
rebus:list Documentation

Release 2.0

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Contents:

1	Contents	3
1.1	Orientation	3
1.2	Logging in and out	6
1.3	Changing your details	11
1.4	Viewing Lists	14
1.5	Creating Reading Lists	21
1.6	Editing Reading Lists	24
1.7	Draft Mode	36
1.8	Administration	42
1.9	Settings	44
1.10	Configuration	56
1.11	Hierarchy (Hierarchy mode customers only)	58
1.12	Tags	64
1.13	Users	66
1.14	Permissions	69
1.15	My Lists	76
1.16	Materials	77
1.17	Reports	80
1.18	Requests	89
1.19	My Requests	91
1.20	Rollover	91
1.21	Rolling over all lists	96
1.22	Appendix A - Material Tags	97
1.23	Appendix B - Privileges	100
1.24	Indices and tables	101



Welcome to rebus:list. Whether you are using rebus:list in an academic environment to sort materials according to specific courses, or creating current awareness lists as part of a public library programme, rebus:list allows you to manage your reading list materials in a way relevant to your environment.

The purpose of this training guide is to introduce you to the ease of use and rich functionality of rebus:list. Just follow the instructions on the pages below.

The screenshots are included as examples of screen layout and content; the actual content you see may be different.

Any comments you have on the notes would be welcome.

PTFS Europe Limited
54 Well Lane
Horsell
Woking
Surrey GU21 4PP
England

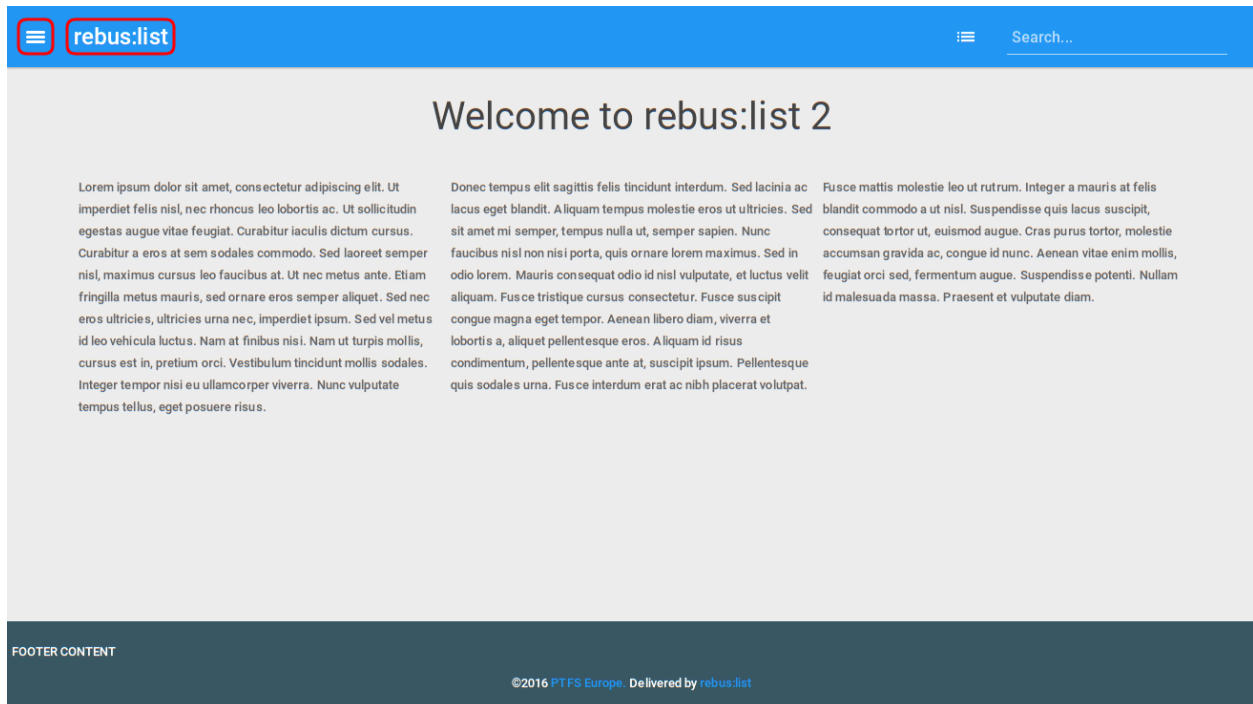
Tel: +44 (0) 800 756 6803
Fax: +44 (0) 800 756 6384
E-mail: support@ptfs-europe.com

Orientation

rebus:list is a web-based system. From the home page there are links in the top menu to Search reading lists. Use the menu icon on the top right hand side to Browse reading lists (hierarchy mode customers only)

The rebus:list logo links to the home page.

Click on the Main menu icon to login to the Administration area - your permissions will allow you to perform Administration functions as required.



Search

To search reading lists and staff members use the Search box on the right hand side of the menu bar.

As you start typing the window displays both Lists and Users that match the search terms.

The more text you type the more refined the search results.

Search terms are highlighted within the results. Clicking a result will take you to that list.



You can use the search to find a term associated with management structure - e.g. the School, Course code or the List name. You can also search for course identifiers or for the staff member or academic managing the list.

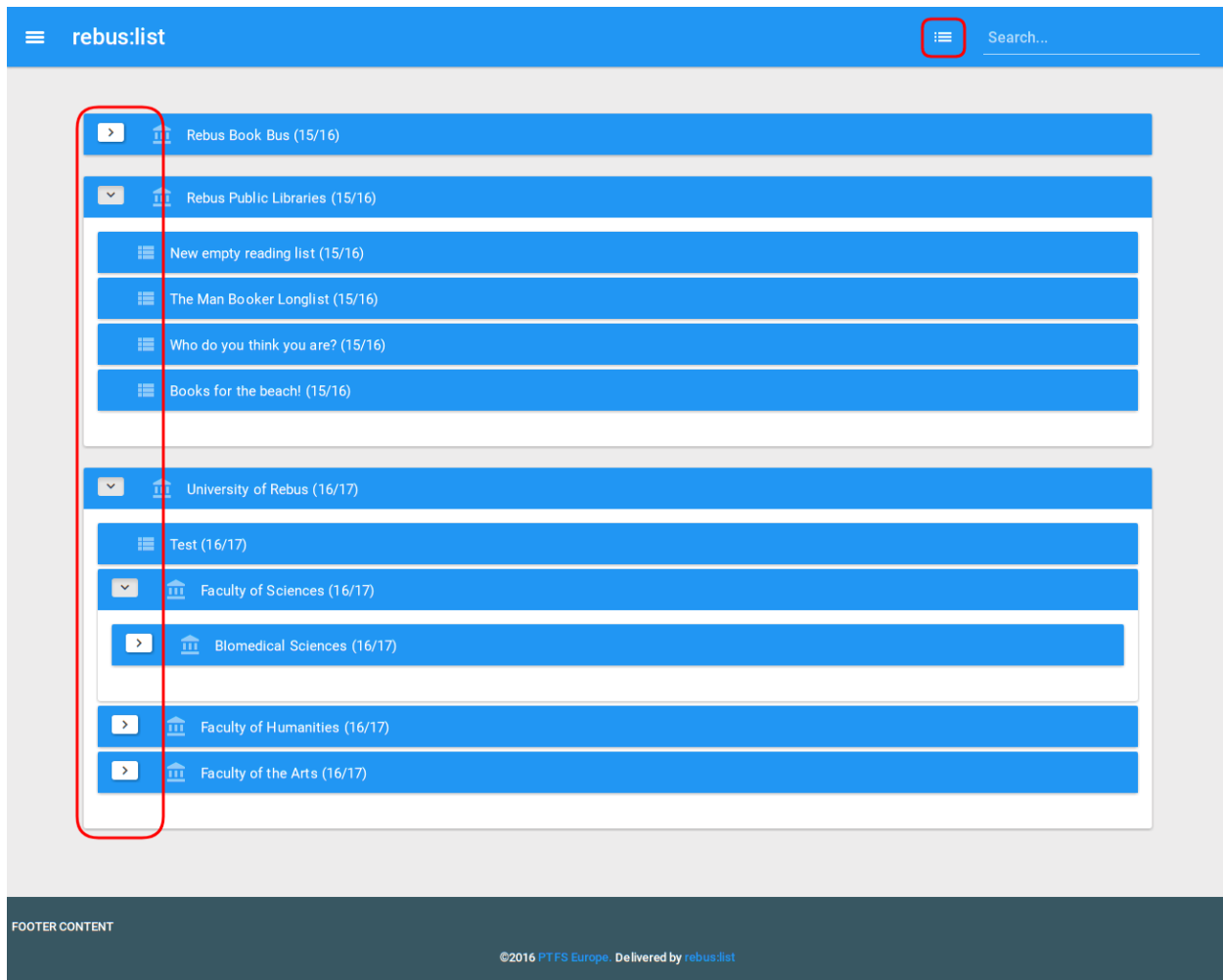
Hovering over the information icon on a result will provide additional information about that list



This search box will not return results for materials in lists - material searches are handled elsewhere

Browse (hierarchy mode customers only)

Browse allows you to browse through the hierarchy tree structure of lists to discover a list.



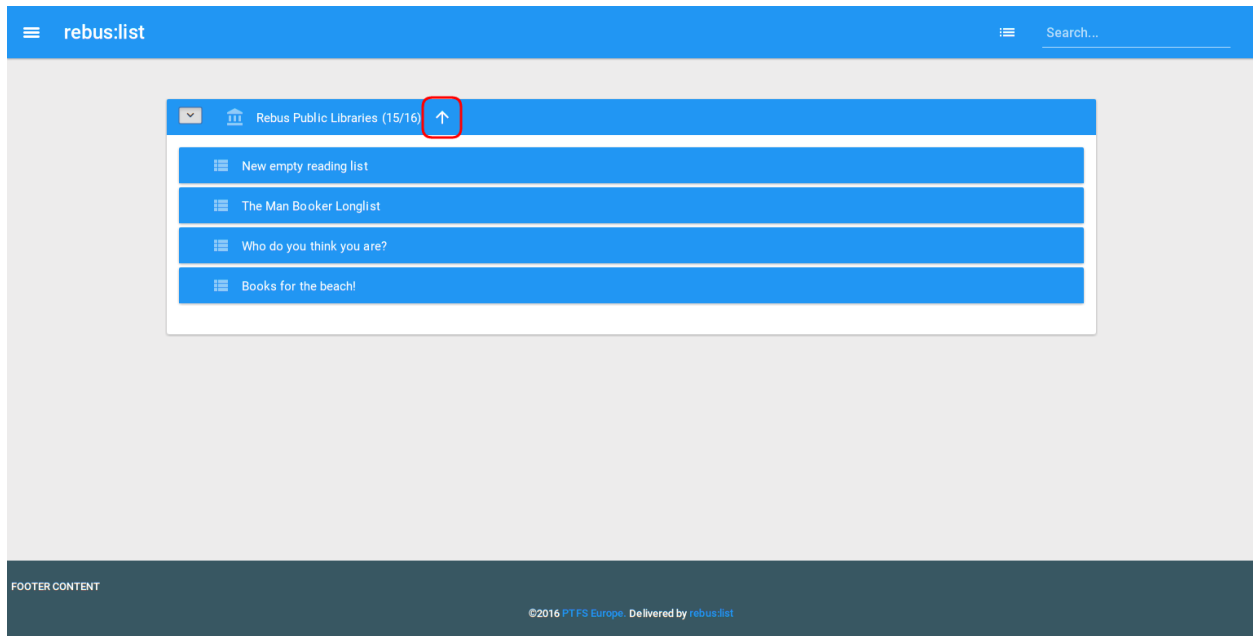
Use the arrows to expand the branches of the hierarchy tree. If there is no arrow there are no sub-lists.

The arrow indicates that there is a parent level or list above. Click on the up-arrow to navigate back up through the tree.

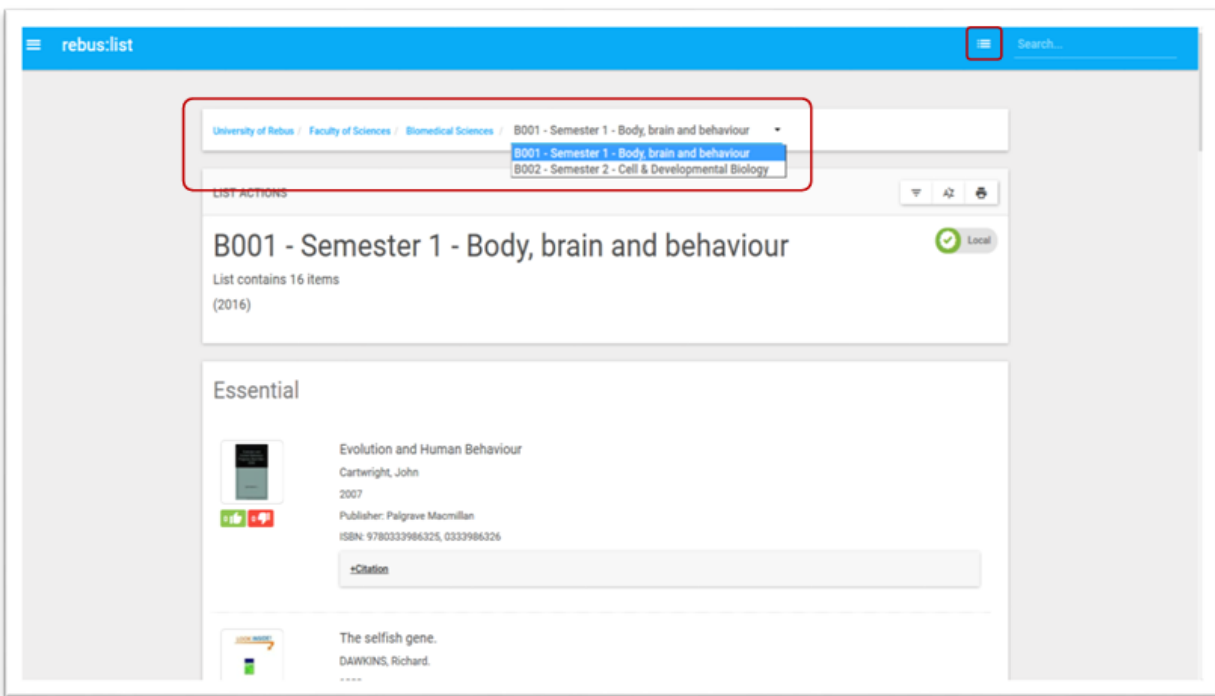
Select and click on a reading list to view the items as shown in the example here.

Clicking on the name of a hierarchy item will either display the associated list or display the hierarchy from that “unit” downwards. This is useful for only displaying portions of the hierarchy.

When viewing only a portion of the hierarchy, it is possible to return to the parent of the currently viewed list by clicking on the icon



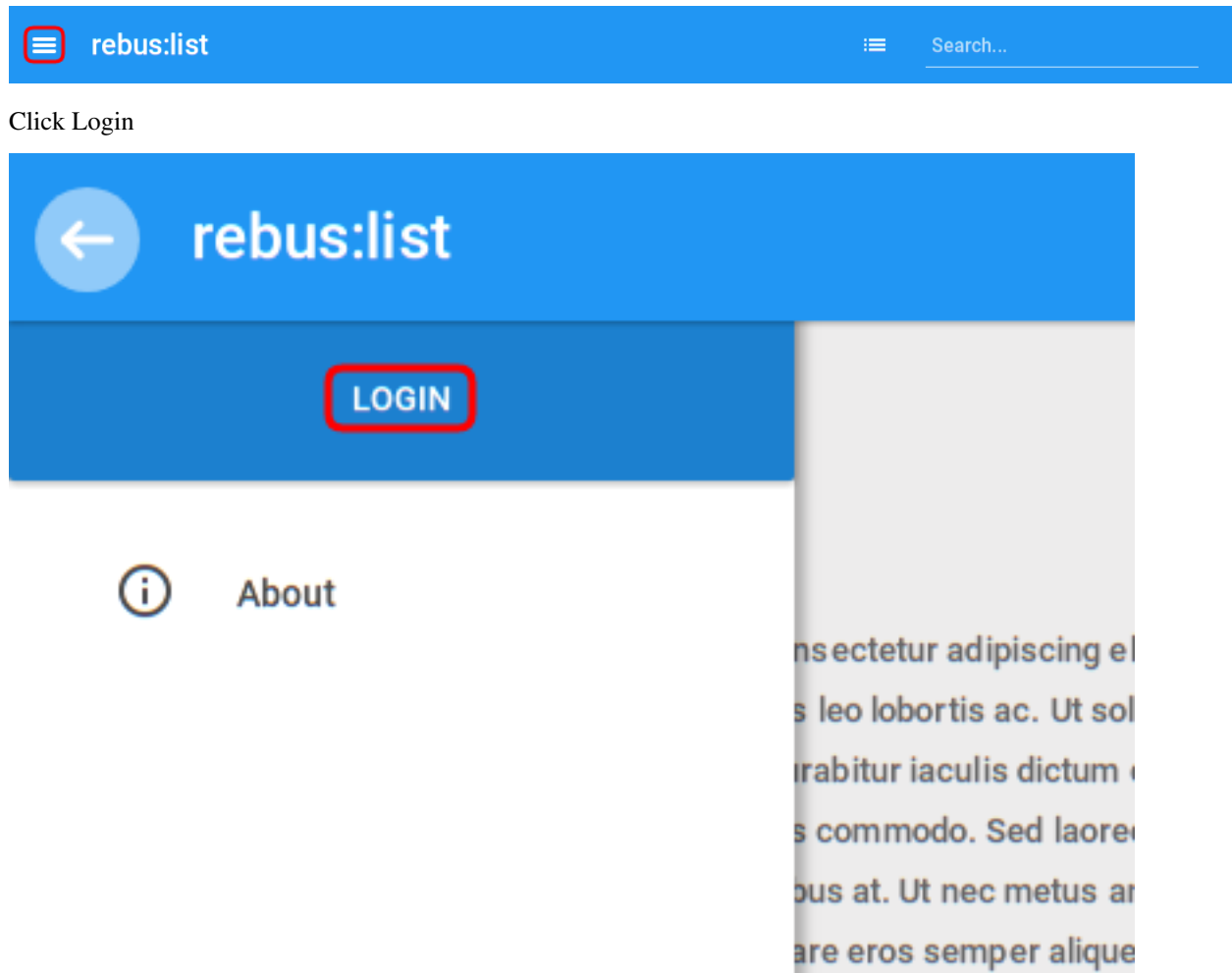
Within a list use the breadcrumb trail to navigate back up the previous levels in the hierarchy. Use the browse button to jump to the top of the tree.



Logging in and out

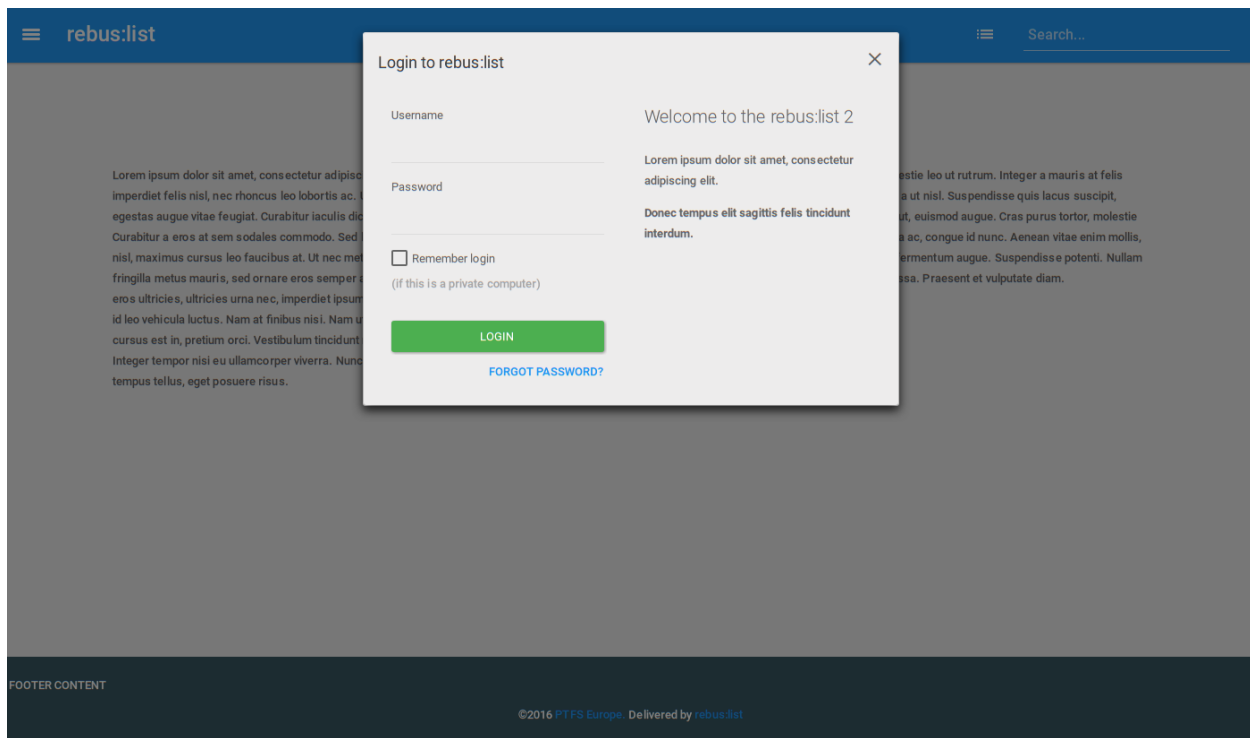
Logging in

To Log in, click on the Main menu icon at the top of rebus:list, this opens the menu sidebar.



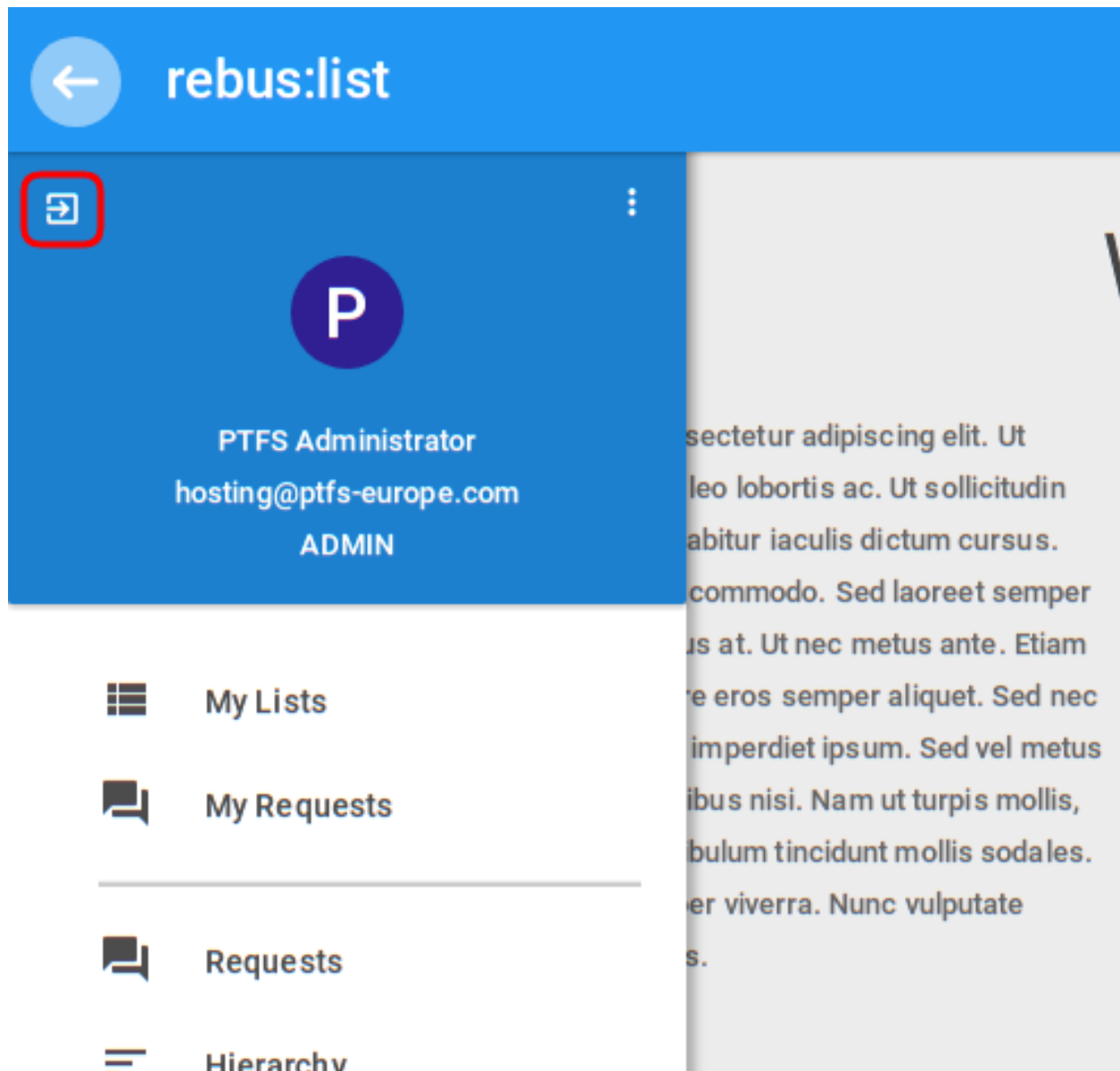
Click Login

Log in using your username and password.



Logging out

To log out, click on the Main menu icon at the top of rebus:list, this opens the menu sidebar. Click the button in the top left corner



Forgot password?

If you have forgotten your password, it is possible to have an email sent containing a link to reset it. Click on the “Forgot password?” link on the login dialog box:

Login to rebus:list

Username

Password

☐ Remember login
(if this is a private computer)

LOGIN

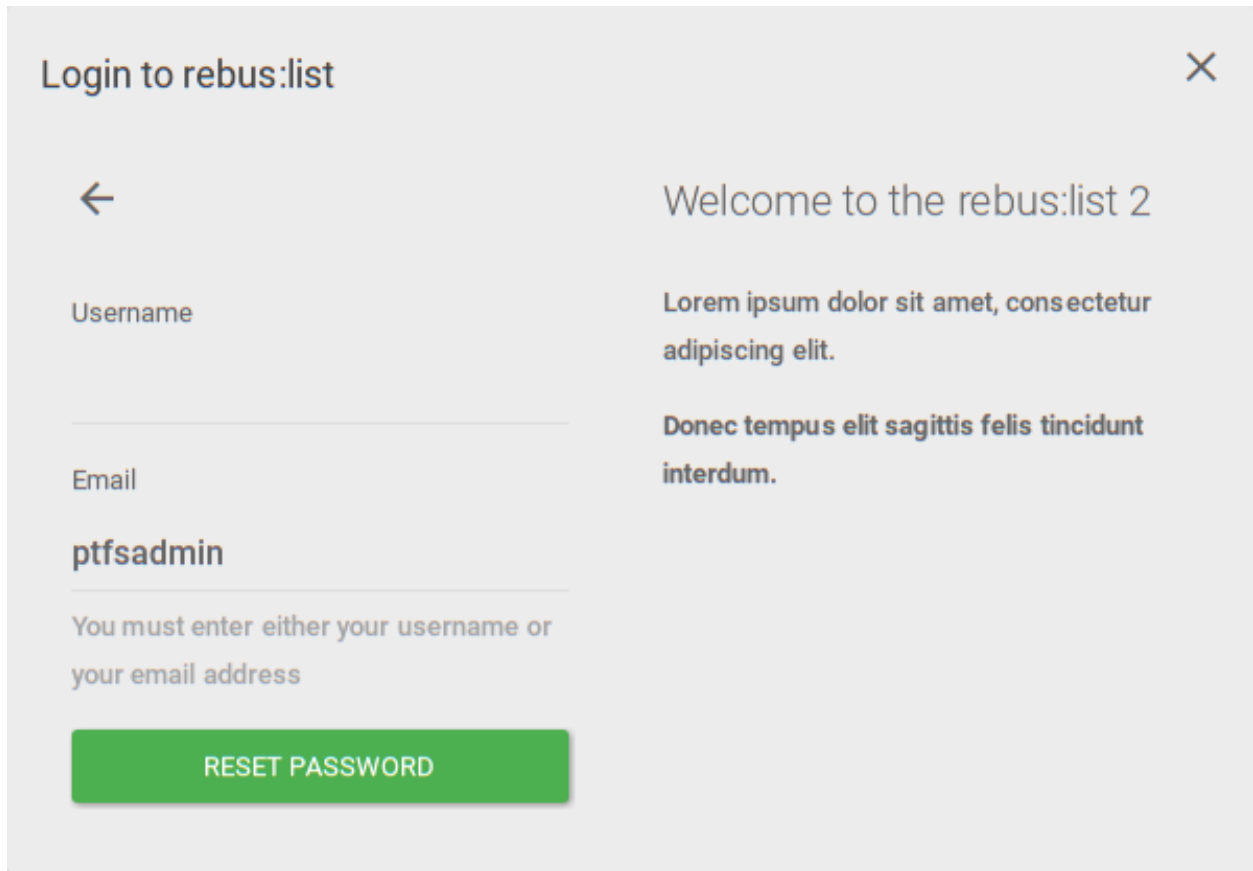
FORGOT PASSWORD?

