NILDE

Network Inter-Library Document Exchange

End User Manual

2021

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CREDITS

First version of Nilde 4.0 User Manual: November 2010
Edited by Elisa Buzzetti, Jessica Palmieri e Silvana Mangiaracina, with the collaboration of Diego Malipiero, Alessandro Tugnoli and Silverio Giancristofaro (National Research Council, Bologna Research Area Library).
Second revision of NILDE 4.0 User Manual: April 2012
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Revision of NILDE 5.0 User Manual: January 2017
Revision and readapted for the new web portal by Carmen Ingrid Di Nunno, Cristina Morroni, Federica Nieri, Ornella Russo e Silvana Mangiaracina (National Research Council, Bologna Research Area Library).
Revision of NILDE 5.0 User Manual: September 2019
Revision and editing by Giovanna Colombo (Como Science Library, Insubria University), Loriana Maimone Ansaldo Patti (Library Services, Messina University), Gabriela Carrara (National Research Council, Bologna Research Area Library).
English translation of NILDE 5.0 User Manual: Settembre 2019
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Revision of NILDE 5.0 End Users Manual: December 2019
Revision and update of the End Users manual by Debora Mazza, Gabriela Carrara, Alessandro Tugnoli and Silvana Mangiaracina (National Research Council, Bologna Research Area Library).
Creation of the printable .pdf version of the NILDE 5.0 User manual and of the End Users manual: December 2020
Editing, correction and check by Gabriela Carrara, Silvana Mangiaracina e Debora Mazza (National Research Council, Bologna Research Area Library), Giovanna Colombo (Como Science Library, Insubria University), Loriana Maimone Ansaldo Patti (Library Services, Messina University).
English translation of End Users Manual NILDE 5.0: June 2021
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Spanish translation of End Users Manual NILDE 5.0: July 2021
Carmen Lomba Gutiérrez (Cantabria University Library, Spain). Editing, correction and check by Giovanna Colombo (Como Science Library, Insubria University) and Gabriela Carrara (National Research Council, Bologna Research Area Library).

Abstract

This manual is expressly dedicated to users of libraries that adopt the NILDE software.

NILDE Network Inter-Library Document Exchange - 2020 Biblioteca D'Area del CNR di Bologna.

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1 What is NILDE Users

NILDE (Network for Inter-Library Document Exchange) is a web software for document delivery service between libraries. Over time, a network of libraries (NILDE Community) has grown, willing to share their bibliographic resources in a spirit of collaboration, in order to provide their users with a quality service of document retrieval by using the NILDE software. **Within the NILDE community, libraries exchange documents almost always free of charge, in compliance with copyright law and licensing agreements with publishers.**

At present date, about 900 libraries belonging to different nations, institutions and disciplinary fields are part of the NILDE Network, to which almost 70,000 users including researchers, teachers, students, freelancers or ordinary citizens belong. The reference website of the NILDE community of libraries and users is: https://nildeworld.bo.cnr.it/

NILDE users

NILDE users is the software interface dedicated to library users.

NILDE users offers:

- **Management of your own bibliography**
- **Request of Document Delivery (DD) service to your library**
- **Institutional authentication through the Italian Federation IDEM-GARR** (`https://www.idem.garr.it/`)

In order to use NILDE, users must first request registration and be enabled for the service at one of the libraries of the NILDE network, the list of which is available here:
https://nildeworld.bo.cnr.it/en/content/libraries

NILDE users is the software interface dedicated to library users.

2 User Registration

If a user wants to send DD requests to the library he refers to, he must have a NILDE account. To create an account, click on **Register to the NILDE service of your Library**, as shown in figure 1.

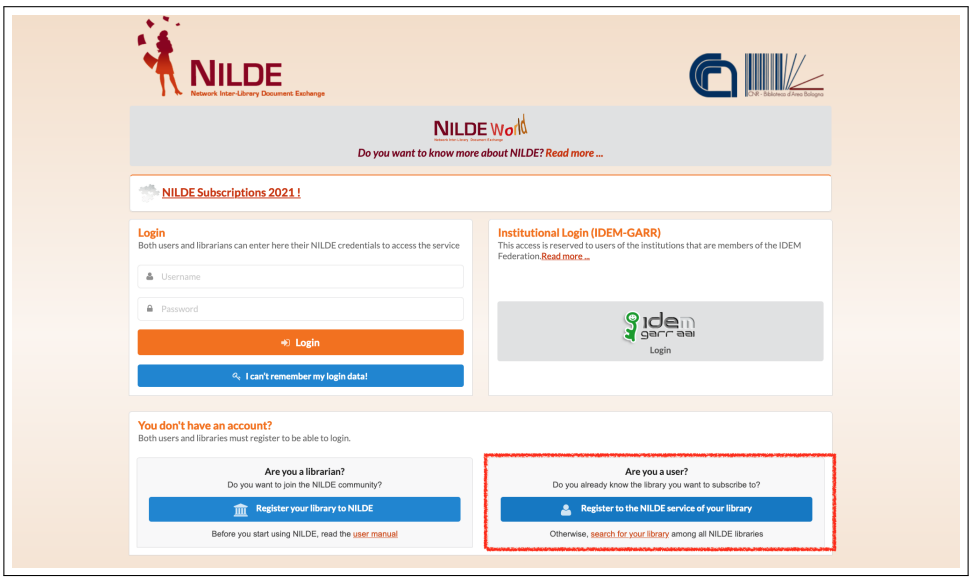

Figure 1: NILDE login page with the highlighted registration box for new users

There are two kinds of registration:

- the creation of a traditional account, with credentials provided by NILDE system
- the creation of an institutional account using IDEM-GARR credentials

During the registration, the user is asked if he has got an institutional IDEM-Garr account; the system will guide the user in creating an account, depending on the answer.
If the selection is **Yes**, an institutional account will be created.
If the selection is **No**, a traditional account will be created.

2.1 Registration - Traditional account

The registration of a traditional user consists of 4 steps:

1. Clicking on No, the user will have to choose Username and Password of the account in order to login

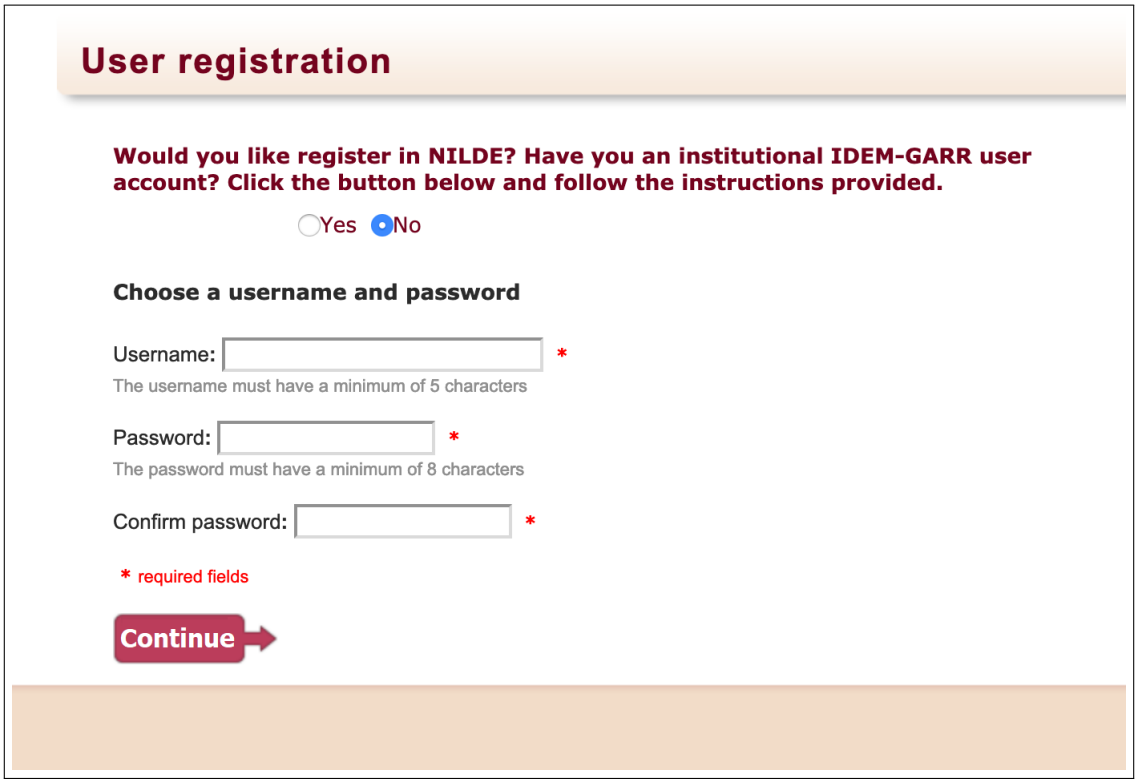

Figure 2: Registration of a traditional user without IDEM-GARR institutional account: form to fill in with username and password

