Adding, Editing, and Assigning Notes in Holdings Management

Notes are a valuable tool for providing additional information to your users about your holdings. Notes are assigned to specific Titles, Packages, Vendors, or at the Root level for all items in your collection.

To create a Note click on **Manage Your Notes** from the **Overview** screen.

From the main Notes page all of your previously created Notes will display. You can click on a Note to edit the settings or assignments or click **New Note** to create a new note.

The following fields are available for customizing your Notes.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note Name</strong></td>
<td>This is the name of your note which you can use when searching for a note to assign to your holdings.</td>
</tr>
<tr>
<td><strong>Rank</strong></td>
<td>The rank determines the order the notes will display, if multiple notes are assigned to your holdings.</td>
</tr>
<tr>
<td><strong>Note Text</strong></td>
<td>The note text is the information you would like to display for your users in Publication Finder.</td>
</tr>
<tr>
<td><strong>Display Settings</strong></td>
<td>Display settings control whether a note displays in <em>Full Text Finder</em> (your link resolver menu) or <em>Publication Finder</em> (the search interface for locating holdings). The default setting is to display in both. There is also an option to <strong>Show to unauthenticated users</strong>. If toggled to “Yes”, users accessing via Guest Access will be able to see the note. “No” is the default setting.</td>
</tr>
<tr>
<td><strong>Icon Settings</strong></td>
<td>Icons can be assigned to notes to assist users in understanding the information. You can select from the Icon library or enter the URL of a locally hosted icon you would like to display. Icons must be no larger than 18px.</td>
</tr>
</tbody>
</table>

**Assigning Notes**

**Managing assignments from the Title/Package/Vendor page**


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Notes can be assigned from either the Title, Package, or Vendor page, depending on the level at which you would like the Note to display. Note: The instructions below for assigning at the Vendor level can be replicated using the Titles or Packages options.

1. Use the **Vendor** tab and searching for a specific vendor (i.e. Sage, JSTOR, ProQuest).
2. Click the Vendor name from the search results.
3. Click the **Notes** tab under the Vendor information.
4. Locate an existing Note available in your library by selecting **Show: Notes not assigned to this Vendor**.
5. For any of the displayed notes click the gray **Not Assigned** button. The button will turn green and display **Assigned**.
6. The Links tab will immediately update with number of Notes assigned to that Vendor.

**Managing assignment from Note edit page**

You can also manage your Notes directly from the Notes page. This is helpful if you are creating a new note as you can create the note and then search for, and assign, holdings to the note without leaving the Notes area.

From the **Notes** page available via the sub-tab under the main EBSCOadmin or the **Manage Your Notes** quick link on the **Overview** screen:

1. Select a Note from your list of available Notes.
2. To the right of the Details tab you will see Titles/Packages/Vendors/Root and the number of each item that the note is assigned to, or a (0). Click the assignment level you are selecting for the note assignment.
3. The default display is all of the items already assigned at that level.
4. Select **Find Vendors to Assign**.
5. Search by the vendor name and from the result list click the gray **Not Assigned** button. The button will turn green and display **Assigned**.

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