Welcome to the rebus:list 2

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Donec tempus elit sagittis felis tincidunt interdum.

and enter either your username or email address into the form, then click “Reset password”:



a link enabling you to reset your password will then be emailed to you

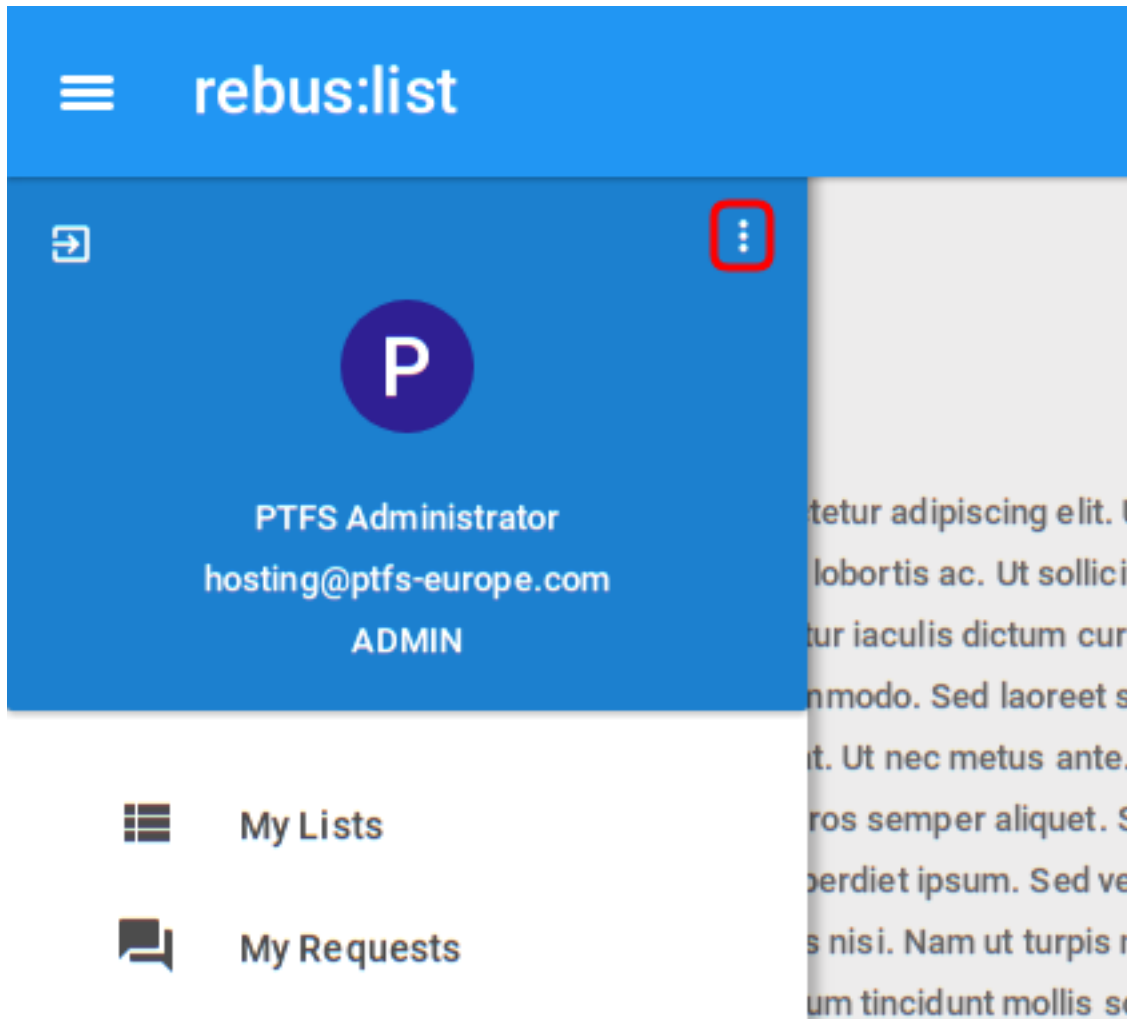
Changing your details

It is possible for a logged in user to modify their display name, email address and also change their password. **Note: this functionality is not available for users who log in via an external authentication system such as Shibboleth or LDAP**

While logged in, click on the rebus:list menu button:

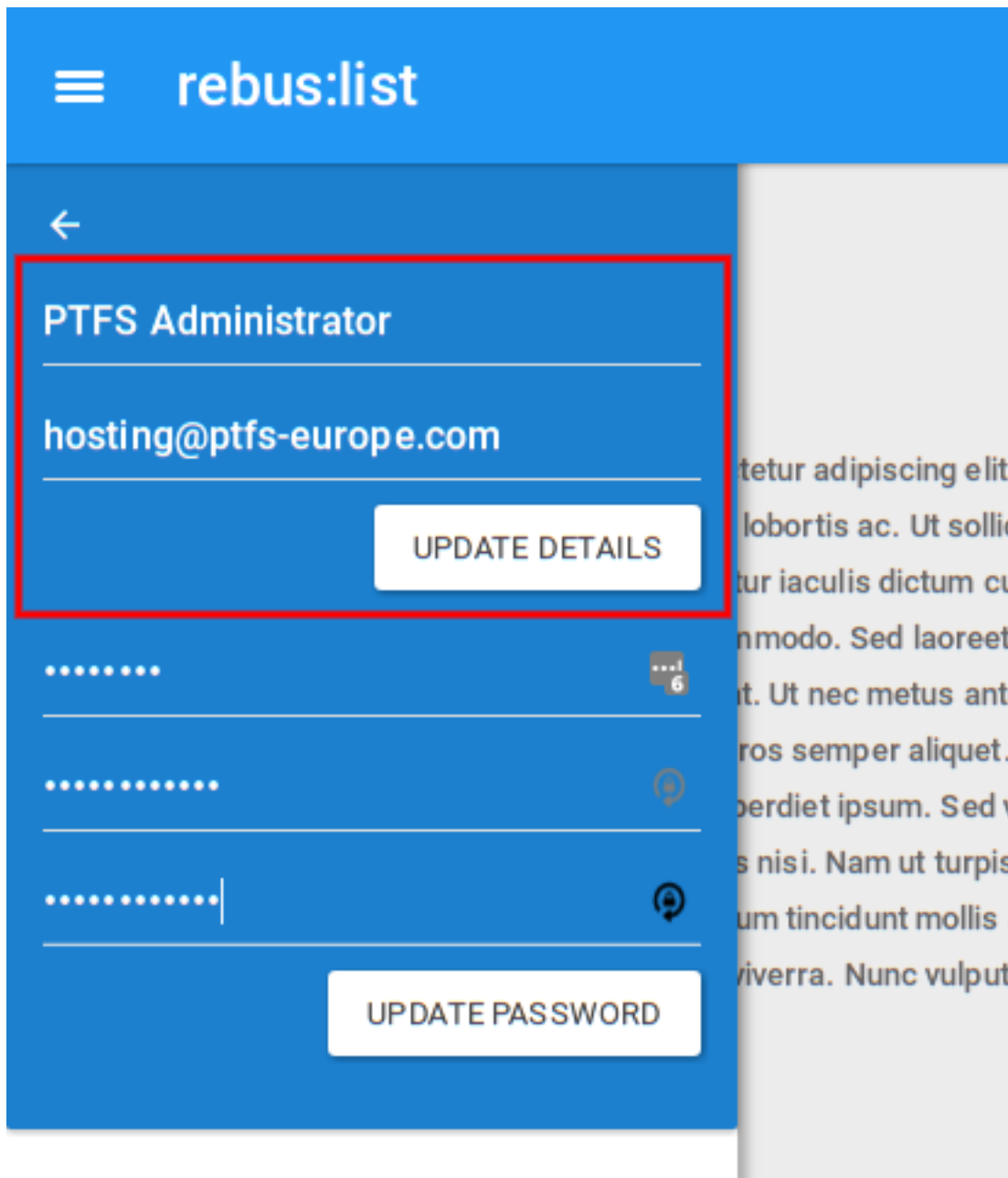


in the user “Profile” area, click the “Edit your details” button:



Changing your username and email address

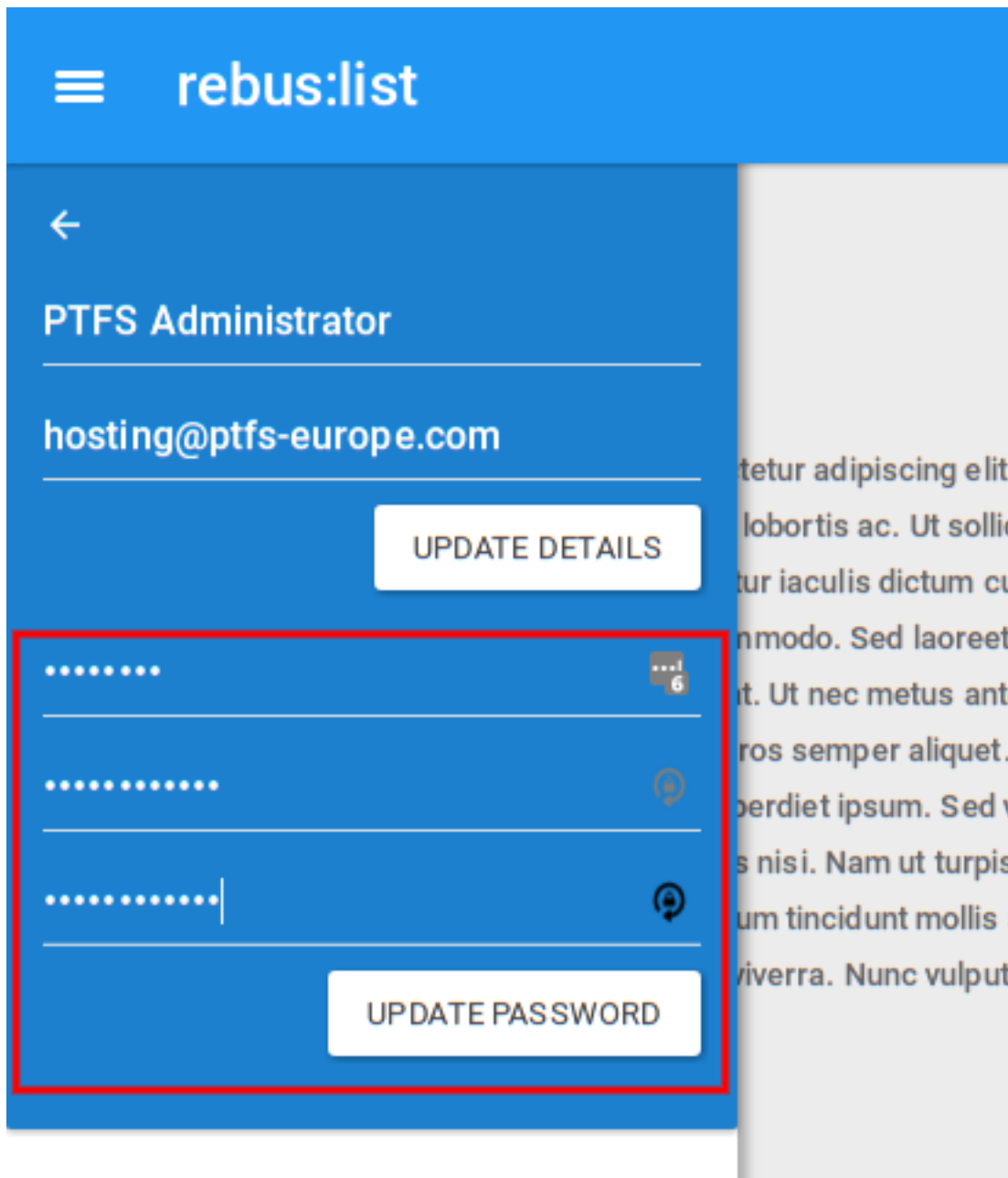
You can change your username and email address by modifying them in the form, then clicking “Update details”:



The screenshot shows the 'rebus:list' user interface. At the top is a blue header with a hamburger menu icon and the text 'rebus:list'. Below the header is a blue sidebar with a back arrow icon. The main content area is white and contains a user profile card. The card has a blue header with the text 'PTFS Administrator'. Below this is a text input field containing 'hosting@ptfs-europe.com'. To the right of this field is a white button with the text 'UPDATE DETAILS'. Below the email field are three more text input fields, each with a password strength indicator (a series of dots) and a lock icon. The first two fields are empty, and the third field contains a cursor. Below these fields is a white button with the text 'UPDATE PASSWORD'.

Changing your password

You can change your password by filling in the form:



The screenshot shows the 'rebus:list' interface with a blue header. Below the header, there's a back arrow, the title 'PTFS Administrator', and the email 'hosting@ptfs-europe.com'. An 'UPDATE DETAILS' button is visible. A red rectangle highlights the 'UPDATE PASSWORD' section, which contains three password input fields (each with a strength indicator), a confirmation icon, and an 'UPDATE PASSWORD' button.

Enter your current password in the first text box, your new password in the second and third text boxes. If you have mistyped your new password, you will be notified. Then click “Update password”

Viewing Lists

The List name is displayed on the top left of the lists, with materials displaying in categories beneath.

rebus:list

University of Rebus / Faculty of Sciences / Biomedical Sciences / B001 - Semester 1 - Body, brain and behaviour

LIST ACTIONS

B001 - Semester 1 - Body, brain and behaviour Preview

List contains 18 items
(16/17)
Angela Academic, Professor Faculty, Brian Librarian

Essential

Sleep.
1978 Date: 1978
Publisher: American Sleep Disorders Association and Sleep Research Society, etc.]
ISSN: 0161-8105

Sleep / J. Allan Hobson.
Hobson, J. Allan
Publisher: Scientific American Library 1989

List Actions

List actions display above list name. It is a sticky toolbar and will remain visible as you scroll through your list.

LIST ACTIONS

B001 - Semester 1 - Body, brain and behaviour Preview

List contains 18 items
(16/17)
Angela Academic, Professor Faculty, Brian Librarian

In order of display the buttons are:

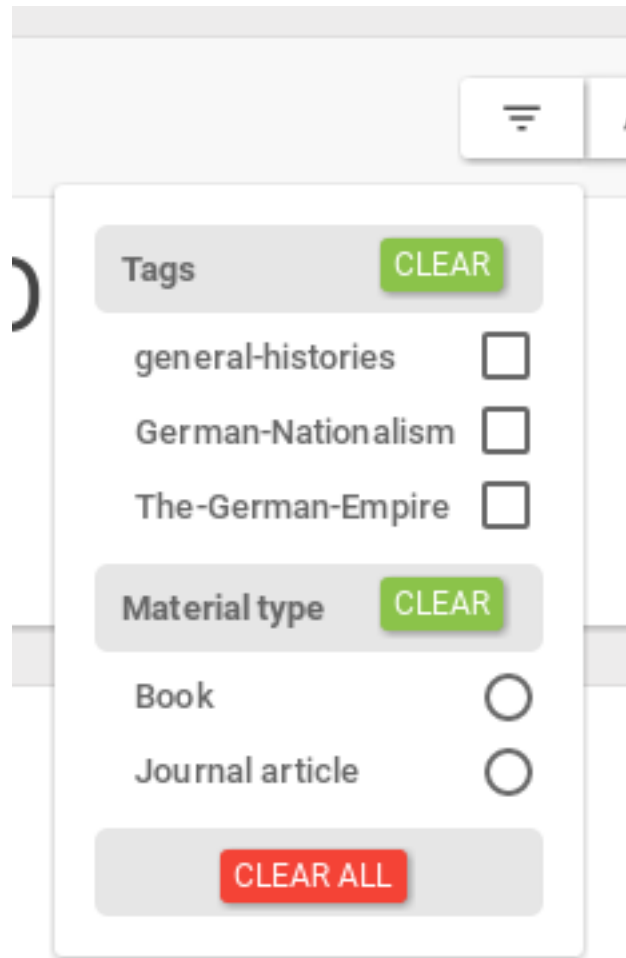
- Filter list
- Sort alphabetically
- Export list
- Print list

Filter list

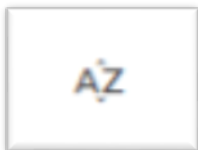


Filter the list by material tag or material type. (see :doc: *manage_tags*)

The filter options displayed are dependent on the contents of the list.



Sort alphabetically



Sort alphabetically within each category heading. Clicking again will reverse the order and clicking 'Original Sorting' returns the list to the order material was originally added in.

Export list



Export all items in a list as a .ris file, allowing import into a citation manager.

Print list



Re-formats the list including tags in a format compatible for printing.

Material Actions

Items on reading lists show different icons on the top right of the list entry depending on the options available. Book jackets are always displayed. If no book jacket is found or the material is not a book then a generic icon representing material type is displayed.

Essential

[Nurturing natures. Attachment and children's emotional sociocultural and brain development.](#)

MUSIC, Graham

ISBN: 9781848720527

+Citation

[Sociology. \[electronic resource\].](#)

Bascom, John

1887

+Citation

[Can't count or won't count? Embedding quantitative methods in substantive sociology curricula: A quasi-experiment.](#)

Williams, Malcolm

Sociology2016 Vol.: 50 Issue: 3 Page: 435

+Citation


Sociology

Find items on shelf



Items which show the Find items on shelf icon will either display: a link through to the catalogue or discovery platform for real-time information (e.g. print holdings).

Essential




[Nurturing natures. Attachment and children's emotional sociocultural and brain development.](#)

MUSIC, Graham

ISBN: 9781848720527


+Citation



eBooks and full-text



- Formats with OpenURL and any full-text linking service. Establish the base URL for your link resolver in Settings (see Section 10) for access to full-text by clicking on this icon.
- The minimum requirement in the reading list record is an ISSN.
- The more information provided in the record, the more reliable the OpenURL record match. Add Volume, issue, pages to the reading list record for creating the OpenURL.
- Click on the icon to retrieve the URL field 856 directly from the catalogue and link to an eBook service




[Experimental Sociology: A Preliminary Note on Theory and Method](#)

1929 Vol.: 8 Issue: 1 Date: 1929

ISSN: 00377732, 15347605

+Citation


Sociology



Web links




Link to the URL that has been entered in the rebus:list item record.



[The Man Booker Prize](#)

+Citation



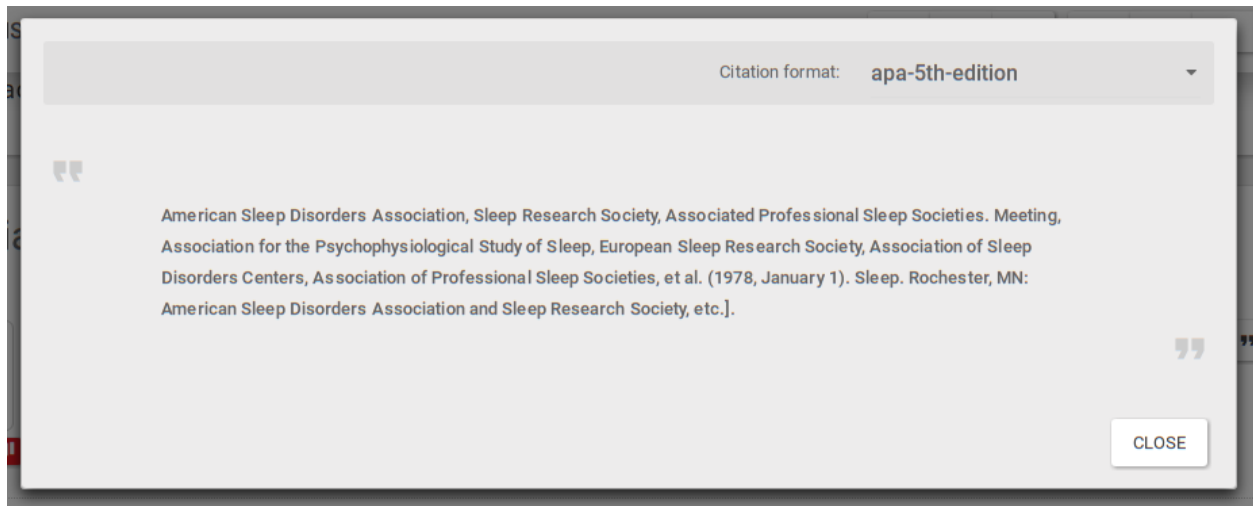
View citation



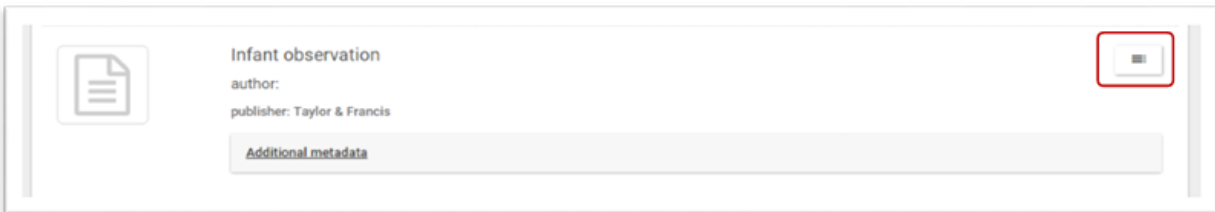
Sleep.
 1978 Date: 1978
 Publisher: American Sleep Disorders Association and Sleep Research Society, etc.]
 ISSN: 0161-8105



View the item in a citation format selected from a list provided by the system administrator



View current table of content



- Links out to a current table of contents service.
- An ISSN is required in the reading list record.
- Gives current table of contents for the Journal as a RSS feed.
- Subscribe to the feed as usual for update alerts in your browser.

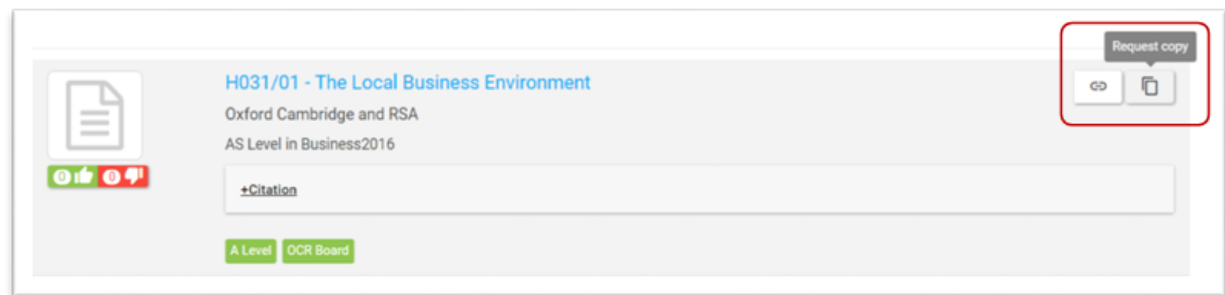
Rating material in lists



- Users can flag items that they think are useful or not useful
- Click on the Thumbs up or the Thumbs down image to register interest.
- A summary will be shown against items that have been rated.

Copy Requests

Users with the correct privileges are given a **Request copy** option next to eligible materials in reading lists. The material types for which requests are eligible are configured in the Settings area of the main menu. See 5.4

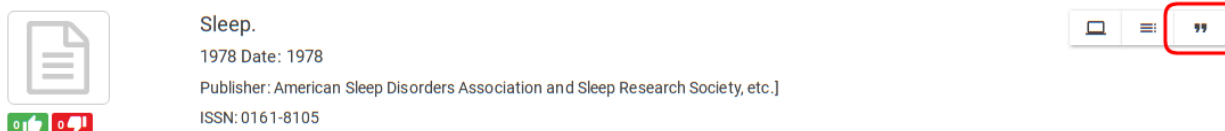


In the example above, a user is placing a request for an Exam Paper by clicking the Request copy button. This will trigger a notification email to the address specified in Settings and the request to be recorded with a status of **new**.

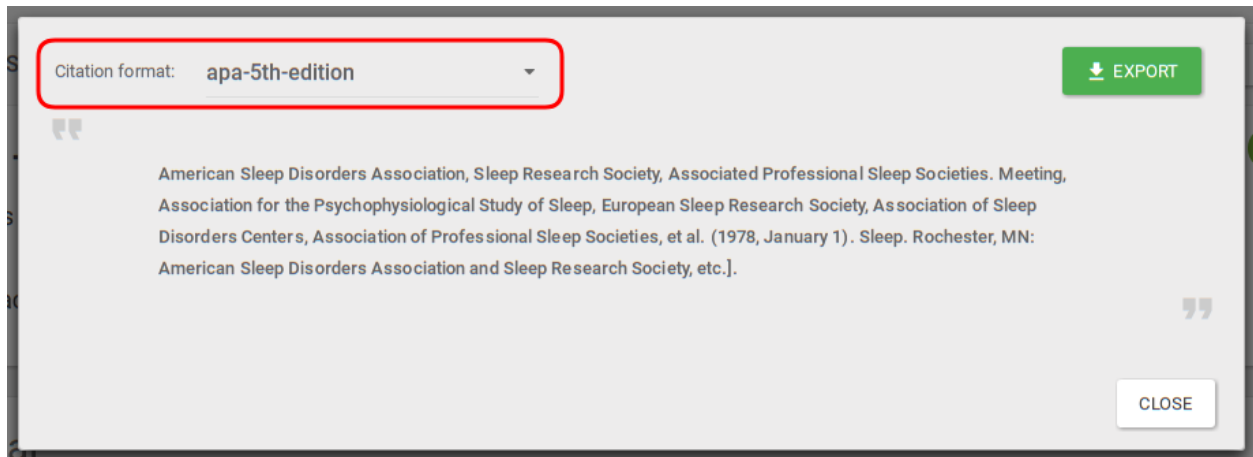
The request will now display on the **My requests** screen for both the requestor and the assignee.

Viewing and exporting citations

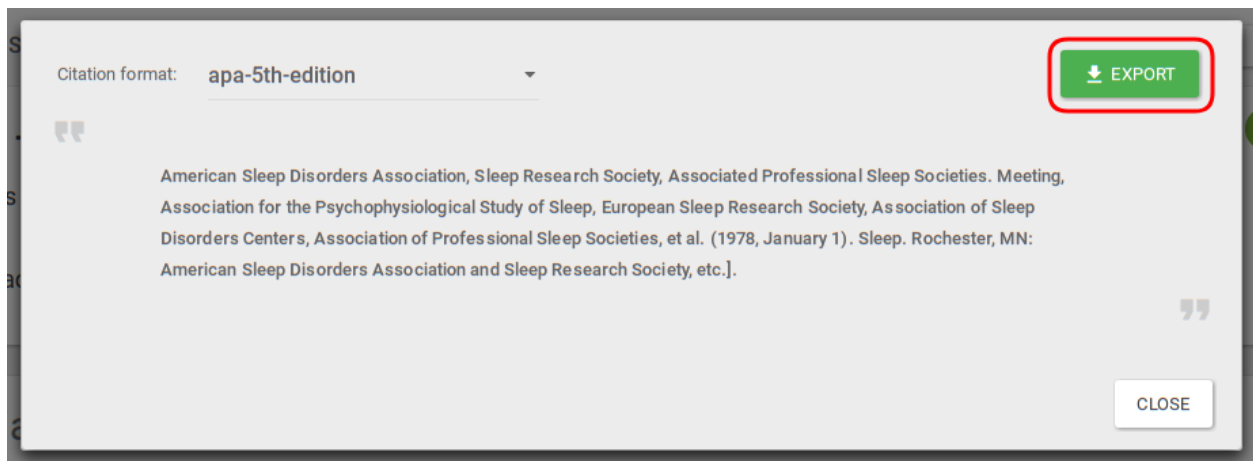
It is possible to view and export citations for any material within a list.



Clicking the citation button will open the citation dialog box, here it is possible to view the citation in a variety of formats defined by the system administrator.



It is also possible to export the citation to a reference manager. Clicking the “Export” button will perform this action.



Creating Reading Lists

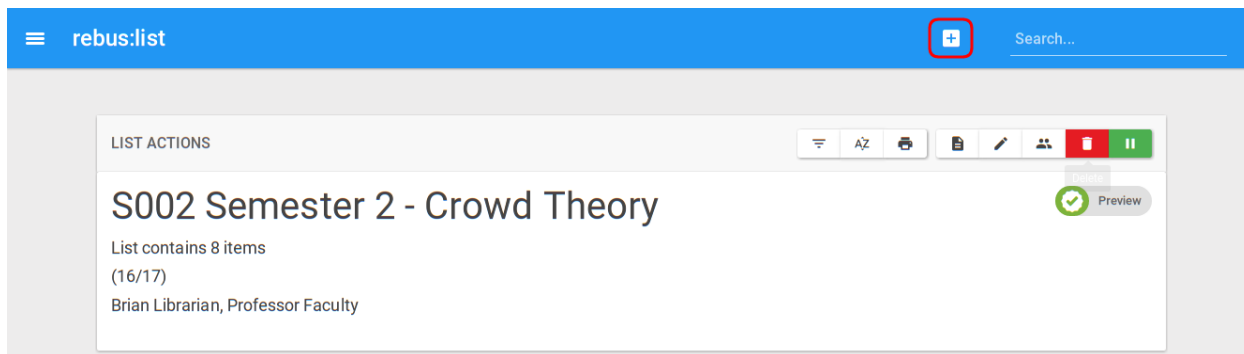
To create or edit a list you will need to be logged in with the correct roles and privileges

Hierarchy structure

See *Creating and Modifying*

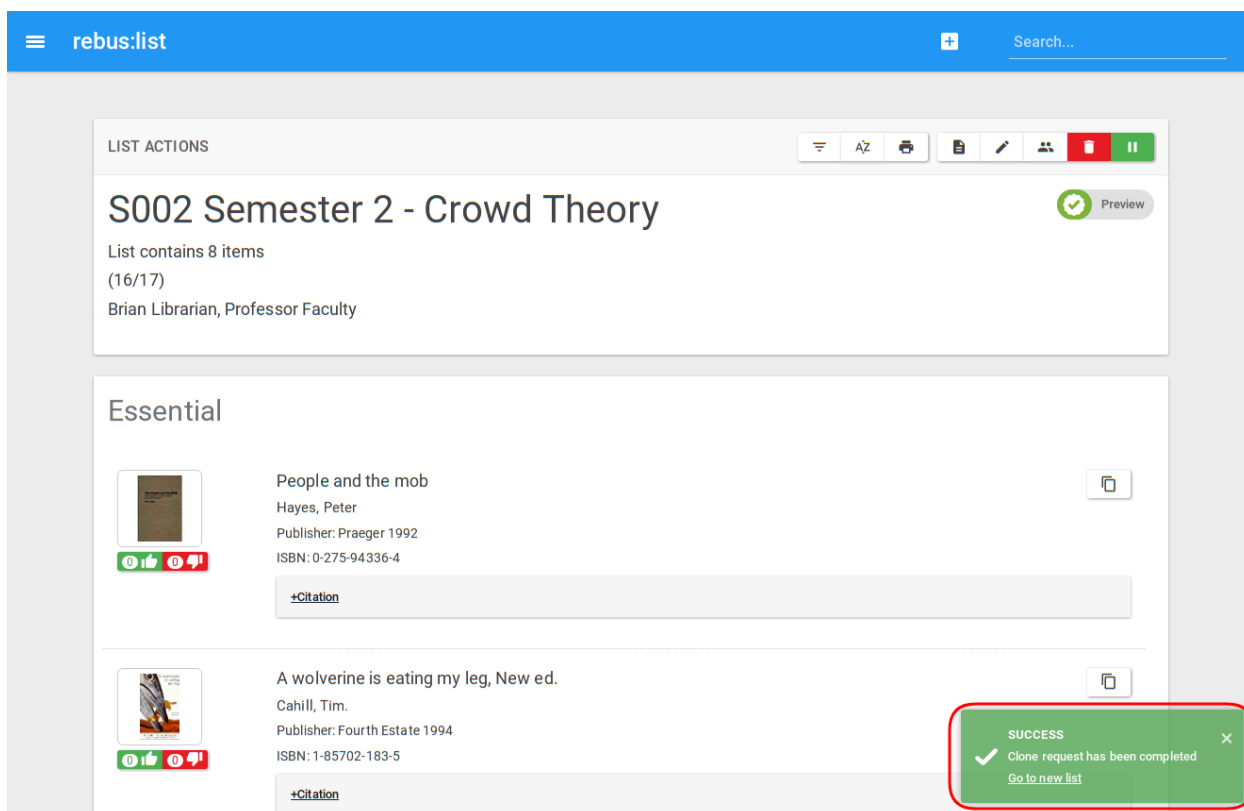
Flat structure

It is possible to create a new list from anywhere within rebus:list, by using the button



Depending on the page you're currently viewing, you will get different options. If you are currently viewing a list you will be given the choice of creating a new blank list *or* creating a new list based on the currently viewed one. If you are not currently viewing a list, you will only be able to create a new blank list.

If you choose to create a new list based on the currently viewed one, after selecting this option, a request will be submitted for a clone of the list to be made. Once this clone has been completed, a notification will appear:



You can then click on the link in the notification to go to your new list.

If you choose to create a new blank list, you will be prompted to enter the new list's metadata.

List Metadata

The metadata for the list is provided during list creation using Manage hierarchy. Below is the form that is presented

The fields in the metadata form are:

List

Name:

Enter name



⚠ You must specify a name

Course identifier:

(inherited from "")

Book to student ratio:

(inherited from "")

books to

(inherited from "")

students

Number of students:

(inherited from "")

Visible from:



HH

:

MM

AM



(Value "08/09/2016 04:00" inherited from "Rebus Public Libraries")

Visible to:



HH

:

MM

AM



(Value "01/09/2022 03:00" inherited from "Rebus Public Libraries")

Course start:



(Value "" inherited from "")

Course end:



(Value "" inherited from "")

Year:

2015 (inherited from "Rebus Public Libraries")

Created:

- Name - This is the list descriptive name as it will appear in the headings and hierarchy
- Summary - This is a brief summary that will display in the header of the list
- Course identifier- This is a course id. It can be either displayed or suppressed in the admin Settings page
- Book to student ratio - This is special entry for reporting. It is not a required field

Book to student ratio:
1
books to
10
students

It is possible to record the number of books to students. This can be used to help with purchasing decisions.

- Number of students - The number of students on the course
- Visible from and to - It's possible to create lists which are only visible between specific dates. This is useful if you are tying lists closely to term times
- Year - This is the year of creation
- Created - System generated
- Last updated - System generated

When you have filled out these fields and clicked finish the list is created. The only mandatory field is Name for hierarchy structure customers, for flat structure customers, Year is also mandatory. Other fields can be left blank and will inherit data from above (hierarchy structure customers only, see [Inheritance](#)).








List are suppressed by default so they will not be displayed to the outside world. It's important to assign an author or editor role to the person who will be creating or editing the list (see [Assigning user roles on a list](#)).

Editing Reading Lists

Editing list metadata


It is possible to modify a list's metadata from within the list.