2. In the second step, the user will select the library he refers to, browsing by city, Institution or keyword;

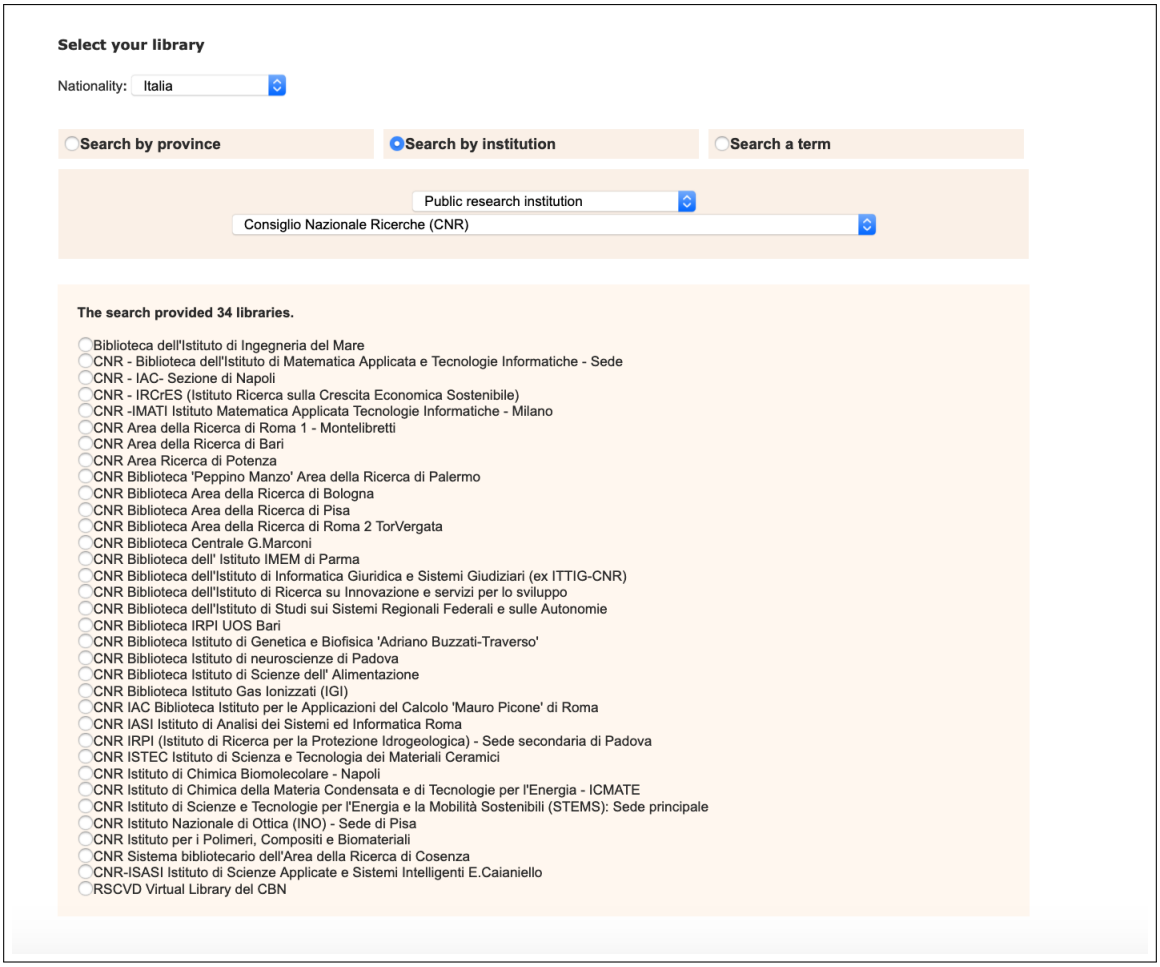

Figure 3: User registration: selection of the library. In the figure, a list of libraries searched by Institution.

3. Fill in the form with personal details. Fields with * are mandatory.

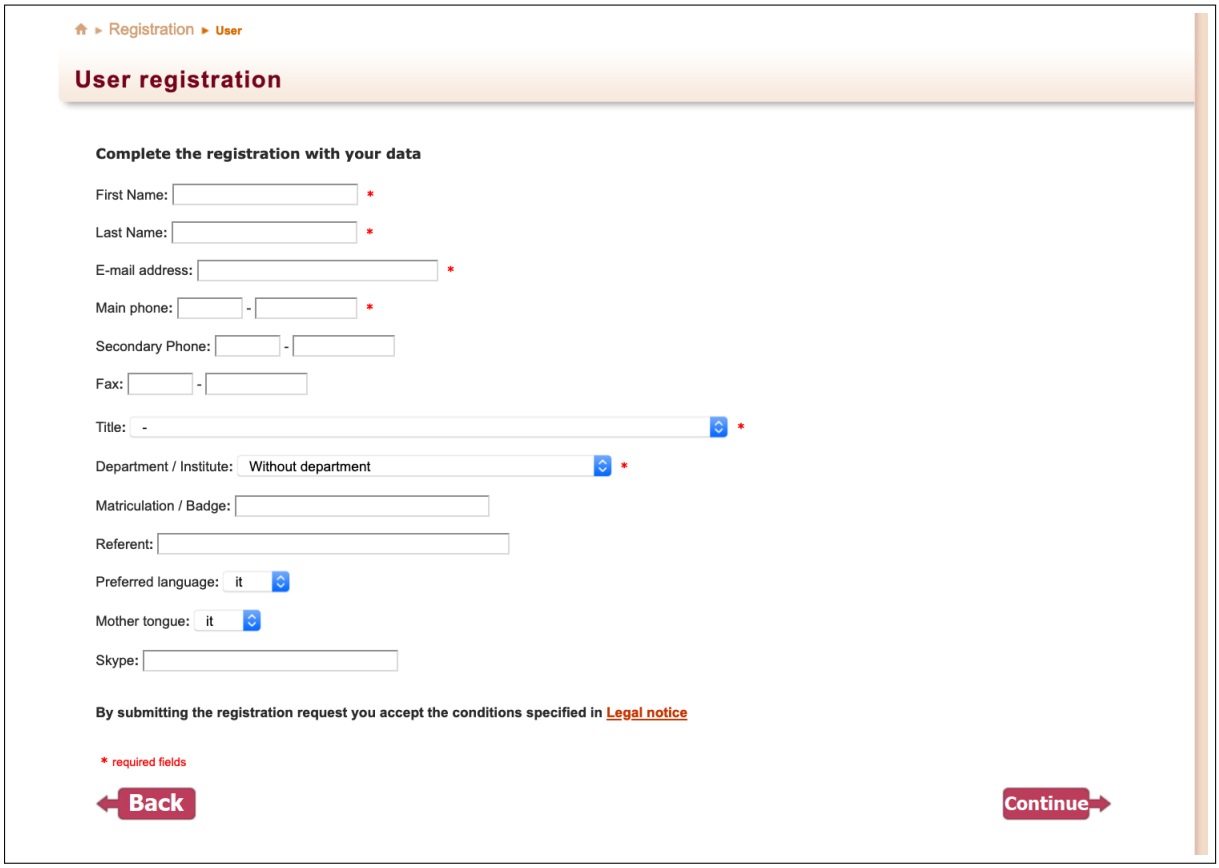

Figure 4: User registration: form with personal data

4. In the last window of the registration, a summary of the information indicated during the process will appear.

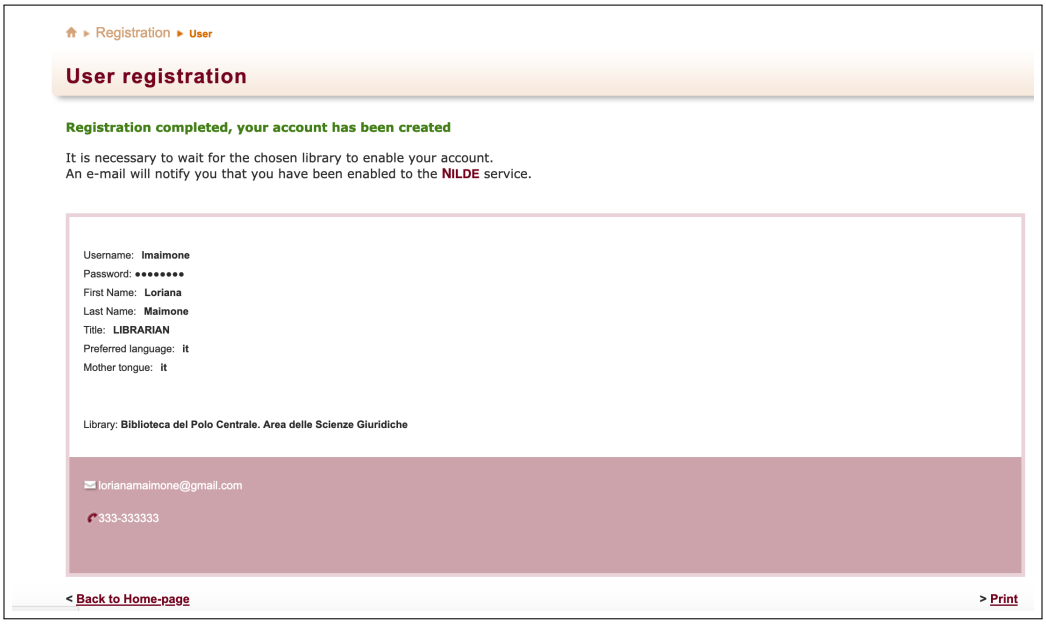

Figure 5: User registration: summary of the information (end of registration)

If the registration has been successful, the system sends an email to the user, but he will not be able to use the account until the library has enabled him. As far as the library has enabled the user account, the system will send another email to confirm the activation of the account.

