The State University of New York

New MD Editor Series: New Features

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February 8, 2021

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

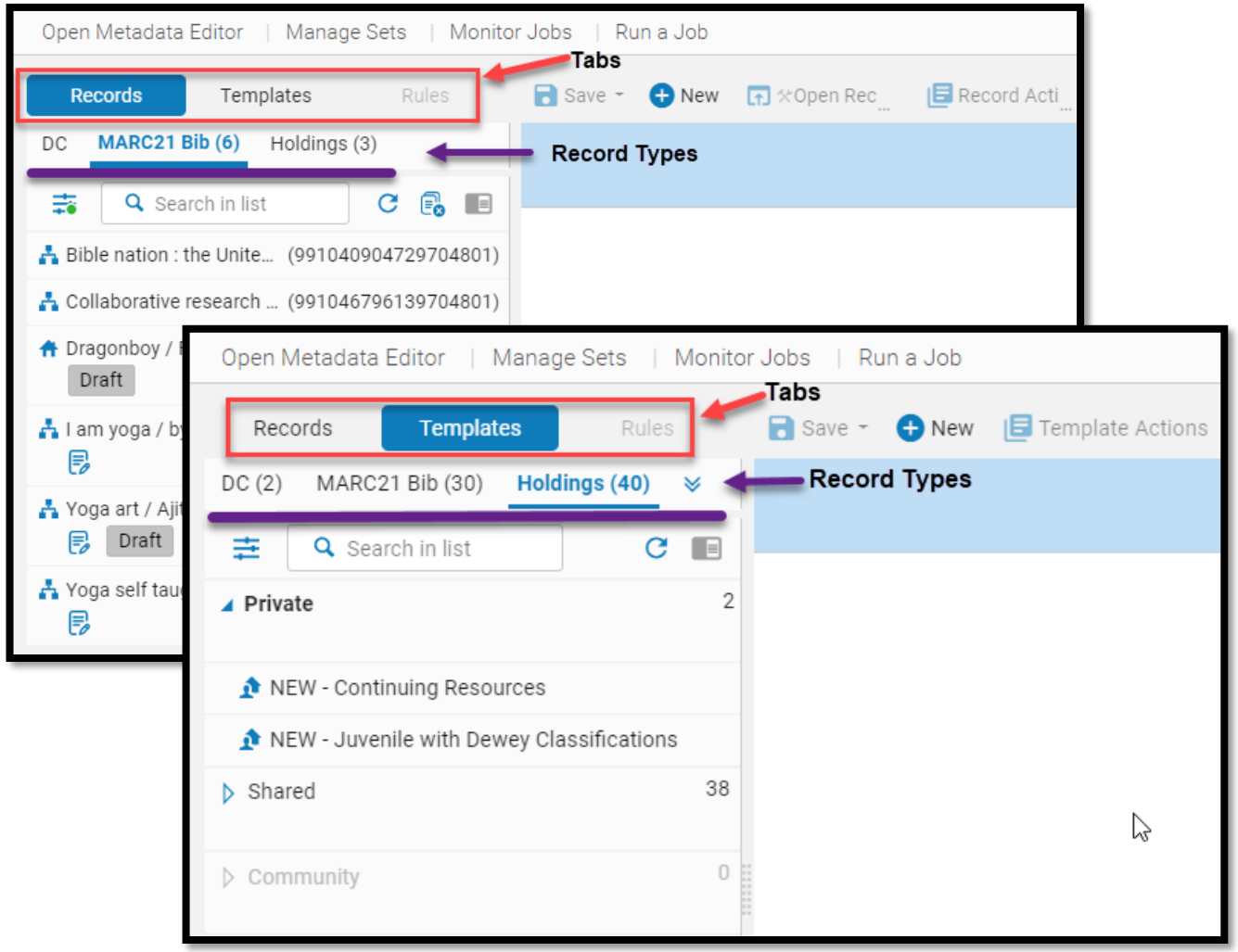
- All MD Editor functionality will be available in the New MD Editor with the March Alma Release
  - Suggest users transition to using the New MD Editor with the March release to get use performing their work in the new MD Editor

