

Digitization Requests in Alma and PrimoVE

Submitting Digitization Requests

Requesting from PrimoVE

Here are the steps for patrons requesting digitizations from PrimoVE:

1. Log into PrimoVE and find the title.
2. Click on the **Digitization** link.
3. Complete the form.
4. Click **Send Digitization Request**.

BOOK
The horse-lover's encyclopedia : A-to-Z guide
Haas, Jessie, editor.
2017
Available at East Campus Library East Campus Stacks (SF278.S76 2017) >

TOP
SEND TO
GET IT
DETAILS
VIRTUAL BROWSE
LINKS

Send to _____

EMAIL PRINT CITATION PERMALINK

Get It _____

REQUEST: Request **Digitization**

< BACK TO LOCATIONS

LOCATION ITEMS
East Campus Library
Available , East Campus Stacks SF278.S76 2017
(1 copy, 1 available, 0 requests)

Partial
Chapter/Article Title
Vaccinations
Chapter/Article Author
Start page
266
End page
268
 Full Chapter?
Comment
Not needed after
Pickup Date
RESET FORM
SEND DIGITIZATION REQUEST

Requesting from Alma

Here are the steps for requesting digitizations for patrons in Alma:

1. Locate the title in Alma.
2. Click on the ... menu
3. Select **Request**.

8 **The Princeton field guide to dinosaurs / Gregory S. Paul.**
Book By Paul, Gregory S. (Princeton, N.J. : Princeton University Press, ©2010.)
Subject: Dinosaurs.
Series: Princeton field guides.
Modification Date: -
Creation Date: 06/11/2020 09:33:16 CDT
Physical (1) Other details

Language: English
ISBN: 9780691137209 and others
Record number: 100290-01carli_network

MMS ID: 99160063905822

Edit Record Holdings ...

Items
Order
Request
Resource sharing request
Publishing information

4. Choose "Patron Digitization Request" from the drop-down menu.
5. Complete the request form.
6. Click **Submit**.

The screenshot shows the 'Create Request' form in Alma. The form is titled 'Dinosaurs rediscovered : the scientific revolution in paleontology / Michael J. Benton.' and includes the following fields and options:

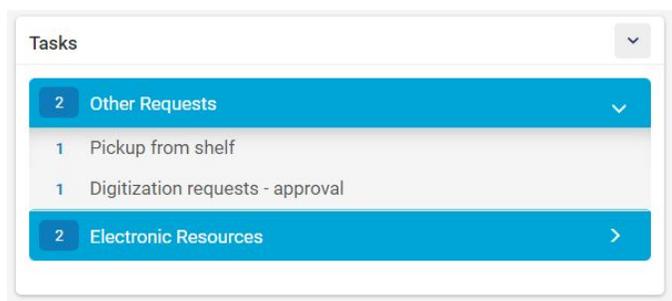
- Request Type:** Patron digitization request
- Requester:** TRIMBLE, ASHTIN
- Part to Digitize:** (Empty text field)
- Partial Digitization:**
- Full Chapter:**
- Volume:** (Empty text field)
- Issue:** (Empty text field)
- Part:** (Empty text field)
- Publication Date:** (Empty text field)
- Chapter/Article Title:** Ch4 - The evolution of dinosaurs and their world
- Chapter/Article Author:** (Empty text field)
- Required Pages:** From (Empty text field) To (Empty text field)
- Managing Department:** Quad Cities Circulation
- Calculate Digitization Fee:** (Button)
- Copyright Declaration Signed by Patron:**

Digitization Fulfillment Process

Here is an overview of the process for filling digitization requests using the "Document delivery - attachment" method:

1. Log into Alma and select the appropriate circulation or digitization department.
2. Approve the request. (See Part 1 below.)
3. Fill the request. (See Part 2 below.)

Note: New digitization request tasks will display in your Tasks widget.