2.2 Registration - Institutional account with IDEM-GARR credentials

The registration process with IDEM-GARR credentials is different.

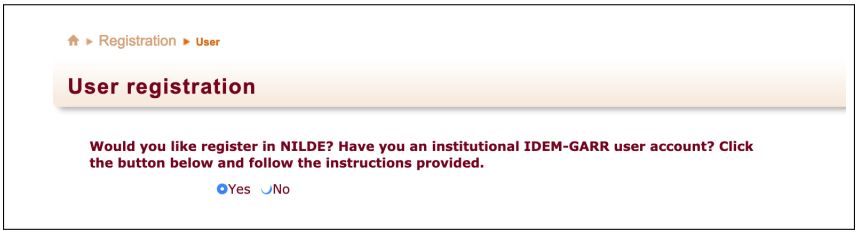

Figure 6: Registration panel for an IDEM-GARR institutional account.

In fig.7, it is possible to see the options to select.

Figure 7: Option to select for an IDEM-GARR institutional account

The user must select **Yes** if he has got institutional credentials supplied by one of the Institutions belonging to **IDEM-GARR** federation (**IDEM** is the Italian national federation for Universities and research Institutions for authentication and authorization; for more details, go to https://www.idem.garr.it/). The system redirects automatically to IDEM WAYF Service ("Where Are You From Service"), where the user can select his Institution (as in fig. 8) and then set his credentials in the Identity Provider (see fig. 9).

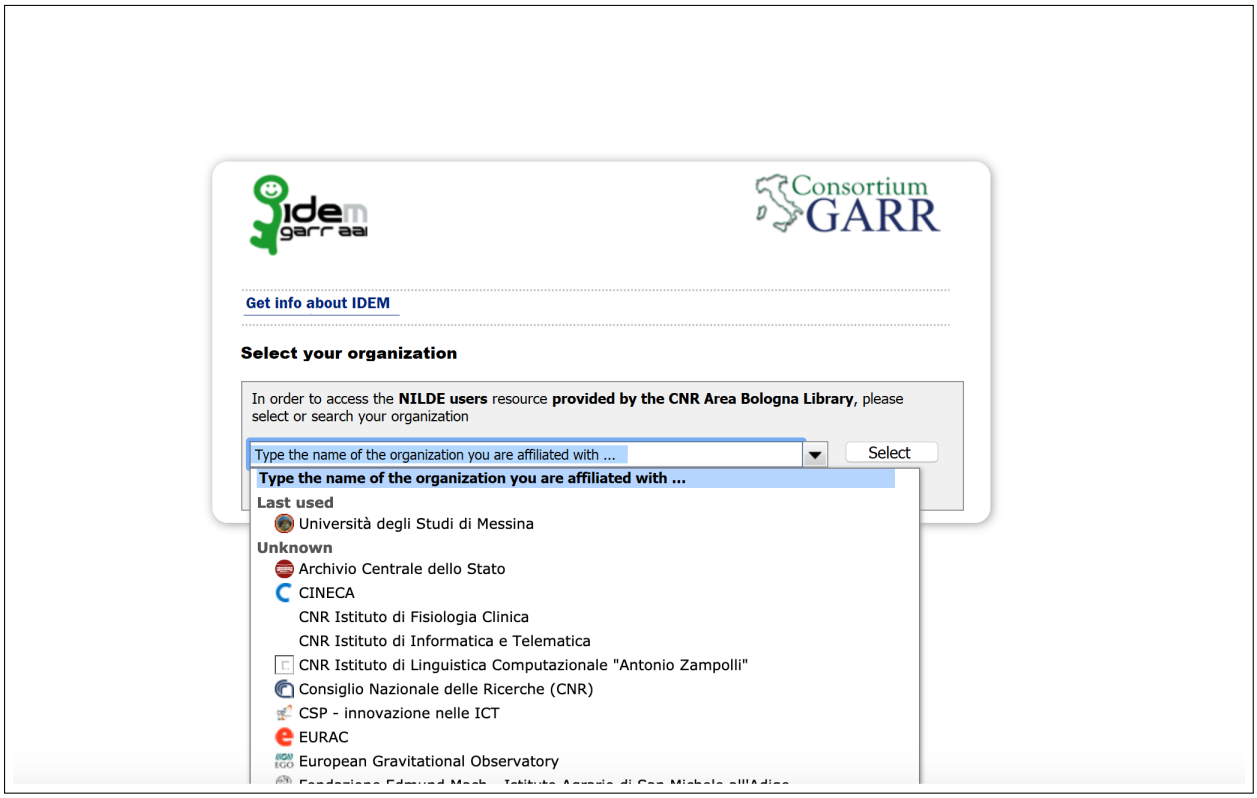

Figure 8: Registration of a user with an institutional account: redirection to IDEM WAYF Service and selection of the Institution

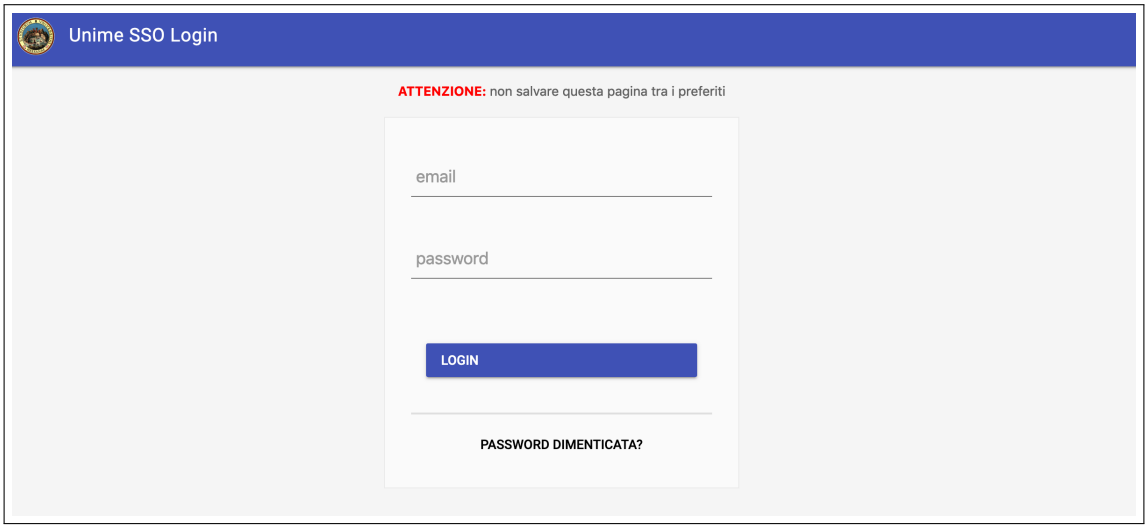

Figure 9: Insert the credentials in the Identity Provider. In this figure, the Institution selected is the University of Messina.

The system turns back to NILDE. If the user has never registered to NILDE, it is sufficient clicking on the **Registration** button and fill in the requested fields. If the user has got a previous NILDE traditional account (with credentials supplied by NILDE), he can update his account, making the "migration".

Figure 10: User registration with an institutional account, after the authentication on the Identity Provider of the Institution.

Then, the system will show a list of the libraries belonging to the Institution selected before and the user will be able to select the library which he wants to register to.

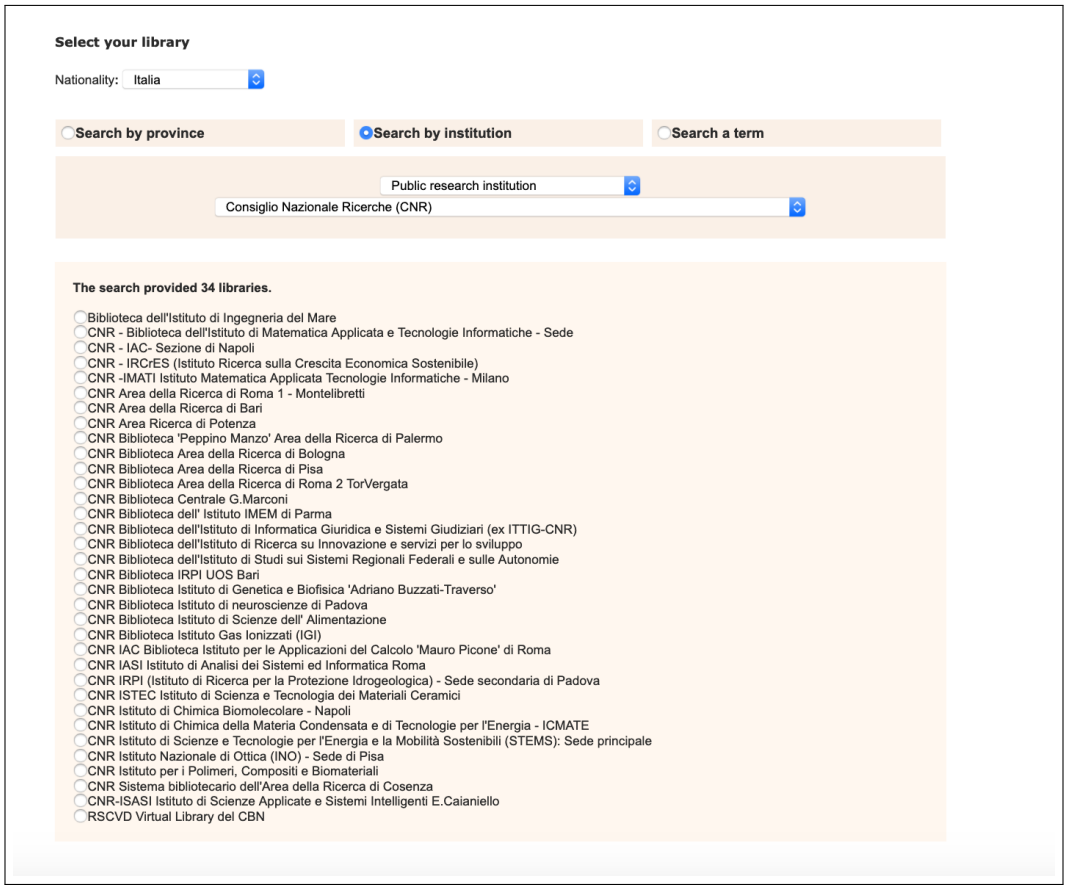

Figure 11: User registration with an institutional account: selection of the library which the user wants to register to. The list shows only libraries belonging to the Institution.