- 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

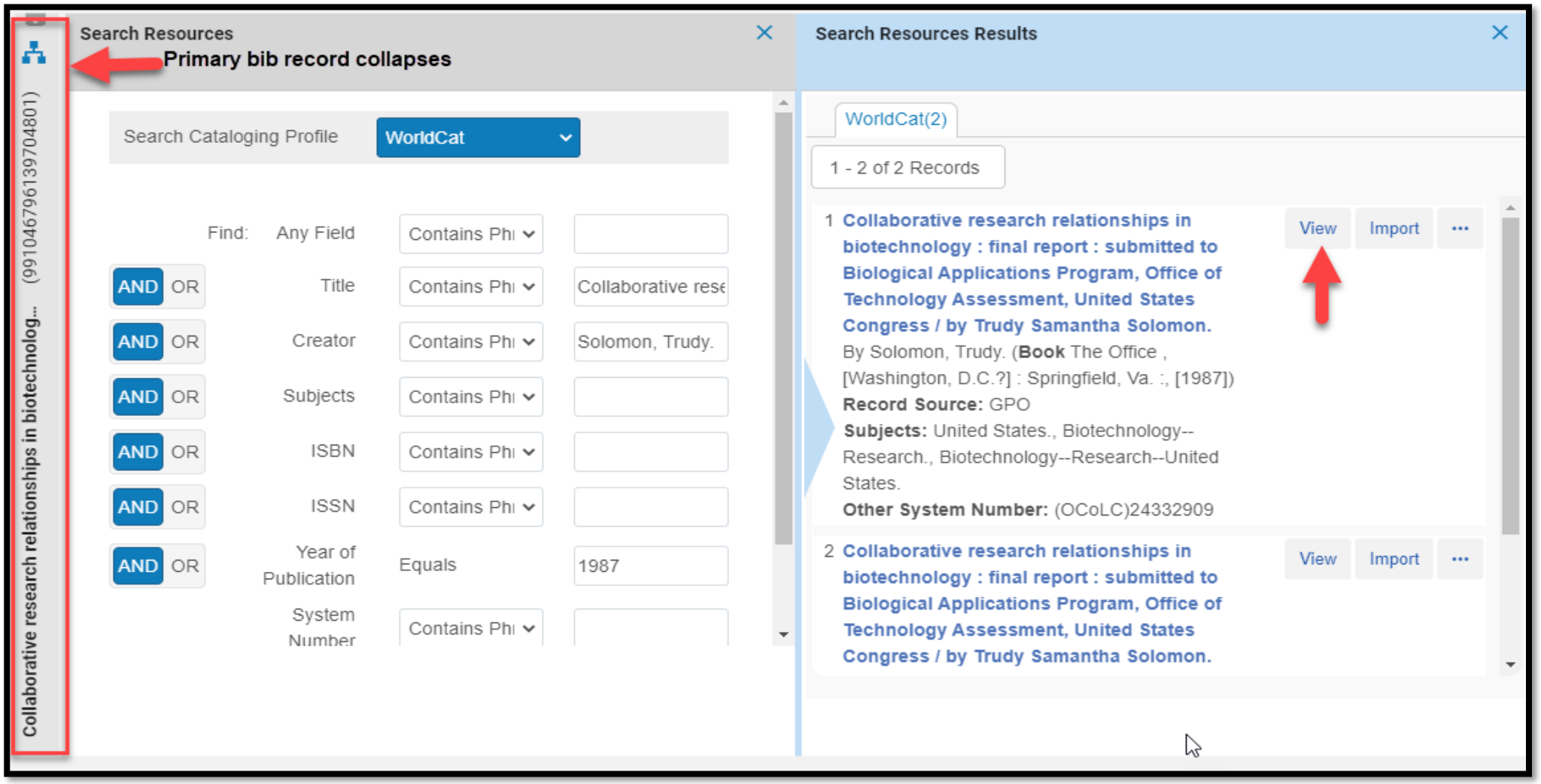
Side-by-side Editing of Primary and Searched/Browsed Records