LIST ACTIONS



S002 Semester 2 - Crowd Theory

List contains 8 items
(16/17)
Brian Librarian, Professor Faculty

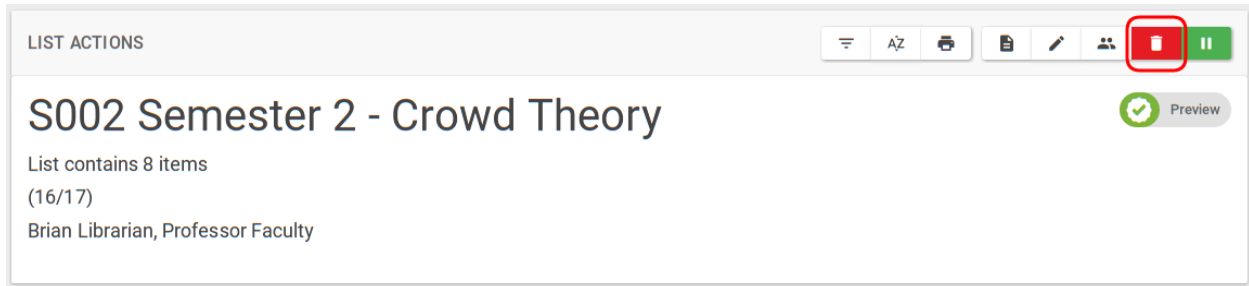
 Preview

This opens the list metadata form, it can be modified as appropriate, then saved by clicking “Finish”

For more details on list metadata, see `list_metadata`

Deleting a list

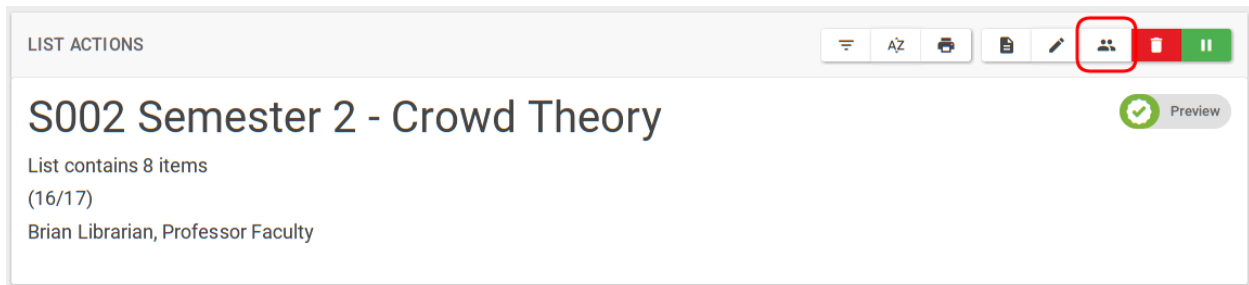
It is possible to delete a list while viewing it



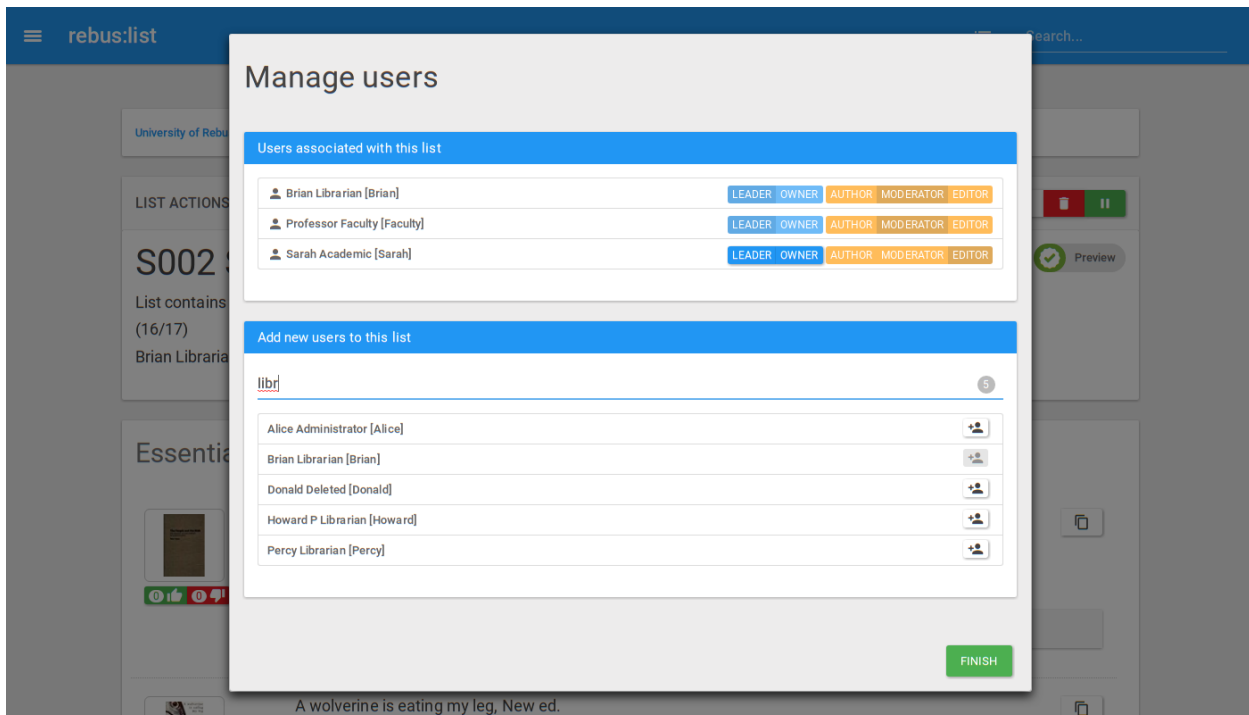
Note: You will be asked to confirm this action before it is performed.

Assigning user roles on a list

It is possible to assign users roles on a list while viewing it



Opening the role assignment dialog box allows you to search for users and assign those users roles on the current list

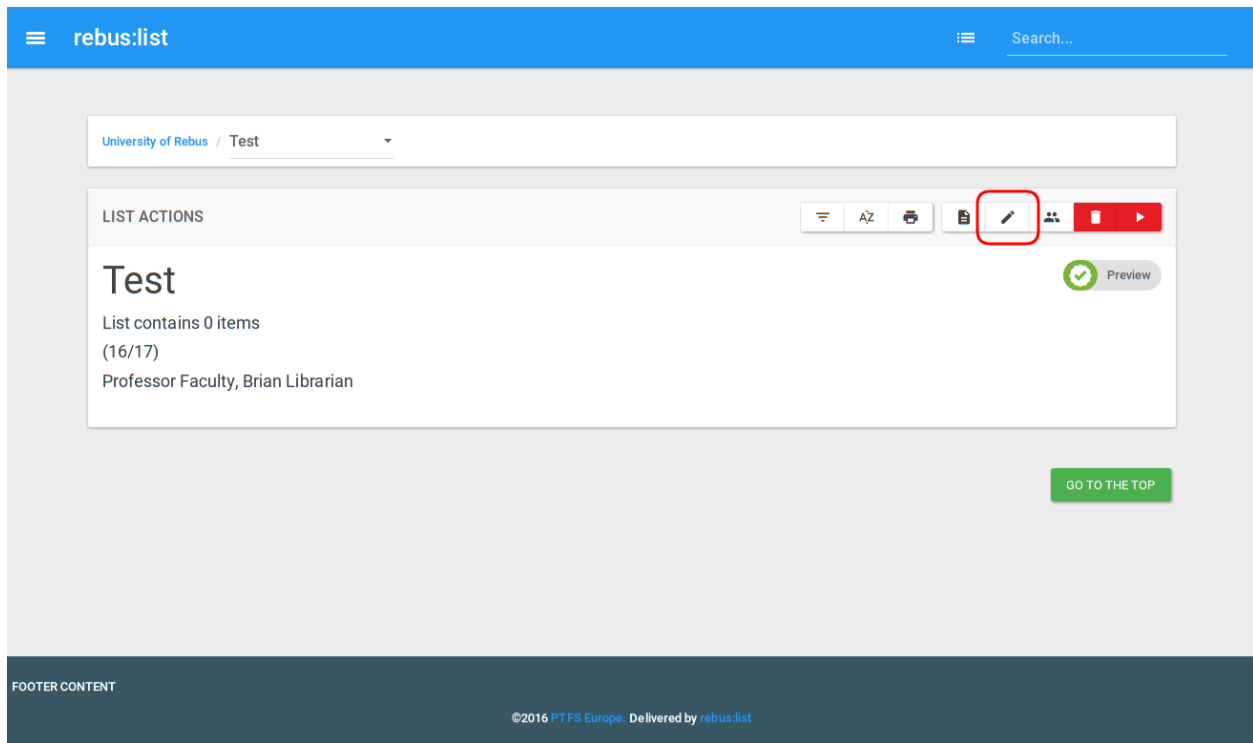


For more information, see `roles_list_perspective`

Populating lists

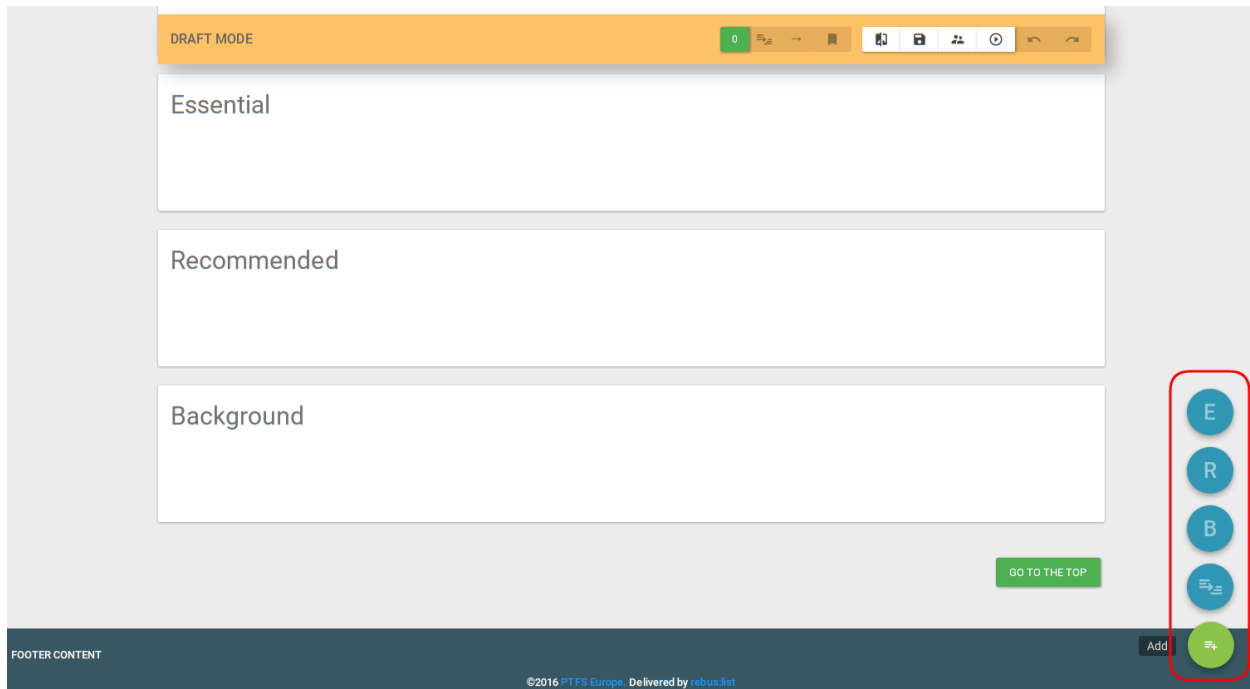
To start building your reading list you first need to open it - you can do this by searching or browsing

for the lists. If you are assigned the correct list role for the list it will appear in 'My Lists'. You will then need to follow the link to the list. The example below shows an empty list - to begin populating the list click the edit button on the List Actions bar.



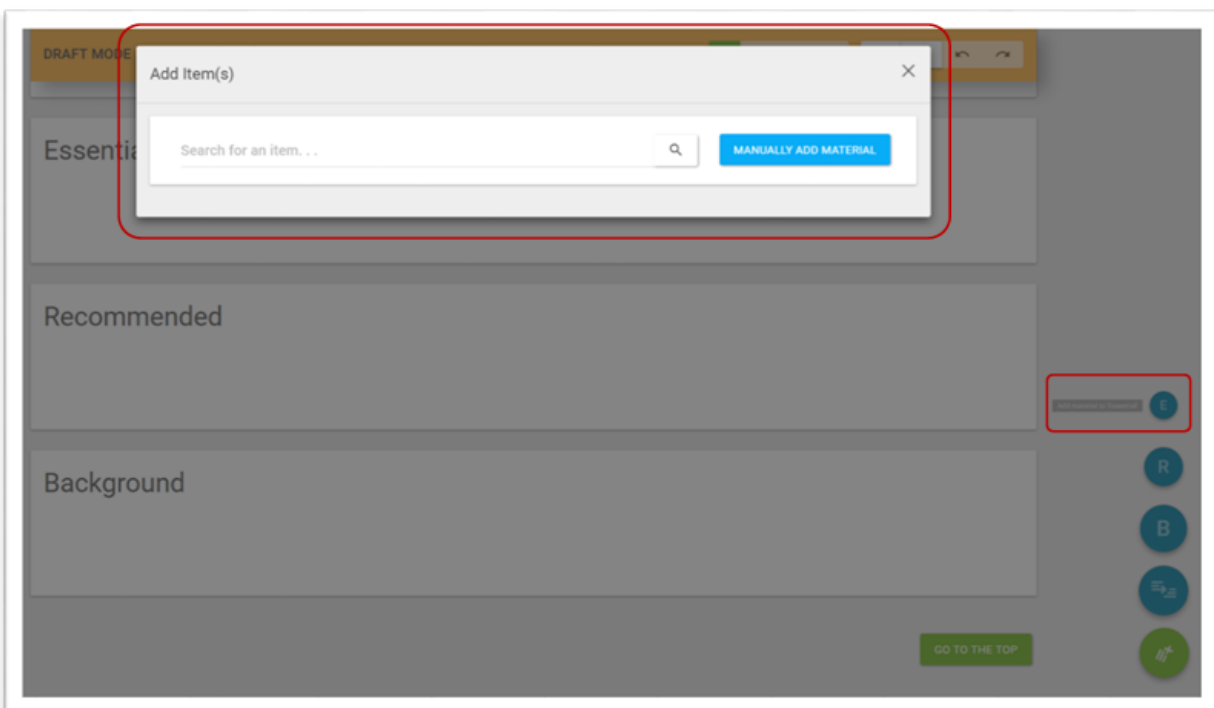
After clicking edit on a reading list draft mode opens - from this screen material can be added to any of the “global category headings” (see Section 8.1). By default these are Essential, Recommended and Background.

To add new material hover over the green add button and the available options will expand dependant on your position in the list.



The blue buttons correspond with the different category headings and display if the correct category is visible. There is an additional blue button that displays which allows for the creation of sublists which will be covered in a later section.

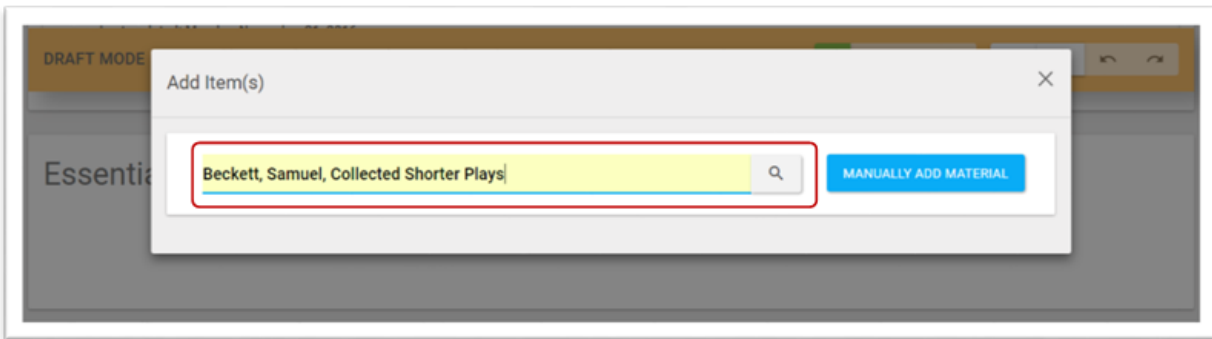
Click the relevant blue button and the add material window will open. There are two separate ways of adding material. It is possible to use connectors to add material automatically or to add material manually.



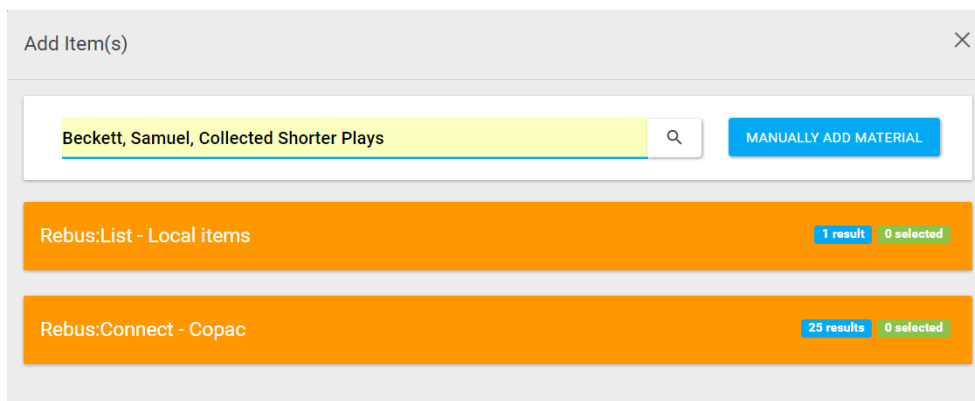
Add Material - Via Connector

When delivered your rebus:list system will have been configured with connectors which allow you to search for material across several of your chosen sources simultaneously.

To do this type your search into the search box and then click the search icon.

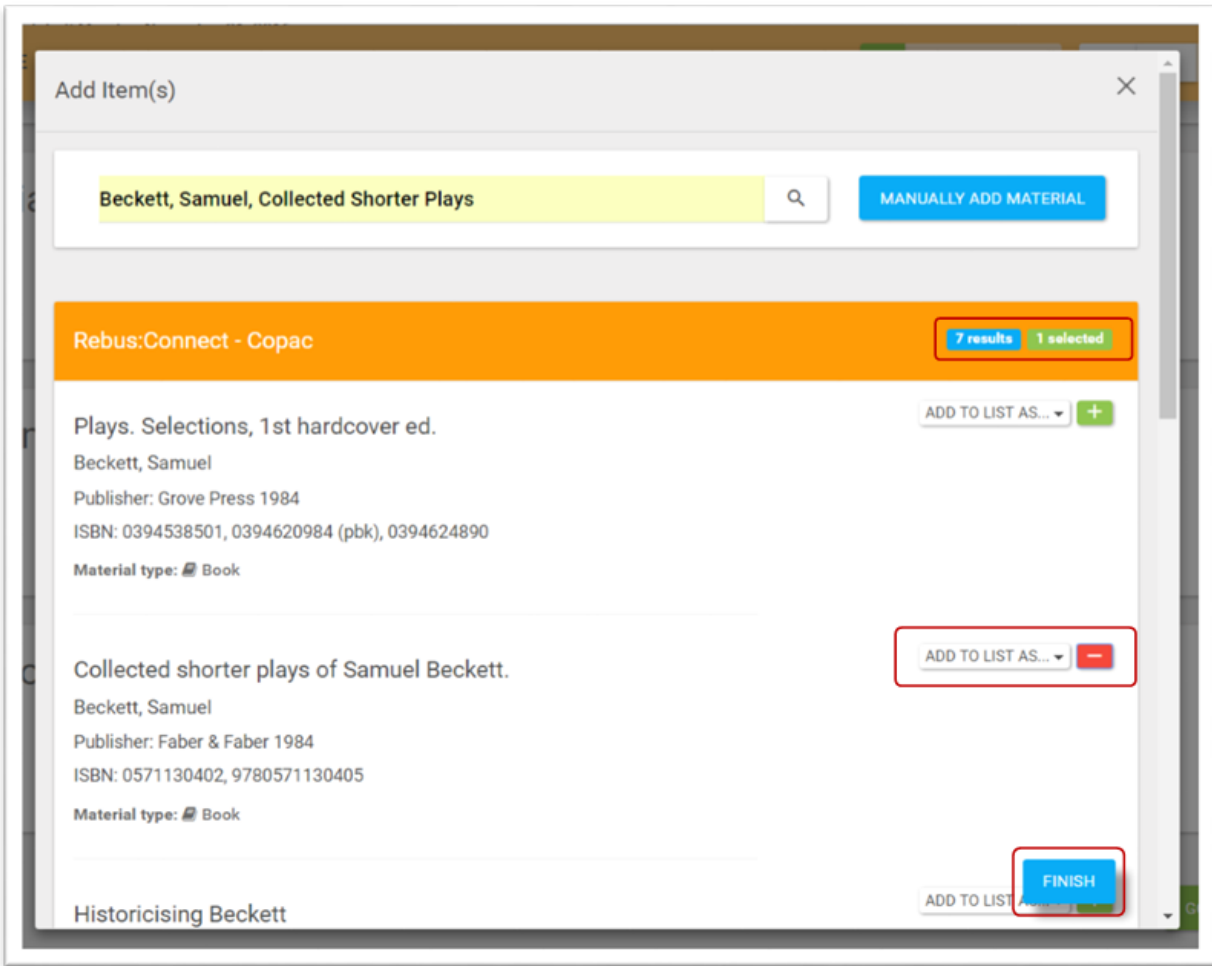


After you carry out the search the results are returned for the different connectors as well as for material that has been manually added to existing lists. You then click to expand the results.

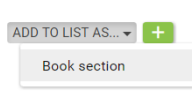


You can select one or more of the returned results then click finish to add them to your list.

In the example below the results from the Copac connector have been expanded. The required material is the second result down and has been selected for addition. This is indicated both by the plus changing to a minus and in the results bar.



Material will take its item type from the connector (if present). In creating a reading list it's sometimes necessary to add individual chapters or sections from a single title. To facilitate that rebus:list allows you to add material to the list as a section using a dropdown.



On clicking finish the material is added to the list.

Essential

Collected shorter plays of Samuel Beckett.

Beckett, Samuel

Publisher: Faber & Faber 1984

ISBN: 0571130402, 9780571130405

[+Citation](#)

Enter note here

[Add tag](#)

Note. Local Material is limited to material that has been manually created.

Add Materials - Manual

[MANUALLY ADD MATERIAL](#)

Material can also be created manually in rebus:list. When you select to add material manually you will initially need to select a material type from the drop down. (see Section 8.5)

Edit material

Material type - This material has no valid type, please select one

Article
Journal article
Magazine article
Newspaper article
Bill
Book
Broadcast
Book section
Dataset
Entry
Dictionary entry

When you select a Material Type you are presented with the data entry screen. This screen allows you to add the relevant detail for the material you are adding. Each material type has number of mandatory fields, a warning displays if they are not filled out. Mandatory fields are marked in red.

The screenshot shows the 'Book' form interface. At the top, there's a header 'Book' and a checkbox for 'Electronic'. Below this, a red error message box states: 'There is a problem with your form data, please check it and try again. This message will disappear when your form data is valid'. The form has three main tabs: 'Material details', 'Material link URLs', and 'Tags'. The 'Material details' tab is active and contains sub-tabs: 'Title details', 'Contributors', 'Publishing details', 'Identifiers', 'Misc', and 'Description'. The 'Title details' sub-tab is selected, showing a 'Title' field with a red 'Required' error message below it. A green hint text 'Short / abbreviated form of title' is visible below the title field. At the bottom right, there are 'FINISH' and 'CANCEL' buttons.

There are three tabs displayed

Material details is the first tab and it's here that you can fill out bibliographic information about the material. Which fields are available is dependent on material type.

This screenshot shows the same 'Book' form, but with the 'Title details' sub-tab selected. The 'Title' field now contains the text 'Vernon God Little'. The 'Required' error message is gone. The 'Short / abbreviated form of title' field is empty. The 'FINISH' and 'CANCEL' buttons remain at the bottom right.

The Second tab provides three fields for specific links associated with the material

The Third Tab allows you to either create tags or associate existing ones to the material.

Book ☐ Electronic

Material details **Material link URLs** Tags

Web link

Link to the web resource (e.g. catalogued website)

LMS link

Link to the record in the LMS/Discovery platform

Full text link

<https://books.google.co.uk/books?id=eOf8yOMqFIIC>

Using the checkbox you can also indicate if the material is in electronic format or not.

After filling out all the fields and clicking finish you will be returned to the add items screen.

Book ☐ Electronic

Material details Material link URLs **Tags**

Global tags

Book

2016 Man Booker

2016 Man Booker Shortlist

Booker Prize

Click finish on this screen and the material will be added to the list.

Rebus:List - Non-Rebus:Connect items 1 result 1 selected

Vernon God Little

DBC Pierre

ISBN: 0571215165

Material type: Book

ADD TO LIST AS...

FINISH

Making Sublists

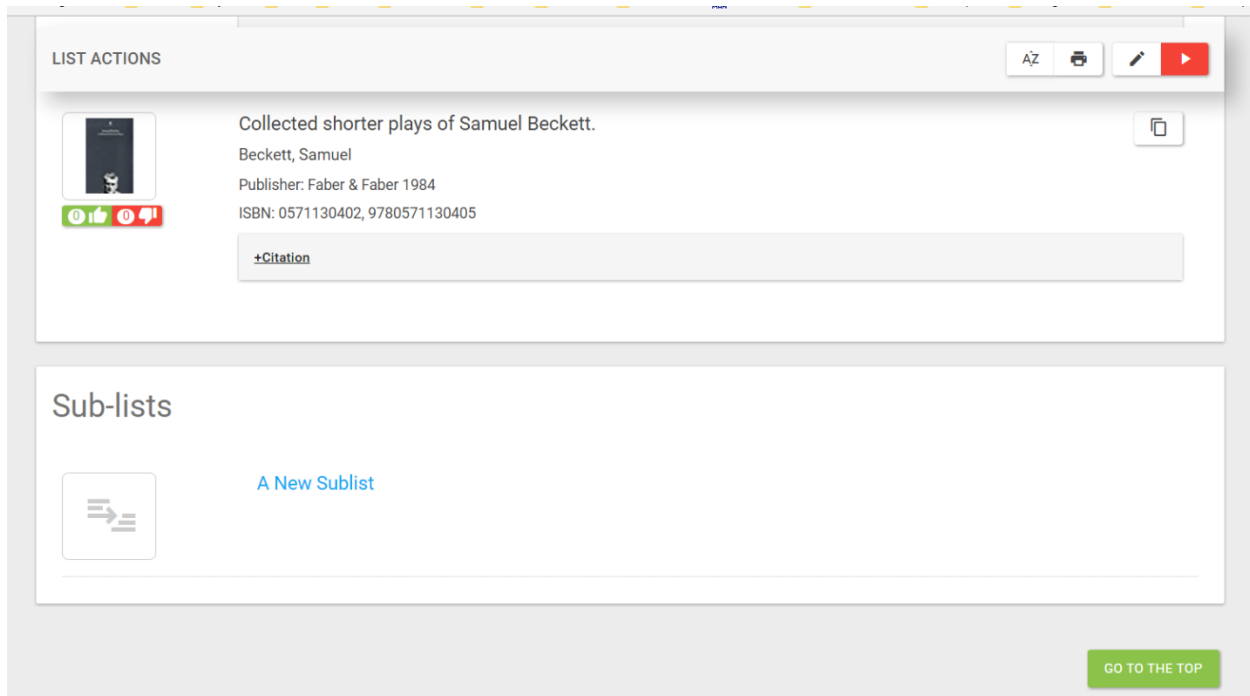


When you select to add to a list the button a further option available is to add a sub-list. This is to allow users who don't have access to the hierarchy to create lists related to the list they manage.

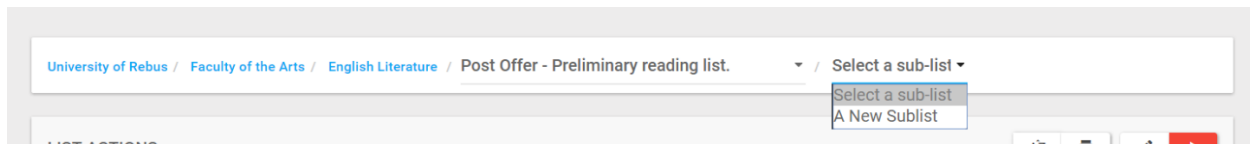
After selecting to add a sublist you will be presented with a simplified version of the List Metadata screen (see Section 4.2)

Once you have filled out the relevant fields and clicked finish your sublist will have been created. The procedure for populating a sublist is the same as for a normal list.

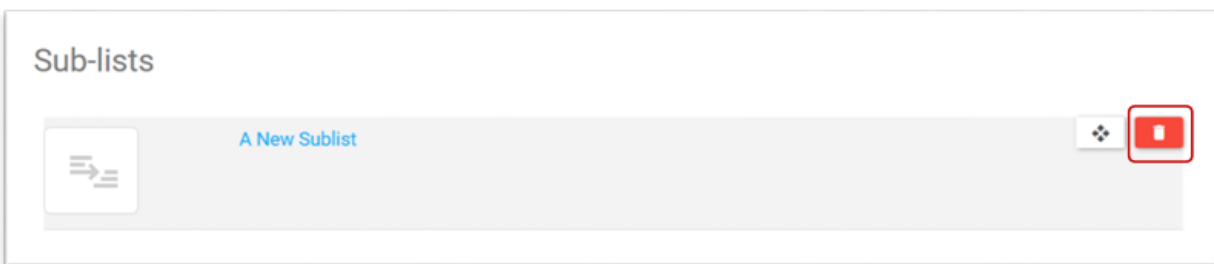
When completed sublists can be accessed from the bottom of the parent list



Sublists are also available from the breadcrumb trail at the top of the list

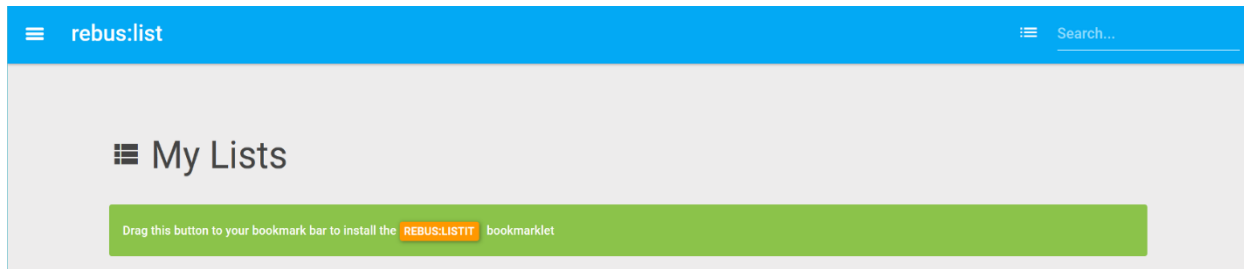


To delete a Sublist in Draft Mode navigate to the bottom of the list where the sublist displays and click on the bin icon next to the list.



rebus:list:it

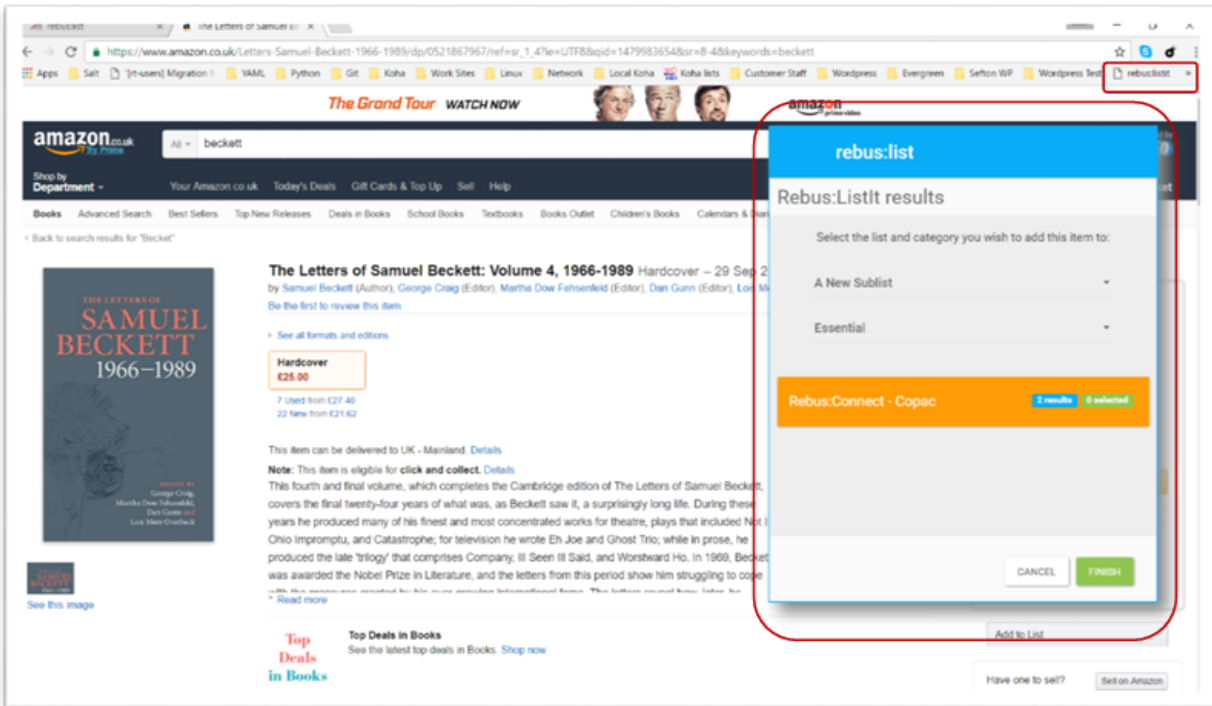
The final way of adding material to a list is via the rebus:list:it bookmarklet. You can access this on the My Lists page



rebus:list:it is a bookmarklet tool that can be used to import items from external websites such as catalogues, book-sellers, journal providers, etc. **Note: list:it is not for adding web pages to lists, this can be achieved by manually adding items to the list of type “web page”**

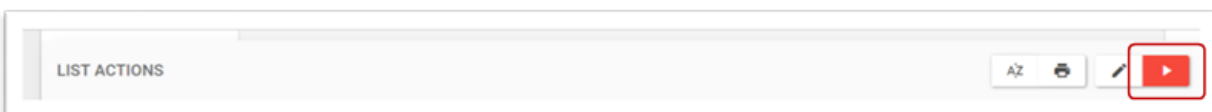
Drag the image to your bookmarks bar to start using the rebus:list:it tool. After you have added the tool it will show on your toolbar.

From an external page on a library catalogue opac, a bookseller, or service (e.g. Amazon, Google Books, a journal provider, COPAC etc.) from the full view record of an item, click the rebus:list:it icon on your bookmarks bar to import the item.