Then, the user will have to fill in the form with personal details (as shown in fig. 4. The fields with * are mandatory). Finally, a summary of the information indicated during the process will appear (see fig. 5). If the registration has been successful, the system sends an email to the user but he will not be able to use the account until the library has enabled him. As far as the library has enabled the user account, the system will send another email to confirm the activation of the account.

2.3 Migration from a Traditional to an Institutional account

A user who has got institutional credentials and already has a NILDE traditional account, can make the "migration" process in order to login using institutional credentials since then, without losing the information about previous requests forwarded to the library. To do that, the user must login to NILDE through the institutional login (IDEM-GARR) and then the system will show a page where the user must fill in username and password of his NILDE account (not the IDEM-GARR institutional account) in the required fields and click on "Migration account", as shown in fig. 10.

At the end of the process, if successful, the user will be able to login to NILDE, using his institutional credentials.

3 USER LOGIN AND ACCOUNT RECOVERY

The login space is the area where both the users and the libraries can access the system. If a user already has the credentials to enter (username and password), he can fill in the appropriated fields and click on **Login** button; otherwise, from here it is possible to go to the User Registration [see par.2].

Two kinds of login are possible:

- a traditional login, filling in username and password chosen during the registration;
- an institutional login through IDEM-GARR: in this case, the system redirects to IDEM WAYF Service ("Where Are You From" Service), where it is possible to select own Institution and then fill in the institutional credentials.

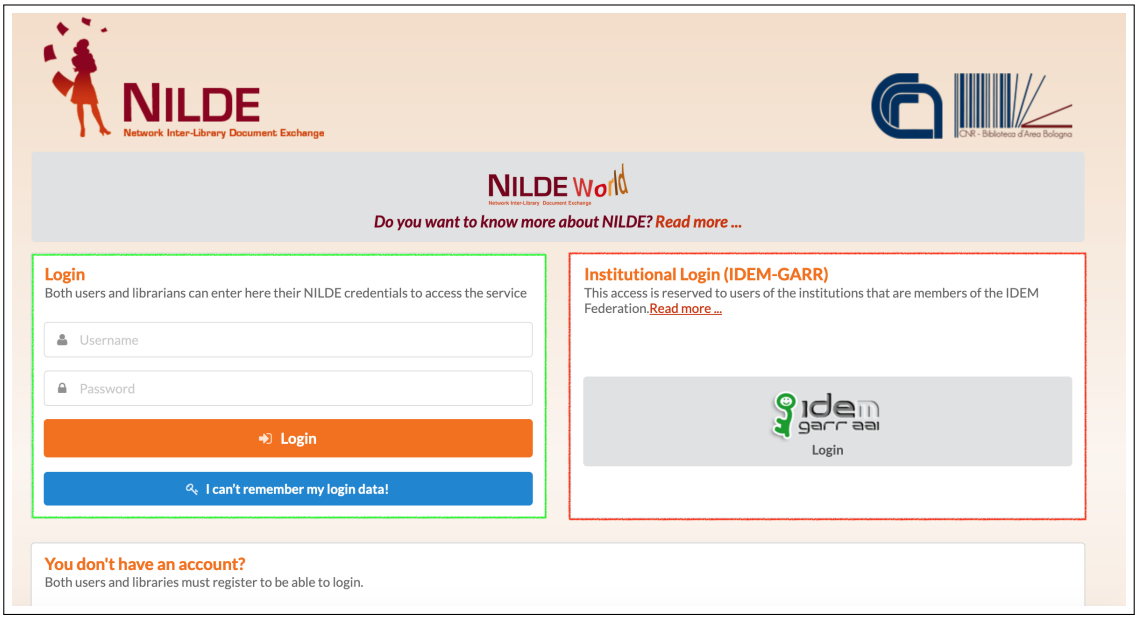

Figure 12: Login to NILDE: traditional and institutional login

After logged, the system goes to **NILDE users**.

4 ACCOUNT RECOVERY

Those who use a traditional login to access to NILDE, can recover the forgotten credentials clicking on **I can't remember my login data!**

Figure 13: Login to NILDE with *I can't remember my login data!* to recover the credentials

Fill in username and/or email address and the captcha code, as shown in fig. 14. After that, click on **Account check**.

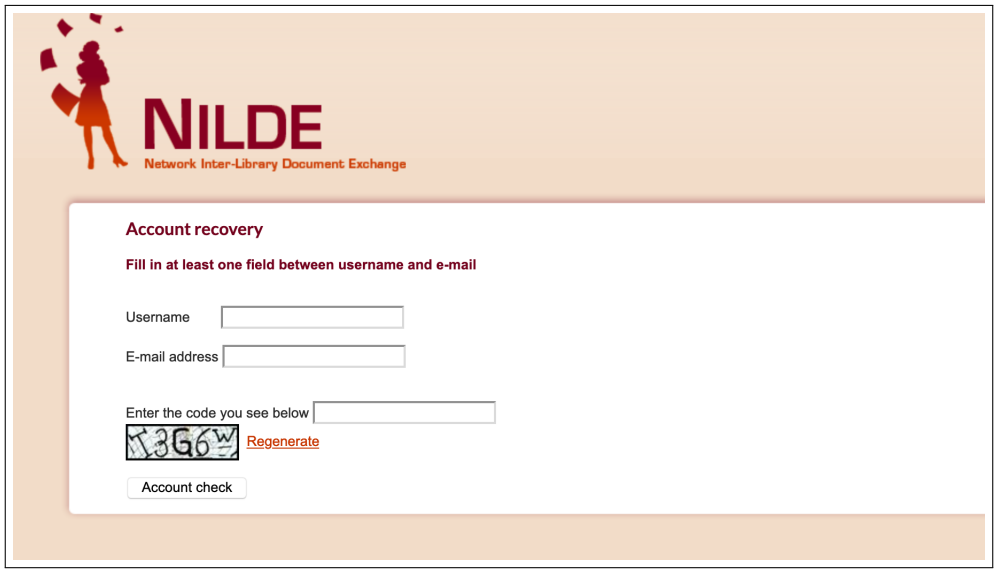

Figure 14: Process to recover credentials: form to fill in

If the inserted data are correct, the system sends an email to the user with a link that redirects to a page where it is possible to choose new credentials. Then, a second email is sent, with the new credentials, to confirm that the process has been successful (see fig. 15).
N.B. Those who use an **Institutional account (IDEM-GARR)** must refer to own Institution, because the credentials to login **are not registered on NILDE server**.

Figure 15: Process to recover the credentials: the new credentials to access to NILDE

5 Reference manager

Once logged in, you are directed to NILDE Users **Reference Manager**, which allows you to manage your bibliographic references and send document delivery requests to the library where you are registered.

You can:

- Change your personal data or modify the details about the library where you are registered;
- Create, delete, visualize the references you saved and change the order in which they appear (by author, by title, etc.);

- Manage your references using labels and add labels to documents or references;
- Forward a Document Delivery request to the library where you are registered;
- Check the status of a request.

Figure 16: NILDE Users Reference Manager.

5.1 Changing personal data

Clicking on the icon at the left of the Welcome message a menu opens up. From there it is possible to change your personal data and view the details about the library where you are registered.

Figure 17: Screenshot of NILDE Users Reference Manager. The Welcome button is highlighted. Clicking on it you can visualize or change your personal data.

Clicking on **Edit** it is possible to change the data. Some of them are required at the moment of the registration, but they can be modified at any time. In particular, user's title (student, researcher, librarian, etc.) must be selected from the drop-down menu. The menu will only show the standard titles allowed for the type of institution to which the library belongs. It is possible to choose the institute or the department only in case the library manages different departments or research institutes.

Figure 18: "My account" section with user's personal data.