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



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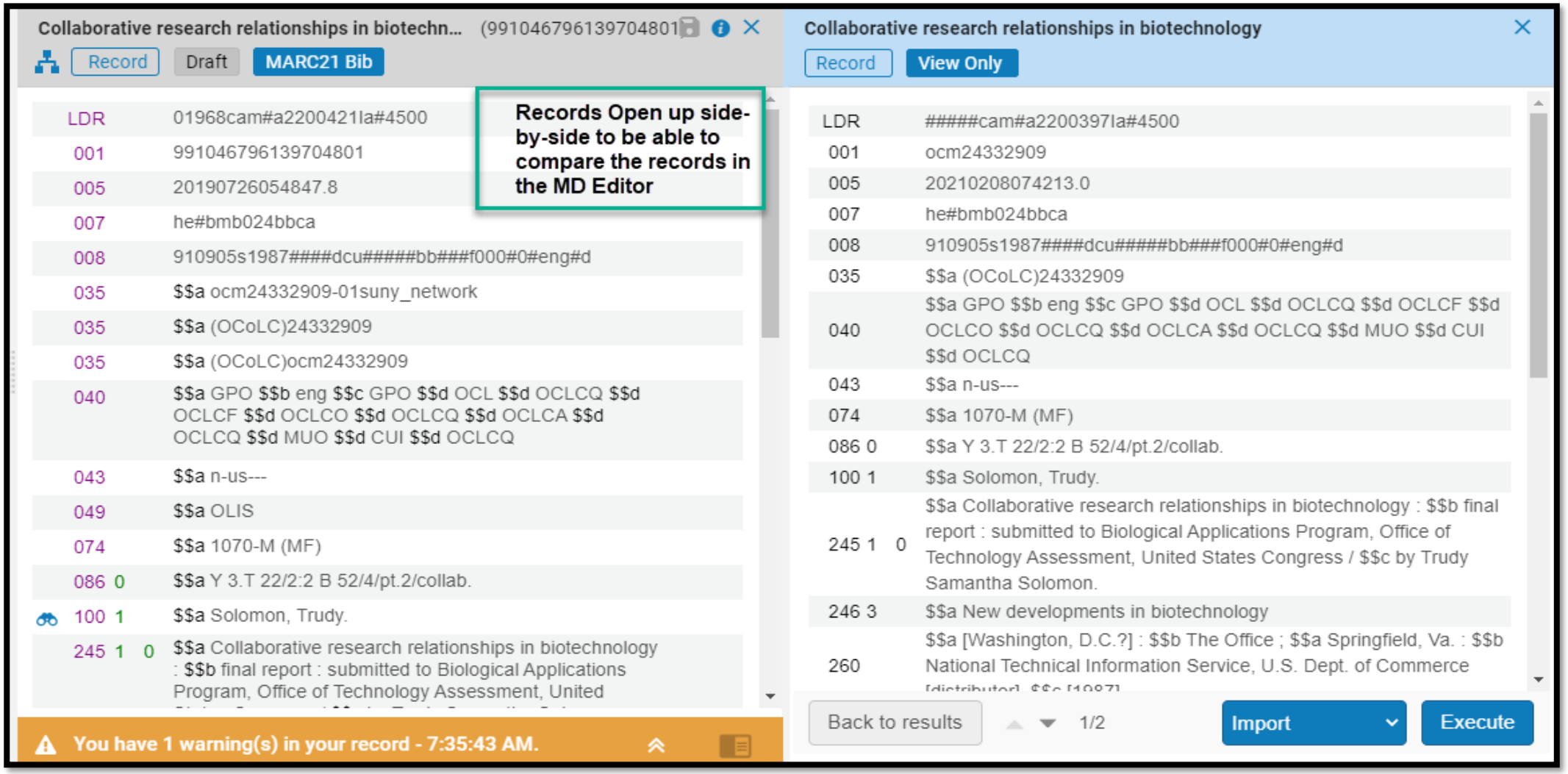
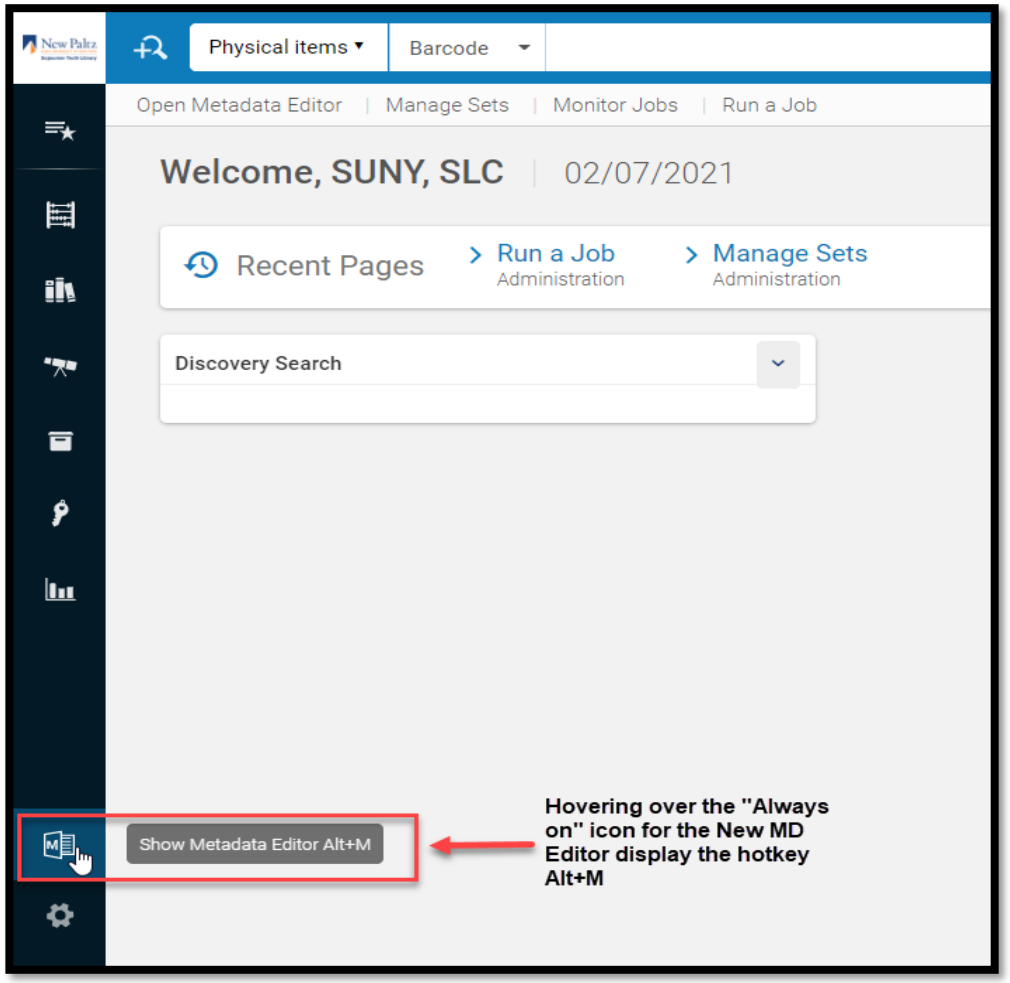


