attribute type **Requested_format**. Up to five citation attributes can be added per citation attribute type.

(See also [Configuring Citation Attributes](#) and [Mapping Citation Attributes to Citation Attributes Types](#).)

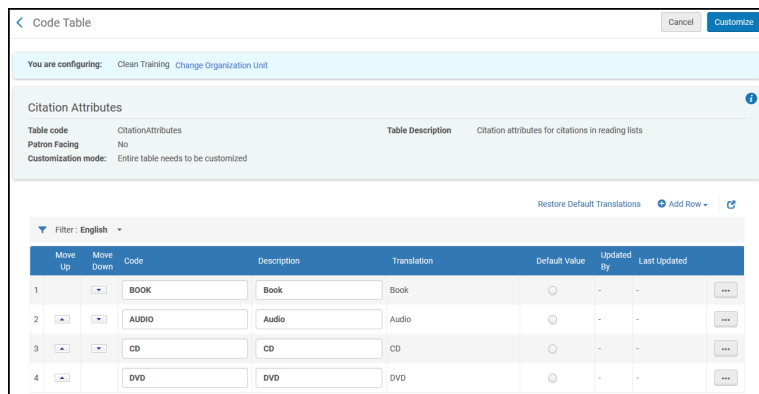
Configuring Citation Attributes

To configure citation attributes, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

When working with citations, you can add attributes to the citations (see [Attaching Citation Attributes to Citations](#)). Each attribute has a name and a type.

You can configure additional attributes for citations on the Citation Attributes Code Table page (**Configuration Menu > Fulfillment > Courses > Citation Attributes**). For more information about code tables, see [Code Tables](#). Alma comes configured out-of-the-box with the citation attributes **Book**, **Audio**, **CD**, and **DVD**.



Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated	
		BOOK	Book	Book	<input type="radio"/>	-	-	...
		AUDIO	Audio	Audio	<input type="radio"/>	-	-	...
		CD	CD	CD	<input type="radio"/>	-	-	...
		DVD	DVD	DVD	<input type="radio"/>	-	-	...

Citations Attributes Page

Note

The **Default value** field is not relevant in this table.

Up to five citation attributes can be added per citation attribute type.

(See also [Configuring Citation Attribute Types](#) and [Mapping Citation Attributes to Citation Attributes Types](#).)

Mapping Citation Attributes to Citation Attributes Types

To configure citation attributes to citation attributes types, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

When working with citations, you can add attributes to the citations (see [Attaching Citation Attributes to Citations](#)). Each attribute has a name and a type.

Before you use citation attributes, you must map citation attributes to citation attribute types on the Citations Attributes To Citations Attributes Types mapping table (**Configuration Menu > Fulfillment > Courses > Citation Attributes to Citation Attributes Types**). For more information about working with mapping tables, see [Mapping Tables](#).

Enabled	Attribute	Attribute Type	Updated by	Last Updated	
<input checked="" type="checkbox"/>	Book	Requested format	-	-	...
<input checked="" type="checkbox"/>	DVD	Requested format	-	-	...
<input checked="" type="checkbox"/>	CD	Requested format	-	-	...
<input checked="" type="checkbox"/>	Audio	Requested format	-	-	...

Citations Attributes To Citations Attributes Types Page

Alma comes configured out-of-the-box with the **Book**, **Audio**, **CD**, and **DVD** attributes mapped to the **Requested_format** attribute type.

You can add additional attribute types and attributes, and map them to each other, as needed. Up to five citation attributes can be added per citation attribute type.

(See also [Configuring Citation Attribute Types](#) and [Configuring Citation Attributes](#).)

To map citation attribute types to citation attributes:

1. On the Citations Attributes To Citations Attributes Types mapping table page, select **Add Row**.
2. In the **Attribute** field, select a citation attribute.
3. In the **Attribute type** field, select a citation attribute type to which you want to assign to the selected attribute.
4. Select **Add Row**. The mapped values appear in the Mapping Table Rows table. The attribute is mapped to the indicated attribute type.
5. When you are done, select **Customize**.