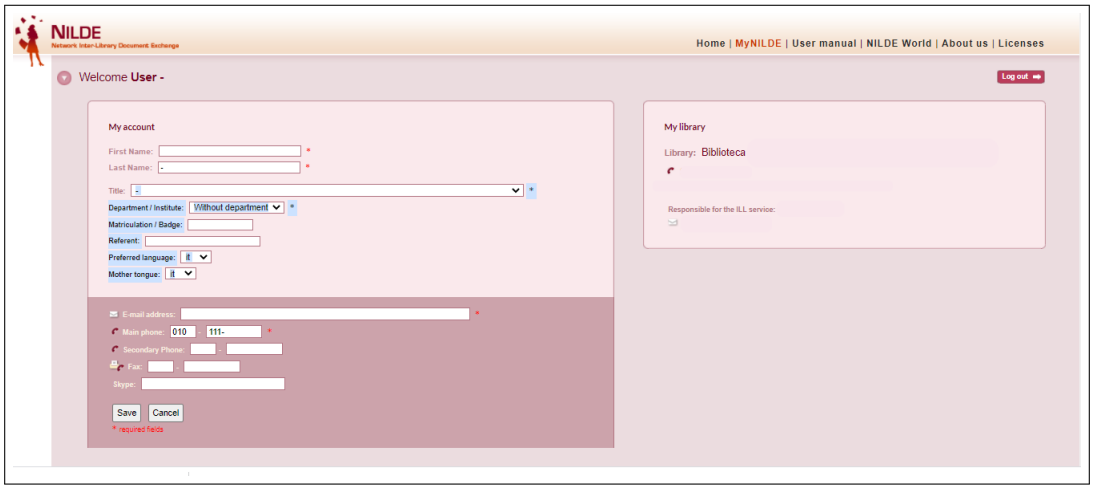

Figure 19: Screenshot of the menu where personal data can be changed.

5.2 Labels

In the blue section of NILDE Users you can create labels to organize your references. It is possible to create up to 20 labels. Click on the arrow to open the drop-down menu.

Figure 20: Detail of the section where it is possible to create, apply or remove labels to documents.

To create a label, you just need to write a title in the relevant field and then click on **Create**. After the label has been created you can select your references and choose **Apply** to label them or **Remove** to remove the label. Click on the pencil symbol to rename the label. Click on the X to delete it.

5.3 How to insert and request a bibliographic reference

You can enter a new reference in the bibliography by clicking on **Insert new**.

Then select the type of document. The fields of the request can be different according to the document type.

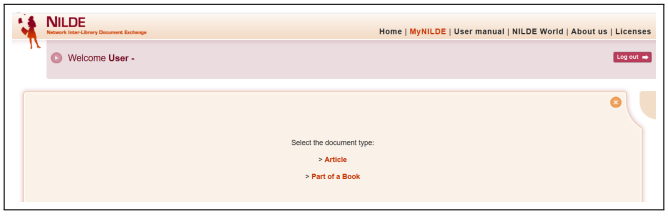

Figure 21: How to enter or request a new document: selecting the document type to insert or request.

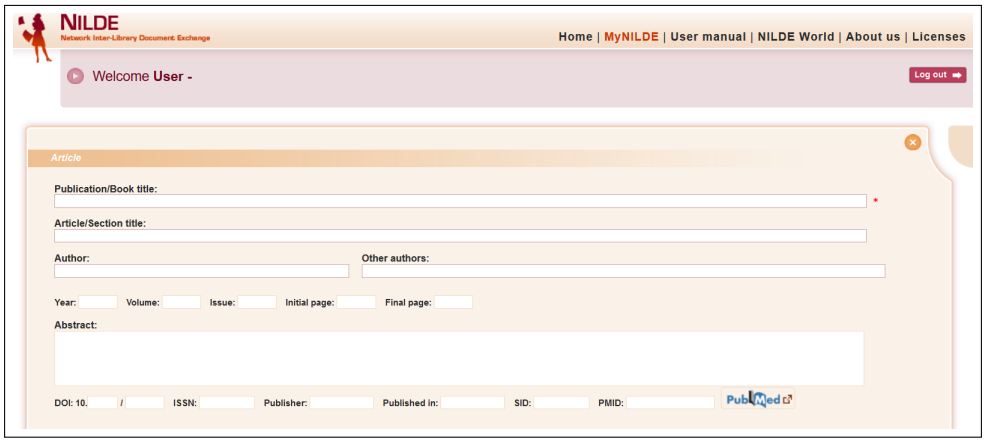

Figure 22: How to enter or request a new document: the descriptive fields available when requesting an Article.

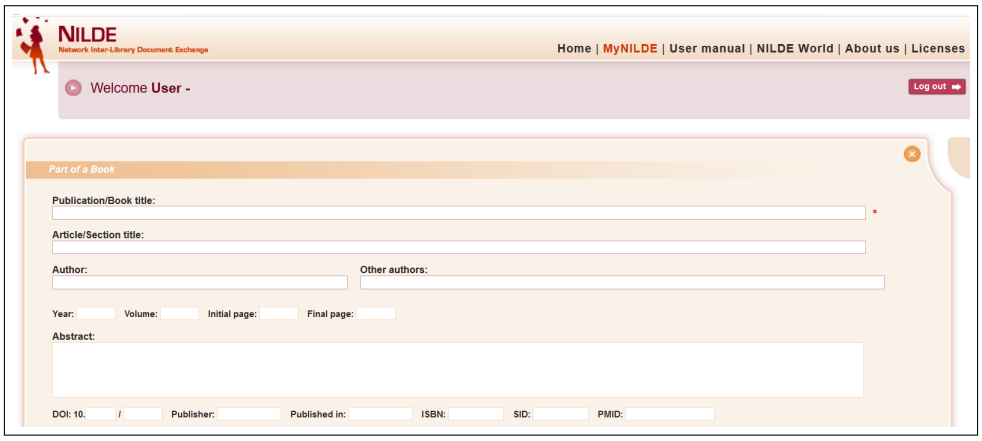

Figure 23: How to enter or request a new document: the descriptive fields available when requesting a Part of a Book.

More detailed a request is, easier and faster finding the document will be!

The **Publication/ Book Title**, the **Article / Section Title** and **at least one of the following combinations** must always be filled in:

- year and initial page;
- year and author;
- volume and initial page;
- volume and author.

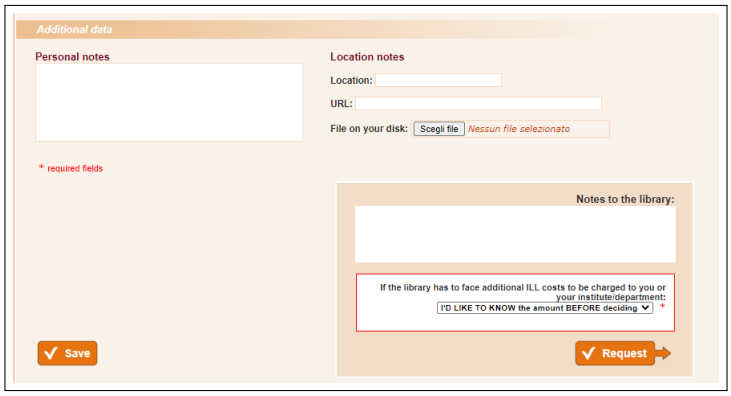

Figure 24: How to enter or request a new document: Additional data to fill in if you send the request to the library.

If you can, insert the **ISSN** of the publication and the **ISBN** of the book. In addition to manual compilation, it is possible to import the data of a bibliographic reference from any bibliographic database that supports the **OpenURL** standard or from the Pubmed database if the **PMID** is known.

The **SID** (Service Identifier) is the unique identifier of the database from which the bibliographic reference was imported (via OpenURL).

The **PMID** (PubMed unique identifier) is the unique identifier of a document indexed by the Pubmed database. If you enter the PMID code and click on **Pubmed**, the essential data of the reference. [for both cases, see par 6 - NILDE integration via OpenURL with databases and par 7 - main bibliographic resources on the web and Pubmed and NILDE integration].

Once the reference has been entered, both forms (Article or Part of a Book) present a space dedicated to **Additional Data** in the final part, in which it is possible to enter any personal notes that are used exclusively by the user, even if you intend to forward a DD request to your library. Enter any **Notes for the library** also **about cost** will be imported.

There is the possibility to communicate to your library the intention to pay for any additional costs needed to find the material outside the NILDE network.

There are 3 options:

1. I'D LIKE TO KNOW the amount BEFORE deciding
2. I DON'T ACCEPT additional costs
3. I ACCEPT any additional costs

If the library has to pay a fee for the document requested, you receive an email with the amount of the additional cost, so you can decide to accept or reject the conditions.

Only the bibliographic data and the Notes to the library are transmitted in case of request. To save the reference in your bibliography, simply click on **Save**.

Attention: if you click on Save, the request will **not** be sent, but you can request the document later.

If, on the other hand, you wish to forward the request to your library, click on **Request**. In both cases, the reference can be viewed in the Reference Manager.

To request a saved reference, click on the reference to view it in detail and, in the lower left part, click on **Request**.

Figure 25: Reference manager of NILDE users with the detail of the bibliographic reference that you can request by clicking on "Request".

5.4 Status of the request

In the Reference Manager the status of the request is visible through three types of traffic lights:

1. Yellow light: the request is being processed;
2. Red light: the request has been closed without positive answer;
3. Green light: the request has been processed. In this case, the library communicates to the user info about the document delivery.

Figure 26: Reference manager of NILDE users with the detail of the request of the document that has been received.

6 NILDE integration via OpenURL Resolver with databases and the main bibliographic resources of the web

Through OpenURL technology it is possible to connect the bibliographic and citational databases most used to NILDE with considerable advantage for both users and librarians. It will be much easier for the user to request an article because **the request form will be pre-filled from the database with the bibliographic data of the article**. In other situations, some libraries or some University library systems prefer to configure a **Link resolver** so that the OpenURL linking services are usable by all databases subscribed by the library or the University.