When a record is selected, the user will be prompted to choose a list to add the item to. This will be restricted to lists for which the user has permission to edit. A connector search is also carried out to check if the material is available from your other sources.

Making a List Visible

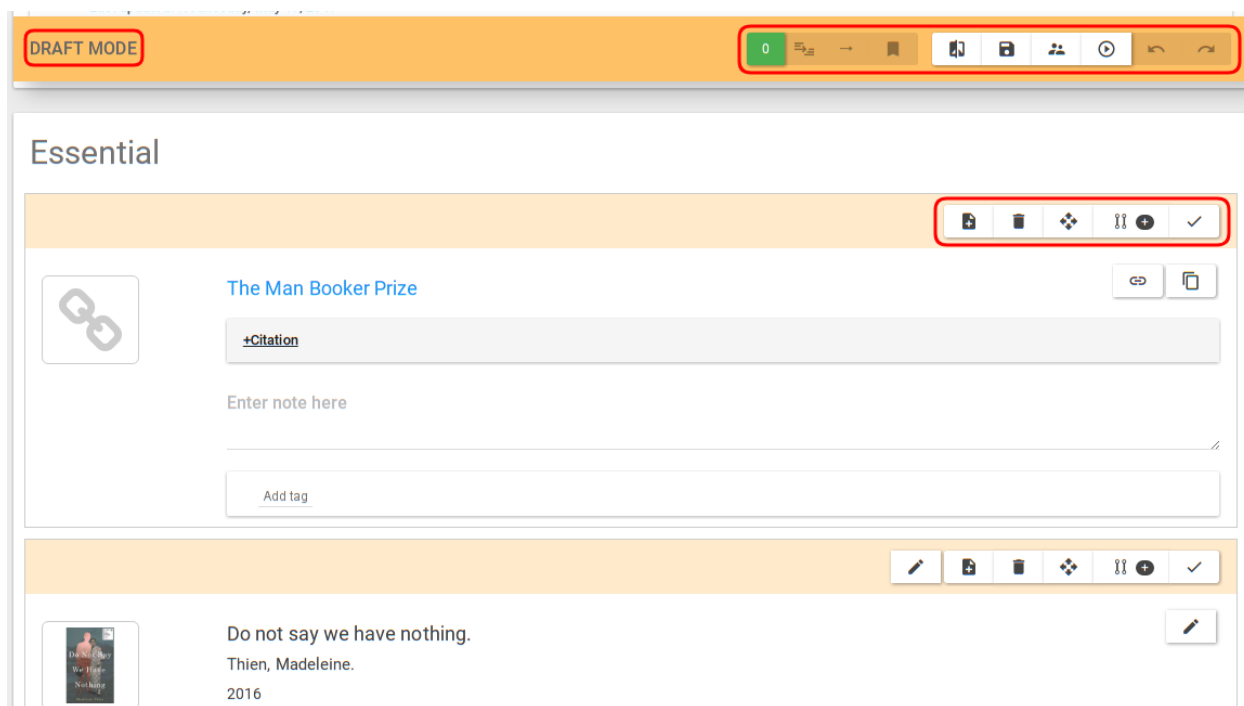


Once you have finished creating your list to make it visible to the outside world it will need to be unsuppressed. For users with the correct permissions to do this is as simple as clicking the suppress / un-suppress button on the List Actions Bar.

	Un-suppress - Currently Hidden
	Suppress - Currently Visible

Draft Mode

Click the edit icon to enter 'Draft Mode' when you are creating a list or modifying an existing list. There are several options available to you in Draft Mode on the List Action toolbar and added to the actions icons on material entries themselves.



The List Action Toolbar

The List Action Toolbar is floating and remains visible as you scroll down the page. The functions are greyed out if they are not available. The functions are split into two groups - the first group are actions that can be carried out on specific selected material, the second group are related to the whole list.

For the first group of icons to be enabled one or more items on the list must be 'selected' - this is done by clicking the tick icon alongside a material entry

	Multiple items can be selected allowing you to perform actions on groups of material quickly. This box indicates how many materials have been selected. Clicking the box will select all items in the list.
	Create a sublist from the selected materials. Materials can either be moved or copied to a new sublist. On selection the sublist metadata page is opened. (see Section 5.3)
	Append to an existing list. Materials can either be moved or copied to existing lists. On selection a search box is opened to allow you to choose the relevant list to append to - lists displayed depend on your roles and privileges. (see Section 12)
	Add Tag to material. Using this tool allows for the creation and addition of a tag to multiple items in a list.

The other four icons on the toolbar control are specifically related to the draft. Different icons are displayed depending on the workflow in use.

Moderation Workflows

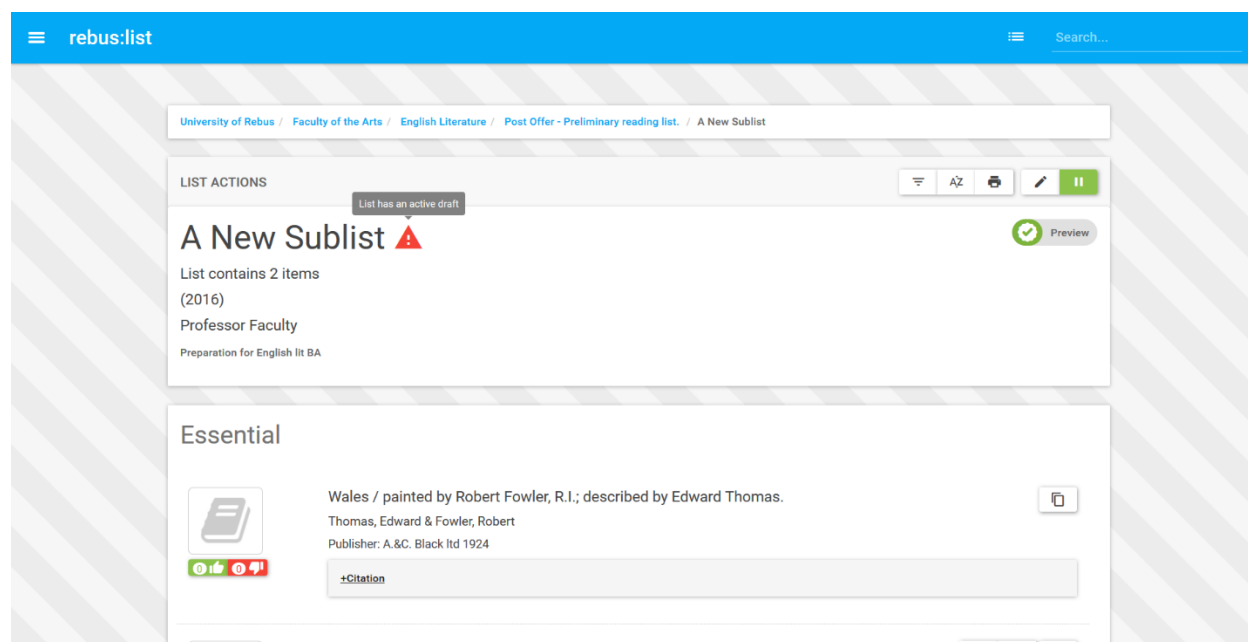
There are two list distinct list editing workflows available in rebus:list which allow for fine grained control user responsibilities.

Depending upon what privileges you have assigned your users they will see one of the workflows described below.

Unmoderated

Below is the display for a non-moderated workflow. In a non-moderated workflow the user has full control of list saving and publication. By default, this is the situation when using the *Author* list role (see Section 11.4)

	Save draft allows a user to save their work without finalizing the changes by publishing the list. It also allows collaboration between users on a draft prior to publication. When a list has a draft saved its appearance is changed for any user that has editing rights.
--	--



When a user with the required permissions select edit on the saved draft the edit screen will open and two alert boxes will open with information about the existing draft. The accept and publish icon also displays which allows you to publish the draft without making any further changes.



ⓘ	Publishing the list finalizes the changes made in draft mode it's the last step in the editing process. When changes are made and then the list is published any user with viewing rights can see those changes.
---	--

Note. Publishing does not make the list visible to the public, that is controlled by list suppression and validity period.

	The final two two buttons as you would expect undo and redo changes	
--	---	--

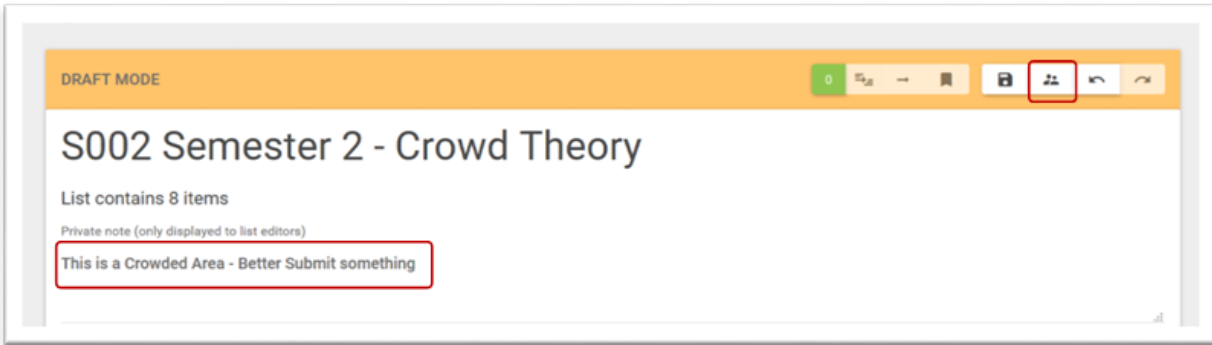
Moderated

The moderated workflow makes use of the Editor and Moderator user roles (See 11.4), by default, and adds an intermediate step to list creation or modification. An Editor can build and manage as previously discussed but can not publish.

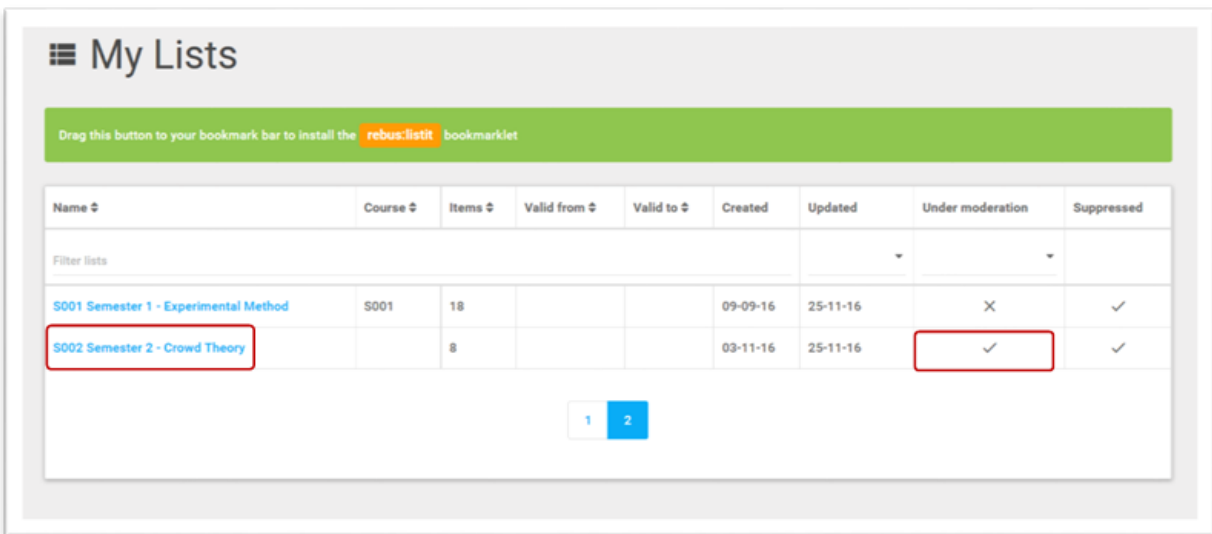
	The submit button replaces the publish button in the moderated workflow. When a user with a role of Editor has finished editing a list clicking submit flags it as requiring moderation.
--	--

	When a user with Moderation permissions edits a submitted list rather than the standard publish button they are provided with a choice of 'Thumbs Up' accept and publish or 'Thumbs Down' reject. If reject is selected the Moderator will be asked to provide a reason.
--	--

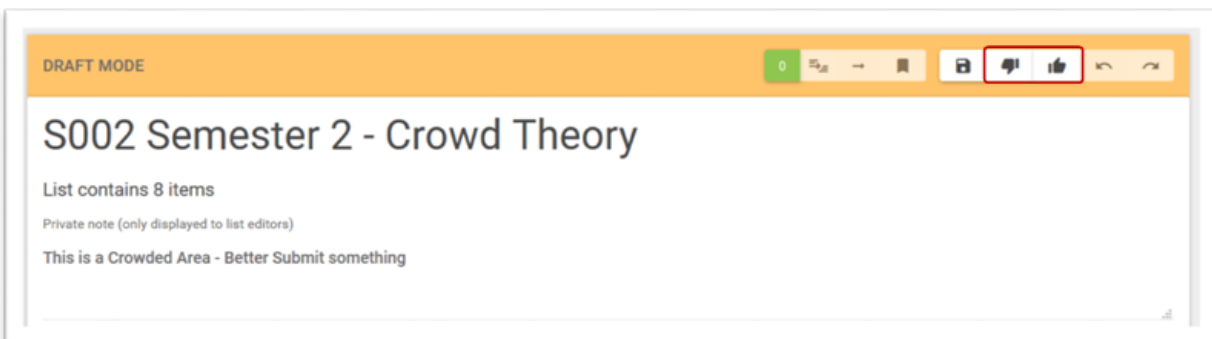
In the example below an editor has made a modification to a list and will then click to submit it for moderation.



When the Moderator logs in My Lists, they can see that one of their lists has a moderation request

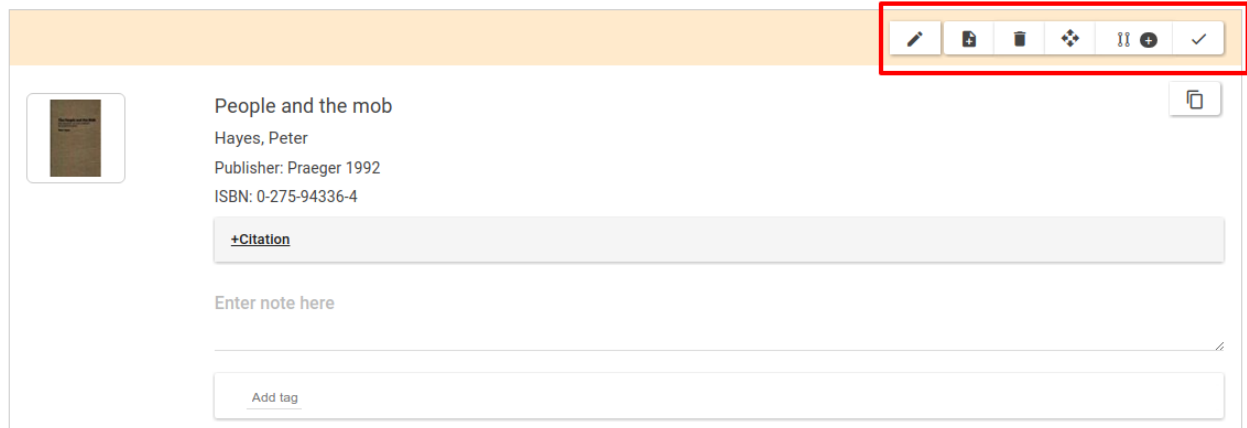


The moderator then opens the list and can review the proposed changes made to the list by clicking the **View changes made in this draft** button. Once they have reviewed the changes, they can choose to either publish the draft or reject the submission. For more information about reviewing changes, see [reviewing_changes](#)



Material Manipulation

In Draft Mode several edit options are available on the material in the list itself. Dependant on the material some of these may not display.



People and the mob

Hayes, Peter







Publisher: Praeger 1992

ISBN: 0-275-94336-4

[+Citation](#)

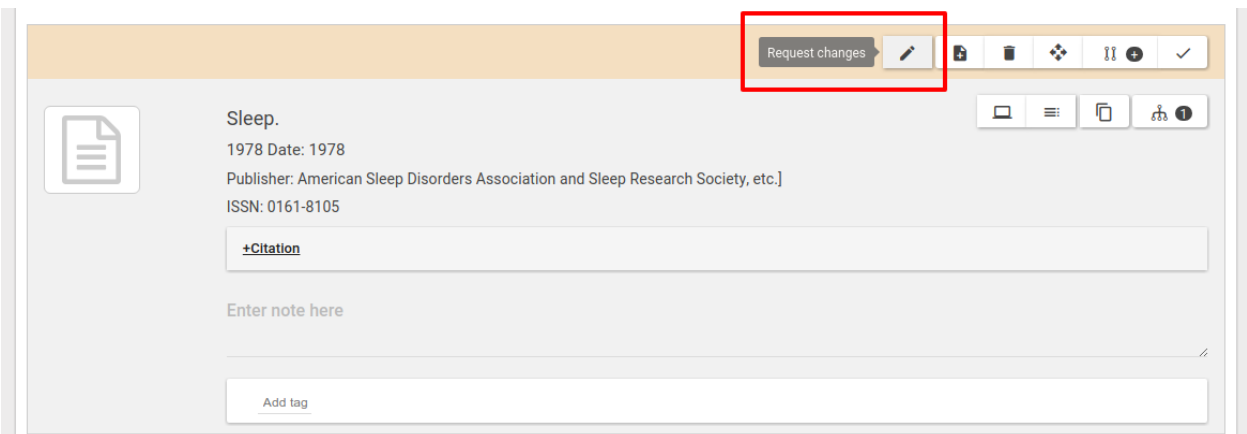
Enter note here

[Add tag](#)

	Add new item after this one. This allows you to quickly add new material beneath the item you are working from in the list.
	Delete this item. This allows you to delete an item from this list it will not remove the item from the system if it is used in another list.
	Move this item. This allows you to drag and drop an item to different positions in the list.
	Equivalents. This is a connector dependent tool for FRBR-ized records. If enabled it allows for the automatic population of record equivalents. (See 6.5)
	Add list alternatives. This allows you to add alternative records such as different editions.(See 6.6)
	This allows you to select the material for global editing by the 'List Action' tools.

Editing Materials

Depending upon a users privileges they will be have a either a **Request changes** or **Edit material** button display in the item actions bar. Clicking this button will open an edit modal from which the user can suggest changes to the material record by editing the fields directly.



Sleep.

1978 Date: 1978

Publisher: American Sleep Disorders Association and Sleep Research Society, etc.]

ISSN: 0161-8105

[+Citation](#)

Enter note here

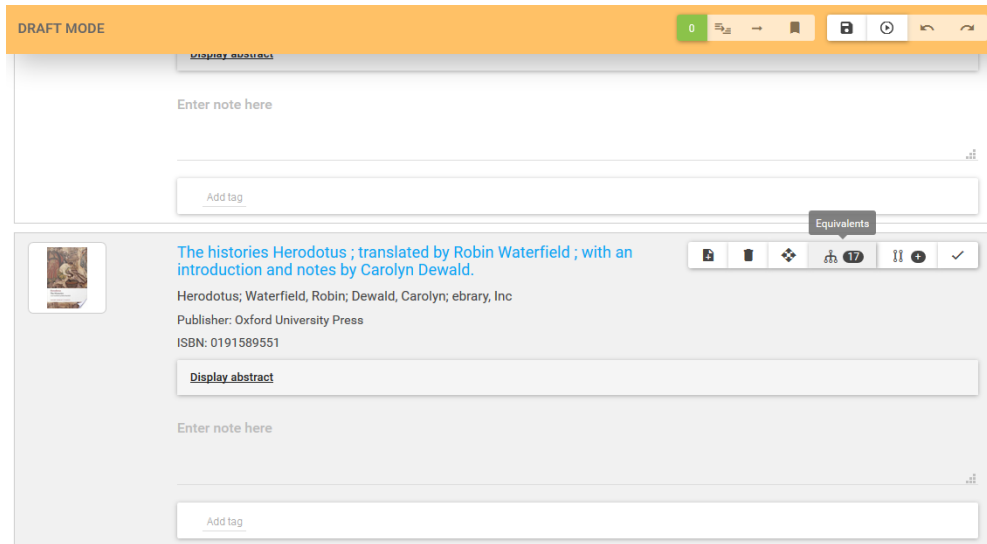
[Add tag](#)

If the button was 'Edit' then the suggested changes will immediately be applied to the material system wide, or alternatively if the button was of the 'Request' form then the changes will be recorded as a *Change request* and the relevant member of staff will be notified of the request.

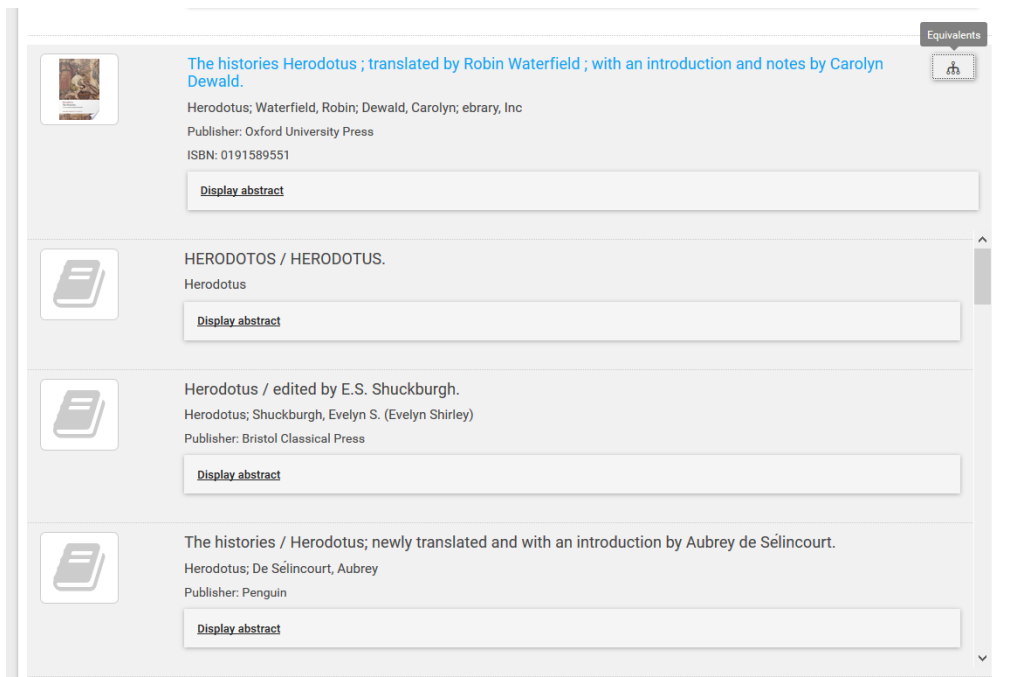
Managing Equivalents

Some rebus:list connectors search databases that return FRBR records if a record does have FRBR information rebus:list can use this to automatically populate record equivalents. Examples of equivalents might be the hardcopy and electronic version of a journal title. Another example is when there is a continuation record for a Journal title occurring because of a title or publisher change.

In the example below the title “The histories Herodotus” is shown as being a FRBR record that is listed as having 17 equivalents.



Clicking the Equivalents button will import the records. Alert boxes will display to inform you of progress. When the list is published the Equivalents icon will appear next to the material. Clicking the icon will drop down the attached records.



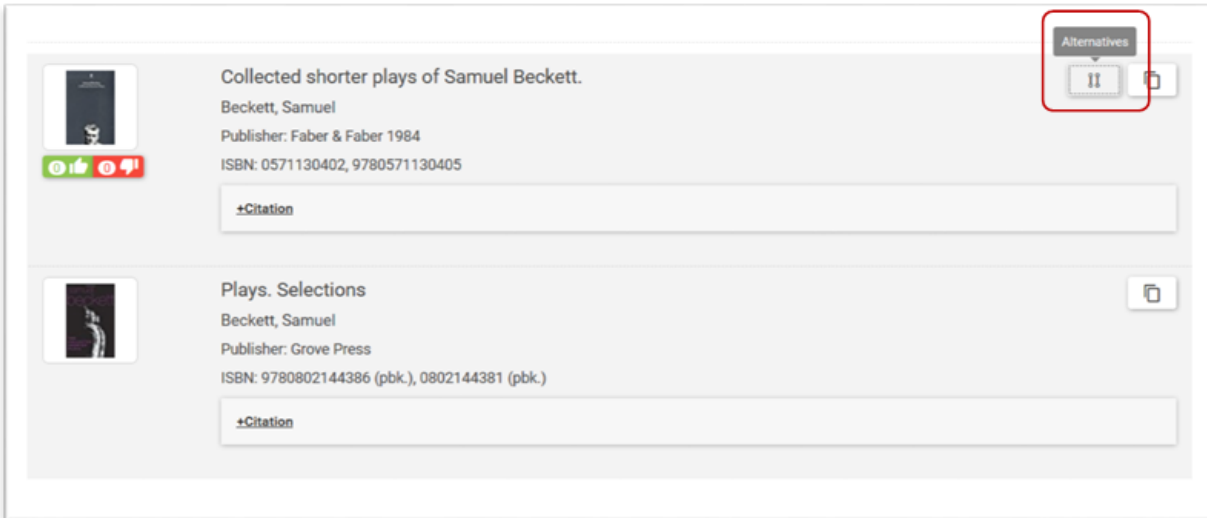
With a title such as this the Equivalents are different translations of the work.

Adding Alternatives

The List Alternatives button allows you to add connected records to your material record. Examples of these could be alternative editions or versions in a similar way to the equivalent records.

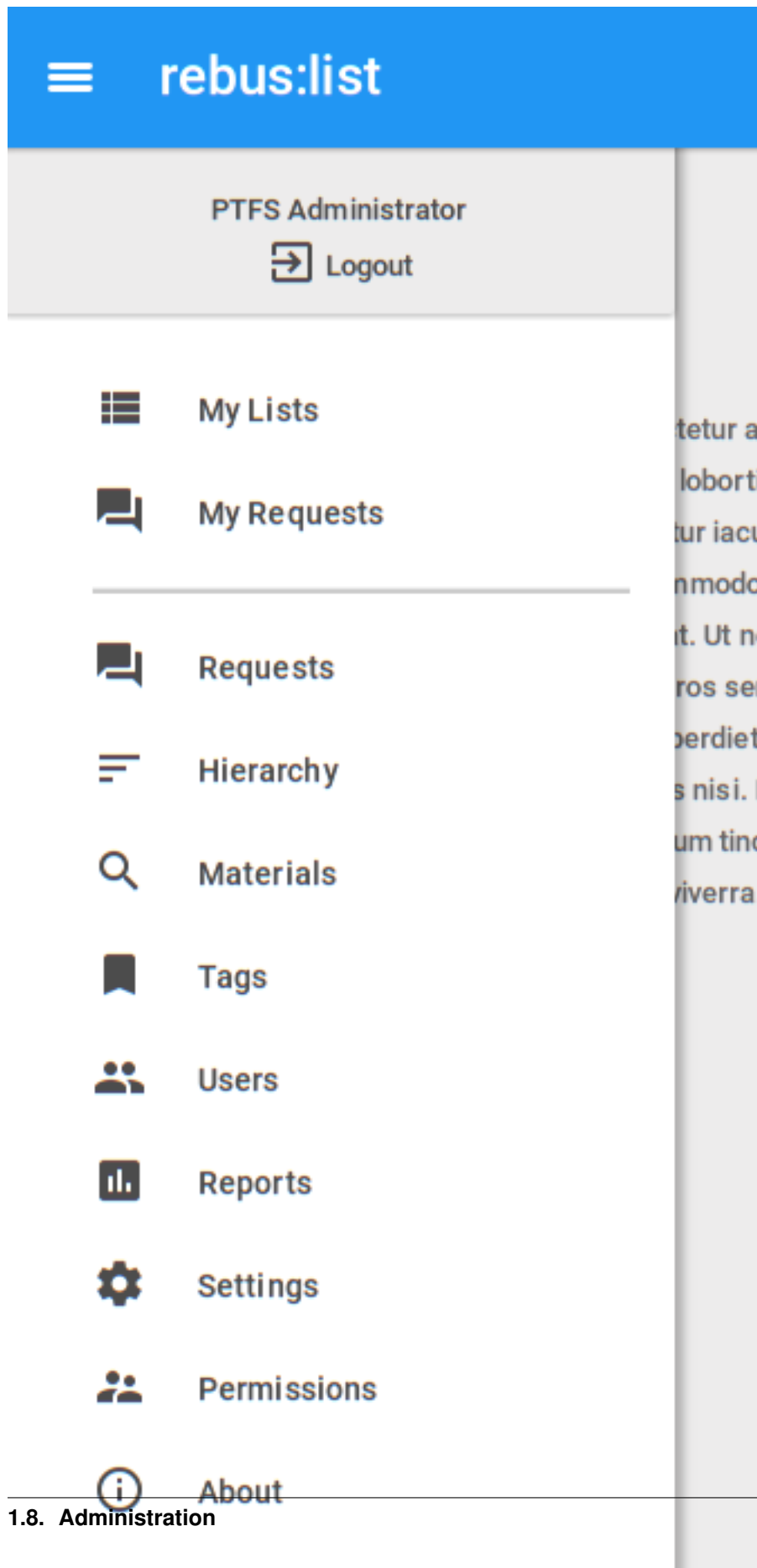
On clicking the Alternatives button you are taken to the standard add material process (See 5.11)

When you finish creating your new material and publish you will find it has been added in an alternatives dropdown.



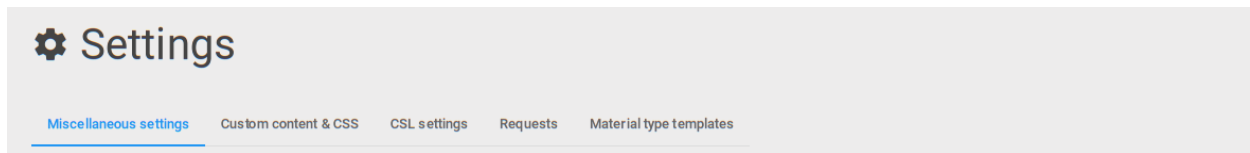
Administration

Below is the menu you will be presented with if you login with an Administration account. In the following sections we will look at each selection in turn.



Settings

These tabs represent each setting group:



Miscellaneous settings

Display likes / dislikes

YES NO

Allows you to enable or disable the like feature.

Global admin email address

hosting@ptfs-europe.com

Allows you to specify a default administration email address.

Allows you to select one or more of the available book jacket providers

Book cover providers

☒ Amazon

☒ Google Books

☒ Open Library

You can edit, remove or create new Global category headings here. These headings allow you to organize material, within lists, into meaningful groups. The changes will automatically take effect on the lists you have already populated. It's also possible to add extra categories and to change the order in which they display using drag and drop. You will be prevented from deleting a category that already contains material but you may rename it.

Global category headings

Essential

Recommended

Background

+ ADD

Enter your resolvers base URL in this box to allow OpenURL linking.

Link resolver base URL

http://myresolver.com/

This is a system setting which defines the out of hours period during which scheduled reports will run.