New MD Editor Hotkey

- ***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 created, edit, or deleted 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

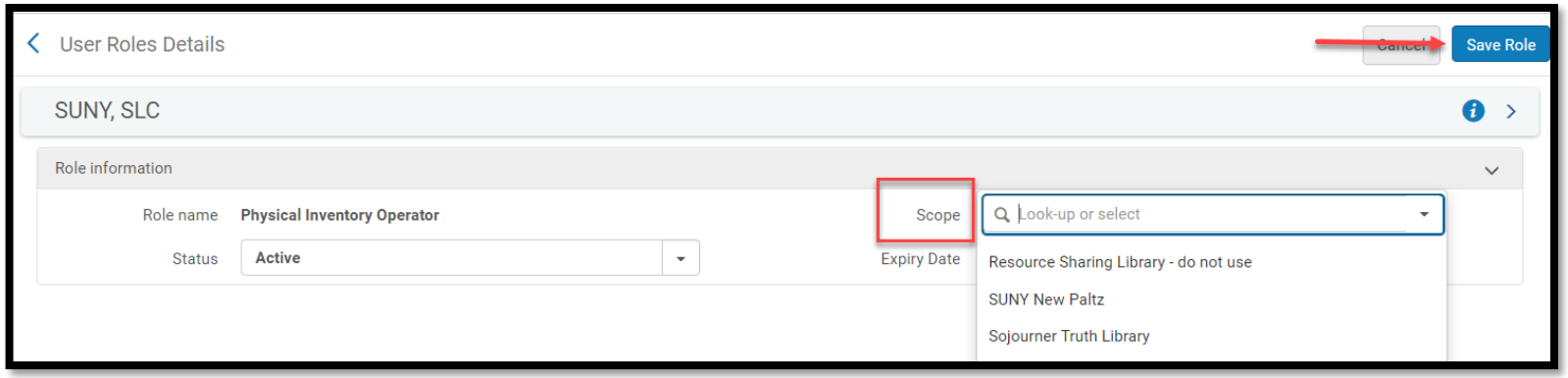
- Roles containing PHYSICAL_INVENTORY_DELETE privilege:
  - PHYSICAL_INVENTORY_OPERATOR_EXTENDED

