



The State University of New York

New MD Editor Series: New Features

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www.suny.edu



New MD Editor Roll-out Timeline

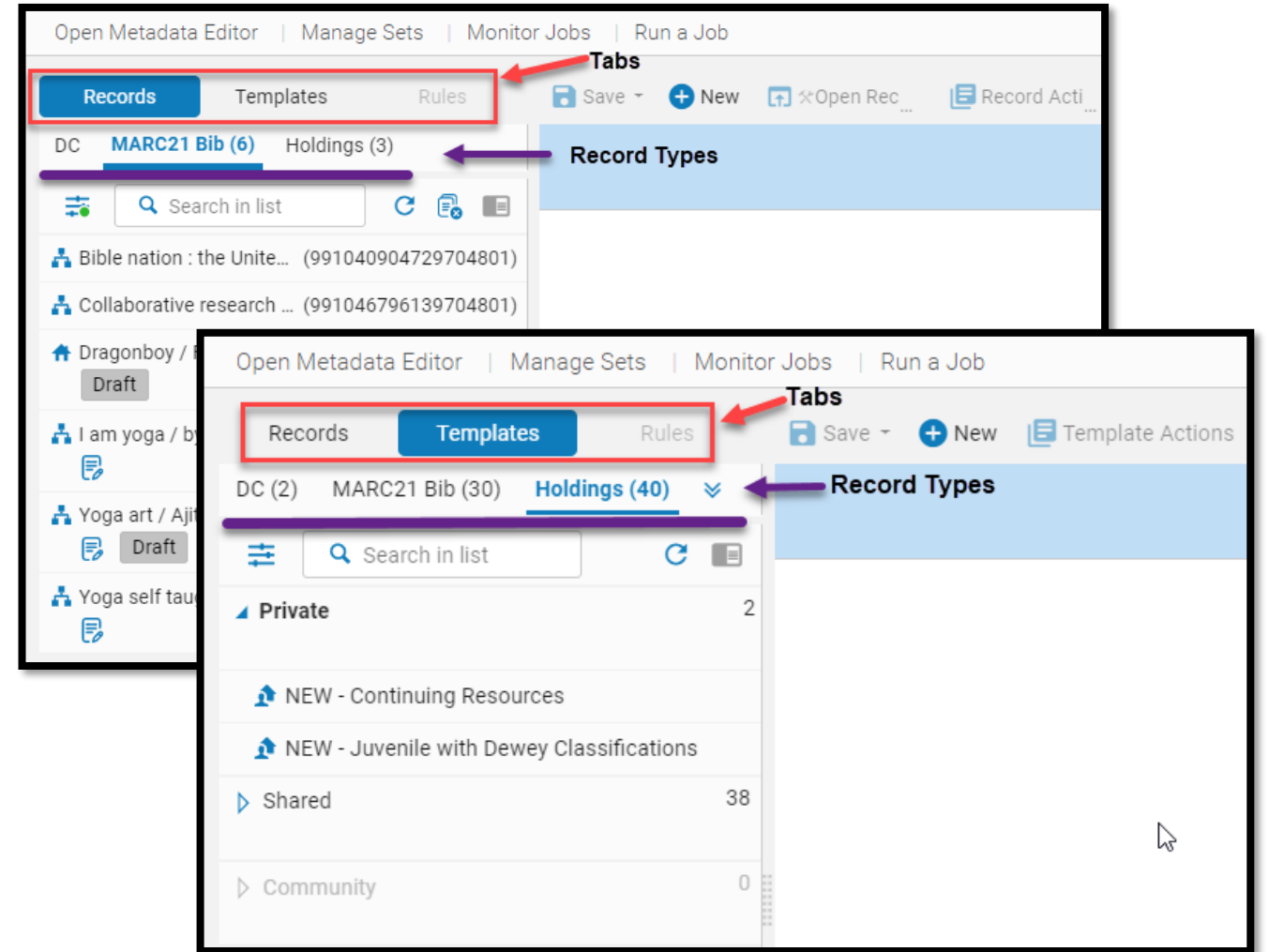
Features	Release Date - Sandbox	Release Date - Production
Rules Management	February 21, 2021	March 7, 2021
New MD Editor Exclusive Use	May 23, 2021	June 6, 2021