Configuring Citation Matching Criteria

You can configure the fields that Alma uses to match newly-entered non-repository citations to Alma inventory. For books (with ISBNs), Alma tries to match to the local Alma bibliographic record. For articles (with ISSN), Alma tries to match using the OpenURL link resolver (with DOI). Alma tries to match all enabled fields (AND). See [Managing a Citation's Attachment to an Inventory Item](#).

You configure the fields on the Match by Fields code table ([Configuration Menu > Fulfillment > Courses > Locate Citation by Fields](#)). For more information about code tables, see [Code Tables](#).

You can set the priority enabled fields by using the drag icon and dragging and dropping to order the fields.

Enabled	Code	Description	Translation	Default Value	Updated By	Last Updated
<input type="checkbox"/>	Title	Title	Title		ex_lmpl	02/25/2025
<input type="checkbox"/>	Author	Author	Author		ex_lmpl	02/25/2025
<input type="checkbox"/>	Edition	Edition	Edition		ex_lmpl	02/25/2025
<input checked="" type="checkbox"/>	ISSN/ISBN	ISSN/ISBN	ISSN/ISBN		ex_lmpl	02/25/2025
<input checked="" type="checkbox"/>	OCLC	OCLC Number	OCLC Number		ex_lmpl	02/25/2025
<input type="checkbox"/>	LCN	LCN(010)	LCN(010)		ex_lmpl	02/25/2025
<input type="checkbox"/>	ORIGINATION_SYSTEM_ID	Originating system ID	Originating system ID		ex_lmpl	02/25/2025
<input type="checkbox"/>	Title_Author	Title AND Author	Title AND Author		ex_lmpl	02/25/2025
<input checked="" type="checkbox"/>	Title_Author_Year	Title AND Author AND Year	Title AND Author AND Year		ex_lmpl	02/25/2025

Match by Fields Page

To add or remove fields as required matching criteria:

Select the gray or yellow checkmarks in the rows. Select **Customize** when you are done. The display order and default value features on this page are not enabled.

Originating system ID is the ID that the record had in the previous system before the record was migrated to Alma. The field appears if it was added during the migration process (for more information, contact Ex Libris customer support) and can be added manually when editing a citation (see [Adding Citations to a Reading List](#)).

Configuring Citation and Section Tags

Note

Sections (and section tags) are only relevant for Leganto.

In addition to attributes, citations and reading list sections can use an expanded tagging system.

- Librarians can configure any amount of tags for both citations and sections in Alma.
- **Public** citation and section tags appear to patrons in Leganto. Instructors and librarians can view **Instructor-Library** tags in Leganto and Alma. Only librarians can view **Library-Internal** tags in Leganto and Alma. Instructors can view **Library-External** tags in Leganto and Alma, but they cannot add or remove them.

Note

A fourth type of tag, **Internal**, is created by Ex Libris and cannot be managed by customers. These tags are typically added to a section or citation as a result of a Leganto or Alma feature and used to indicate some kind of process status for that feature. They are visible to instructors in Leganto and to librarians in Leganto and Alma. Customers cannot add, edit, manage, or remove these tags.

- Librarians can view and remove citation tags to/from citations in Alma. The tags assigned to citations appear in each citation section on the Edit Reading List page (see [Managing Citations](#)).
- Tag descriptions must be at least three characters long.
- Tags that are not mapped to a specific tag type can be added to citations using the Questions feature but cannot be added manually (see [Adding citation tags](#)).
- Defining tags is a two-step process:
 1. Define the tag in the Tags table.
 2. Configure the tags as citation/section and as public/instructor-library/library-internal/library-external on the Tag

Mapping table.

To define tags:

1. To define public tags, open the Tags code table (**Configuration Menu > Fulfillment > Courses > Tags**). For more information about code tables, see [Code Tables](#).

Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>			ESS	Essential	Essential	<input type="radio"/>	ex Impl	2016/10/06
<input checked="" type="checkbox"/>			REC	Recommended	Recommended	<input type="radio"/>	ex Impl	2016/10/06
<input checked="" type="checkbox"/>			DGZ	Digitization Request	Digitization Request	<input type="radio"/>	ex Impl	2016/10/06

Public Tags Page

Make any required changes. Note that the **Default Value** field currently has no effect. When you are done, select **Customize** to save your changes.