The integration of NILDE with a database or with a link resolver is possible through an internationally adopted linking technology, which uses a standard protocol (ANSI / NISO Z.39.88-2004 OpenURL Framework for Context-Sensitive Services), called **OpenURL protocol**.

The OpenURL defines in a standard way the information useful to find an article (title, author, issn, etc ..).

Here are some examples of how the NILDE request form can be pre-filled directly from a database or from the menu of a link resolver in order to immediately request the document you need on NILDE.

6.1 Web of Science

On Web of Science, when you find the article you are looking for, if you click on the button that identifies the link resolver of the institution, you will be redirected to a form that verifies if you can access to the full text of the document and if other services are available. For example it verifies the possibility to directly forward the Document Delivery request via NILDE when the full text is not available (in the example of the figure 27 the button is CNR @ LINK).

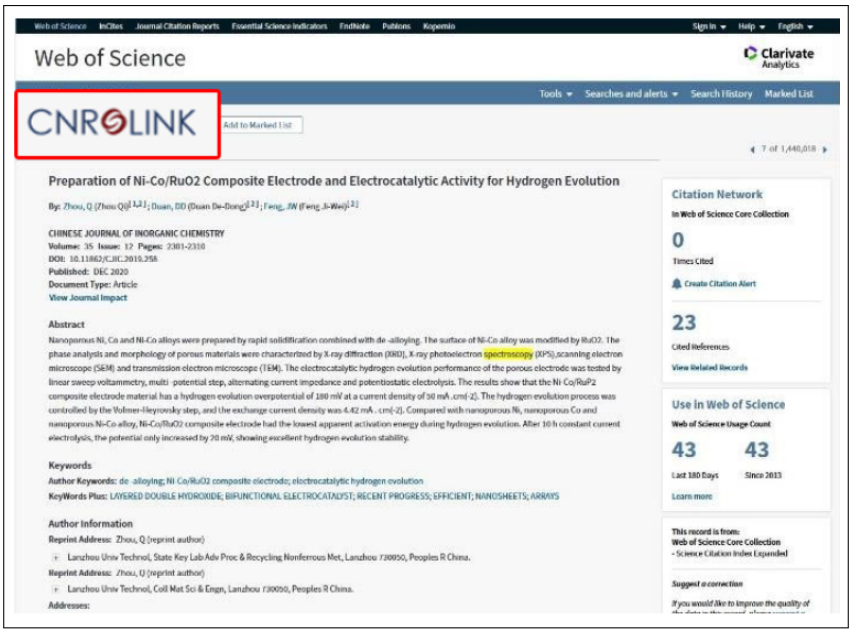

Figure 27: Bibliographic record in Web of Science database with the institutional link resolver button highlighted.

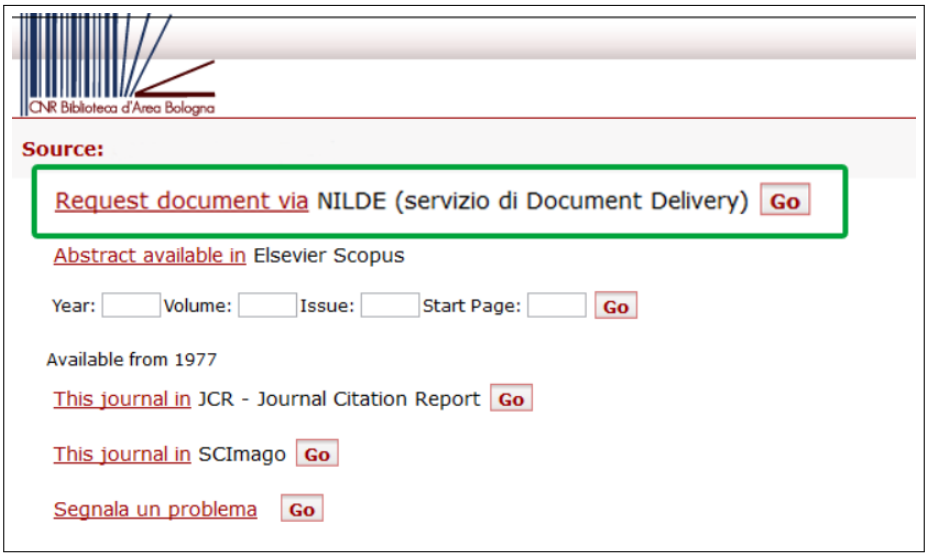

Figure 28: Link resolver menu from which it is possible to make a request with NILDE.

If you click on **Request document via NILDE**, you will be directed to the page to login to NILDE.

Figure 29: NILDE login screen with notice of data entry via OpenURL.

When you will be authenticated, the new screen will open with the fields filled in automatically.

Figure 30: Bibliographic reference screen with automatically compiled bibliographic metadata from the database or link resolver.

6.2 Scopus

With Scopus, when you enter the page of a bibliographic record and you click on the **Ask NILDE** button (as configured by the library, see Fig. 31), you will be redirected to the NILDE login page (as already seen in Fig.29) and after authentication, the complete request data will appear as shown in figure 30.

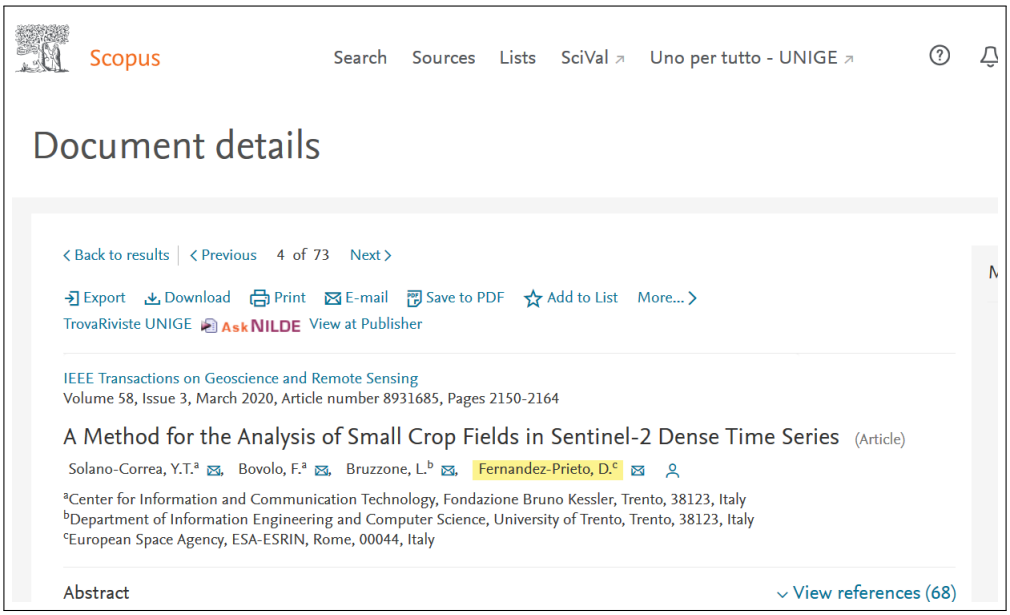

Figure 31: Bibliographic record in the Scopus database with the Ask NILDE button.

7 Pubmed and NILDE

There are two ways to import the metadata requested to complete the request on NILDE.

7.1 Outside tool

Outside Tool is a **PubMed** tool that allows you to implement services based on OpenURL. The tool creates a link in each PubMed record that refers to the resources made available by the institution for its users.

To activate the Outside tool you need to:

- Connect to this address: https://pubmed.ncbi.nlm.nih.gov/?otool=itnilde
- Run a free search
- From the list of results obtained, click on the article's title to enter the bibliographic record page
- Click on the NILDE-Bibliosan icon

In this way the NILDE page that requires login will open and, after that, you will be able to see automatically the request form completed.

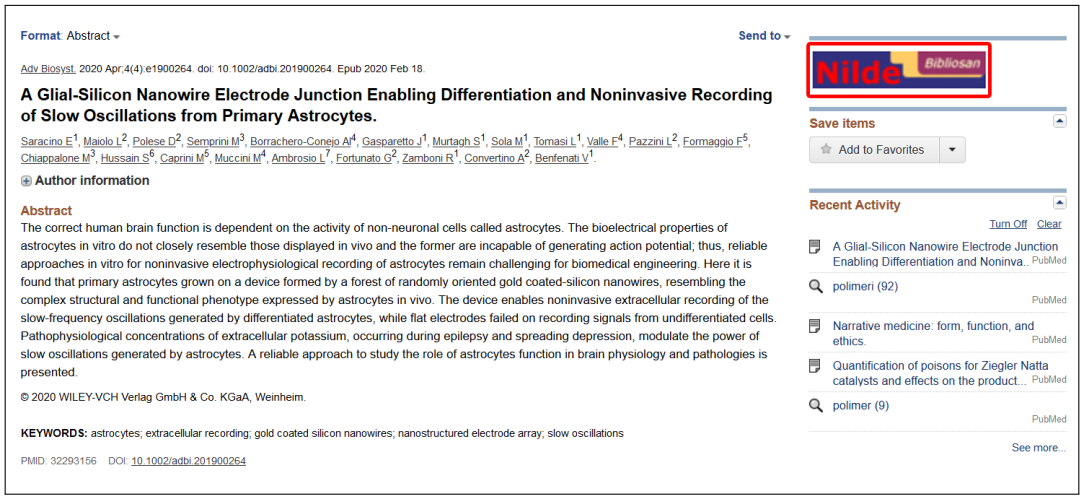

Figure 32: Bibliographic record card in the PubMed database with the NILDE-Bibliosan icon on the right.