- All MD Editor functionality will be available in the New MD Editor with the March Alma Release
 - Suggest users transition to using the New MD Editor with the March release to get use performing their work in the new MD Editor
- June 6, 2021 the old MD Editor will no longer be available for use in the:
 - Sandbox
 - Production



Record, Templates, and Rules Tabs

- Tabs have replaced the drop-down menu for **Records**, **Templates**, and **Rules**
 - **Black** = Enabled tabs
 - **Grey** = Not enabled tab
 - March 7, 2021 the **Rules** tab will be enabled
 - **Blue** = Active tab and record type
- Record type can be selected below the Tabs
 - DC21
 - MARC21
 - Holdings



Side-by-side Editing of Primary and Searched/Browsed Records

Side-by-side editing of primary and searched/browsed records:

- Allows users to view the searched/browsed for record when searching external resources (***Search & Browse>Search Resources***) alongside the primary bibliographic record
- Allows the user to easily compare the primary bibliographic record with the searched record
- Provides the user with easy navigation back to the search form to refine your search as needed



Side-by-side Editing of Primary and Searched/Browsed Records

To view side-by-side editing of primary and searched/browsed for records:

1. Open a bib record in the MD Editor
2. Click **Search & Browse>Search Resources**
3. Select the Search Cataloging Profiles
4. Edit/type in the search criteria
 - Note: it will pre-populate the search criteria with information from the primary search record
5. Click **Search**
6. Click **View**
 - Both records will open in the MD Editor to allow the user to compare the two records
7. Click **Back** to return to search results
8. Click **View** from another bib record side-by-side with the primary bib record

NOTE: Back also allows the user to edit the search criteria



Side-by-side Editing of Primary and Searched/Browsed Records

The screenshot displays two side-by-side windows from a library catalog system. The left window, titled "Search Resources", shows a search form for "WorldCat" with various search criteria. A red box highlights the search criteria, and a red arrow points to a "Primary bib record collapses" label. The right window, titled "Search Resources Results", shows two search results for the same title. A red arrow points to the "View" button for the first result.

Search Resources (991046796139704801)

Search Cataloging Profile: **WorldCat**

Find: Any Field Contains Phi

AND OR Title Contains Phi Collaborative rese

AND OR Creator Contains Phi Solomon, Trudy.

AND OR Subjects Contains Phi

AND OR ISBN Contains Phi

AND OR ISSN Contains Phi

AND OR Year of Publication Equals 1987

System Number Contains Phi

Search Resources Results

WorldCat(2)

1 - 2 of 2 Records

1 **Collaborative research relationships in biotechnology : final report : submitted to Biological Applications Program, Office of Technology Assessment, United States Congress / by Trudy Samantha Solomon.** View Import ...
By Solomon, Trudy. (Book The Office , [Washington, D.C.?] : Springfield, Va. :, [1987])
Record Source: GPO
Subjects: United States., Biotechnology--Research., Biotechnology--Research--United States.
Other System Number: (OCoLC)24332909

2 **Collaborative research relationships in biotechnology : final report : submitted to Biological Applications Program, Office of Technology Assessment, United States Congress / by Trudy Samantha Solomon.** View Import ...