Part 1 - Approving the Digitization Request

1. Go to the Fulfillment tab and click on Approval Requests List.
2. From the ... menu, select **Work On**.

Approval Requests List

1 - 1 of 1

Status: Active Associated With Course: All

Title	Creation date	Expiration Date	Requester	Digitization Type	Request Notes	Status	Resource Total Pages	Warning	Copyright Declaration
1. Dinosaurs rediscovered : the scientific revolution in paleontology / Michael J. Benton.	09/22/20...	10/06/20...	TRIMBLE, ASHTIN	Partial	Chapter article title:Ch4 - The evolution of dinosaurs and their world;	Waiting for CC	-	Title is waiting for Copyright Clearance.	Copyright Declaration Not Signed by Patron

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

3. Review the request, click **Approve** to fill the request.

< Approval Request

Reject Cancel Approve

Dinosaurs rediscovered : the scientific revolution in paleontology / Michael J. Benton.

Request Date	09/22/2020	Expiration Date	09/29/2020	Resource Total Pages	-	Required Chapters	-
Requester	TRIMBLE, ASHTIN	Digitization Type	Partial	Required Pages	-	Total Chapters Count	-
Requester Notes	Chapter articl...	Approval Reason	-	Total Required Pages	0	Includes image(s)	No

Digitization Request

CC Number

CC Order Date 09/22/2020

CC Approval Date 09/22/2020

Note

4. Select the approval reason and click **Submit**.

< Approve the Request

Cancel Submit

Reason Covered by License

Note

Part 2 - Digitization Request Fulfillment

1. Go to the Fulfillment tab and click on **Pick from shelf**.
2. Check the "Select all" box and **Print Slip**.

Location: - Quad Cities New

Call Number: QE861.4 .B4586 2019

Item Barcode:

Dinosaurs rediscovered : the scientific revolution in paleontology /
By: Benton, M. J.

Material Type: Book

Requested For: LS

Destination: Quad Cities Campus Library - Quad Cities Circulation

Request Type: Patron digitization request

Request ID: 496915070005822

Patron ID at Item's Institution:

BHC900241295



3. Retrieve item from shelf.
4. Go to the Fulfillment tab and select **Scan in Items**.
5. Scanning the item will change the destination to Digitization.

Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place In Queue	Checked In
Dinosaurs rediscovered : the scientific revolution in paleontology / Michael J. Benton.	Digitization	30061200024806	Patron digitization request	TRIMBLE, ASHTIN	BHC900241295	1	

6. Click on the **Manage in Process Items** button.
7. From the ... menu, select **Next Step**.

Title	Requester	Status	Request/Process Type	Notes	Date received for department	End of Activity
Dinosaurs rediscovered : the scientific revolution in paleontology / Michael J. Benton.	TRIMBLE, ASHTIN	Digitization	Partial	Chapter article title:Ch4 - The evolution of dinosaurs and their world;	09/22/2020	10/06/2020

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

8. From the ... menu, select **Attach Documents**.

Title	Requester	Status	Request/Process Type	Notes	Date received for department	End of Activity
1 Dinosaurs rediscovered : the scientific revolution in paleontology / Michael J. Benton.	TRIMBLE, ASHTIN	Document Delivery	Partial	Chapter article title:Ch4 - The evolution of dinosaurs and their world,	09/22/2020	10/06/2020

Edit

Attach Documents

Cancel Request

9. Click **Add Attachment**.

10. Select the file and **Add Attachment**.

11. You may need to click the Refresh button to verify the file has been uploaded.

12. Click **Done** to complete the request and send an attachment to the patron.

13. Click on the **Scan in Items** button.

Done
Refresh
Cancel
Save

Dinosaurs rediscovered : the scientific revolution in paleontology / Michael J. Benton.