7.2 Entering the PMID code in the request form

Search on Pubmed and open the page of the article concerned. Under the heading Keywords, you will find the **PMID code**. Copy it in the form to insert a new reference on NILDE in the relative PMID field.

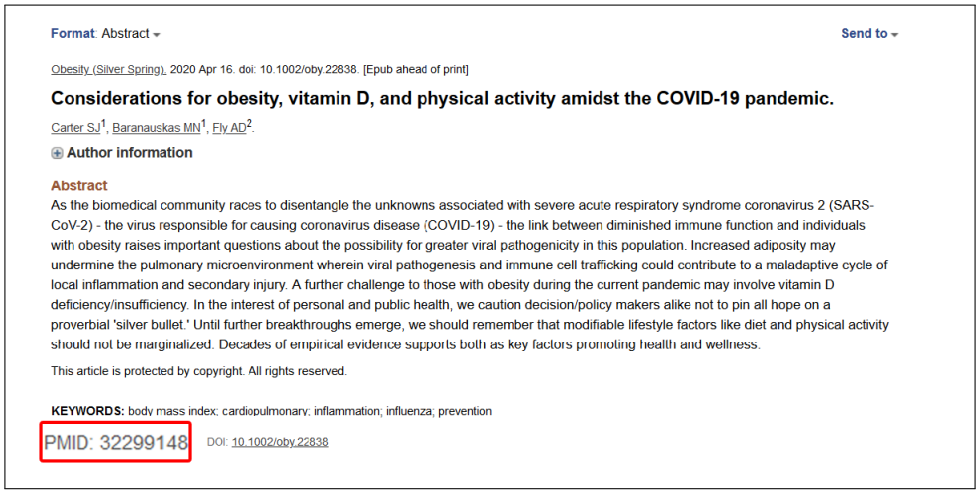

Figure 33: Bibliographic record card of the PubMed database with highlighted the PMID code to be copied in the relevant field of the new reference on NILDE.

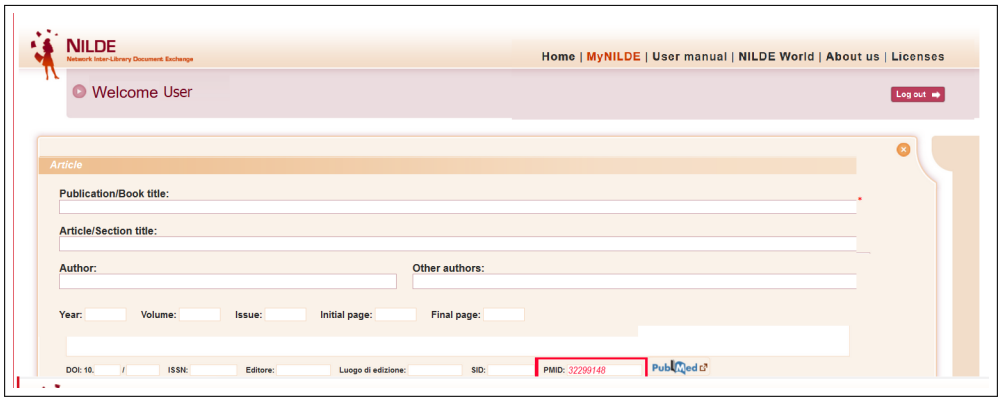

Figure 34: Screenshot of the new NILDE bibliographic reference with the PMID field highlighted with the article code entered.

After entering the code, click on the PubMed button. A confirmation pop-up for importing data will open. Click **Ok**.

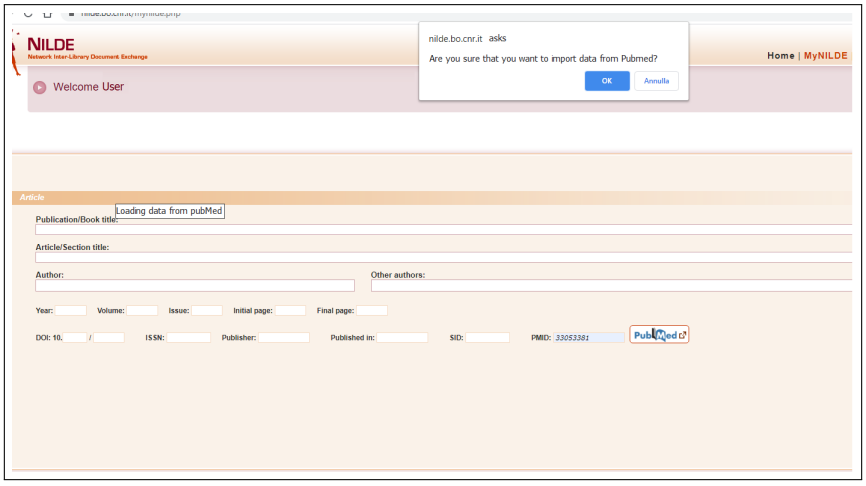

Figure 35: Confirmation pop-up for importing data from PubMed.

At the end, the bibliographic metadata of the request will be automatically filled in, including the abstract.

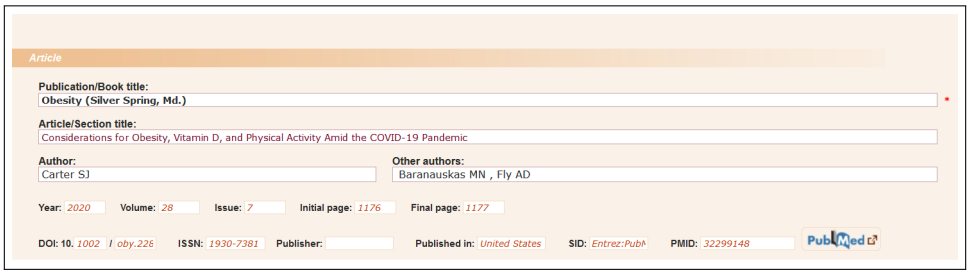

Figure 36: Bibliographic reference screenshot with bibliographic metadata automatically compiled from PubMed PMID. Please note that the abstract is also imported.

8 Integration NILDE - EndNote Click (formerly Kopernio)

EndNote Click (formerly Kopernio) is a free browser plug-in for quick and easy access to PDF of the scientific articles. It also searches for Open Access versions self-archived by the authors, if any.

It is possible to register and install the plug-in from its official website: https://click.endnote.com/.

EndNote Click is integrated with **Web of Science** and **Pubmed** and it is activated when the user views an academic content with a DOI or PMID on any web page: first EndNote Click try to retrieve the PDF from the publisher's site using DOI / PMID and, if it fails, it checks if there is an alternative Open Access version self-archived in some OA repository by the authors themselves. If the search fails again, EndNote Click verifies that the user has a Link Resolver and returns the necessary metadata to call up the Link Resolver menu, otherwise, in the absence of Link Resolver, it is still able to generate a request to NILDE. The search can be carried out starting directly from the sites of the two databases or from the EndNote Click quick search bar, integrated with your favorite database in Settings.

In **Web of Science**, to make EndNote Click works, you need to enter the record page bibliographic.

If there is a **Link Resolver** in your institution, EndNote Click can be configured in order to return the metadata necessary to activate the Link Resolver menu.

If the institution does not have a Link Resolver, EndNote Click can be configured to generate an OpenURL complete request on NILDE. In this case, instead of PDF Not Found, it appears **Use NILDE** button.

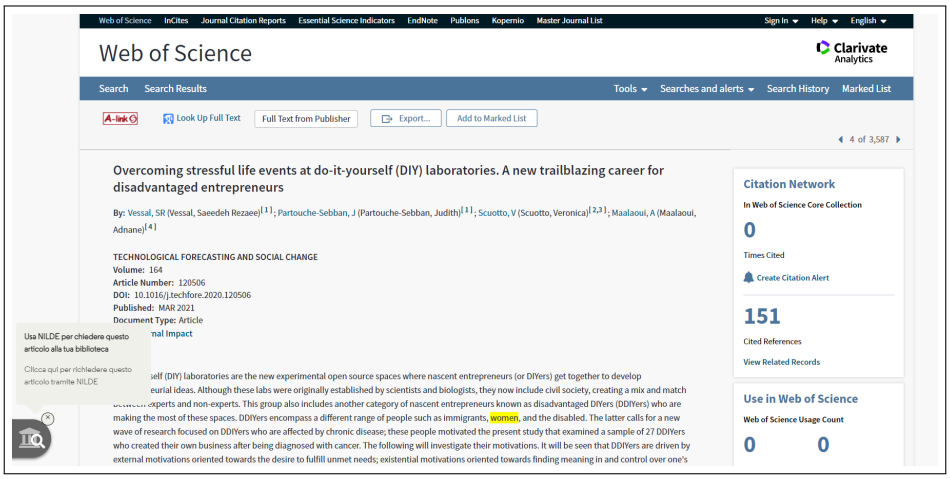

Figure 37: Bibliographic record in the Web of Science database with the EndNote Click (formerly Kopernio) plug-in on the left configured to generate an OpenURL request on NILDE.