Start running reports time

2000

Stop running reports time

0600

This switch allows you to choose to display the course code along with the title

Display course code with list title

YES

NO

This switch allows you to choose to display the list year with the title

Display list year with list title

YES

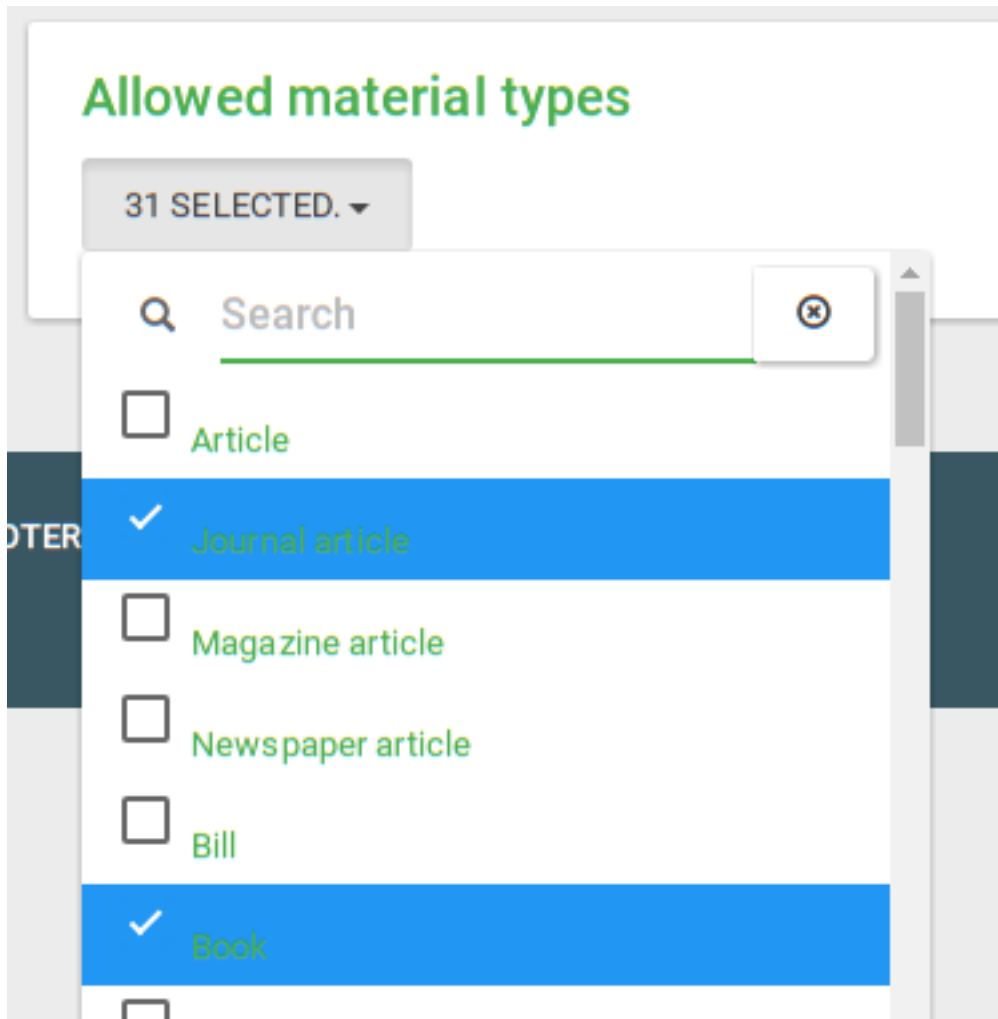
NO

Use this setting to determine the format the list year is displayed in

Year display format

17/18

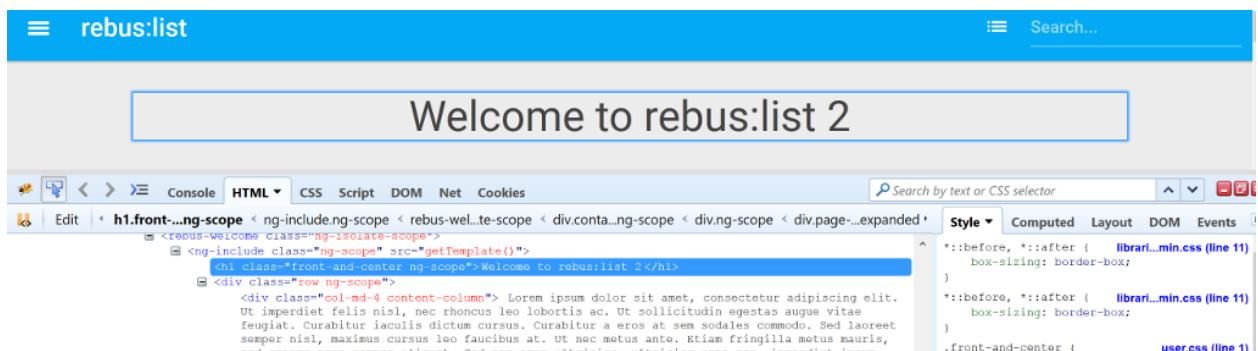
Use this setting to determine which material types should be available to users when adding new manual materials



Custom content & CSS

The look and feel of rebus:list is highly customisable. You can create your own front page and footer content, and use CSS to make changes throughout the system.

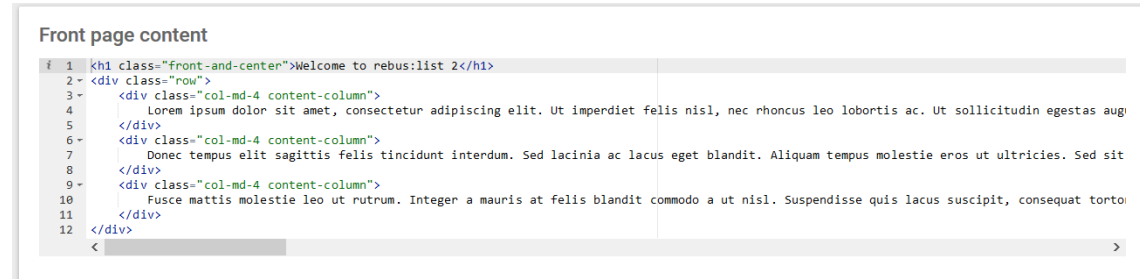
Use a web developer tool such as Firebug to identify elements on the page:



Logos

If you have a site logo located on your own website separate to rebus:list, you can point to the full URL as in Example 3 below.

Please contact PTFS Europe Support if you would like us to host your site logo on the rebus:list server.



Front page content

On migration there are 3 columns of default content starting with:

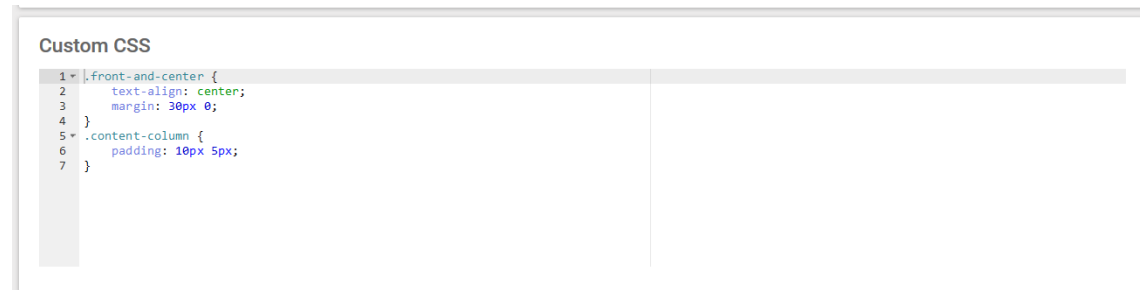
```

<h1 class="front-and-center">Welcome to rebus:list 2</h1>
<div class="row">
  <div class="col-md-4 content-column">.....

```

You can change the text here and layout by modifying the html - e.g. to create 2 columns instead of 3.

You can use the existing CSS or add new CSS declarations that you can use in conjunction with the Custom CSS block.



Custom CSS

Build up any custom changes to existing CSS and add new CSS blocks here.

Example 1:

To change the font colour of the h1 class front-and-center on the front page

Modify the Custom CSS block .front-and-center:

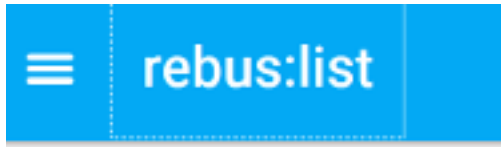
```

1 .front-and-center {
2   color: #ff3333; /* NEW */
3   margin: 30px 0;
4   text-align: center;
5 }

```

Example 2:

To hide the rebus:list logo at the top of the navigation page:



In Custom CSS add:

```
/* Hide rebuslist logo */
.navbar-brand {
  display: none;
}
```

Example 3:

To add your logo to the top of the navigation area:

In Custom CSS add:

```
#site-logo {
  top: 7px;
  display: block;
  background-image: url("http://yourownsite/images/logo.png");
  background-size: 200px;
  background-repeat: no-repeat;
  height: 66px;
  width: 200px;
}
```

Example 4:

Once you have added your logo you may need to increase the width of the navbar:

In Custom CSS add:

```
.navbar {
  height: 80px;
}
```

Example 5:

If the logo is not transparent you may need to change the background colour of the navbar:

In Custom CSS add:

```
.navbar {
  height: 80px;
  background-color: #ff3333;
}
```

Footer content

Footer content

f 1	FOOTER CONTENT
-----	----------------

This area allows you to enter html to customise the footer area of the page

Site title tag / Customer name

Site title tag

rebus:list - [customer_name]

Customer name

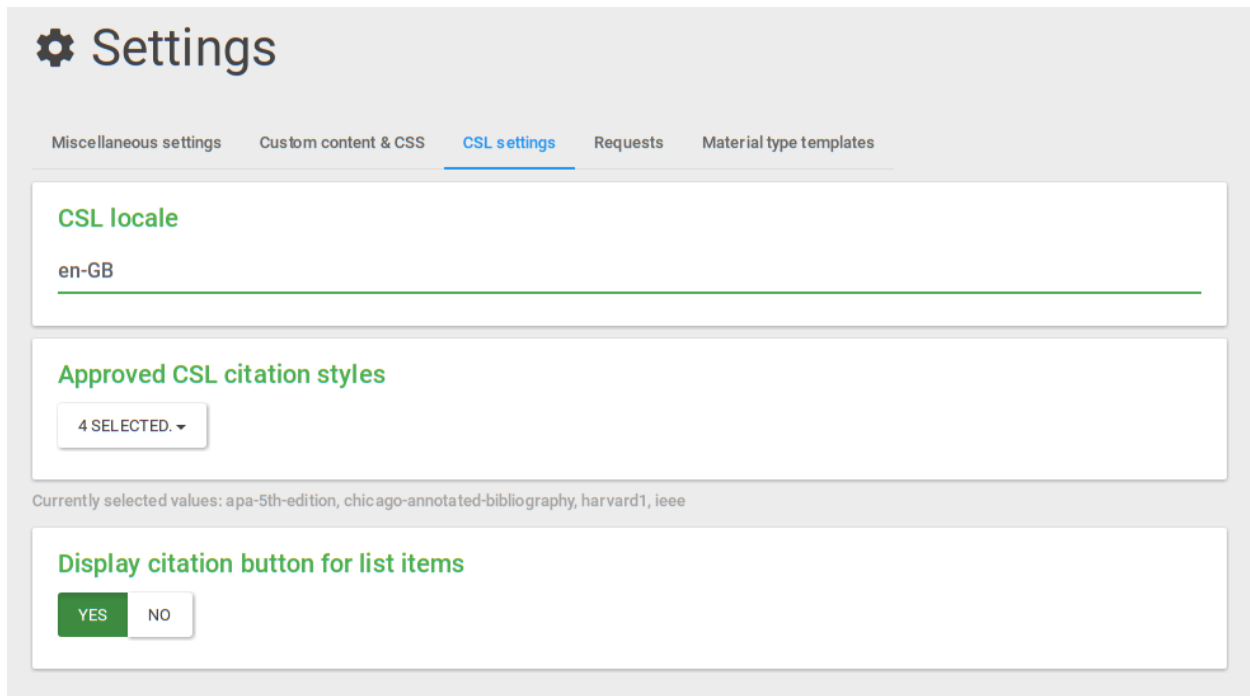
PTFS Europe Customer

- Site title tag - appears on the title tabs within browsers
- Customer name - enter your institution name as you want it to appear on labelling and emails it can be used as a tag in the format customer_name anywhere in any of the custom CSS or html on the rebus:list system.

CSL settings

CSL stands for Citation Style Language and is the language used by the system to describe the formatting of citations and bibliographies. For further information: <http://docs.citationstyles.org/en/stable/index.html#>

It is possible to allow the user to view citations for any item within a list. If this option is turned on, for each list item a “View citation” button will be displayed. Clicking this button will open a dialog box containing a citation for the item, along with a selection box that allows the user to choose the preferred format of citation. The list of formats made available to the user is chosen by the admin.



Settings

Miscellaneous settings Custom content & CSS **CSL settings** Requests Material type templates

CSL locale

en-GB

Approved CSL citation styles

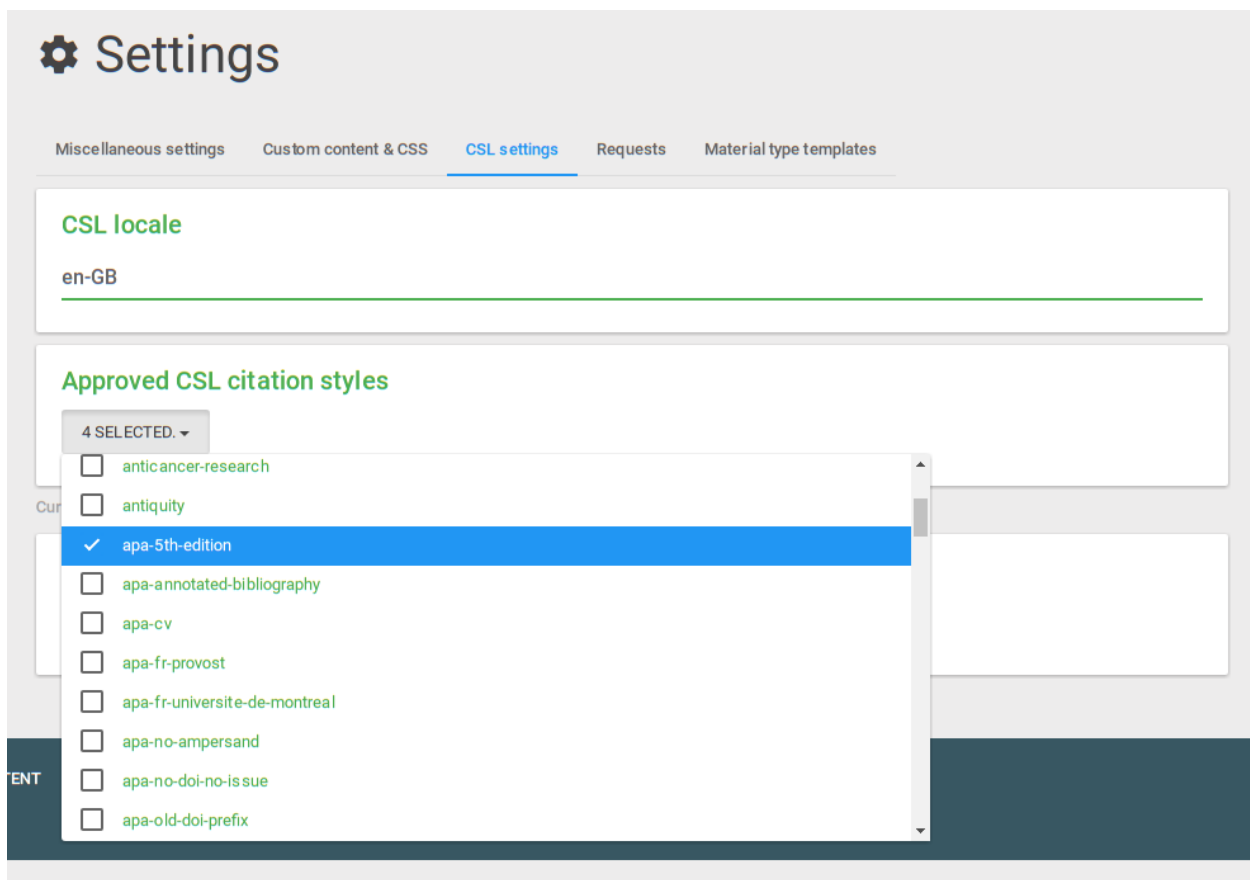
4 SELECTED. ▼

Currently selected values: apa-5th-edition, chicago-annotated-bibliography, harvard1, ieee

Display citation button for list items

YES NO

On this system, you can see the CSL locale is set to the default value of *en-GB*, 4 citation formats have been selected and the admin has chosen to display the “View citation” button.



Settings

Miscellaneous settings Custom content & CSS **CSL settings** Requests Material type templates

CSL locale

en-GB

Approved CSL citation styles

4 SELECTED. ▼

- ☐ anticancer-research
- ☐ antiquity
- ☒ apa-5th-edition
- ☐ apa-annotated-bibliography
- ☐ apa-cv
- ☐ apa-fr-provost
- ☐ apa-fr-universite-de-montreal
- ☐ apa-no-ampersand
- ☐ apa-no-doi-no-issue
- ☐ apa-old-doi-prefix

Here it is possible to select which citation formats should be made available to the user from a list of over 1,800 that

are provided by CSL. The admin can search for, and select, which styles they wish to be made available.

Some of the more common citation formats are:

- apa-annotated-bibliography
- harvard-cite-them-right
- modern-humanities-research-association
- modern-humanities-research-association-author-date
- modern-language-association
- ieee
- ieee-with-url
- oscola

The CSL locale can also be changed - the available options can be found here:

<https://github.com/citation-style-language/locales>

If the admin wishes to disable the “View citation” button entirely, they can do so using the “Display citation button for list items” toggle switch.

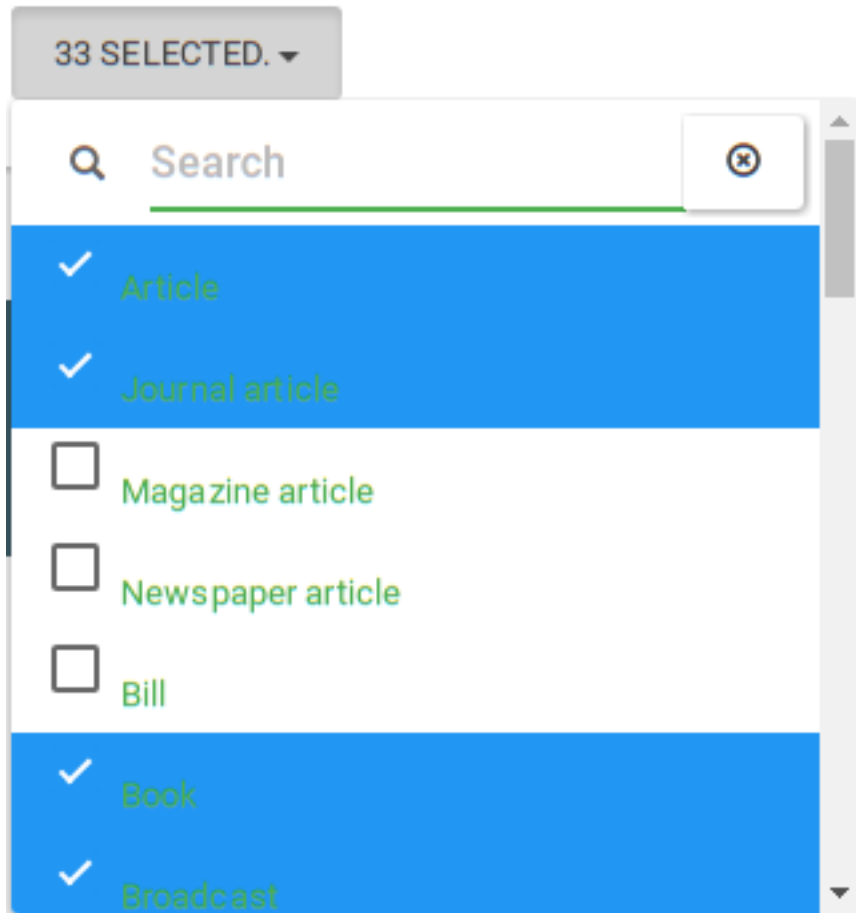
Requests

These settings allow you to configure the various material request types that are available.

Copy requests

Requests for copies of a material can be made by users with the appropriate privileges.

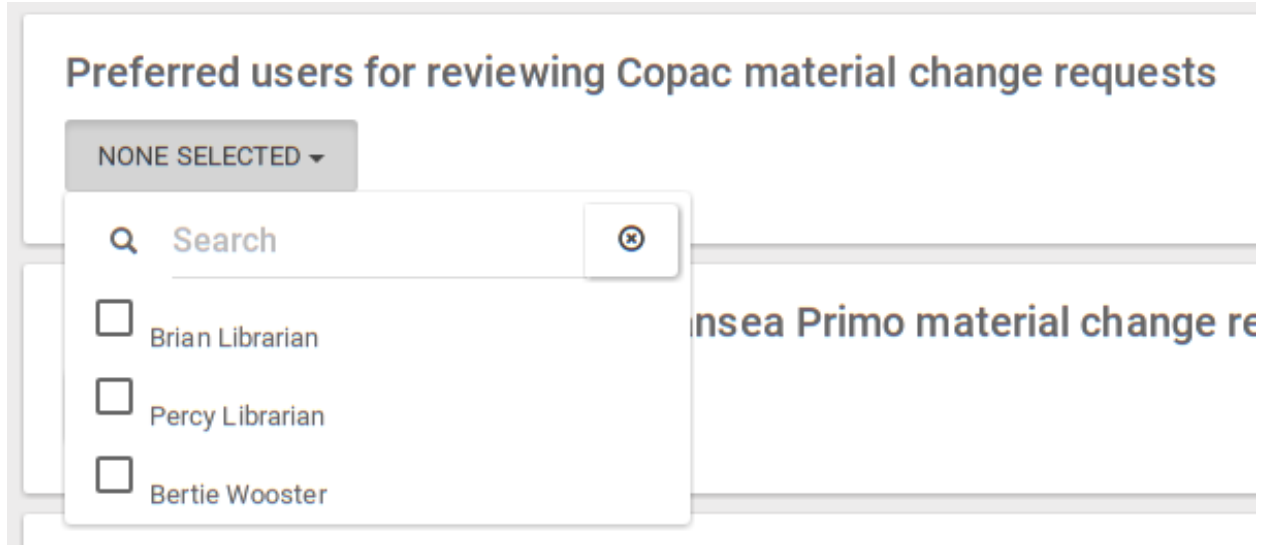
Define which materials will have a copy request button available. Use the drop down to select for which material types copy request are allowed, this determines when the copy request icon will display next to materials



Define an email address to send notifications of new copy requests to.

Change requests

When a user requests a change to a material, by default that change request will be randomly assigned to a user with the privileges to review the request. If you would rather specify which user(s) should be assigned the request, it is possible to specify them here. This is done on a per-connector basis, only users with the privilege to review requests on material from that connector will be available for selection. These privileges can be assigned in the Permissions view.



Material type templates

Global settings

Miscellaneous settings Custom content & CSS CSL settings Scan requests **Material type templates**

Song template

```

1 <div>
2   <h4><cs1-title rebus-linkify></cs1-title></h4>
3   <h5><Performer(s): <cs1-author></cs1-author></h5>
4   <h5><Composer(s): <cs1-composer></cs1-composer></h5>
5   <h6><span hide-if-empty>Publisher: <cs1-publisher></cs1-publisher></span></h6>
6   <h6><span hide-if-empty>Note: <cs1-note></cs1-note></h6>
7   <rebus-collapse expand-text="Citation" collapse-text="Citation" element-class="panel panel-default" heading-class="expand-collapse panel-head
8   <p hide-if-empty><rebus-citeproc></rebus-citeproc></p>
9   </rebus-collapse>
10 </div>
11

```

Pamphlet template

```

1 <div>
2   <h4><cs1-title rebus-linkify></cs1-title> <span hide-if-empty><cs1-issued></cs1-issued></span></h4>
3   <h5><cs1-author></cs1-author></h5>
4   <h6>Publisher: <cs1-publisher></cs1-publisher></h6>
5   <h6><span hide-if-empty>Note: <cs1-note></cs1-note></span></h6>
6   <rebus-collapse expand-text="Citation" collapse-text="Citation" element-class="panel panel-default" heading-class="expand-collapse panel-headir
7   <p hide-if-empty><rebus-citeproc></rebus-citeproc></p>
8   </rebus-collapse>
9 </div>

```

Review template

```

1 <div>
2   <h4><cs1-title rebus-linkify></cs1-title> - <span hide-if-empty><cs1-reviewed-title></cs1-reviewed-title></span>, <span hide-if-empty><cs1-review

```

The CSL schema defines a large number of material “types”, each type has its own template. It is therefore possible to have books display in a different way to journal articles.

Each template is simple HTML with special tags for each material metadata field (such as title, author, ISBN etc.). A very simple book template might look like this:

```

<h1><cs1-title></cs1-title></h1>
<h2><cs1-author></cs1-author></h2>

```

This template would display just the title and author for each material marked as a book in the list. A full list of

material metadata tags can be found in *Appendix A - Material Tags*. It is possible to use any HTML elements and attributes in the template. This, in conjunction with the user defined CSS, offers a lot of control over list item display.

Special Attributes

In addition to the main material metadata tags, there are a few special attributes that can be added to elements to control their display:

hide-if-empty

When this is added to an element, the element will be hidden if any of its children metadata elements are empty. So, for example:

```
<h1 hide-if-empty>Title: <csl-title></csl-title></h1>
```

This would cause the entire <h1> element to be hidden if the title of the item is not populated.

```
<div hide-if-empty>
  Title: <csl-title></csl-title>
  Author: <csl-author></csl-author>
</div>
```

This would cause the entire <div> element to be not display if either the title or author of the item are not populated

rebus-linkify

When this is added to an element, the element will be converted into an appropriate link for the item. For example:

```
<h1><csl-title rebus-linkify="findonshelf"></csl-title></h1>
```

As shown above, it is possible to tell linkify what type of link you would like, if available, to be used. The choices are:

- `fulltext`: Link to the fulltext of record
- `weblink`: Link to the web resource (e.g. catalogued website)
- `findonshelf`: Link to the record in the LMS/Discovery platform

If one of the above values is supplied to rebus-linkify, it will attempt to use it. If that value is not available in the record, a link will not be created. If, however, one of the values above is not supplied, rebus-linkify will attempt to create a link using whatever is available in the following order of preference: `fulltext`, `weblink`, `findonshelf`.

rebus-collapse

This creates a collapsible section that can be expanded or collapsed, it useful for initially hiding data that can be expanded by the user. It accepts a number of attributes:

```
<rebus-collapse expand-text="Expand" collapse-text="Collapse" element-class="panel_
↳panel-default" heading-class="panel-heading" body-class="panel-body">
  <csl-author></csl-author>
</rebus-collapse>
```

This causes the item author to be initially hidden within a collapsible box. The various attributes are:

- `expand-text`: The text that is displayed when the box is in its collapsed state.
- `collapse-text`: The text that is displayed when the box is in its expanded state.
- `element-class`: One or more CSS classes that should be applied to the entire box
- `heading-class`: One or more CSS classes that should be applied to the box heading
- `body-class`: One or more CSS classes that should be applied to the box body

rebus-citeproc (Deprecated)

This element generates a citation in the CSL format defined in the “CSL citation style” section of the Settings admin page.

```
<rebus-citeproc></rebus-citeproc>
```

Generates a citation at the position in the template where the `<rebus-citeproc>` element is placed.

Note: `<rebus-citeproc>` has now been deprecated in favour of the “View citation” list item button, see [CSL settings](#)

Date formats

In fields that display dates:

- `<csl-accessed>`
- `<csl-container>`
- `<csl-event-date>`
- `<csl-issued>`
- `<csl-original-date>`
- `<csl-submitted>`

It is possible to specify a format for the date to be displayed. This should be provided in the following way:

```
<csl-issued format="dd-mm-yyyy"></csl-issued>
```

If no date format is supplied, a default of `yyyy` is used.

The following date formats are supported:

- `yyyy`: 4 digit representation of year (e.g. AD 1 => 0001, AD 2010 => 2010)
- `yy`: 2 digit representation of year, padded (00-99). (e.g. AD 2001 => 01, AD 2010 => 10)
- `y`: 1 digit representation of year, e.g. (AD 1 => 1, AD 199 => 199)
- `MMMM`: Month in year (January-December)
- `MMM`: Month in year (Jan-Dec)
- `MM`: Month in year, padded (01-12)
- `M`: Month in year (1-12)
- `LLLL`: Stand-alone month in year (January-December)
- `dd`: Day in month, padded (01-31)

- `d`: Day in month (1-31)
- `EEEE`: Day in Week,(Sunday-Saturday)
- `EEE`: Day in Week, (Sun-Sat)
- `HH`: Hour in day, padded (00-23)
- `H`: Hour in day (0-23)
- `hh`: Hour in AM/PM, padded (01-12)
- `h`: Hour in AM/PM, (1-12)
- `mm`: Minute in hour, padded (00-59)
- `m`: Minute in hour (0-59)
- `ss`: Second in minute, padded (00-59)
- `s`: Second in minute (0-59)
- `sss`: Millisecond in second, padded (000-999)
- `a`: AM/PM marker
- `Z`: 4 digit (+sign) representation of the timezone offset (-1200-+1200)
- `ww`: Week of year, padded (00-53). Week 01 is the week with the first Thursday of the year
- `w`: Week of year (0-53). Week 1 is the week with the first Thursday of the year
- `G`, `GG`, `GGG`: The abbreviated form of the era string (e.g. 'AD')
- `GGGG`: The long form of the era string (e.g. 'Anno Domini')

format string can also be one of the following predefined localizable formats:

- `medium`: equivalent to `MMM d, y h:mm:ss a` for `en_US` locale (e.g. Sep 3, 2010 12:05:08 PM)
- `short`: equivalent to `M/d/yy h:mm a` for `en_US` locale (e.g. 9/3/10 12:05 PM)
- `fullDate`: equivalent to `EEEE, MMMM d, y` for `en_US` locale (e.g. Friday, September 3, 2010)
- `longDate`: equivalent to `MMMM d, y` for `en_US` locale (e.g. September 3, 2010)
- `mediumDate`: equivalent to `MMM d, y` for `en_US` locale (e.g. Sep 3, 2010)
- `shortDate`: equivalent to `M/d/yy` for `en_US` locale (e.g. 9/3/10)
- `mediumTime`: equivalent to `h:mm:ss a` for `en_US` locale (e.g. 12:05:08 PM)
- `shortTime`: equivalent to `h:mm a` for `en_US` locale (e.g. 12:05 PM)

format string can contain literal values. These need to be escaped by surrounding with single quotes (e.g. `h 'in the morning'`). In order to output a single quote, escape it - i.e., two single quotes in a sequence (e.g. `h 'o' 'clock'`).

Configuration

There are a number of configuration options available at the server level. To change these settings you will need to consult a member of the PTFS-Europe team to have them changed for you. They are settings that change the overall functionality of rebus:list and need more detailed consideration than the settings available in the **Settings** screen.

Connectors

rebus:list uses *connectors* to allow interaction with remote systems.

These connectors are self contained and provide the following functionality dependant upon what the remote system supports:

Search and Retrieve

This is the minimum functionality required for a connector to exist and it pertains simply to the ability to search the remote system for materials which can then be added to rebus:list lists.

Search results can come in various formats with varying levels of detail, often with the *search* view containing a sparse record and a *retrieve* call being required on the individual item to get the full record detail.

Mapping

It is important that a customer works together with PTFS-Europe to build a detailed mapping document so we may accurately depict records of varying content consistently within rebus:list. This should be carried out as part of the initial implementation process.

Material Sync

In rebus:list we believe in minimizing catalogueing workload and therefore will strive to keep records from remote systems in sync with the original with the need for manual intervention.

This can be achieved in a number of ways dependant on what the remote system supports, but as a fallback we can use the *search and retrieve* functionality from above. If that is the case we have a number of configuration options to control this behaviour:

Op-tion	Description
resync	Length of time between checks for changes. For example, if this is set to ‘2 weeks’ then we will only check for changes to a material once every 2 weeks.
sync_start	Time of day after which the sync process may run
sync_end	Time of day before which the sync process may continue to run
pause	Time in seconds between individual material sync requests
time-out	Length of time the connector will wait on a response from the remote system before it presumes the request was lost and it retries.

Live Availability

If the remote system supports it we can impliment a live availability function in rebus:list. This functionality means that your list consumer can look up the availability status of a material from directly within rebus:list without the need to click through to the original source, your library catalogue for example.

Live Holds

If the remote system supports it we can impliment a live holds function in rebus:list. This functionality allows a list consumer to place holds on items from directly within rebus:list without the need for them to click through to the original source, your library catalogue for example.

Hierarchy (Hierarchy mode customers only)



rebus:list is based around the concept of a hierarchy which determines the navigation and browse structure of the system.

There are four separate areas in the Hierarchy Module



Creating and Modifying

The hierarchy is constructed from Organizational Units and Lists.

The structure below has Organizational Units of

- University
- Faculty
- Subject



Below which are the reading lists.

- You can create as many Units or Lists as you need to suit your organization.
- A List will always appear at the bottom of its branch in a hierarchy.
- It is not possible to add a Unit on a level below a List on a given branch.
- It is not possible to add a List on a level below a List on a given branch.
- It is possible to create a Sublist but they are not handled as a part of Hierarchy management.

Note. It is quite possible to use a single layer layout for the system. For a future release ‘flat-mode’ is in development which will improve browsing functionality for those users who have chosen not to implement a hierarchical structure.

Creating a Unit


To create a hierarchy a user with appropriate permissions needs to initially create a Unit at the top level. To do this click the Add New Unit button. This will open the Unit metadata page, see below.

A small blue rectangular button with the text "ADD NEW UNIT" in white capital letters.

Unit

Name:

Enter name

 You must specify a name

Summary:

(inherited from "")

Course identifier:

(inherited from "")

Book to student ratio:

(inherited from "")

books to

(inherited from "")

students

(inherited from "")

students

Number of students:

(inherited from "")

Visible from:



Visible to:



HH : MM AM

(Value "" inherited from "")

HH : MM AM

(Value "" inherited from "")

Year:

(inherited from "")

Created:

Last updated:

Name is the only required field, the other fields allow you to provide extra information if necessary. Click finish and your Unit will be created.

Once this is done, it is then possible to create additional Units and Lists below it.

Building a Hierachy

You can create as many Units at the top level as you like and then using the editing tools continue to build your hierarchy.



Above you can see two top level Units, one for Rebus Public Libraries and another for the University of Rebus.

In the above example the editing tools have been expanded for the University of Rebus.