2. Open the Tags to Tag Mapping table (**Configuration Menu > Fulfillment > Courses > Tag Mapping**). For more information about working with mapping tables, see [Mapping Tables](#).

Enabled	Level	Tags	Visibility	Updated By	Last Updated
<input checked="" type="checkbox"/>	Citation	Digitize	Instructor-Library	esec	06/29/2017
<input checked="" type="checkbox"/>	Citation	Essential	Public	system	-
<input checked="" type="checkbox"/>	Citation	Recommended	Public	system	-
<input checked="" type="checkbox"/>	Section	Lecture readings	Public	esec	11/15/2016
<input checked="" type="checkbox"/>	Section	Seminar readings	Public	esec	11/15/2016
<input checked="" type="checkbox"/>	Citation	Lecture Reading	Public	esec	11/06/2016
<input checked="" type="checkbox"/>	Citation	Seminar Reading	Public	esec	11/05/2016
<input checked="" type="checkbox"/>	Citation	Further reading	Public	esec	11/05/2016
<input checked="" type="checkbox"/>	Citation	Purchase	Instructor-Library	janasm	07/13/2017
<input checked="" type="checkbox"/>	Citation	DCS_Review	Instructor-Library	git	09/17/2017
<input checked="" type="checkbox"/>	Citation	Extra Credit	Public	git	04/11/2018

Tags to Tags Level and Visibility Page

Make any required changes. When you are done, select **Save** to save your changes.

Note

- Changing this table does not affect any existing tags already attached to citations.
- (Leganto only) The order that tags appear in the drop-down list in Leganto is determined by the Leganto customer parameter **tag_sorting** (**Configuration Menu > Leganto > General > Settings**). The options are:
 - **group** (default) – Sort in the following orders: all public tags, followed by (librarians only) all library-internal tags, followed by all library-instructor tags. Within each group, the order is determined by the order in the Tags code table.
 - **table** – Sort only by the order in the Tags code table.

Configuring Reading List Subjects

You can view the out-of-the-box subjects available for reading lists on the Reading List Subject Tags code table (**Configuration Menu > Fulfillment > Courses > List Subjects**). You can add new subjects on the Additional Reading List Subject Tags code table (**Configuration Menu > Fulfillment > Courses > Additional List Subjects**). For more information about code tables, see [Code Tables](#).

Enabled	Code	Description	Translation	Updated By	Last Updated
<input checked="" type="checkbox"/>	AERONAUTICS	Aeronautics	Aeronautics	-	-
<input checked="" type="checkbox"/>	AESTHETICS	Aesthetics	Aesthetics	-	-
<input checked="" type="checkbox"/>	AGRICULTURE	Agriculture	Agriculture	-	-
<input checked="" type="checkbox"/>	ANARCHISM	Anarchism	Anarchism	-	-
<input checked="" type="checkbox"/>	ANGLING	Angling	Angling	-	-
<input checked="" type="checkbox"/>	ANIMAL_HUSBANDRY	Animal Husbandry	Animal Husbandry	-	-
<input checked="" type="checkbox"/>	ANIMAL_SCIENCE	Animal Science	Animal Science	-	-

Reading List Subject Tags Code Table

Enabled	Code	Description	Translation	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>	Games	Games	Games	-	admin	03/04/2019

Additional Reading List Subject Tags Code Table

On the Reading List Subject Tags code table, you can enable, disable, or change the names of the subjects. The available subjects are as follows:

Aeronautics	Aesthetics	Agriculture	Anarchism	Angling
Animal Husbandry	Animal Science	Anthropology	Aquaculture	Arboriculture
Archaeology	Architecture	Archives	Art	Astronautics
Astronomy	Atlas	Bahaism	Bible	Bibliography
Biography	Biology	Books	Botanic	Botany
Bridges	Buddhism	Building Construction	Canon Law	Cartography
Chemical Technology	Chemistry	Christianity	Civil Engineering	Classical Studies
Colonization	Commerce	Communication	Communism	Community
Criminology	Decorative Art	Demography	Dentistry	Dermatology
Design	Diplomatics	Doctrinal Theology	Drawing	Eclectic Medicine
Economic History	Economic Theory	Education	Education Theory	Electrical Engineering
Electronics	Emigration	Engineering	Environmental Science	Environmental Technology
Epigraphy	Ethics	Family	Finance	Fisheries