Side-by-side Editing of Primary and Searched/Browsed Records

Records Open up side-by-side to be able to compare the records in the MD Editor

Field	Record 1 (Left)	Record 2 (Right)
LDR	01968cam#a22004211a#4500	#####cam#a22003971a#4500
001	991046796139704801	ocm24332909
005	20190726054847.8	20210208074213.0
007	he#bmb024bbca	he#bmb024bbca
008	910905s1987####dcb#####bb###t000#0#eng#d	910905s1987####dcb#####bb###t000#0#eng#d
035	\$\$a ocm24332909-01sunny_network	\$\$a (OCoLC)24332909
035	\$\$a (OCoLC)24332909	\$\$a (OCoLC)ocm24332909
040	\$\$a GPO \$\$b eng \$\$c GPO \$\$d OCL \$\$d OCLCQ \$\$d OCLCF \$\$d OCLCO \$\$d OCLCQ \$\$d OCLCA \$\$d OCLCQ \$\$d MUO \$\$d CUI \$\$d OCLCQ	\$\$a GPO \$\$b eng \$\$c GPO \$\$d OCL \$\$d OCLCQ \$\$d OCLCF \$\$d OCLCO \$\$d OCLCQ \$\$d OCLCA \$\$d OCLCQ \$\$d MUO \$\$d CUI
043	\$\$a n-us---	\$\$a n-us---
049	\$\$a OLIS	\$\$a OLIS
074	\$\$a 1070-M (MF)	\$\$a 1070-M (MF)
086 0	\$\$a Y 3.T 22/2:2 B 52/4/pt.2/collab.	\$\$a Y 3.T 22/2:2 B 52/4/pt.2/collab.
100 1	\$\$a Solomon, Trudy.	\$\$a Solomon, Trudy.
245 1 0	\$\$a Collaborative research relationships in biotechnology : \$\$b final report : submitted to Biological Applications Program, Office of Technology Assessment, United States Congress / \$\$c by Trudy Samantha Solomon.	\$\$a Collaborative research relationships in biotechnology : \$\$b final report : submitted to Biological Applications Program, Office of Technology Assessment, United States Congress / \$\$c by Trudy Samantha Solomon.
246 3	\$\$a New developments in biotechnology	\$\$a New developments in biotechnology
260	\$\$a [Washington, D.C. ?] : \$\$b The Office ; \$\$a Springfield, Va. : \$\$b National Technical Information Service, U.S. Dept. of Commerce	\$\$a [Washington, D.C. ?] : \$\$b The Office ; \$\$a Springfield, Va. : \$\$b National Technical Information Service, U.S. Dept. of Commerce

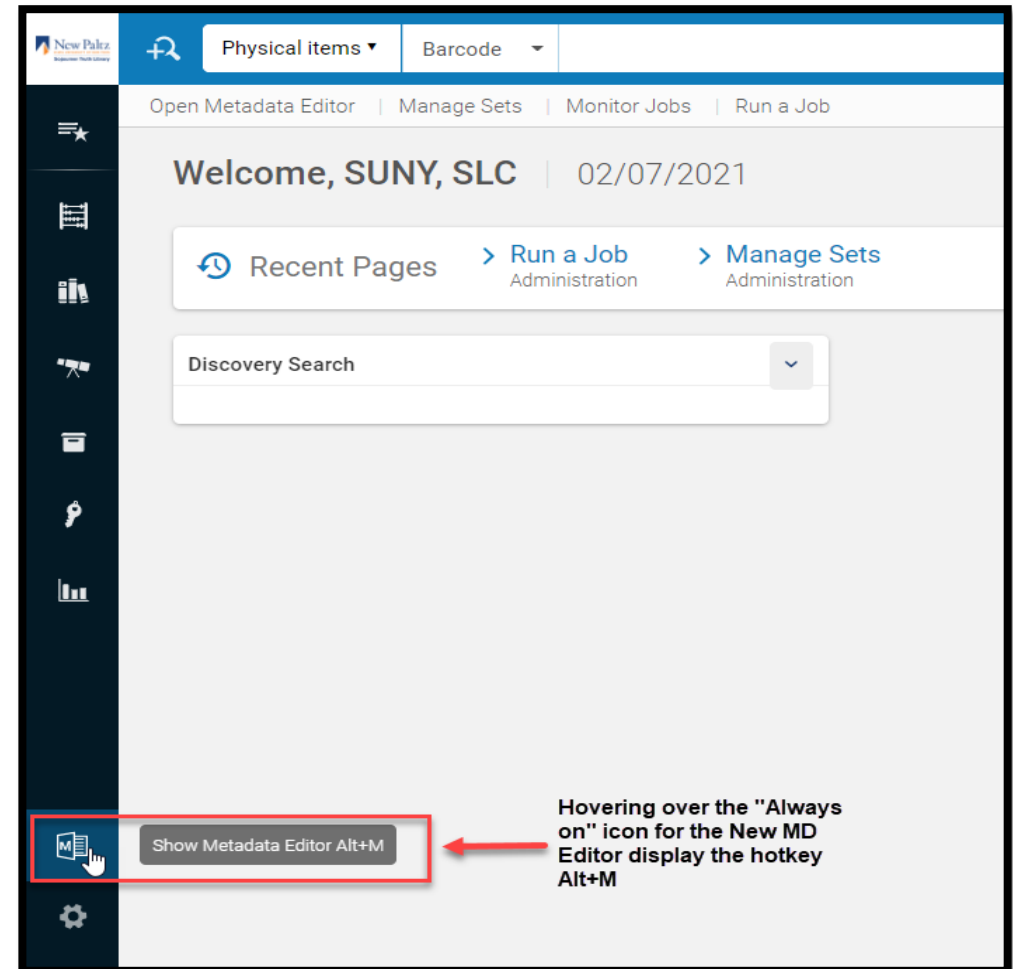
Warning: You have 1 warning(s) in your record - 7:35:43 AM.