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***



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

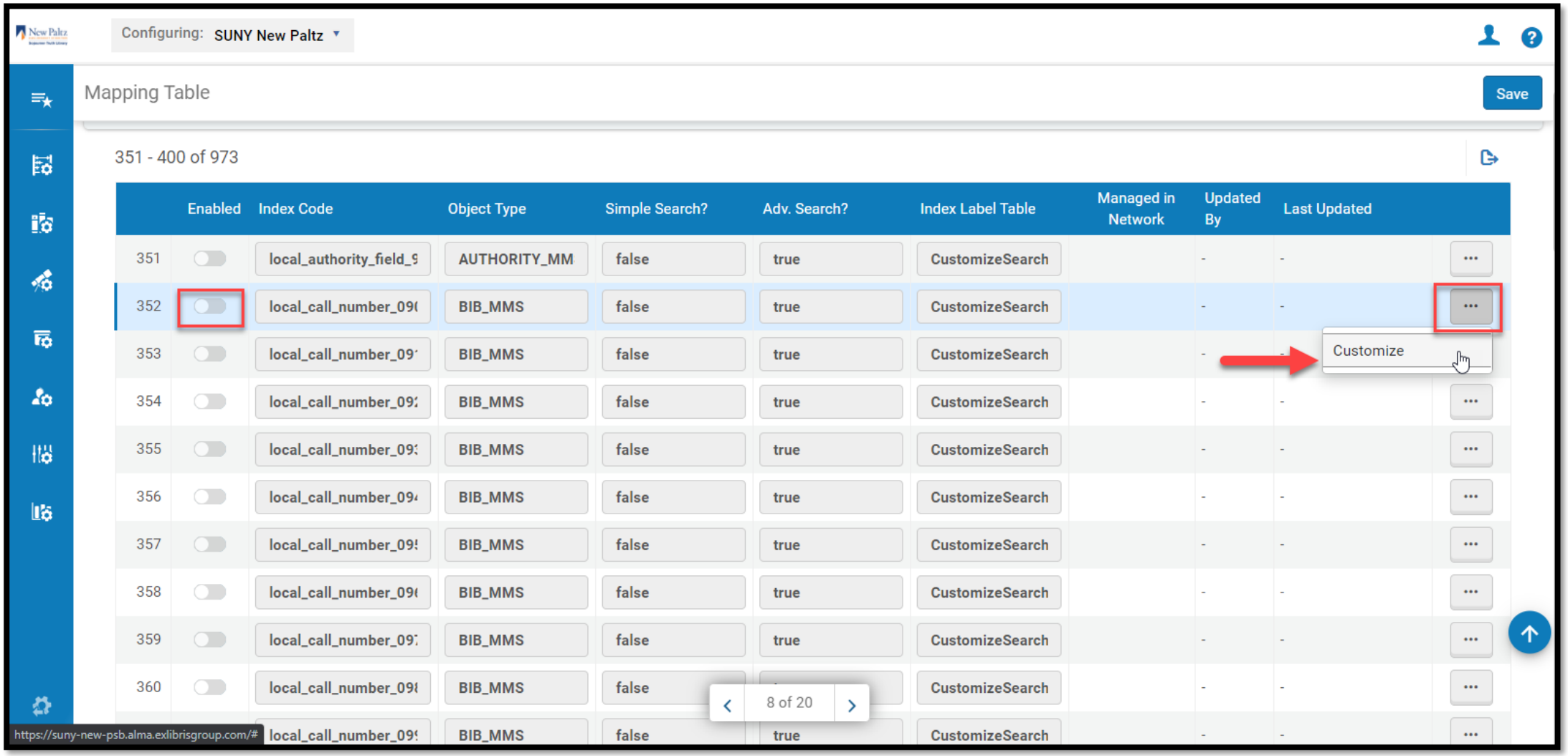