Folklore	Forestry	Genealogy	Geography	Geology
Gynecology and Obstetrics	Heraldry	Highway Engineering	History	History of Civilization
History of Education	Homeopathy	Horticulture	Human Anatomy	Human Ecology
Hunting	Hydraulic Engineering	Illustration	Industry	Information Resources
Inscriptions	International Law	International Migration	International Relations	Islam
Judaism	Labor	Law	Leisure	Libraries
Linguistic	Literature	Literature on Music	Local Government	Logic
Manners and Customs	Map	Marriage	Mathematical Geography	Mathematics
Medicine	Metallurgy	Microbiology	Mining Engineering	Modern Languages
Motor Vehicles	Municipal Government	Music	Mythology	Natural History
Nuclear Engineering	Numismatics	Nursing	Ocean Engineering	Oceanography
Ophthalmology	Otorhinolaryngology	Painting	Paleography	Pathology
Pediatrics	Pharmacology	Philology	Philosophy	Physical Geography
Physics	Physiology	Plant Breeding	Plant Propagation	Political Science
Political Theory	Practical Theology	Print Media	Psychology	Public Welfare
Race	Rationalism	Recreation	Religions	Religious Law
Sanitary Engineering	Science	Sculpture	Seals	Silviculture
Social Class	Social History	Socialism	Social Pathology	Social Problem
Social Reform	Social Science	Society	Sociology	Statistics
Surgery	Technical Chronology	Technology	Theosophy	Therapeutics
Transportation	Visual Art	Women and Sexuality	Writing	Zoology

On the Additional Reading List Subject Tags code table, you can add, delete, enable, disable, or change the names of new subjects.

Note

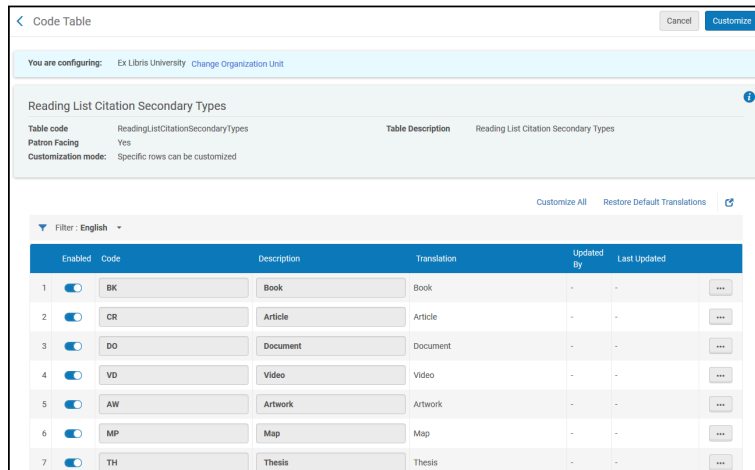
- Alma does not check if the codes you enter on the Additional Reading List Subject Tags code table are unique, both within the table and with the codes in the Reading List Subject Tags code table. If you enter a duplicate code, the results may be unexpected.
 - If you remove a subject from the Additional Reading List Subject Tags code table that was assigned to a reading list, the subject remains assigned to the reading list until you remove it from the reading list.
-

Configuring Citation Material Types

You can view the secondary material types available for citations on the Reading List Citation Secondary Types code table ([Configuration Menu > Fulfillment > Courses > Citation Material Type](#)). For more information about code tables, see [Code Tables](#).

Note

This list is not the same as the one described in [Configuring Physical Item Material Type Descriptions](#).