Digitization Type: Partial
Request ID: -
Requester: TRIMBLE, ASHTIN

1 - 1 of 1

+ Add Attachment ⌵ ⚙️

File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status
1 Dinosaurs Ch4.pdf	application/pdf	45.9kb	TRIMBLE, ASHTIN	09/22/2020 14:01:06 CDT	-	-	Uploaded

14. The item will be returned to its owning location.

Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In
1. Dinosaurs rediscovered : the scientific revolution in paleontology / Michael J. Benton.	Reshelve to Quad Cities New	30061200024806	-	-	-	0	

15. The patron will receive the “Ful Digitization Notification Item Letter” with the file attached.



Notification Item Letter

09/22/2020

TRIMBLE, ASHTIN

Quad Cities Campus Library
6600 34th Avenue
Q1-201
Moline, 61265
309-796-5700

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

Material:

Dinosaurs rediscovered : the scientific revolution in paleontology /

Request Type: Digitization

Sincerely,
Circulation Department

Quad Cities Campus Library

Configuring Digitization in Alma

Configure Department

To configure your circulation department to handle digitization requests, go to the Configuration menu. Make sure you are working at the library-level. Go to the Fulfillment tab > Library Management > Circulation Desks.

The screenshot shows the Alma Configuration interface. At the top, there is a 'Configuring' section with a dropdown menu set to 'Quad Cities Campus Library' and a 'Filter List' search bar. Below this, there are four main categories: 'Discovery', 'Library Management', 'Physical Fulfillment', and 'Resource Sharing'. Under 'Library Management', the 'Circulation Desks' option is highlighted in yellow. Other options under 'Library Management' include 'Library Details', 'Opening Hours', and 'Relationships'. Under 'Physical Fulfillment', options include 'Fulfillment Units', 'Terms of Use and Policies', 'Item Policy', and 'Advanced Policy Configuration'. Under 'Resource Sharing', options include 'Rota Assignment Rules' and 'Sending Borrowing Request Rules'. A 'General' section at the bottom right includes 'Printers'.

Go to the Edit menu for the circulation desk(s) and select the option “Supports Digitization” and Save.

The screenshot shows the 'Circulation Desk - General Information' configuration page. It has a 'Cancel' button and a 'Save' button in the top right corner. The page is divided into two main sections. The first section contains fields for 'Maximum time on hold shelf (Days)' set to 14, 'Has hold shelf processing' checked, and 'Notify patron of canceling expired hold' checked. The second section is titled 'Digitization Department' and has a dropdown arrow. Under this section, 'Supports Digitization' is checked and highlighted in yellow, and 'Work Time(days)' is set to 14.

To set-up a separate digitization department, follow the instructions in the Ex Libris Knowledge Center at [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/030Fulfillment/080Configuring_Fulfillment/070Digital_Fulfillment#Configuring_Digitization_Departments](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/070Digital_Fulfillment#Configuring_Digitization_Departments).

Configure Terms of Use

Terms of Use and Policies will need to be modified to support digitization. These modifications will be made in Alma Configuration at the institution-level. Go to Fulfillment > Physical Fulfillment > Terms of Use and Policies.

Filter the Terms of Use Type to “**Request**”. Find the TOUs that should be available for digitization, and go to the Edit menu.

The screenshot shows the 'Terms of Use Management' page. At the top, it indicates 'You are configuring: Black Hawk College (BHC) – Moline, IL and Galva, Change Organization Unit'. Below this, there is a search bar with 'Description' selected and a search icon. To the right, there are buttons for 'Add a Terms Of Use', a share icon, and a settings icon. A dropdown menu is set to 'Terms Of Use Type: Request'. Below this is a table with the following data:

Name	Type	TOU Owner	Description	
1 0 Days Community Limited	Request	Institution	0 Days Community Limited	...

Edit the Is Digitizeable policy type so that it reads “Is Digitizable”, click **Next** and then **Save**.

Terms of Use Policies		
Policy Type	Policy Name	
1 Is Requestable	Not Requestable (Default value is not requestable)	
2 Pickup Locations	Pickup only in owning library (Must pickup in owning library)	
3 Hold Shelf Period	10 Days Hold Shelf Period (10 Days Hold Shelf Period)	
4 Is Digitizeable	Is Digitizable (Default value for digitizable)	

Configure Fulfillment

Fulfillment Units will need to be modified to support digitization. These modifications will be made in Alma Configuration at the institution-level. Go to Fulfillment > Physical Fulfillment > Fulfillment Units.