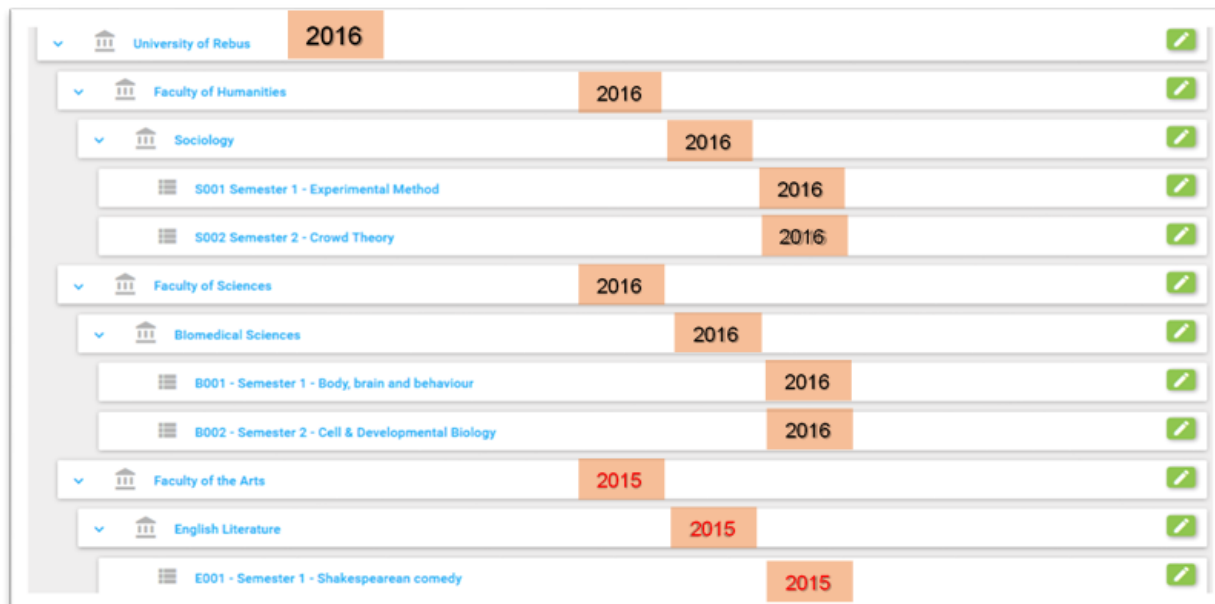
	Clicking the green pen icon opens and closes the available editing tools for a Unit or List
	Clicking the bin icon will delete the current Unit or List. As a safety feature it is not possible to delete a whole branch of the hierarchy by clicking one high level button. All child Units or Lists must be deleted first.
	Clicking the pen icon in the edit tools will open the Unit or List metadata page for editing (see above).
	Clicking the people icon in the edit tools will open the Unit or List role assignment dialog box. See roles_list_perspective
	Clicking this icon will suppress the Unit or List. This removes it from public view and it will no longer be browseable or searchable. Suppression is inherited so all lists below a suppressed Unit will also be suppressed.
	This is the add button in expanded form. If you click the plus icon you are then presented with the option of creating a Unit or List at the next level down the hierarchy.

Using these tools you can quickly and easily produce a hierarchy that will suit your organisation.

Inheritance

You will notice when you create a Unit or List that many of the fields have a placeholder of **(inherited from)**. This placeholder indicates that the field will inherit its contents from the level above if it is left blank.

Inheritance is a very useful labour saving tool. Below you can see the expanded tree for the University of Rebus.



In a University setting all the lists may cover one academic year. In that case ‘Year’ can be set at the top ‘University’ level and will then be inherited down the hierarchy without the need to repeatedly enter the data no matter how many lists there are.

Inheritance can also be overwritten further down the hierarchy.

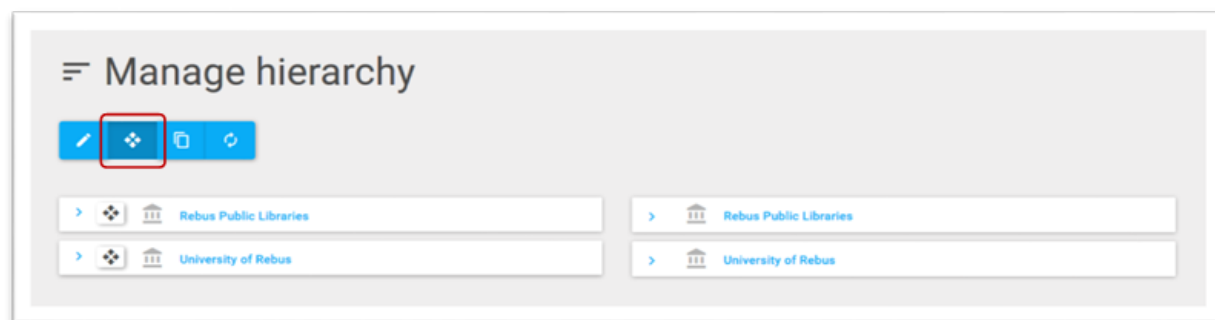
Above ‘Year’ has been set as 2016 in the metadata in the University of Rebus top level Unit. The boxes on the diagram show how 2016 is inherited down the hierarchy.

The Faculty of the Arts lists are still being used from 2015.

Adding 2015 in the Year field of the Faculty of the Art Unit results in 2015 being inherited as year in all the Units and Lists down that branch.

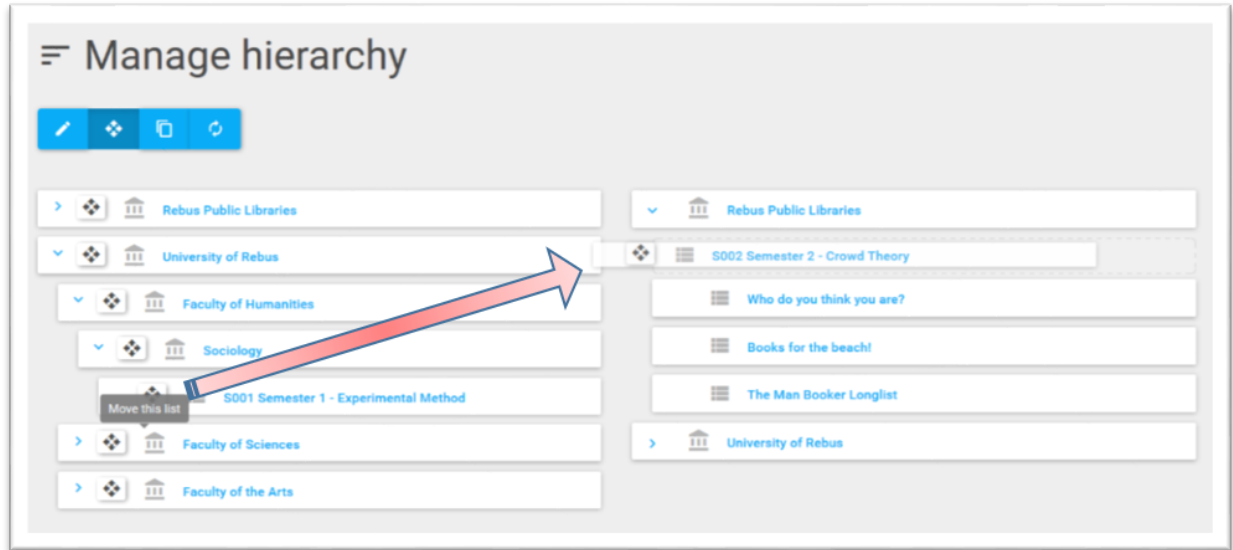
Note, the dates and boxes are examples only and do not display on the system.

Moving Lists and Units



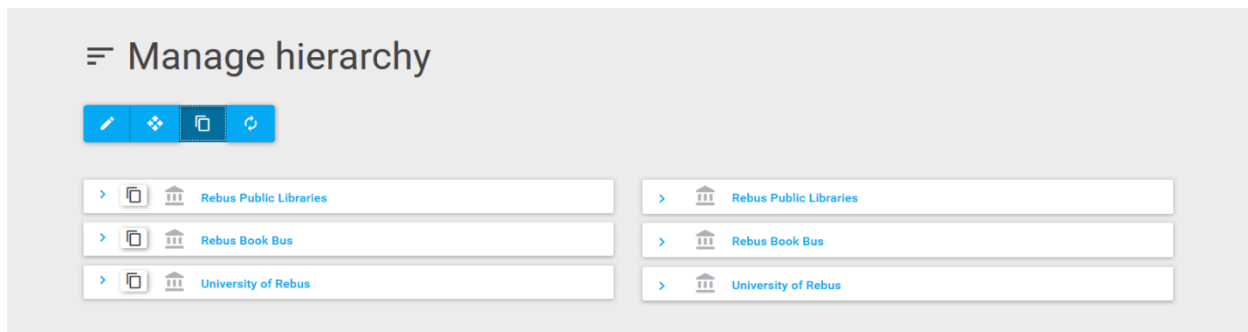
When you click the icon to open the move list functions you are presented with a screen that displays the hierarchy twice. You can move either a single list or a whole branch of your hierarchy.

	To move a List or Unit click on the four arrow icon next to the List or Unit name on the left hand side of the screen. and drag it into position on the righthand side of the screen
--	--




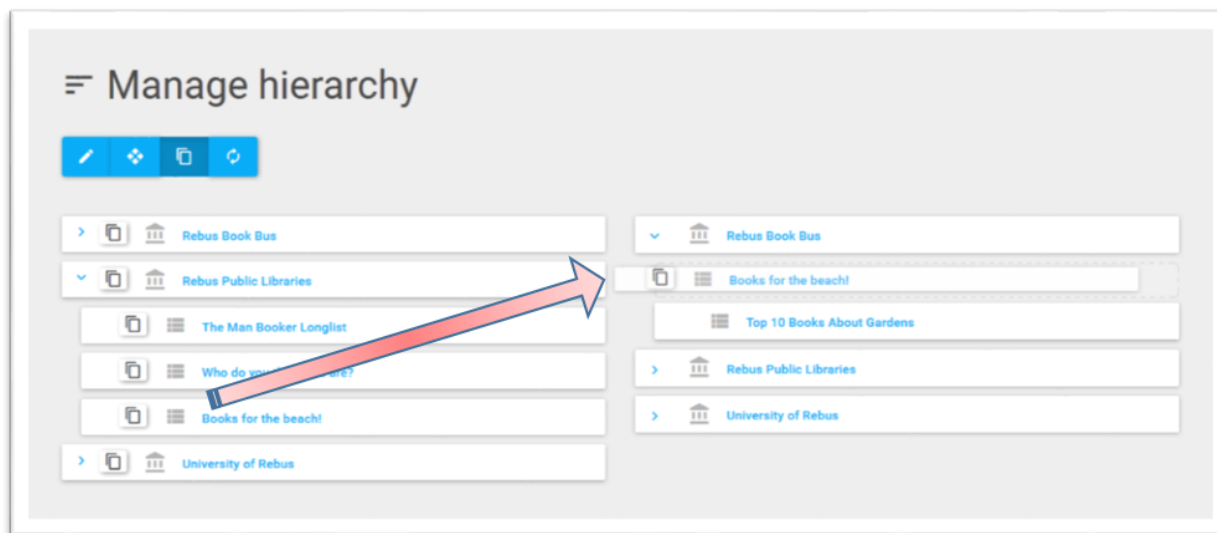
When you have dragged your List or Unit into its new position the hierarchy will automatically be saved. If you move a Unit it will move the entire branch to the new position.

Cloning Lists or Units



Sometimes it might be necessary to clone a List or Branch to another position in the hierarchy. The procedure for doing this is very similar to moving lists.

- | | |
|---|--|
|  | <p>To clone a List or Unit click on the clone icon next to the List or Unit name on the left hand side of the screen. and drag it into position on the righthand side of the screen.</p> |
|---|--|



Above is an example of a situation when cloning lists might be used.

Rebus Public Library have created a mobile library service and have created a Unit called Rebus Book Bus. This unit will only be made available to users of the service.

The library wishes to provide some of the same lists as are listed under the main Rebus Public Library. To avoid having to recreate the lists on another branch they can clone them.

After cloning a List or Unit the hierarchy will be locked for editing whilst the system recalculates inheritance. Recalculation can take some time dependant on the size of the hierarchy that is being cloned.

Note: A Cloned List is a separate entity to the original list. Changes made to one will not automatically effect the other.

Tags



Material tags are an additional way to group material using keywords, they provide a useful tool for searching, browsing and filtering enhancing the user experience. Tags can be created and applied using the 'Tags' functionality or directly whilst editing lists.

Using the 'tags' admin area means that you can edit a tag and the changes you make will automatically apply to all occurrences of that tag throughout your system.

Add a new tag and search

On selecting Tags from the admin menu you will be presented with two boxes - the first provides a text box that will allow you to create a new tag. The second box displays the existing tags along with details of how frequently they are used.

Tags

Add a new tag

ADD

Find existing tags

5102050

Tag ↕	Occurrences ↕	Action
Filter tags		
2013	0	
2016 Man Booker	11	
2016 Man Booker Shortlist	0	
A Level	1	
Ancestry	1	

Once you add a new tag it will become available for other users to select and apply to a reading list.

Finding, Editing and Deleting material tags

Find existing tags

5102050

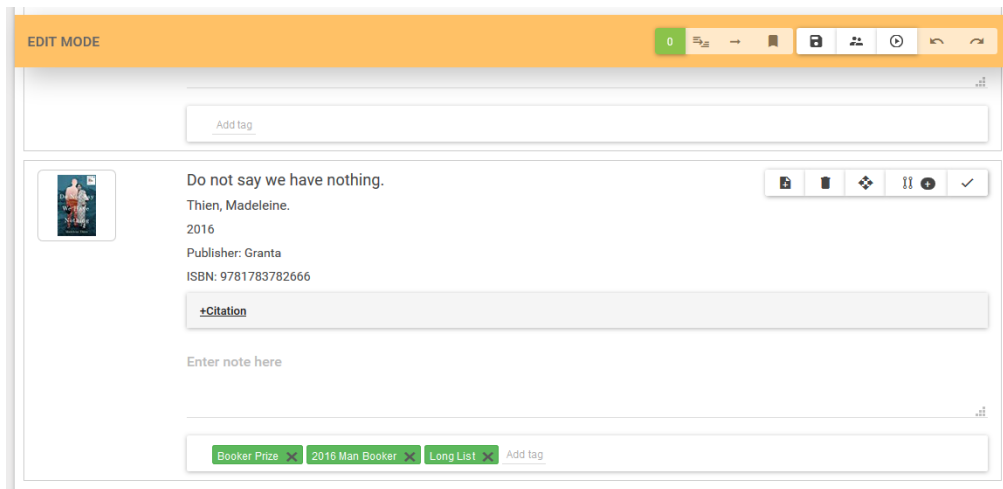
Tag ↕	Occurrences ↕	Action
<input type="text" value="Book"/>		
2016 Man Booker Shortlisted	0	
2016 Man Booker	11	
Booker Prize	11	

Use the filter box to limit the tags displayed. In a similar way to searching the filtered results will start to be displayed once you have entered three characters. You are then able to either edit or delete a tag.

<div> <div>2016 Man Booker Shortlist</div> <div>✓</div> <div>✕</div> </div>	To edit click on the tag and an edit box will open allowing you to enter new text. Clicking the tick will apply the changes across the system.
	Clicking the bin icon will delete the tag - tags can only be deleted if there is no material associated with the tag.

Applying a tag to an item in a list

Tags can also be added as you edit a list. When editing Material begin typing in the tag area rebus:list will begin to give you suggestions once you tag has passed three characters. You can select a tag that has previously been created or you can create a tag that is entirely new. Once a tag is created by this method it will be accessible from the manage tags tab.



The screenshot shows the 'EDIT MODE' interface for a book entry. At the top, there is an orange header bar with 'EDIT MODE' on the left and a toolbar with icons for undo, redo, save, and other actions. Below the header, there is a search bar labeled 'Add tag'. The main content area displays the book details: a small image of the book cover, the title 'Do not say we have nothing.', the author 'Thien, Madeleine.', the year '2016', the publisher 'Granta', and the ISBN '9781783782666'. Below the details, there is a section for '+Citation' and a text area labeled 'Enter note here'. At the bottom, there is a tag management section showing existing tags: 'Booker Prize', '2016 Man Booker', and 'Long List', followed by an 'Add tag' input field.


Users



From the Users home screen you can Add a new user, search for current users and edit user accounts.





























Search for users

On selecting to open the Users tab you are presented with a search box and plus button. Typing in the search area will bring back results from the users entered on the system - as with the other searches on the system once three characters have been entered results will begin to be returned.

 **Users**

+

10

Name	Login	Email	Actions
Alice Administrator	Alice	Alice@rebuslibrary.co.uk	  
Sarah Academic	Sarah	Sarah@rebusuniversity.ac.uk	  
Angela Academic	Angela	angela@rebusuniversity.ac.uk	  
Bertram Lecturer	Bertram	bertram@rebusuniversity.ac.uk	  
Oscar Student	Oscar	oscar@rebusuniversity.ac.uk	  
Brian Librarian	Brian	Brian@rebusuniversity.ac.uk	  
Donald Deleted	Donald	Donald@rebuslibrary.co.uk	
Howard P Librarian	Howard	Howard@rebuslibrary.co.uk	  
Percy Librarian	Percy	Percy@rebuslibrary.co.uk	  
Professor Faculty	Faculty	faculty@rebusuniversity.ac.uk	  

The search runs across all three fields but, when searching for a user, you will only retrieve and be able to maintain users that are the same or below your current username login type.

For example, a user logged in with “Librarian” level user type will not retrieve users with the type “Admin”.

Add a new user

Please note this section refers to the manual creation of users. For customers using Shibboleth or LDAP user creation will be automated and the password section of this chapter will not apply.

Click on the plus button icon and the following form will be opened

Create a user

Name

Name

Login

Login

Email address

Email address

User type

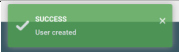
Select a type

CLOSE

FINISH

Required fields are: user name, login, email address and user type.
User type applies a default set of permissions for the user (see chapter 2)




When a user has been added successfully the SUCCESS confirmation message will appear in the bottom right hand corner of the screen.



A password email is sent to the newly created user. From this screen, when in edit mode, an administrator can also send a password reset email.







Edit or Deactivate a user

Edit or deactivate users by clicking on the appropriate link as in the following example.

Name	Login	Email	Actions
Brian Librarian	Brian	Brian@rebuslibrary.co.uk	 
Alice Administrator	Alice	Alice@rebuslibrary.co.uk	 

Managing user roles

From the manage user page you can also edit list roles for a specific user on a list by list basis - to access this select the edit list roles icon.

Name	Login	Email	Actions
Brian Librarian	Brian	Brian@rebuslibrary.co.uk	  
Alice Administrator	Alice	Alice@rebuslibrary.co.uk	  

This will result in the *Manage User Roles* window opening

For information on how to manage user roles, see `roles_list_perspective`

Permissions



Permissions

Permissions allow precise control of what different users are able to do.

In rebus:list the abilities of the user are defined by their permissions. These are grouped in two ways:

- User Roles - These define users ability to manipulate lists and the materials on those lists and are discussed in the previous chapter.
- User Types - These are groups of permissions for individual users and define how the system may be used and are dealt with in this chapter.

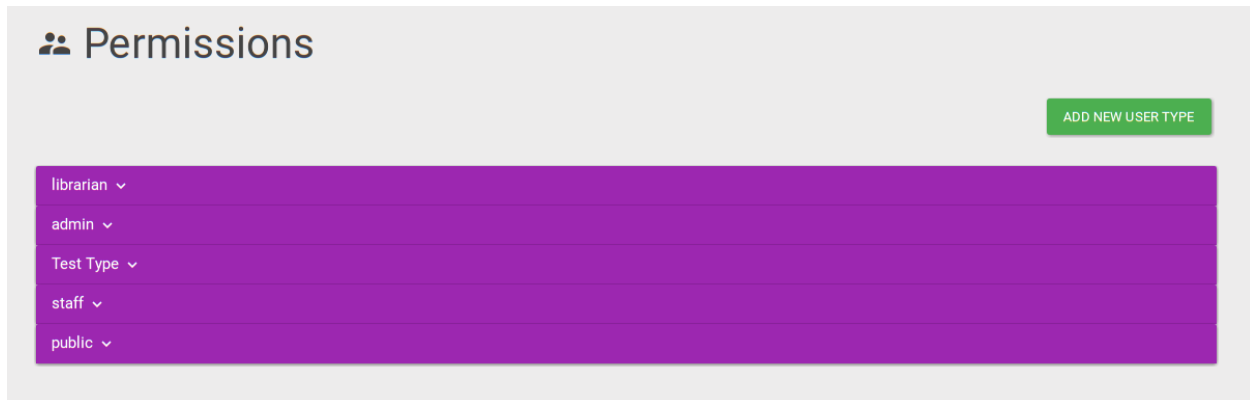
Default User types

rebus:list is highly configurable and allows for the editing or creation of many different User Types. The system is delivered with four default User Types:

- librarian - Librarian level access
- admin - Full access
- staff - Standard staff access
- public - View only access

The defaults are configured with different permissions to represent the different tasks they may perform. From this screen you can access permission management for any of the default User Types and also create new User Types.

Click the dropdown to open permissions management for a specific user type



Edit User types

To edit the privileges applied to each user type open the drop down.

You will be presented with the five areas as headed in green below.

Here you can:

- Edit the user type name and short description
- Assign or remove Responsibilities in the left column
- Assign or remove individual Privileges in the right column

Responsibilities and Privileges are also split into two rows Assigned and Unassigned. This can be seen below for the librarian User Type.

Permissions

[ADD NEW USER TYPE](#)

librarian ^

User type name and description

librarian

[Librarian level access](#)

Responsibilities assigned to "librarian"

Lists Requests

Privileges assigned to "librarian"

buffer-accept buffer-create buffer-read buffer-reject
 buffer-update change_request-assign
 copac:change_request-create copac:change_request-delete
 copac:change_request-read copac:change_request-review
 copac:change_request-update copy_request-assign
 copy_request-create copy_request-delete copy_request-progress
 copy_request-read copy_request-update docs:material-update
 list-assign list-create list-delete list-move list-read
 list-suppress list-update material-create material-delete
 material-rate material-read material-tag report-clone
 report-create report-delete report-read report-schedule
 report-update sublist-create sublist-delete tag-create
 tag-delete tag-read tag-update user-create
 user-read user-update

Available responsibilities for "librarian"

Configuration + Hierarchy + Materials + Reports + Rollover +
 Users +

Available privileges for "librarian"

buffer-submit + config-update + docs:change_request-create +
 docs:change_request-delete + docs:change_request-read +
 docs:change_request-review + docs:change_request-update +
 list-clone + list-rollover + privilege-read + report-run +
 responsibility-assign + responsibility-create + responsibility-delete +
 responsibility-read + responsibility-update + role-assign +
 role-create + role-delete + role-read + role-update +
 sublist-suppress + swansea_primo:change_request-create +
 swansea_primo:change_request-delete +
 swansea_primo:change_request-read +
 swansea_primo:change_request-review +
 swansea_primo:change_request-update + unit-assign + unit-clone +
 unit-create + unit-delete + unit-move + unit-read +
 unit-rollover + unit-suppress + unit-update + user-assign +
 user-delete + usertype-assign + usertype-create +
 usertype-delete + usertype-read + usertype-update +

There are a large number of privileges available on rebus:list (see appendix) so to make management simpler we have grouped these privileges into areas of responsibility. Rolling over a responsibility will highlight the related privileges in red.

Responsibilities assigned to "librarian"

Requests

Privileges assigned to "librarian"

buffer-create

buffer-read

buffer-reject

buffer-update

list-assign

list-create

list-delete

list-move

list-read

list-suppress

list-update

material-create

material-delete

material-rate

material-read

material-tag

material-update

report-clone

report-create

report-delete

report-read

report-schedule

report-update

request-create

request-delete

request-read

request-update

sublist-create

sublist-delete

tag-create

tag-delete

tag-read

tag-update

taxon-create

user-create

user-read

user-update

Available responsibilities for "librarian"

Configuration

Hierarchy

Lists

Materials

Reports

Rollover

Users

Available privileges for "librarian"

buffer-accept

buffer-submit

config-update

list-clone

list-rollover

privilege-read

report-run

responsibility-assign

responsibility-create

responsibility-delete

responsibility-read

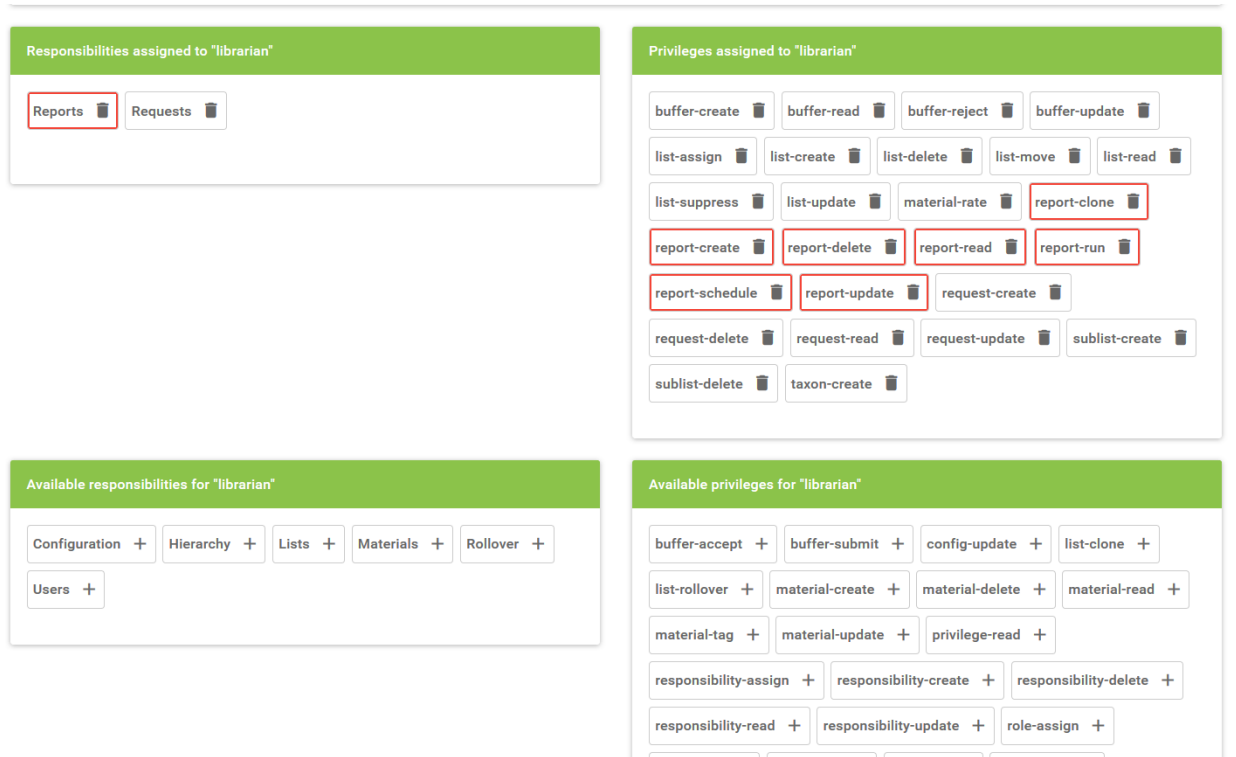
In the example above we can see that the Requests responsibility has been assigned to the Librarian User Type. The permissions within the Requests responsibility group are highlighted in red.

<div>Requests</div>	Clicking the plus on a responsibility button will enable all the associated privileges.
<div>Requests</div>	Clicking the Bin icon will disable all the associated privileges

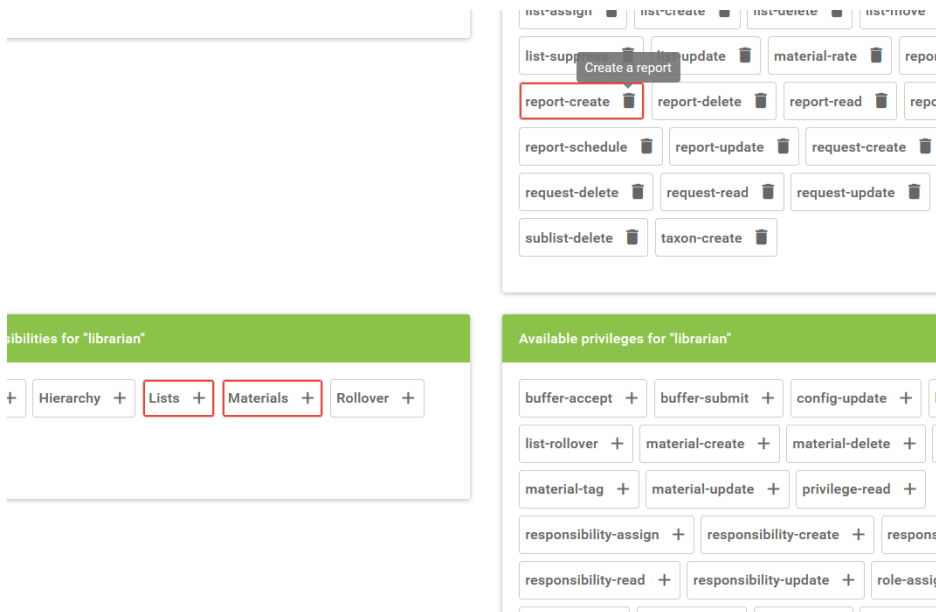
Individual privileges can be assigned in addition to responsibilities

<div>request-create</div>	Clicking the plus on a privilege button will assign it for the User Type you are working with
<div>request-create</div>	Clicking the Bin icon on a privilege button will un-assign it for the User Type you are working with

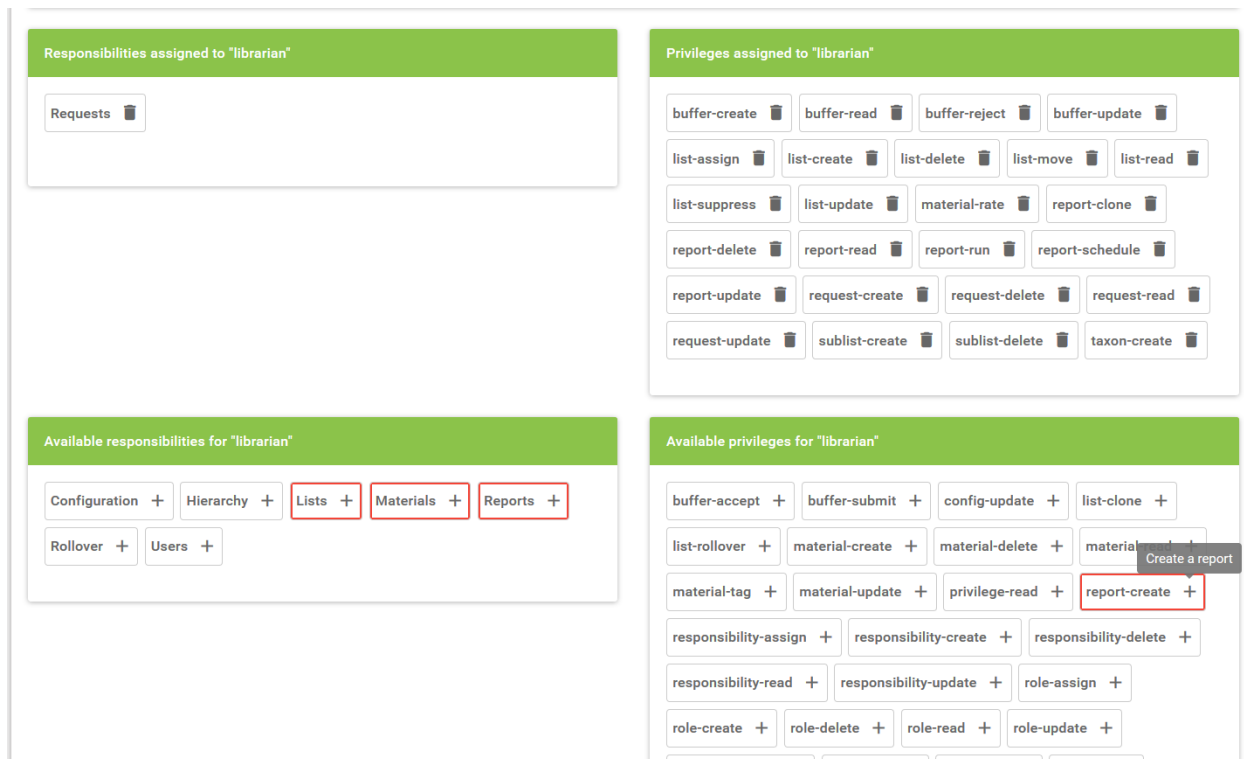
It's possible to build a custom group of privileges quickly by making use of a combination of responsibility groups and assigning / un-assigning individual privileges



In the above example the Reports responsibility group has been added to the librarian User Type. This has assigned all the Reporting privileges.