Buttons: Back to results, Import, Execute



New MD Editor Hotkey

- **Alt+M** - New hotkey added to allow quick access to the MD Editor
 - Only works with the new MD Editor
 - Hovering over the “Always on” MD Editor icon will display the hotkey shortcut
 - New MD Editor hotkey functions works like the “Always on” icon
 - Navigates the users to and from the MD Editor with a quick keystroke
 - The MD Editor will remain open when navigating between the MD Editor and working in Alma



Holdings Roles and Scoping

- Ex Libris added privileges to limit who can create, edit, and/or delete holdings records by:
 - Role:
 - Previously, all users with a cataloger role could create, edit, or delete holdings for any library in their institution
 - Cataloging roles no longer can create, edit, and/or delete holdings records
 - Scope :
 - Roles can be scoped to the Institution or Library level
 - Library scope allows the user to create, edit, and/or delete holdings only at the library the role has been scoped to
 - Institution scope allows the user to create, edit, and/or delete holdings for all libraries in the institution
 - Roles can still be scoped to the institution level



Holdings Roles and Scoping

- Ex Libris added the following privileges:
 - PHYSICAL_INVENTORY_MANAGE - prevents unauthorized users with cataloging roles from creating and editing holdings records
 - PHYSICAL_INVENTORY_DELETE - prevents unauthorized users from deleting holdings records
- Roles containing PHYSICAL_INVENTORY_MANAGE privilege:
 - PHYSICAL_INVENTORY_OPERATOR
 - PHYSICAL_INVENTORY_OPERATOR_LIMITED
 - PURCHASE_MANAGER
 - PURCHASE_OPERATOR
 - REPOSITORY_MANAGER
- Roles containing PHYSICAL_INVENTORY_DELETE privilege:
 - PHYSICAL_INVENTORY_OPERATOR_EXTENDED



Configuring Holdings Roles and Scoping

- To configure a user roles the user must have one of the following roles:
 - User Manager
 - User Administrator

To configure a user role to a specific library or institution:

1. Perform a repository search for the user
2. Click on the Username (or edit from the ellipses)
3. Click **Edit** from the existing role
 - Click **Add Role** if the role does not exist and add the role and scope it for the user
4. Select the scope
5. Click **Save Role**

The screenshot displays the 'User Roles Details' page for 'SUNY, SLC'. The role name is 'Physical Inventory Operator' and the status is 'Active'. The 'Scope' dropdown is open, showing options like 'Resource Sharing Library - do not use', 'SUNY New Paltz', and 'Sojourner Truth Library'. A red box highlights the 'Scope' dropdown, and a red arrow points to the 'Save Role' button.