Reading List Citation Secondary Types Page

The types are:

Abstract	Anthology	Archive	Article	Artwork	Audio Recording
Blog	Book	Book Chapter	Book Extract	Case	Case Study
CD	Computer Program	Conference	Conference Paper	Database	Dissertation
Document	DVD	E-book	Electronic Article	Eoffprint	Government Document
Grant	Image	Interview	Journal	Legal Document	Legislation
Letter	LibGuides	Manuscripts	Map	Music	Newspaper
Newspaper Article	Note *	Other	Pamphlet	Patent	Poem
Presentation	Reference Entry	Research Dataset	Review	Score	Series
Standards	Statistical Data Set	Technical Report	Text Resource	Thesis	Transcript
Video	Website	Working Paper			

* 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. You can only edit or delete them in Alma.

Configuring Reading List Statuses

To configure reading list statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

While managing a reading list, you can assign a status to the reading list (see [Managing Reading Lists](#)). Alma comes with a number of predefined reading list statuses (see [Reading List and Citation Statuses](#) in the Leganto Administration Guide). You can change the name of the predefined statuses and you can add additional reading list statuses. Note that you cannot remove Alma's predefined statuses.

You configure reading list statuses on the Reading List Statuses code table ([Configuration Menu > Fulfillment > Courses > Reading List Statuses](#)). For more information about code tables, see [Code Tables](#).

Code	Description	Translation	Managed in Network	Updated By	Last Updated
1	Being Prepared	Being Prepared	-	-	-
2	Ready For Processing	Ready For Processing	-	-	-
3	Being Processed	Being Processed	-	-	-
4	Complete	Complete	-	-	-
5	Inactive	Inactive	-	-	-
6	Declined	Declined	-	-	-

Reading List Statuses Page

You can change the names of the reading list statuses on this page. You cannot edit or delete any system-defined statuses.

You add additional reading list statuses on the Additional Reading List Statuses code table ([Configuration Menu > Fulfillment > Courses > Additional Reading List Statuses](#)).

See also [Configuring Additional Reading List Citation Statuses](#).

Move Up	Move Down	Code	Description	Default Value	Updated By	Last Updated
		WFA	Waiting for Approval	<input checked="" type="radio"/>	ext_impl	09/11/2017

Additional Reading List Statuses Page

You can add, edit, and delete additional reading list statuses on this page. The default radio button has no effect on this page.

Note

- Alma does not check if the codes you enter on the Additional Reading List Statuses code table are unique, both within the table and with the codes in the Reading List Statuses code table. If you enter a duplicate code, the results may be unexpected.

- If you remove a subject from the Additional Reading List Statuses code table that was assigned to a reading list, the status remains assigned to the reading list until you remove it from the reading list.

Mapping Bibliographic Record Fields to Citation Fields

The fields in a citation are copied from bibliographic records when a) you create a citation from a repository record or b) a resource locate is successfully performed (manually or automatically) on the citation, thereby connecting the citation to a repository record.

Note

Also see the parameters **reading_list_auto_locate_citation_upon_creation**, **resource_locate_multiple_matches**, and **resource_locate_multiple_matches_priority** in [Configuring Other Settings](#). If you are using Leganto, you can configure whether the values in the bibliographic record overlays or merges with the values already in the citation; see [Configuring Repository Locate Workflow](#).

Note

The BIB to Citation Normalization feature now supports both MARC 21 and UNIMARC formats.

Mapping fields is done using normalization rules, which contain a condition and one or more actions to be applied to records. The syntax for these rules is described in [Normalization Rule Syntax](#). For a quick view of the default mapping, see [Repository Fields Used to Overwrite Citation Fields](#).

In the Bibliographic Mapping Rules page ([Configuration Menu > Fulfillment > Courses > Bibliographic Mapping Rules](#)), you can select to edit a set of test rules that you can then test on the Test BIB to Citation Normalization page ([Configuration Menu > Fulfillment > Courses > Test BIB to Citation Normalization](#)). When you are happy with the results, copy your changes to the production rules on the Bibliographic Mapping Rules page (and optionally test them again on the Test BIB to Citation Normalization page).