Enable Local Call Number Search Indexes

- 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



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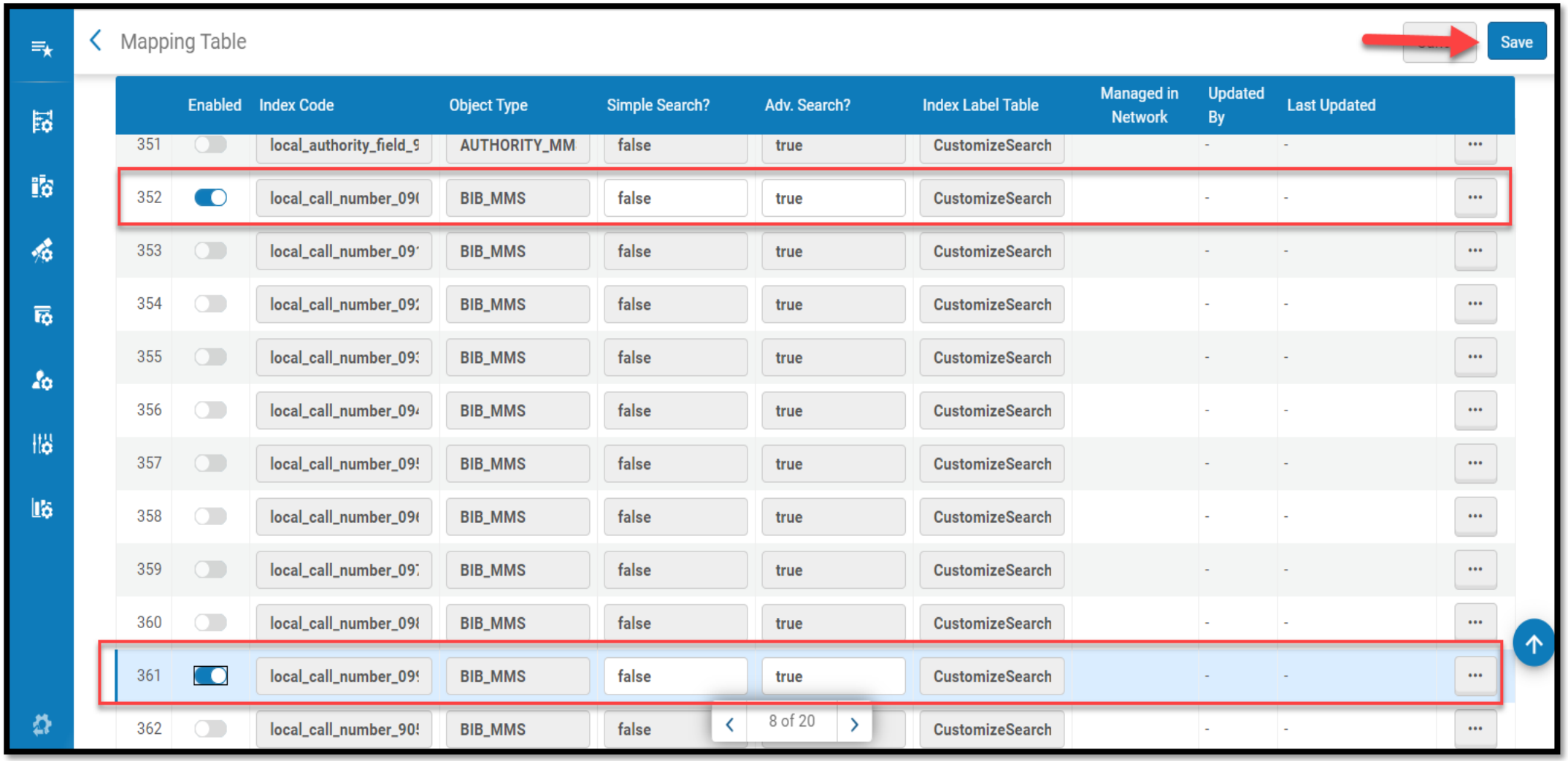