Search Index Operators for Local Call Numbers

- Search index operators were added for Local Call Number search index when performing an advanced repository search
- Local Call Numbers search indexes need to be enabled to be search in an advanced repository search
- Local call number are in 09X fields
- Local Call Numbers can be searched by:

Contains Keywords	Contains Phrase	Equals	>	>=	<	<=
Is Empty	Is Not Empty	Starts With	Not Contains Keywords	Not Equals	Not Contains Phrase	Contains Exact Phrase Starting with



Enable Local Call Number Search Indexes

- The user must have one of the following roles to configure search indexes:
 - General System Administrator
 - Repository Administrator

To enable Local Call Number search indexes:

1. Go to **Configuration>Resources>Search Configuration>Search Indexes**
2. Scroll to the page with local_call_Number_09X
3. Click **Custom** from the ellipses to be enable
4. Toggle the ellipses to enable
 - Toggle will turn **blue**
5. Repeat steps 3 and 4 for any other local_call_number search indexes to be enabled
6. Click **Save**
7. Logout and back in for the changes to take effect



Enable Local Call Number Search Indexes

Configuring: SUNY New Paltz

Mapping Table Save

351 - 400 of 973

	Enabled	Index Code	Object Type	Simple Search?	Adv. Search?	Index Label Table	Managed in Network	Updated By	Last Updated	
351	<input type="checkbox"/>	local_authority_field_9	AUTHORITY_MM	false	true	CustomizeSearch		-	-	...
352	<input checked="" type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
353	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	Customize
354	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
355	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
356	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
357	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
358	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
359	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
360	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...

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https://suny-new-psb.alma.exlibrisgroup.com/#



Enable Local Call Number Search Indexes

Mapping Table Save

	Enabled	Index Code	Object Type	Simple Search?	Adv. Search?	Index Label Table	Managed in Network	Updated By	Last Updated	
351	<input type="checkbox"/>	local_authority_field_9	AUTHORITY_MM	false	true	CustomizeSearch		-	-	...
352	<input checked="" type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
353	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
354	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
355	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
356	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
357	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
358	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
359	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
360	<input type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
361	<input checked="" type="checkbox"/>	local_call_number_09	BIB_MMS	false	true	CustomizeSearch		-	-	...
362	<input type="checkbox"/>	local_call_number_90	BIB_MMS	false		CustomizeSearch		-	-	...

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Search for Local Call Numbers Using Search Index Operators

To Search for Local Call Numbers using search index operators:

1. Click on the **Advanced Search** icon
2. Select where to “Search in”
 - All Titles
 - Physical Titles
 - Physical Items
3. Select Local Call Number 09X for the search index
4. Select the search index operator
5. Type in the search term when applicable
6. Click **Search**

Physical Advanced Search icon

Search in: Physical titles Zone: Institution Network Community

Local call number 090 Contains Keywords 2020

Clear form Search

Physical Titles (1 - 3 of 3) where (c.search.index_names.local_call_number_090 contains keywords "2020")

Institution Network Community

Select All Sort by: Rank Secondary Sort by: Rank

1 The modern embroidery movement / Cynthia Fowler.
Book By Fowler, Cynthia (London : Bloomsbury Visual Arts, 2020.)
Subject: Embroidery--United States--History. Embroidery. United States. and others
Modification Date: 03/12/2020 12:15 PM
Creation Date: 03/04/2020 11:49 AM
Language: English
ISBN (13): 9781350129146 and others
Record number: (OCoLC)1103220177

Physical (1) Other details