Open to the Edit menu for the unit(s) to make available for digitization. Go to the Fulfillment Unit Rules tab. In the Rule Type drop-down menu, select “**Request**”. Map fulfillment rules to the TOUs.

← Edit Fulfillment Unit
Cancel **Save**

You are configuring: Black Hawk College (BHC) –Moline, IL and Galva, IL

Regular

Code Regular

Fulfillment Unit Details

Fulfillment Unit Locations

Fulfillment Unit Rules

Rule Type **Request**

Institution Rules List

+ Add Rule

Filter: All

	Enabled	Move Up	Move Down	Rule Name	Description	Output	Updated By	Update Date	
1..	<input type="checkbox"/>		▼	Requestable for I-Share	-	NZ Request TOU	Staff, Ex Libris	08/27/2020	⋮
2..	<input checked="" type="checkbox"/>	▲	▼	Not Requestable for I-Share	Not Requestable for I-Share	Default terms of use	Campbell (CARLI Account), Debbie	07/19/2020	⋮
3..	<input checked="" type="checkbox"/>	▲	▼	4 Week Students Regular	-	4 Week Students Regular	Staff, Ex Libris	07/19/2020	⋮
4..	<input checked="" type="checkbox"/>	▲	▼	4 Week Faculty Regular	-	4 Week Faculty Regular	Staff, Ex Libris	07/19/2020	⋮

Configure Electronic Document Delivery Rules

In Alma Configuration, at the institution-level, go to the Fulfillment tab > Digital Fulfillment > Electronic Document Delivery Rules and set up rules.

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
<input checked="" type="checkbox"/>			User group	User group is faculty, library staff, support staff or undergraduate	TRIMBLE, ASHTIN	09/22/2020	...
<input checked="" type="checkbox"/>			Inventory	Inventory is owned by QC or EC	TRIMBLE, ASHTIN	09/22/2020	...

More about this step can be found in the Ex Libris Knowledge Center at

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/030Fulfillment/080Configuring_Fulfillment/070Digital_Fulfillment#Configuring_Electronic_Document_Delivery_Rules](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/070Digital_Fulfillment#Configuring_Electronic_Document_Delivery_Rules)

Configure Document Delivery

There are a few options on how to deliver digitizations to patrons. Below are the steps to send the document as an email attachment.

In Alma Configuration, at the institution-level, go to the Fulfillment tab > Copyright Management > Digitization and Copyright Rules.

Scroll down to the bottom and find the “Default Digitization Flow” rule and open the Edit menu.

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
<input type="checkbox"/>			Auto Approved Copyright Work Percentage	Auto Approved Copyright Work Percentage	Ex Libris	11/16/2016	...
<input type="checkbox"/>			Auto Approved Copyright Number of Chapters	Auto Approved Copyright Number of Chapters	Ex Libris	11/16/2016	...
<input type="checkbox"/>			Exceed Copyright Work Percentage	Exceed Copyright Work Percentage	Ex Libris	11/16/2016	...
<input type="checkbox"/>			Resource Available Electronically	Resource Available Electronically	Ex Libris	11/16/2016	...
<input type="checkbox"/>			Same Chapter is Requested in Other Course	Same chapter is requested in other course	Ex Libris	11/16/2016	...
<input type="checkbox"/>			Exceed Copyright Limits for this Resource	Exceed copyright limits for this resource	Ex Libris	11/16/2016	...
<input type="checkbox"/>			Chapter Requested for this Resource in Course	Another Chapter is Already Requested From the Same Resource in this Course	Ex Libris	11/16/2016	...
<input type="checkbox"/>			Default Rule - Please Approve Manually	Default Rule - Please approve manually	Ex Libris	11/16/2016	...