It may be the case that although a librarian should be able to work with reports they shouldn't be able to create them. The report-create privilege can be un-assigned by clicking on the bin icon.



As only a subset of the privileges that make up the Reports responsibility group are now assigned Reports no longer displays as an assigned group

Using this method, you can quickly build a custom set of privileges for your own user types.

There are several special privileges that fall outside the responsibility groups. These are mainly concerned with global administrative tasks.

- sublist-suppress
- taxon-assign
- taxon-clone
- taxon-delete
- taxon-move
- taxon-read
- taxon-rollover
- taxon-suppress
- taxon-update
- unit-assign

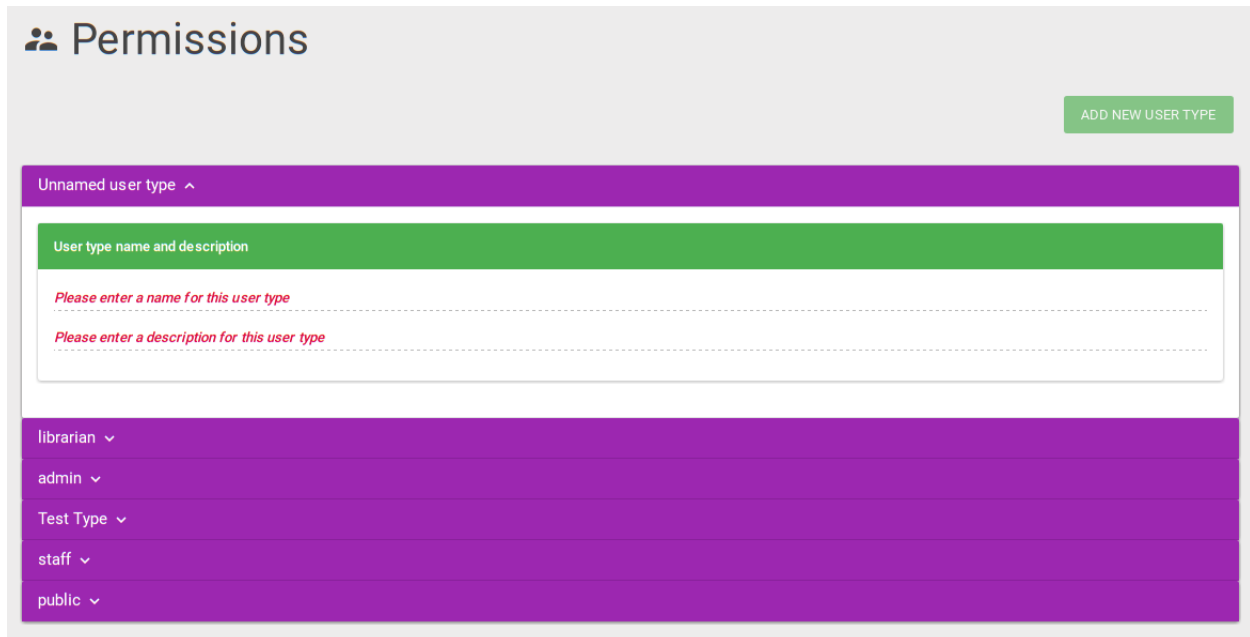
rebus:list uses the term 'taxon' to define any point or level within a hierarchy e.g. a unit is a taxon, a list is a taxon, a sublist is also a taxon.

Creating a User Type

If no default user type exists that fits staff workflows in your organisation it's quite straight forward to create a new user type.

Click the ADD NEW USER TYPE button

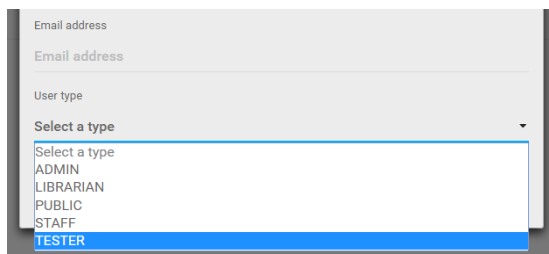
You will be presented with a drop down where you must add a name and short description for the new user type.



The screenshot shows the 'Permissions' section of the application. At the top right is a green button labeled 'ADD NEW USER TYPE'. Below it is a purple header bar with the text 'Unnamed user type ^'. Underneath is a form with a green header 'User type name and description'. The form contains two text input fields with red placeholder text: 'Please enter a name for this user type' and 'Please enter a description for this user type'. Below the form is a list of existing user types: 'librarian', 'admin', 'Test Type', 'staff', and 'public', each with a dropdown arrow.

On ticking the box the assign privilege screen will display allowing you to select the necessary permissions for your new User Type.

Your selections will auto save and your new User Type will be available when you create or edit a user in User Management (see 11.2 Add a New User).



The screenshot shows a form with two fields: 'Email address' and 'User type'. The 'User type' field has a dropdown menu open, showing a list of options: 'Select a type', 'ADMIN', 'LIBRARIAN', 'PUBLIC', 'STAFF', and 'TESTER'. The 'TESTER' option is highlighted in blue.

Deleting a User Type

To delete a user type, in Permissions select the user type and press the bin button. You will be given the option of confirm or cancel. Select confirm and the User Type will be deleted. Any users of that type will be reassigned a type of 'public'

Tester ^

User type name and description

CONFIRM CANCEL

Tester

Functional testing user

Responsibilities assigned to "Tester"

Privileges assigned to "Tester"

Available responsibilities for "Tester"

Configuration +

Hierarchy +

Lists +

Materials +

Reports +

Requests +

Rollover +

Users +

Available privileges for "Tester"

buffer-accept +

buffer-create +

buffer-read +

buffer-reject +

buffer-submit +

buffer-update +

change_request-assign +

config-update +

copac:change_request-create +

copac:change_request-delete +

copac:change_request-read +

My Lists

My lists

My lists displays for all logged in users. It displays information about the lists that the logged on user is associated with by any of the available User Roles.

My Lists

Drag this button to your bookmark bar to install the rebus:list bookmarklet

Name	Course	Items	Valid from	Valid to	Created	Updated	Under moderation	Suppressed
Filter lists								
Top 10 Books About Gardens		10	08-09-16	01-09-21	11-11-16	11-11-16	X	✓

In the above example we can see My Lists for the Bertie user. Bertie has been given a role of Author on the ‘Top 10 Books About Gardens’ list only. That means that Bertie has an association with this list and it will therefore be displayed.

The different columns are:

- Name - Name of the list the user has an association with.
- Course - Information from the Course field of the List metadata if it is populated
- Items - Number of Items on the List.
- Valid from - The date the list will first be available.

- Valid to - The date the list will cease to be available.
- Created - The date the list was first created.
- Updated - The date the list was last modified.
- Awaiting moderation - In the moderation workflow this heading shows if there is a draft that has been submitted for moderation but not yet accepted or denied.
- Suppressed - This displays if the list has been suppressed from public view.

Materials




Search material allows you to search across the system by author, title, ISBN, ISSN and DOI. Both phrase and keyword searching is supported. Phrases should be double quoted e.g. "This is a phrase".


A search provides a summary of information about the material found. Title, Author and ISBN are displayed alongside a column for Actions.




Filter results	
	<p>Applied general statistics</p> <p>Croxton, Frederick Emory, & Cowden, Dudley Johnstone, 1899-</p> <p>Publisher: Prentice-Hall, Inc.,</p> <p></p>
	<p>Basic statistics for laboratories</p> <p>Kelley, William D.</p> <p>Publisher: Van Nostrand Reinhold</p> <p>ISBN: 0442004567</p>
	<p>Statistics</p> <p>Walker, James A. (James Adam)</p> <p>1993</p> <p>Publisher: Hodder & Stoughton</p> <p>ISBN: 0340552468 (pbk)</p>


Given the correct privileges, the actions column allows users to edit manually created materials

Filter results







[Applied general statistics](#)
Croxtan, Frederick Emory, & Cowden, Dudley Johnstone, 1899-
Publisher: Prentice-Hall, Inc.,









Basic statistics for laboratories
Kelley, William D.
Publisher: Van Nostrand Reinhold
ISBN: 0442004567







Statistics
Walker, James A. (James Adam)
1993
Publisher: Hodder & Stoughton
ISBN: 0340552468 (pbk)







view and add/remove Global Tags

Filter results







[Applied general statistics](#)
Croxtan, Frederick Emory, & Cowden, Dudley Johnstone, 1899-
Publisher: Prentice-Hall, Inc.,









Basic statistics for laboratories
Kelley, William D.
Publisher: Van Nostrand Reinhold
ISBN: 0442004567







Statistics
Walker, James A. (James Adam)
1993
Publisher: Hodder & Stoughton
ISBN: 0340552468 (pbk)




and finally view lists which the material appears on


Filter results



Applied general statistics
Croxtan, Frederick Emory, & Cowden, Dudley Johnstone, 1899-
Publisher: Prentice-Hall, Inc.,




Basic statistics for laboratories
Kelley, William D.
Publisher: Van Nostrand Reinhold
ISBN: 0442004567



Statistics
Walker, James A. (James Adam)
1993
Publisher: Hodder & Stoughton
ISBN: 0340552468 (pbk)

The edit button opens edit material box and providing you have the correct permissions and the material was manually added you can edit it. When you have made your changes click finish. Changes are saved across the system. You will then be returned to the Search Material screen.

Edit material

Material type

Book

Book ☐ Electronic

Material details | Material link URLs | Tags

Title details | Contributors | Publishing details | Identifiers | Misc | Description

Title

Ye Olde Big Bumper Book of Laughs

Short / abbreviated form of title

FINISH CANCEL

The show lists button opens a screen similar to the My Lists screen except it displays list on which the selected material is used.

Title	Author	ISBN	Action
Filter results			
Applied general statistics 	Croxtan, Frederick Emory, & Cowden, Dudley Johnstone, 1899-		  
Basic statistics for laboratories	Kelley, William D.	0442004567	  
Statistics	Walker, James A. (James Adam)	0340552468 (pbk)	  

From here it is possible to see information pertinent to the list and to link out to it.



Basic statistics for laboratories


Kelley, William D.

Publisher: Van Nostrand Reinhold

ISBN: 0-442-00456-7




Reports

 Reports

The reports module of rebus:list allows you to query the database directly so you can gather statistical data about your lists and users.

rebus:list

Search...













 Reports

Next scheduled report run in 11 hours, 31 minutes, 29 seconds

CREATE A NEW REPORT

EXISTING REPORTS LIBRARY

5102050


Report name	Creator	Last updated	Last run	Runs pending	Enabled	Actions
Search...						
New Report for Result View	PTFS Administrator	17-11-16 11:04	17-11-16 11:04	0	Yes	     
New Report	PTFS Administrator	16-11-16 09:12	16-11-16 09:12	1	Yes	     

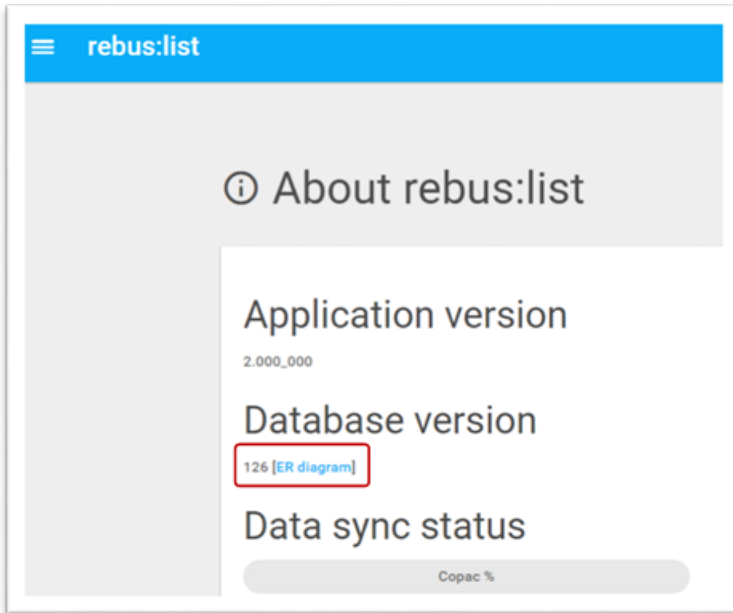
FOOTER CONTENT

©2016 PTFS Europe. Delivered by rebus:list

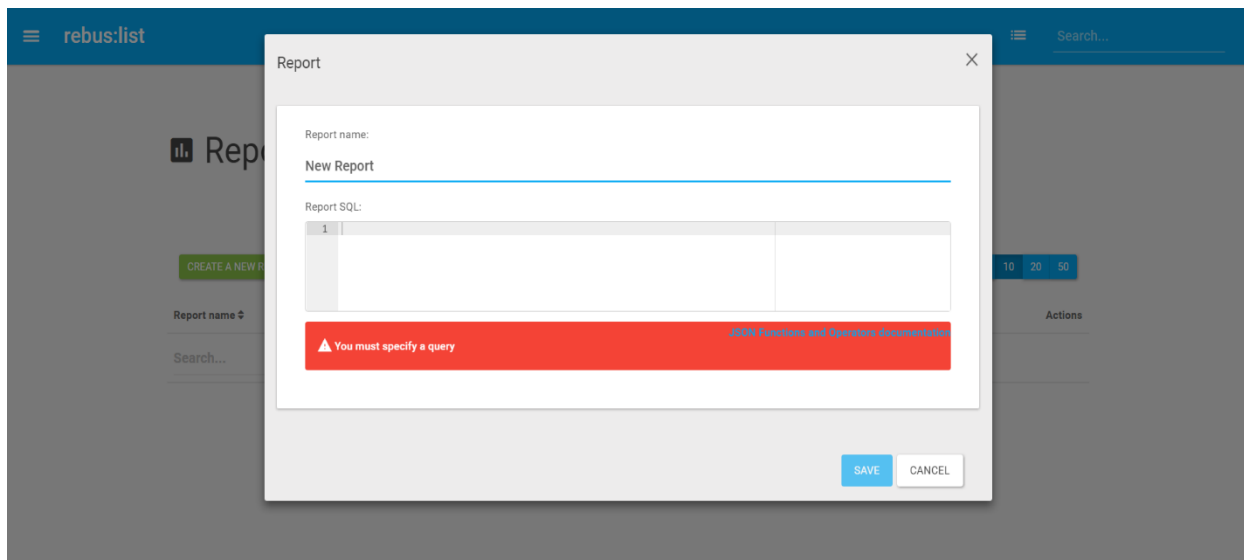
Creating a report

rebus:list runs on a PostgreSQL database. You may use any standard SQL, as well as the psql specific additions, in new reports.

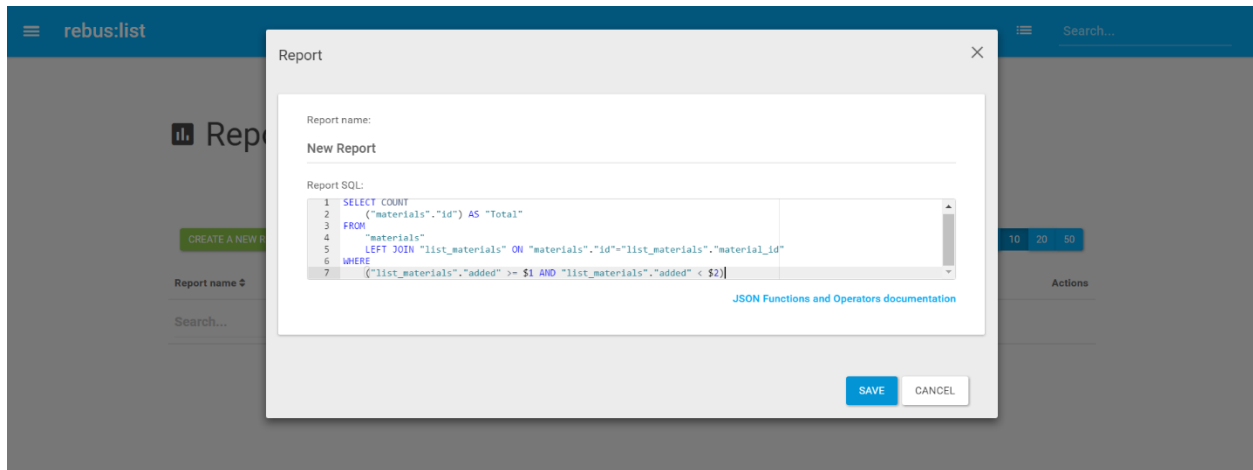
 About rebus:list	The link is available from the about rebus:list page which is linked to from the main menu
--	--



To create a new report click the Create a New Report button and you will be presented with the report builder box.



You must enter a name for the report and then enter the query before you can save your report



rebus:list will not allow you to save an invalid query as a report and will instead give an error that provides information about its location.



Clicking save will save your report ready for it to be run. We understand that not all customers will wish to create sql reports from scratch so we have created a report library that contains canned reports for some of the more commonly needed data. Reports from the library can be cut and pasted directly into the report builder:

<https://ptfs-europe.github.io/rebus-list/reports/>

If you are using a report from the library please pay attention to the attached notes as they will keep you informed of any extra variables that need to be entered and what format they need to be in.



In this example report from the report library you can see that the report will ask you to enter dates as separate variables. It also specifies the format they should be in.

When you run this report within rebus:list you will see the screen below that allows you to add the required parameters for the report to run.

Query parameters

```
SELECT COUNT ("materials"."id") AS "Total" FROM "materials" LEFT JOIN "list_materials" ON
"materials"."id"="list_materials"."material_id" WHERE ("list_materials"."added" >= $1 AND "list_materials"."added" < $2)
```

\$1 Fill in value

⚠ You must provide a value for the "\$1" parameter

\$2 Fill in value

⚠ You must provide a value for the "\$2" parameter

RUN QUERY CLOSE

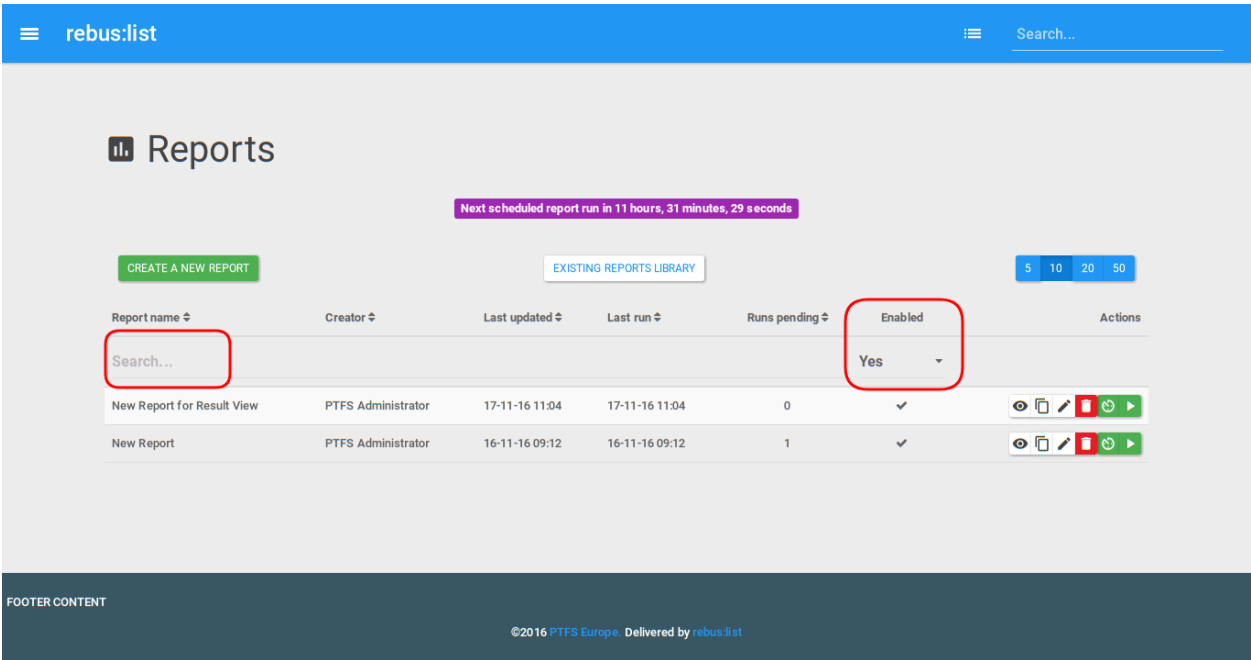
Note. It is important to get the format of the data for these parameters right as you are running a direct query on the database and the use of variables will allow you to enter a malformed query. Doing this will make the report fail.

Working with Reports

Once a report has been created it becomes available on the Reports list and it is from here that you will work with it.

- Report Name - The name provided in the report builder
- Creator - The username of the report creator
- Last Updated - The date that the report was last edited
- Last Run - The date the report was last run
- Runs pending - This shows requested reports that haven't yet completed
- Enabled - This shows the reports current running status
- Actions - The options that allow you to work with the reports

When you have written a lot of reports you can use the search function to find the relevant one. You can enter a search term and filter by Enabled / Disabled or Both.

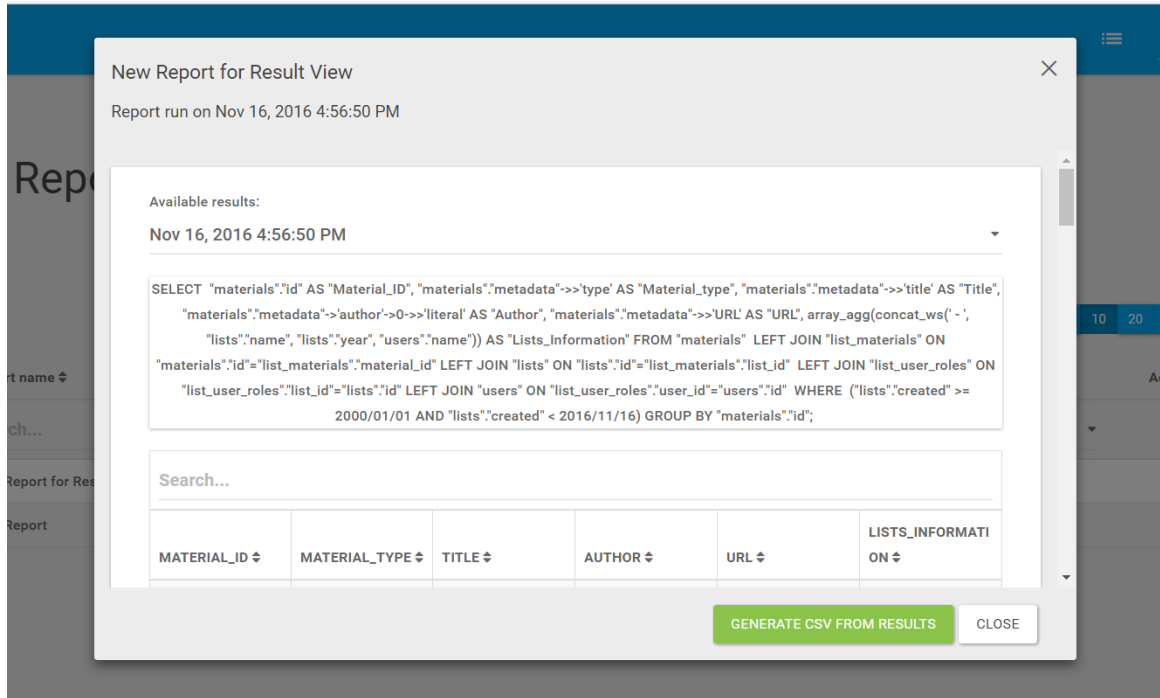


Once you have found the right report use the action buttons to work with it

	This button allows you to clone an existing report. This means you can retain the existing report whilst creating another based upon it.
	This button opens the report builder for editing the selected report.
	This button disables the report - the report is not deleted but can then be filtered out as a report that is not currently used.
	This button allows you to schedule a report - currently this will enable you to delay the running of the report until a specified system time. This is to allow you to avoid adverse effects on system performance. (See 5.1)
	This is the run button clicking this button will make the report run asap.
	Once a report has been run the eye button will appear which will allow you to view the report.

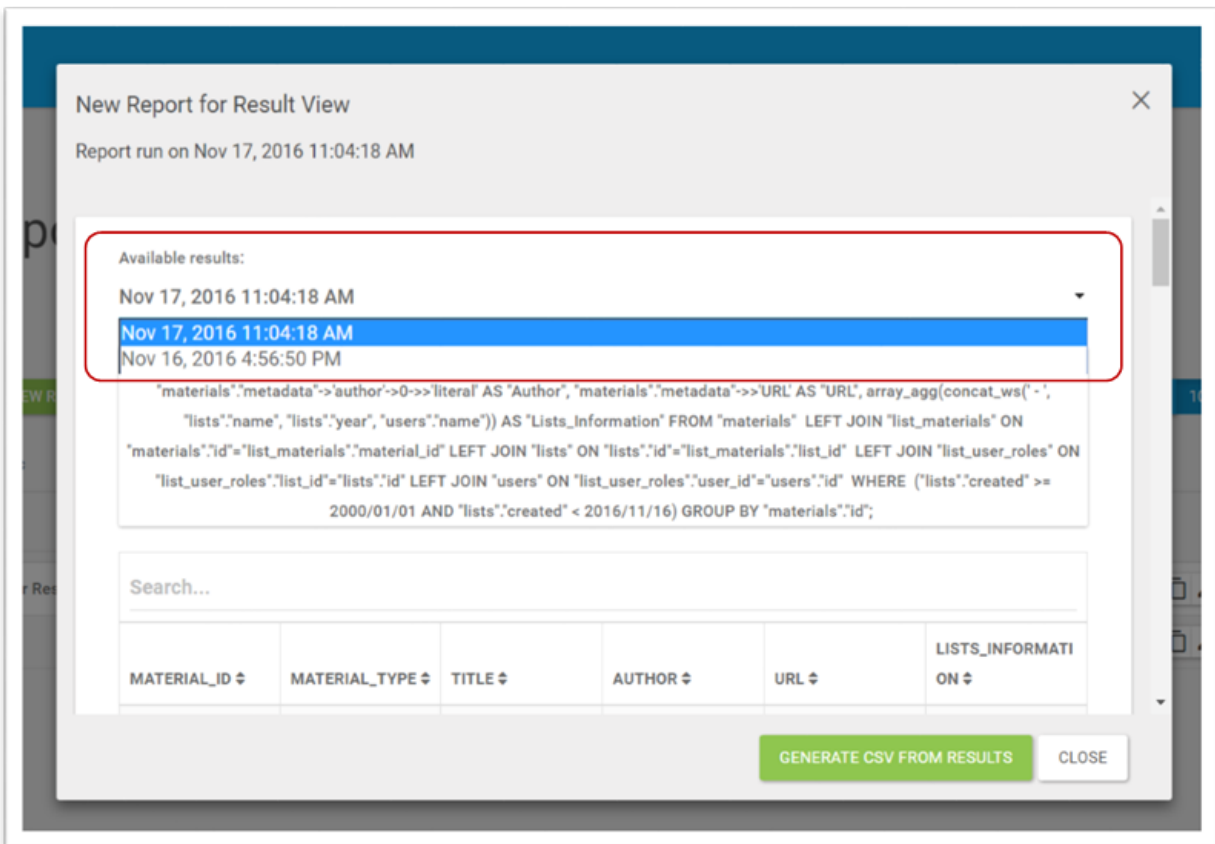
Viewing a Report

To view a report click on the eye button next to it on the reports page. Results view will open.

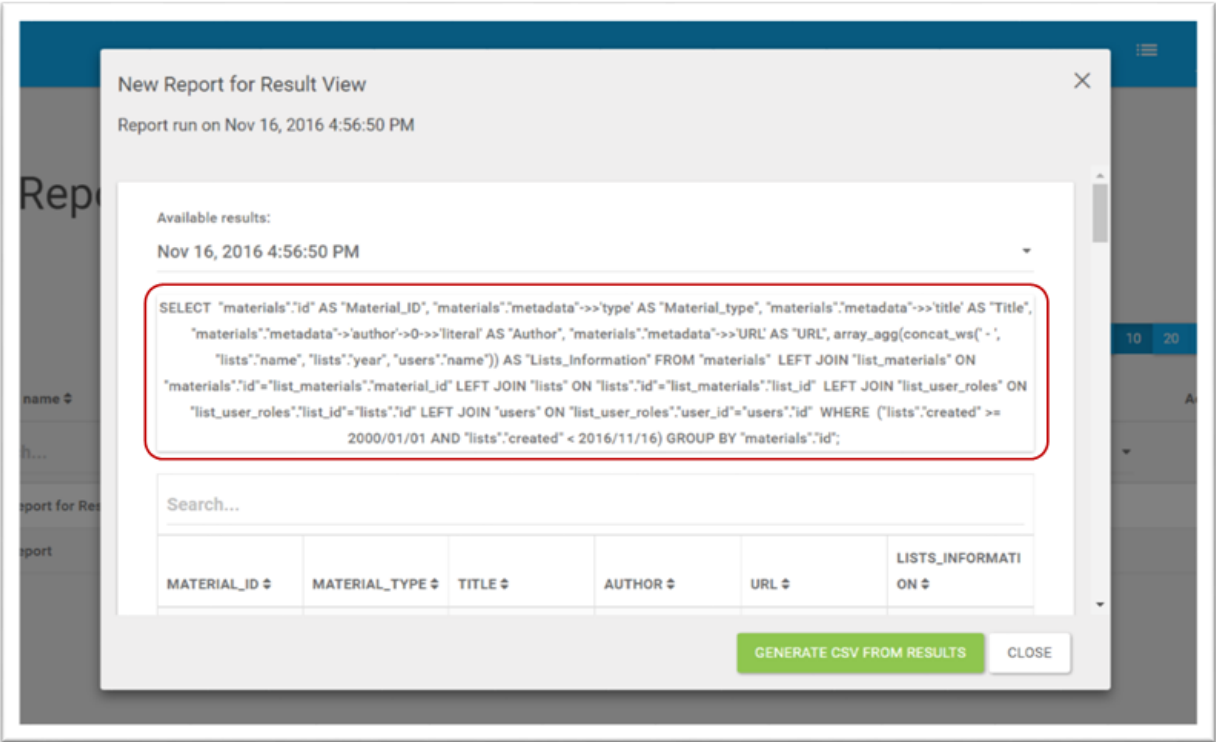


From here you can view the results for any run of the specific report you have chosen

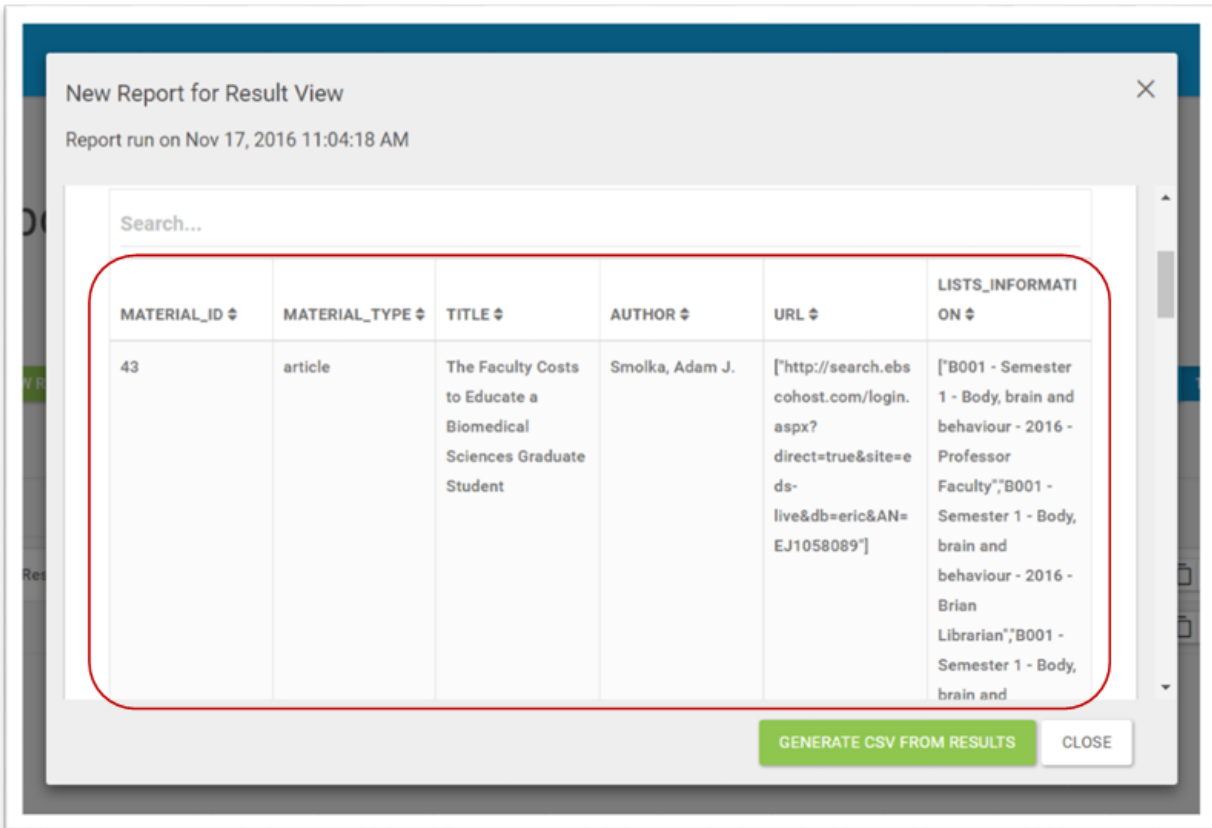
- Use the drop down to choose a specific result set



- See the query that has been run



- See a table of the results returned



- Search from within the results

New Report for Result View

Report run on Nov 17, 2016 11:04:18 AM

```
"lists"."name", "lists"."year", "users"."name")) AS "Lists_Information" FROM "materials" LEFT JOIN "list_materials" ON "materials"."id"="list_materials"."material_id" LEFT JOIN "lists" ON "lists"."id"="list_materials"."list_id" LEFT JOIN "list_user_roles" ON "list_user_roles"."list_id"="lists"."id" LEFT JOIN "users" ON "list_user_roles"."user_id"="users"."id" WHERE ("lists"."created" >= 2000/01/01 AND "lists"."created" < 2016/11/16) GROUP BY "materials"."id";
```

Szalay

MATERIAL_ID	MATERIAL_TYPE	TITLE	AUTHOR	URL	LISTS_INFORMATION
11	unknown	All that man is	Szalay, David		['The Man Booker Longlist']

GENERATE CSV FROM RESULTS

CLOSE

It’s also possible to generate and download the reports output as a csv format flat file which can then be edited in numerous other applications. To do this first click the ‘Generate CSV From Results’ then click the provided link to download the file.