Cur	Filename	Description	Managed in Network	Updated by	Update Date
1	dtools/testMARC2CourseReserveCitation.dsl	Test - dslr to convert marc to course reserve citation	-	-	-
2	dtools/prodMARC2CourseReserveCitation.dsl	Prod - dslr to convert marc to course reserve citation	-	-	-

Bibliographic Mapping Rules Page

Testing BIB to Citation Normalization

Test Input: MMSID

Normalization rule: Prod - dslr to convert marc to course reserve citation

Source Record:

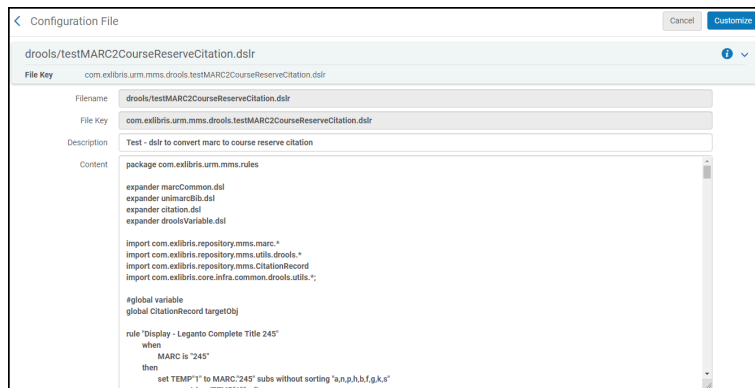
Normalized Record:

No records were found.

Test BIB to Citation Normalization Page

To configure the mapping that determines how the data in a bibliographic record is copied to the citation:

1. In the Bibliographic Mapping Rules page, select **Customize** in the row actions list for the test rules (**Test - dslr to convert marc to course reserve citation / Test - dslr to convert UNIMARC to course reserve citation**). An edit page appears.

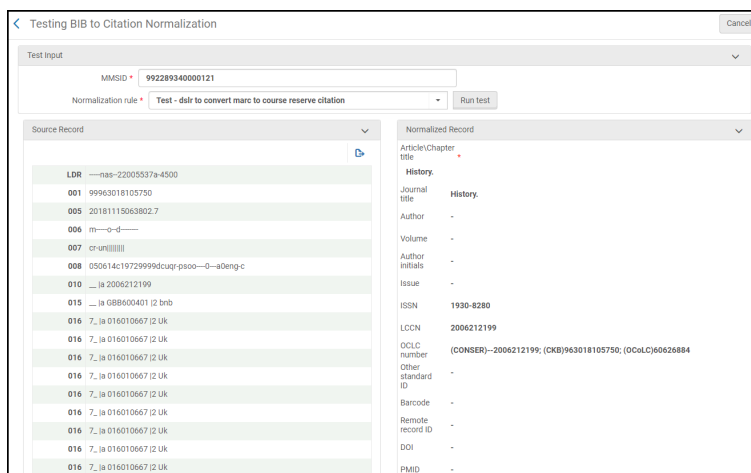


Bibliographic Mapping Rules Edit Page

Note

On this page, do not change the filename or file key. In the content, do not change any lines in the file above the file rule (from the first line until the line `global CitationRecord targetObj`).

2. Add, edit, or delete rules in the content as required. For assistance, see [Normalization Rule Syntax](#). When you are done, select **Customize**.
3. On the Test BIB to Citation Normalization page:
 1. Enter the MMS ID of a record to test.
 2. Select the test normalization rule **Test - dslr to convert marc to course reserve citation / Test - dslr to convert UNIMARC to course reserve citation**.
 3. Select **Run Test**. The source fields of the bibliographic record appear in the **Source Record** pane, and the citation fields derived from the record appear in the **Normalized Record** pane.



Test BIB to Citation Normalization Page, After Run

4. If everything appears correctly, return to the Bibliographic Mapping Rules page, copy the changes from the test rules to the production rules (**Prod - dslr to convert marc to course reserve citation / Prod - dslr to convert UNIMARC to course reserve citation**) and save the changes.

5. Optionally ensure that the rules work correctly by testing the production rules on the Test BIB to Citation Normalization page.