By clicking on the button, you log into NILDE and all the necessary metadata to make a request to your library will appear.

On **PubMed**, EndNote Click searches for pdfs automatically.

Go to **Use NILDE** to request the article, and also in this case the request will be automatically filled in with the bibliographic data to identify the document.

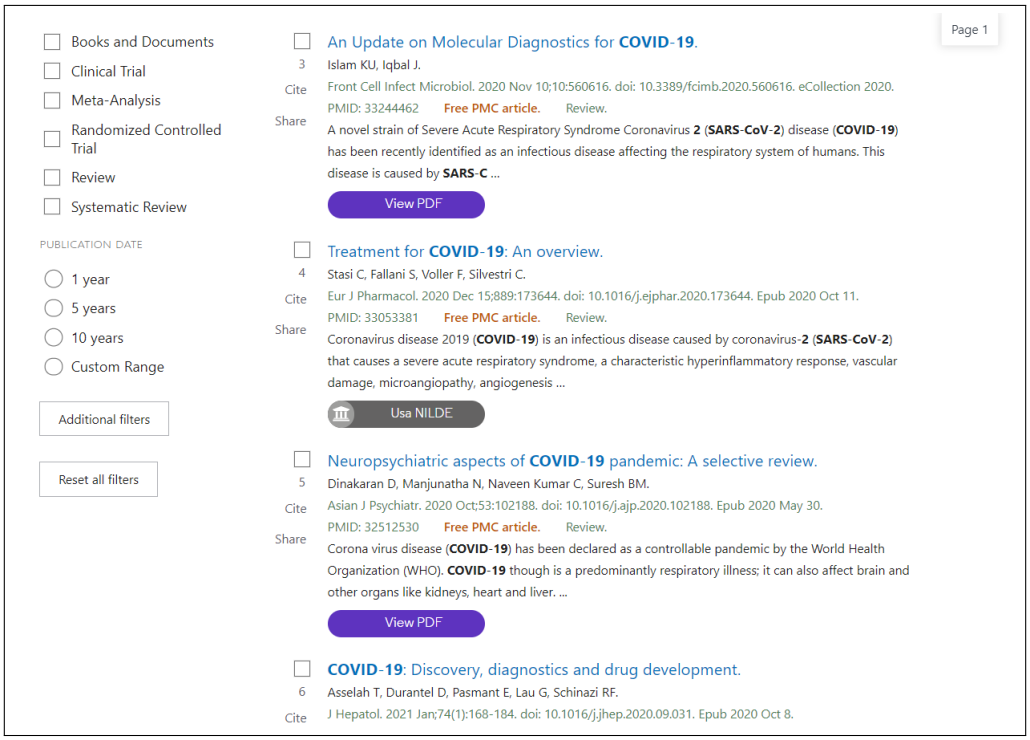

Figure 38: List of bibliographic records in the PubMed database and the various search results performed by EndNote Click (formerly Kopernio).

Please note: Use NILDE button does not work well with recently published articles or articles that do not have the DOI: EndNote Click does not pass metadata and therefore cannot auto-fill the bibliographic data of the request on NILDE.

EndNote Click can also greatly facilitate the search for the full-text of articles directly from **publisher platforms**: if you do not have access rights to access the full-text of a resource bibliographic (i.e. there is no subscription contract for that resource), EndNote Click is able to find Open Access versions or call NILDE to request the document from own library.

9 NILDE - Zotero Configuration

Zotero is an open source software for the management of bibliographic references, that is downloadable from the site: https://www.zotero.org/. It is possible to ask the library in NILDE for a bibliographic reference that has been inserted in your own Zotero.

To configure NILDE with Zotero you need to open the application, go to Modifications< Preferences < Advanced and under the OpenURL choose Custom and then manually enter the URL of the NILDE OpenUrl Resolver: https://nilde.bo.cnr.it/openurlresolver.php

After entering these data, click on **Ok**.

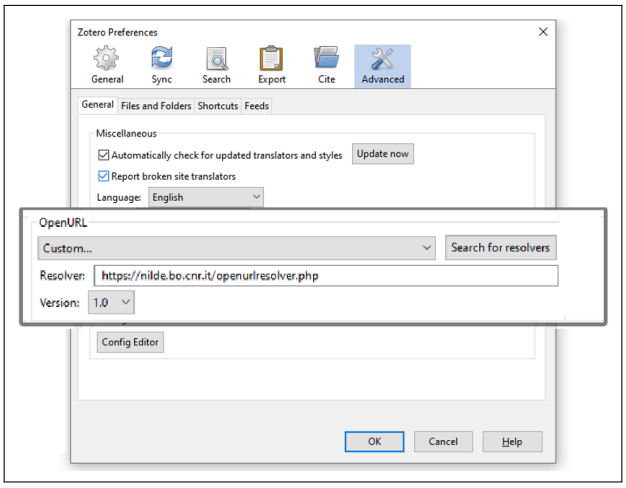

Figure 39: Zotero options screen inside the Advanced item with highlighted the data to be entered for the manual configuration of the OpenURL resolver.

In the Zotero reference manager, select the bibliographic reference to request and click on the green arrow at the top right and click on Search through the library.

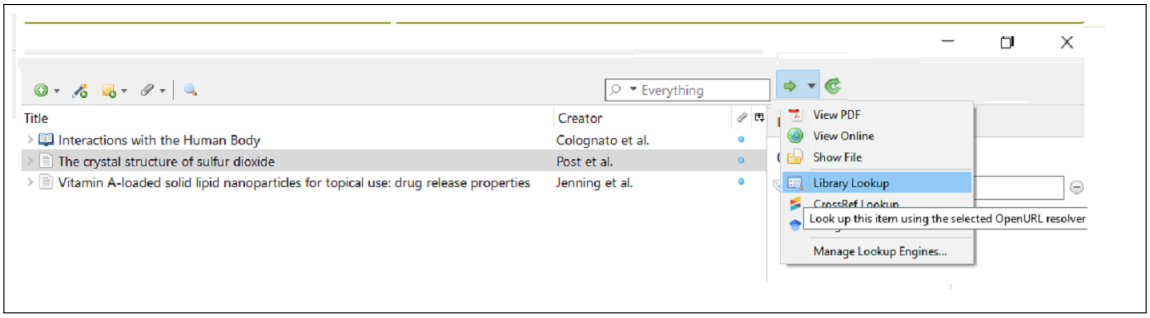

Figure 40: Zotero reference manager with open the menu derived from the green arrow symbol with the item "Search through the library" selected to request the bibliographic reference on NILDE.

At this point, a browser tab will open that requires you to login to NILDE and then the new reference screen will open with all the complete metadata.

Figure 41: NILDE login screen with notice of data entry via OpenUrl.

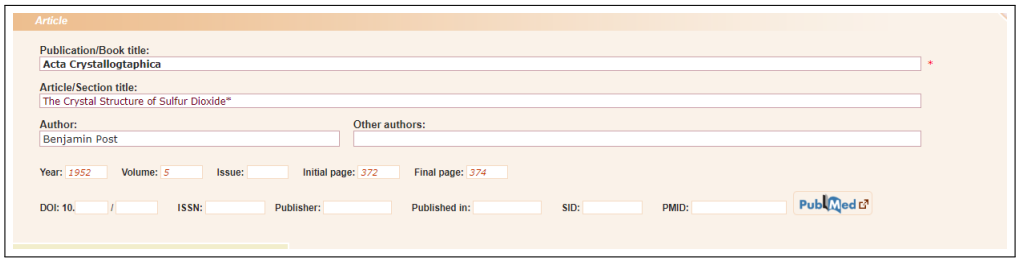

Figure 42: Bibliographic reference screen with automatically filled bibliographic metadata from Zotero.

10 Why haven't I received the pdf?

NILDE uses a system for the secure electronic submission of documents requested and provided by libraries. The NILDE Digital Hard-Copy [HC] system transforms any pdf [such as pdf of articles downloadable from publishers' sites] into a pdf file containing the images of the pages, and completely equivalent to the file that would be obtained by printing and digitizing printing again with an image scanner. The NILDE Digital HC system and secure electronic mailing between libraries is recognized and accepted by many scientific publishers with which the libraries of Italian universities and research institutions have license agreements. However, electronic submission is almost always allowed only between libraries. Upon processing the request, the librarian communicates the instructions to the user to receive the document. As governed by current copyright legislation [Copyright Law] or by the signed license agreements, the user will receive the hard copy and not the PDF file of the requested document. The only possible exception is the possession by the library that provided the document of a license that expressly allows the delivery of the electronic document directly to the user.

To know more:

O. Russo, S. Mangiaracina "Perché non mi mandate il PDF? Il servizio document delivery agli utenti secondo i contratti di licenza concessi dagli editori" in Atti del Convegno *Dead or alive? Le frontiere dei servizi bibliotecari nell'era della condivisione: 15 anni della comunità NILDE, 2017.*

(http://romatrepress.uniroma3.it/wp-content/uploads/2019/05/Perch%C3%A9-non-mi-mandate-il-PDF-Il-servizio-document-delivery-agli-utenti-secondo-i-contratti-di-licenza-concessi-dagli-editori.pdf)