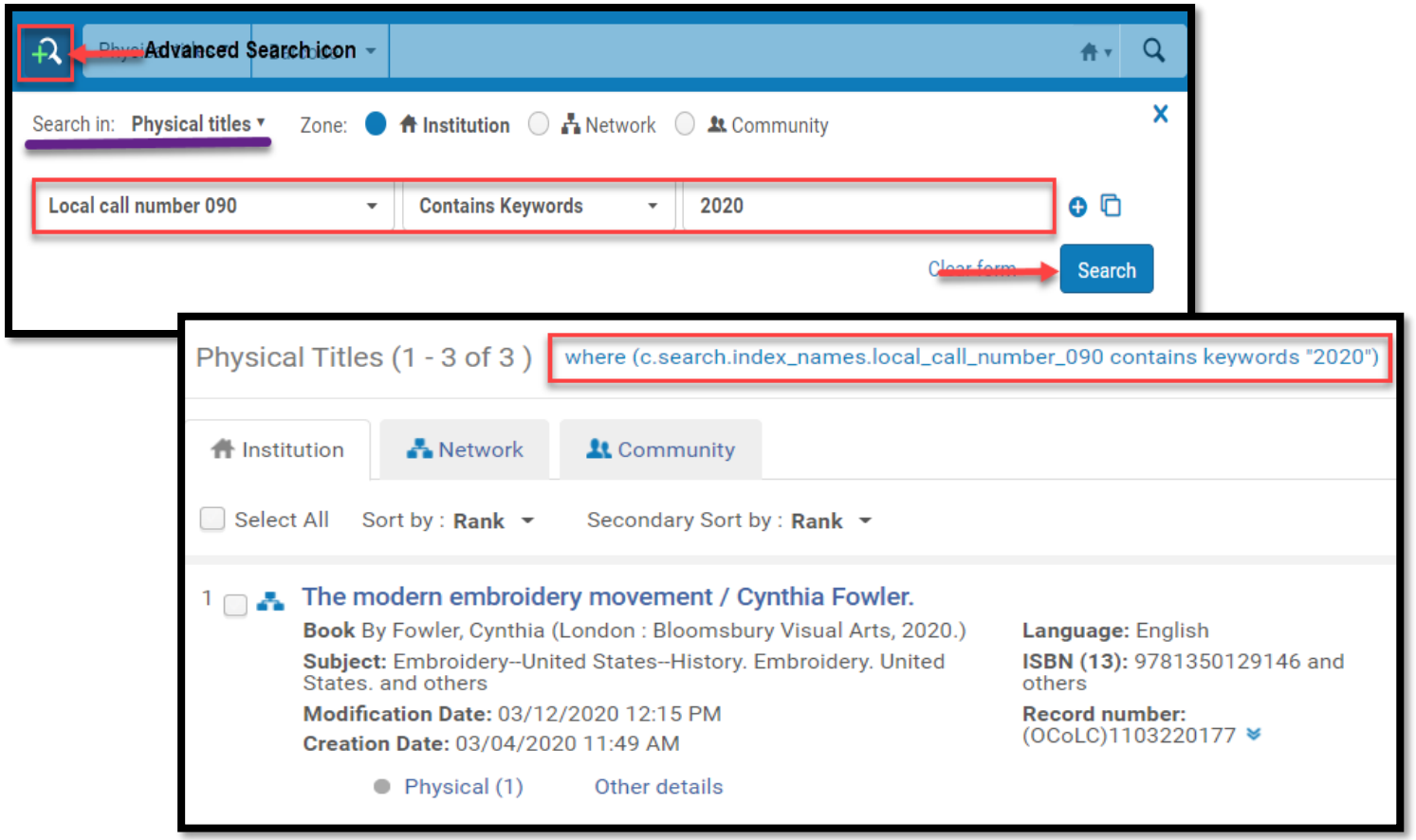


Search for Local Call Numbers Using Search Index Operators

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***