GENERATE CSV FROM RESULTS

CLOSE

[Download CSV now](#)

CLOSE

Requests

Requests

5 10 20 50

Sort by: Title Requester Requested Updated Status

Search... Filter by status:

	Copy of "H031/01 - The Local Business Environment" requested by "PTFS Administrator"	Assigned to: Unassigned	Requested: Apr 24, 2017	Updated: Apr 24, 2017	Status: New	STATUS: NEW
	Copy of "Sleep." requested by "PTFS Administrator"	Assigned to: Unassigned	Requested: Apr 24, 2017	Updated: Apr 24, 2017	Status: New	STATUS: NEW
	Copy of "The Potting-Shed Papers" requested by "PTFS Administrator"	Assigned to: Unassigned	Requested: Jan 4, 2017	Updated: Apr 24, 2017	Status: New	STATUS: NEW
	Copy of "H031/01 - The Local Business Environment" requested by "Percy Librarian"	Assigned to: PTFS Administrator	Requested: Nov 17, 2016	Updated: Apr 25, 2017	Status: New	STATUS: NEW
	Copy of "Essential cell biology" requested by "Percy Librarian"	Assigned to: PTFS Administrator	Requested: Nov 3, 2016	Updated: Apr 25, 2017	Status: Fulfilled	STATUS: FULFILLED
	Copy of "WHO'S WHO." requested by "Percy Librarian"	Assigned to: PTFS Administrator	Requested: Oct 27, 2016	Updated: Apr 25, 2017	Status: Cancelled	STATUS: CANCELLED
	Copy of "Interface methods: renegotiating relations between digital social research, STS and sociology." requested by "Percy Librarian"	Assigned to: PTFS Administrator	Requested: Oct 27, 2016	Updated: Apr 25, 2017	Status: Denied	STATUS: DENIED
	Copy of "Molecular cell biology." requested by "PTFS Administrator"	Assigned to: PTFS Administrator	Requested: Sep 23, 2016	Updated: Apr 25, 2017	Status: Fulfilled	STATUS: FULFILLED
	Copy of "The Schooldays of Jesus" requested by "PTFS Administrator"	Assigned to: PTFS Administrator	Requested: Sep 23, 2016	Updated: Apr 25, 2017	Status: Fulfilled	STATUS: FULFILLED
	Copy of "Work Like Any Other" requested by "PTFS Administrator"	Assigned to: PTFS Administrator	Requested: Sep 9, 2016	Updated: Apr 25, 2017	Status: Denied	STATUS: DENIED

The **Requests** page available from the **Main menu** is where a user can access a list of *all* requests on the system. By default only unassigned requests will appear in the list and they will be ordered by time requested, oldest first. One may then deselect filters to expand the list.

Request Actions

Users may perform certain actions on requests dependant upon the request type on their role.

The re-assignment of a request to a user is available across request types, for users with the privilege to assign requests. The user will be presented with a list of users with the correct privileges to be able to *action* the request they have been assigned.

Copy Requests

The member of staff working on requests can update the status of the request. Available options are **Fulfilled**, **Cancelled** and **Denied**, allowing you to record the progression of a request.

Title ↕	Requester ↕	Request date ↕	Last updated↕	Status ↕
Search...				New ▾
H031/01 - The Local Business Environment	Percy Librarian	17-11-16 14:00	17-11-16 14:00	New ▾
				New Fulfilled Cancelled Denied

Change Requests

A change request requires **review**. This action displays the changes requested in a list and allows for accepting or denying them on a field by field basis. Once all fields are marked as reviewed then the whole request is marked as reviewed.

Once reviewed, if a material is local, the changes will be immediately applied system wide. If the material is remote, however, a task will be scheduled to fetch the updated copy from the source connector where these changes should have been acted upon.

My Requests

My requests

5 10 20 50

1 2

Sort by: Title Requester Requested Updated Status Show only: Choose

Search... Filter by status:

	Copy of "H031/01 - The Local Business Environment" requested by "PTFS Administrator"	Assigned to: Unassigned	Requested: Apr 24, 2017	Updated: Apr 24, 2017	Status: New	STATUS: NEW
	Copy of "Sleep," requested by "PTFS Administrator"	Assigned to: Unassigned	Requested: Apr 24, 2017	Updated: Apr 24, 2017	Status: New	STATUS: NEW
	Copy of "The Potting-Shed Papers" requested by "PTFS Administrator"	Assigned to: Unassigned	Requested: Jan 4, 2017	Updated: Apr 24, 2017	Status: New	STATUS: NEW
	Copy of "H031/01 - The Local Business Environment" requested by "Percy Librarian"	Assigned to: PTFS Administrator	Requested: Nov 17, 2016	Updated: Apr 25, 2017	Status: New	STATUS: NEW
	Copy of "Essential cell biology" requested by "Percy Librarian"	Assigned to: PTFS Administrator	Requested: Nov 3, 2016	Updated: Apr 25, 2017	Status: Fulfilled	STATUS: FULFILLED

The **My requests** page available from the **Main menu** is where all of the logged in users requests can be managed. From this page the user can see and action requests for which they are either the requester or assignee.

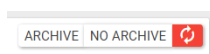
Request actions

The same set of *Request Actions* as available in the *Requests* page are available here.

Rollover

Rollover is a management function; It provides the ability to roll a list, or series of lists, into the next year by updating their *year* and *validity* metadata fields.

One can optionally keep a copy of the original list using the *archive* option. This is a feature which is especially useful for academic institutions who wish to retain historic lists as well as those changed for the new academic year.

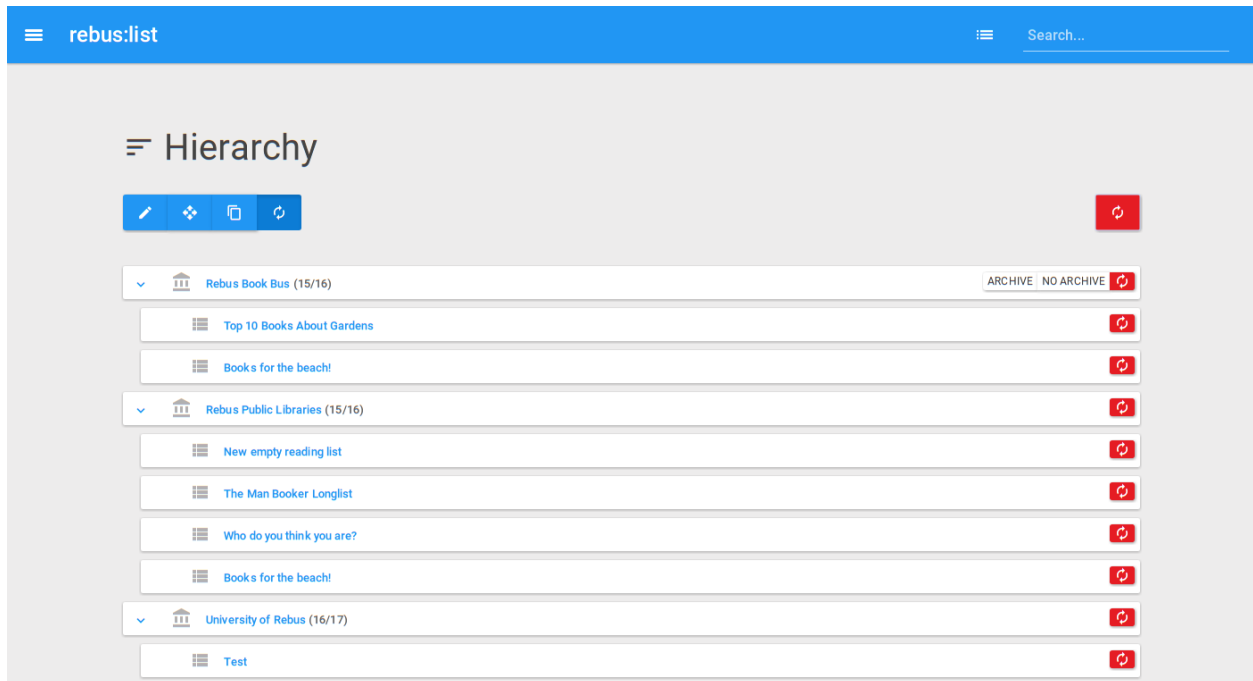


The action is **idempotent**, meaning that if you trigger it twice on the same list, within the same year, the outcome will be the same as if you only triggered it once.

rebus:list uses the *year* metadata field to identify which lists in a selection should actually be rolled over. It is assumed that if a rollover takes place in a given year, then it is the previous years lists which should be rolled over.

Hierarchical structure

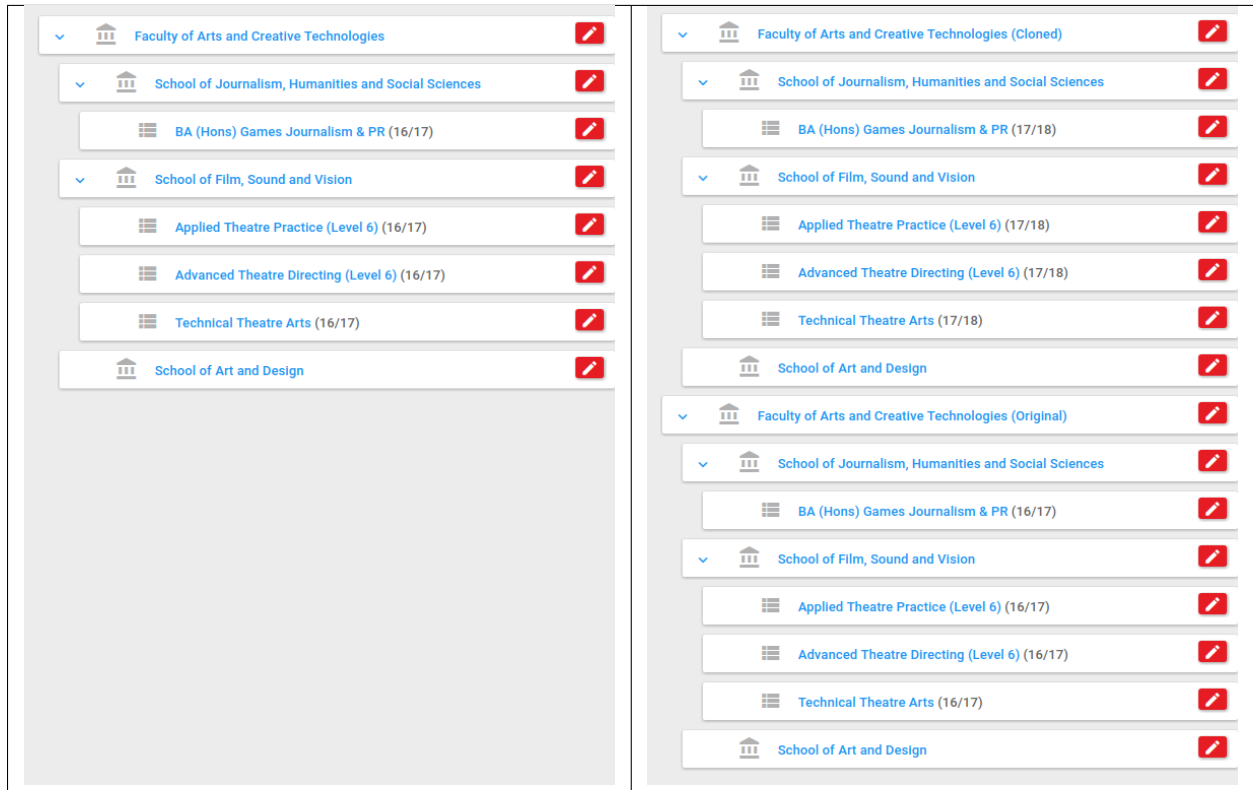
If you have a hierarchical structure then you have a number of rollover strategies at your disposal. You should find the **Rollover** and **Clone** tabs available to you on the **Hierarchy** page; assuming your user has the required privileges.



One may select individual **lists** or whole **units** for **clone** and **rollover** on these tabs. Whilst an action is being undertaken, the hierarchy will become locked; this is to allow for inheritance calculations taking place in the background.

Outlined below are the four most commonly used strategies

Clone and Rollover (Manual archive)



This strategy allows one to archive lists off into their own tree in the hierarchy and create a new set of lists with the new lists having taking a new ID (and thus a new deep link).

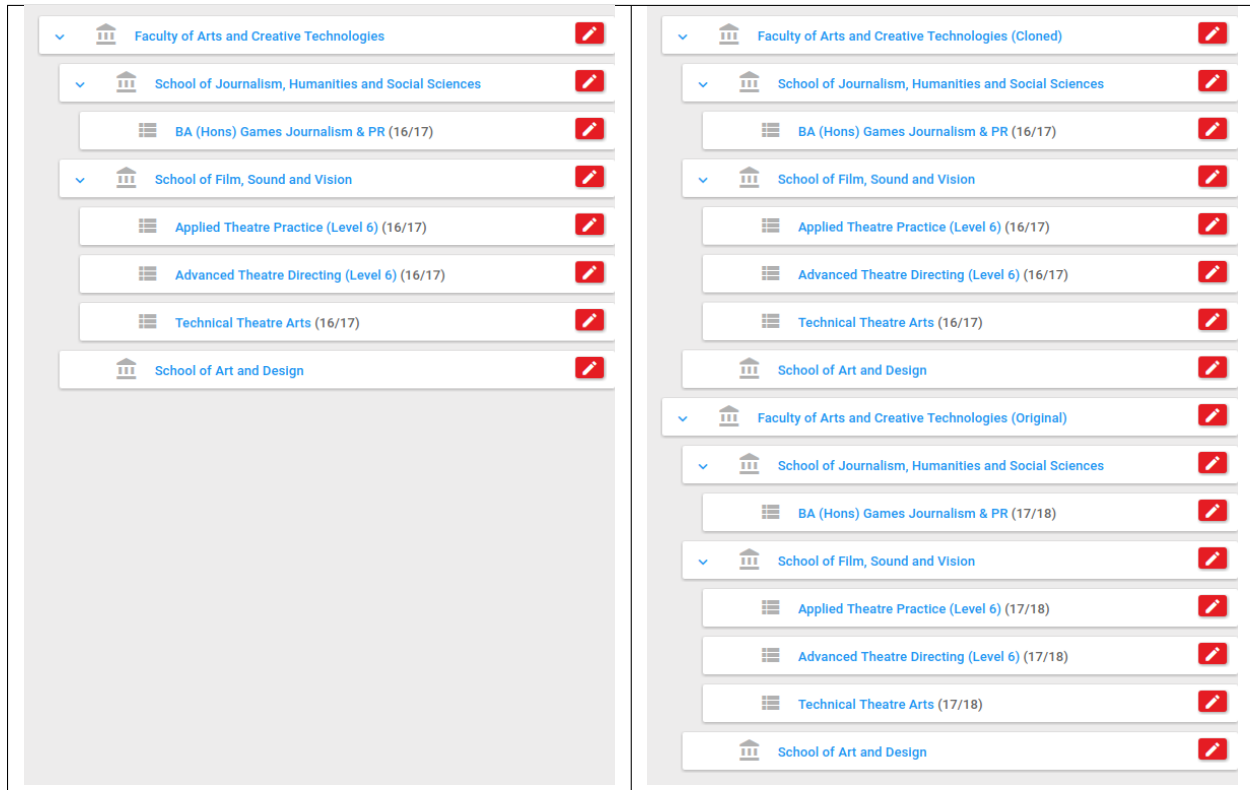
Step 1

From the **clone** tab, select and clone the part of the tree you wish to rollover.

Step 2

From the **rollover** tab, select the newly cloned tree for rollover and choose the ‘No archive’ option.

Rollover and Clone (Manual archive)



This strategy allows one to archive lists off into their own tree in the hierarchy and create a new set of lists with the new lists taking on the ID's (and thus deep links) of the prior years lists.

Step 1

From the **clone** tab, select and clone the part of the tree you wish to rollover.

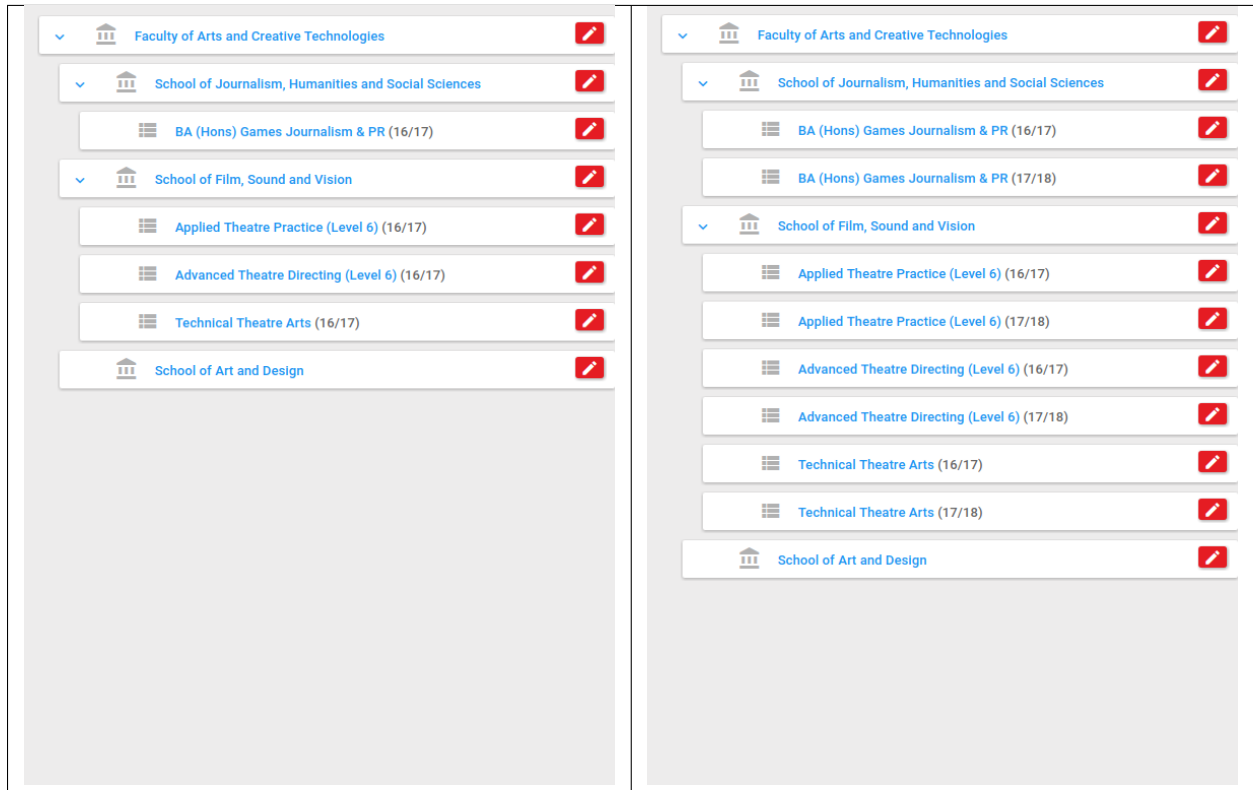
Step 2

From the **rollover** tab, select the original tree for rollover and choose the 'No archive' option.

Step 3

From the **modify** tab, select the newly clone tree and rename as appropriate.

Rollover (Automatic Archive)

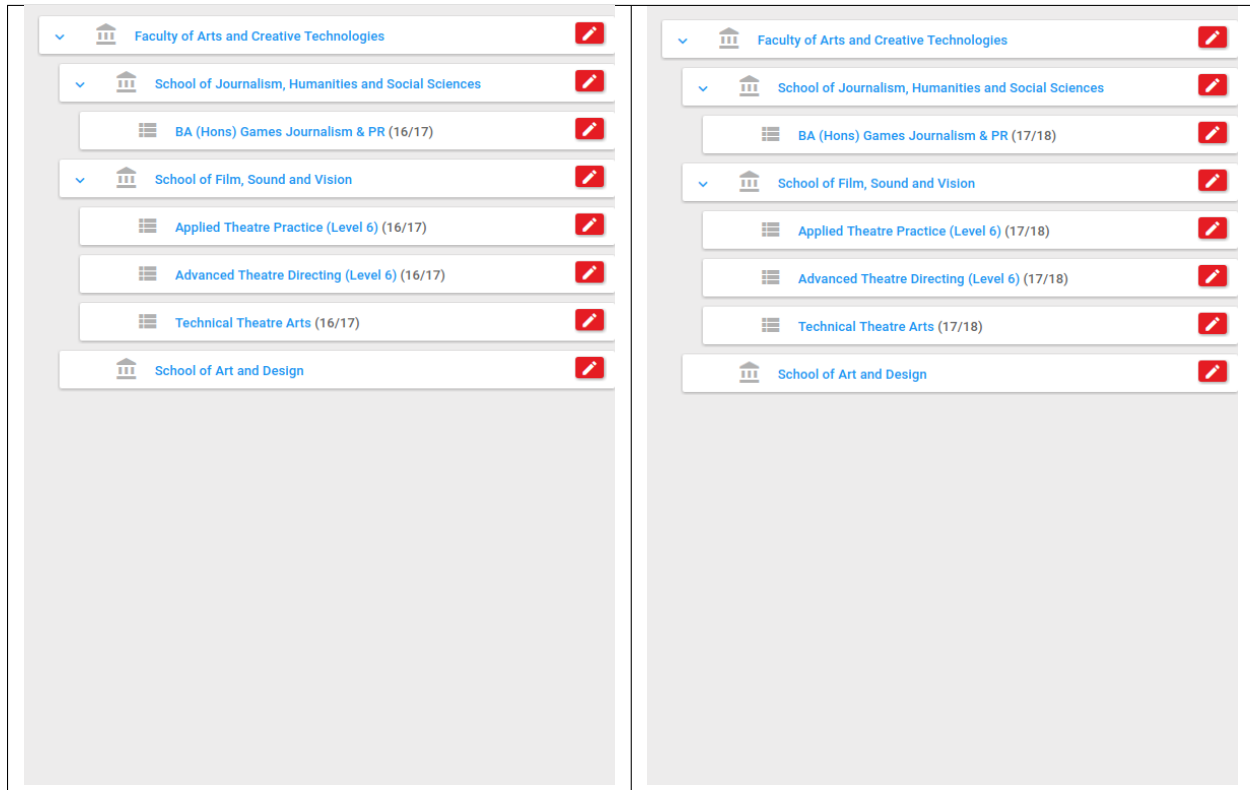


This strategy allows one to build an interleaved structure with archived lists appearing next to their current counterpart within the same tree.

Method

From the **rollover** tab, select the part of the tree you wish to rollover and choose the 'Archive' option.

Rollover (No Archive)



Finally, this strategy allows one to simply migrate lists from one year to the next without any form of archive.

Method

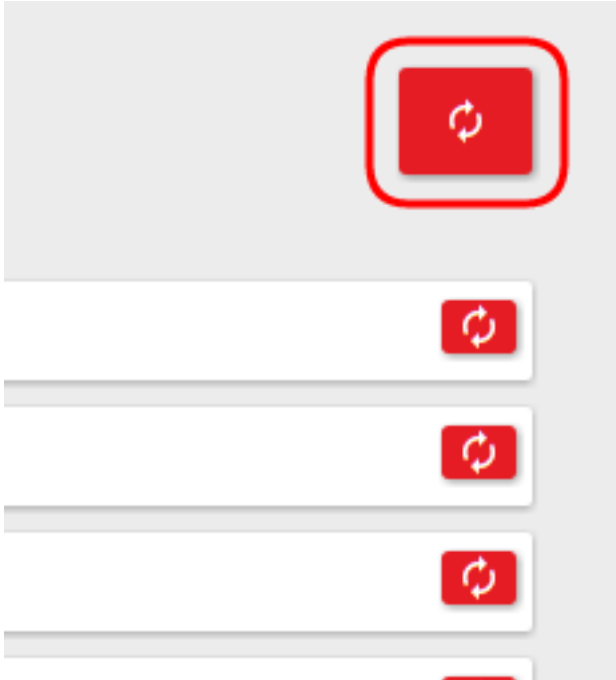
From the **rollover** tab, select the part of the tree you wish to rollover and choose the ‘No archive’ option.

Rolling over all lists

Hierarchy structure customers

Initiating a rollover process will rollover all lists on the system that are eligible.

Users with the required permissions are presented with a “Rollover all lists” option above the main hierarchy display.



Clicking this button will present you with the two options, Archive / No archive as detailed above. Choosing one of these options will initiate the rollover process.

Flat structure customers

Initiating a rollover process will rollover all lists on the system that are eligible.

Users with the required permissions are presented with a “Rollover all lists” option at the bottom of the “About rebus:list” page.



Clicking this button will present you with the two options, Archive / No archive as detailed above. Choosing one of these options will initiate the rollover process.

Appendix A - Material Tags

Item tags

This is a list of all the item related tags available for templates:

- `<item-web-link></item-web-link>`: the URL of a web item (web page added to list)
- `<item-fulltext-link></item-fulltext-link>`: the URL of the full text of an item
- `<item-lms-link></item-lms-link>`: the URL of the LMS / Discovery service entry for an item

CSL Tags

This is a list of all the CSL tags available for templates:

- `<csl-abstract></csl-abstract>`
- `<csl-accessed></csl-accessed>`
- `<csl-annotate></csl-annotate>`
- `<csl-archive></csl-archive>`
- `<csl-archive_location></csl-archive_location>`
- `<csl-archive-place></csl-archive-place>`
- `<csl-author></csl-author>`
- `<csl-authority></csl-authority>`
- `<csl-call-number></csl-call-number>`
- `<csl-chapter-number></csl-chapter-number>`
- `<csl-citation-label></csl-citation-label>`
- `<csl-citation-number></csl-citation-number>`
- `<csl-collection-editor></csl-collection-editor>`
- `<csl-collection-number></csl-collection-number>`
- `<csl-collection-title></csl-collection-title>`
- `<csl-composer></csl-composer>`
- `<csl-container></csl-container>`
- `<csl-container-author></csl-container-author>`
- `<csl-container-title></csl-container-title>`
- `<csl-container-title-short></csl-container-title-short>`
- `<csl-dimensions></csl-dimensions>`
- `<csl-director></csl-director>`
- `<csl-doi></csl-doi>`
- `<csl-editor></csl-editor>`
- `<csl-editorial-director></csl-editorial-director>`
- `<csl-edition></csl-edition>`
- `<csl-event></csl-event>`
- `<csl-event-date></csl-event-date>`
- `<csl-event-place></csl-event-place>`
- `<csl-first-reference-note-number></csl-first-reference-note-number>`
- `<csl-genre></csl-genre>`
- `<csl-id></csl-id>`
- `<csl-illustrator></csl-illustrator>`
- `<csl-interviewer></csl-interviewer>`

- `<csl-isbn></csl-isbn>`
- `<csl-issn></csl-issn>`
- `<csl-issue></csl-issue>`
- `<csl-issued></csl-issued>`
- `<csl-jurisdiction></csl-jurisdiction>`
- `<csl-keyword></csl-keyword>`
- `<csl-language></csl-language>`
- `<csl-locator></csl-locator>`
- `<csl-medium></csl-medium>`
- `<csl-note></csl-note>`
- `<csl-number></csl-number>`
- `<csl-number-of-pages></csl-number-of-pages>`
- `<csl-number-of-volumes></csl-number-of-volumes>`
- `<csl-original-author></csl-original-author>`
- `<csl-original-date></csl-original-date>`
- `<csl-original-publisher></csl-original-publisher>`
- `<csl-original-publisher-place></csl-original-publisher-place>`
- `<csl-original-title></csl-original-title>`
- `<csl-page></csl-page>`
- `<csl-page-first></csl-page-first>`
- `<csl-page-last></csl-page-last>`
- `<csl-pmcid></csl-pmcid>`
- `<csl-pmid></csl-pmid>`
- `<csl-publisher></csl-publisher>`
- `<csl-publisher-place></csl-publisher-place>`
- `<csl-recipient></csl-recipient>`
- `<csl-references></csl-references>`
- `<csl-reviewed-author></csl-reviewed-author>`
- `<csl-reviewed-title></csl-reviewed-title>`
- `<csl-scale></csl-scale>`
- `<csl-section></csl-section>`
- `<csl-source></csl-source>`
- `<csl-status></csl-status>`
- `<csl-submitted></csl-submitted>`
- `<csl-title></csl-title>`
- `<csl-title-short></csl-title-short>`

- `<csl-translator></csl-translator>`
- `<csl-url></csl-url>`
- `<csl-type></csl-type>`
- `<csl-version></csl-version>`
- `<csl-volume></csl-volume>`
- `<csl-year-suffix></csl-year-suffix>`

Appendix B - Privileges

This is a list of the available privileges and their descriptions

System privileges

Taxon privileges

Privilege	Description
config-read	Read the full config block
config-update	Update any configuration values
unit-create	Create a taxon of type 'unit'
unit-read	View a taxon of type 'unit'
unit-update	Update a taxon of type 'unit' (Header Record)
unit-delete	Delete a taxon of type 'unit'
unit-move	Position a taxon of type 'unit' in the hierarchy
unit-hide	Hide/Unhide a taxon of type 'unit'
unit-clone	Clone a taxon of type 'unit'
unit-rollover	Rollover a taxon of type 'unit'
unit-assign	Assign a unit 'role' to a 'user' on a taxon of type 'unit'
list-create	Create a taxon of type 'list'
list-read	View a taxon of type 'list'
list-update	Update a taxon of type 'list' (Header Record)
list-delete	Delete a taxon of type 'list'
list-move	Position a taxon of type 'list' in the hierarchy
list-hide	Hide/Unhide a taxon of type 'list'
list-clone	Clone a taxon of type 'list'
list-rollover	Rollover a taxon of type 'list'
list-assign	Assign a list 'role' to a 'user' on a taxon of type 'list'
buffer-create	Start a 'list draft'
buffer-read	View a 'list draft'
buffer-update	Alter a 'list draft'
buffer-submit	Submit a 'list draft' to become a 'list'
buffer-accept	Accept a 'list draft' (and update 'list')
buffer-deny	Deny a 'list draft' (and feedback why)
sublist-create	Create a taxon of type 'sublist'
sublist-delete	Delete a taxon of type 'sublist'
material-create	Create new 'manual' material
material-read	Read materials
material-update	Update 'manual' material
material-delete	Delete 'manual' material
Continued on next page	

Table 1.1 – continued from previous page

Privilege	Description
material-tag	Assign a ‘global’ tag to a material
material-rate	Rate a ‘list’ material
privilege-read	
report-create	Create a report
report-read	View a report results
report-update	Edit a report
report-delete	Delete a report
report-run	Run a report ‘Now’
report-schedule	Schedule a report to run
report-clone	Clone a report
responsibility-create	
responsibility-read	
responsibility-update	
responsibility-delete	
responsibility-assign	
request-create	Create a request
request-read	View a request
request-update	Update a request
request-delete	Delete a request
usertype-create	Create a usertype
usertype-read	View a usertype
usertype-update	Update a usertype
usertype-delete	Delete a usertype
usertype-assign	Assign a ‘privilege’ or ‘responsibility’ to a usertype
role-create	Create a list role
role-read	View a list role
role-update	Update a list role
role-delete	Delete a list role
role-assign	Assign ‘privilege’ to a list role
tag-create	Create a tag
tag-read	View a tag
tag-update	Update a tag
tag-delete	Delete a tag
user-create	Create a user
user-read	View a user
user-update	Update a user
user-delete	Delete a user
user-assign	Assign a ‘usertype’ to a user

Indices and tables

- [genindex](#)
- [modindex](#)
- [search](#)