Rule Name	Description	Updated By	Update Date	
1 Default Digitization Flow	Full Workflow	TRIMBLE, ASHTIN	08/04/2020	...

In the “Select digitization target” menu, select “Document delivery - attachment” and save.

Digitization Workflow Setup Cancel Save

Digitization Workflow Rule Editor

Name *

Description

Created By TRIMBLE, ASHTIN Created On -

Updated By TRIMBLE, ASHTIN Updated On 08/04/2020

Workflow Setup

DIGITIZED CONTENT MANAGEMENT

Select digitization target

APPROVAL/COPYRIGHT CLEARANCE PROCESSING

Approval

Copyright clearance

Approval/Copyright Clearance Management In parallel to digitization workflow

Blocks digitization workflow

Automatically approved

More information about configuring digitization and copyright rules can be found in the Ex Libris Knowledge Center at [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/030Fulfillment/080Configuring_Fulfillment/Copyright_Management#Configuring_Digitization_and_Copyright_Rules](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/Copyright_Management#Configuring_Digitization_and_Copyright_Rules).

Other Configuration Options

Patron Limits

In Alma Configuration > Fulfillment > Patron Configurations > Patron Limits, you can limit the number of open digitization requests patrons can have at one time.

Mapping Table Cancel Save

You are configuring: Black Hawk College (BHC) – Moline, IL and Galva, IL [Change Organization Unit](#)

Patron Limits Definitions i v

Table Description Patron Limits Definitions Managed in Network No

Customization mode: Entire table needs to be customized

+ Add Row

User group	Max. cash	Max. overdues	Max. bookings	Max. overdue recalls	Max. digitization requests	Max. physical item requests	Updated By	Last Updated	
1 Undergraduate	10.00	3	50	3	3	50	ex_Limpl	10/11/2019	...
2 Faculty	10.00	3	100	3	3	100	ex_Limpl	10/11/2019	...
3 Support Staff	10.00	3	50	3	3	50	ex_Limpl	10/11/2019	...

Request Form

In Alma Configuration > Discovery > GetIt Configuration > Digitization Request, you can choose which fields to display to patrons. To disable a field, select No in the Display to Public column.

< Mapping Table

You are configuring: Black Hawk College (BHC) –Moline, IL and Galva, IL [Change Organization Unit](#)

Digitization Optional Parameters

Table Description	Digitization Optional Parameters	Managed in Network	No
Customization mode:	Entire table needs to be customized		

	Display to Public	Field	Default	Updated By	Last Updated
1	No	partial	True	BHC900241295	09/18/2020
2	Yes	chapterArticleTitle		BHC900241295	09/18/2020
3	Yes	chapterArticleAuthor		BHC900241295	09/18/2020
4	Yes	startPage		BHC900241295	09/18/2020
5	Yes	endPage		BHC900241295	09/18/2020
6	Yes	fullChapter		BHC900241295	09/18/2020
7	Yes	comment		BHC900241295	09/18/2020
8	No	notNeededAfter		BHC900241295	09/18/2020

Letters

The “Ful Digitization Notification Item Letter” is the letter patrons will receive with their file attached.

LM Thu 9/17/2020 9:15 AM
library@bhc.edu
Notification Item Letter

To [redacted]ymail.bhc.edu
Follow up. Completed on Thursday, September 17, 2020.

 Macroeconomics_Ch4.pdf
8 MB



Notification Item Letter

09/17/2020



Quad Cities Campus Library
6600 34th Avenue
Q1-201
Moline, 61265
309-796-5700

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

Material:

Macroeconomics (FOR COURSE RESERVES AT BHCG ONLY)

Request Type:Digitization

Sincerely,

Circulation Department

Quad Cities Campus Library

Additional Resources

Configuring Digital Fulfillment

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/030Fulfillment/080Configuring_Fulfillment/070Digital_Fulfillment](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/070Digital_Fulfillment)

Digitization Processing

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/030Fulfillment/Resource_Requests/070Digitization_Processing](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/Resource_Requests/070Digitization_Processing)