Leganto

Session 1: Automating Library Processing

Kevin Lane-Cummings, Training Services Consultant
Jessie Ransom, Teaching and Learning Product Specialist
Leganto – Become an Expert: Class Sessions

<table>
<thead>
<tr>
<th>Session</th>
<th>Topic</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Automating Library Processing</td>
<td>Jan. 27</td>
</tr>
<tr>
<td>2</td>
<td>Bulk Rollover of Reading Lists</td>
<td>Feb. 17</td>
</tr>
<tr>
<td>3</td>
<td>Digitization and Copyright Overview</td>
<td>Mar. 17</td>
</tr>
<tr>
<td>4</td>
<td>Optimizing the Instructor Experience</td>
<td>Apr. 21</td>
</tr>
<tr>
<td>5</td>
<td>Purchasing Workflows</td>
<td>May 19</td>
</tr>
<tr>
<td>6</td>
<td>Actionable Analytics</td>
<td>June 16</td>
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</tbody>
</table>

Register for upcoming sessions:

Knowledge Center > Leganto > Training > Webinars > Become an Expert: Leganto
Question: Which citations does the library really need to review?
Agenda

• Introduction: Using Alma tasks

• Automation Options

• Bulk Jobs

These are all recommendations, not requirements!
Assumptions:

• You don’t want to spend extra, unnecessary time processing reading lists/citations

• Your library is working from Alma task
Leverage Alma Tasks

- Reading Lists – Ready for Processing

- Citations – Ready for Processing

Alma’s workflows are intended to be used with these task lists
Filter Citation Status to Not Complete
Set Complete to Track Progress

<table>
<thead>
<tr>
<th>Request Status: Ready For Processing</th>
<th>Request Status: Ready For Processing</th>
<th>Request Status: Ready For Processing</th>
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</thead>
<tbody>
<tr>
<td>ABC's of Accommodations</td>
<td>Claiming Disability</td>
<td>Privilege, Power, and Difference</td>
</tr>
<tr>
<td>Article</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Section Name: last section</td>
<td>Section Name: Identity and Power</td>
<td>Section Name: Identity and Power</td>
</tr>
<tr>
<td>Created By: Yael Beller 07/14/2021 14:07</td>
<td>Created By: Yael Beller 04/21/2021 12:58</td>
<td>Created By: Yael Beller 04/21/2021 12:31</td>
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<tr>
<td>Physical</td>
<td>Electronic</td>
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<tr>
<td>Electronic</td>
<td>Digital</td>
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<tr>
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<td>Other</td>
<td>Digital</td>
</tr>
<tr>
<td>Other</td>
<td>Citation Details</td>
<td>Other</td>
</tr>
<tr>
<td></td>
<td>Alerts</td>
<td></td>
</tr>
</tbody>
</table>
Set Complete to Track Progress

Edit Citations (1 - 20 of 289)

- Sort by: Last created
- Remove Citations
- Change Copyright Status
- Change Status
- Expand

Select All
Citation Status: Ready For Processing

1. Elements of yacht design
   - Request Status: Ready For Processing
   - Resource Locate Status: Resource Located
   - Citation Details
   - Physical
   - Electronic
   - Digital
   - Other

2. Concepts of modern art.
   - Request Status: Ready For Processing
   - Resource Locate Status: Resource Located
   - Citation Details
   - Physical
   - Electronic
   - Digital
   - Other

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Training Resources about Working with Leganto Tasks

• New Training Kit
  • **Leganto for Library Staff**
    • Managing reading lists and task in Alma
    • Viewing and filtering citations in Alma
    • And more!

• Best Practices Page
  • **Introduction to Library Workflows with Leganto**
    • Longer video (38 min), walking through tasks, filtering citations, processing citations.
Agenda

• Introduction: Using Alma tasks

• Automation Options
  • Automatically “Complete” certain citation types
  • Change citation status based on other actions

• Bulk Jobs
Default Review Settings

• Physical items
• Uploaded files
• Citations with no inventory

Leganto automatically sets all other citations to “Complete”
Citations that Some Institutions Review

• E-Resources and CDI Citations
  • Check for broken links
  • Identify concurrent user licenses

• Websites

• Uploaded Files
Check for Broken Links

Proactively check all citations “just in case”

Consider:

• How often are links broken?
• How frequently are students/instructors marking links as broken?
• How quickly can you respond to broken links?
Checking for Broken Links

1. Enable broken-link reporting
2. Inform users they can mark links as broken
3. Monitor task list: Citations – Marked as Broken
4. Configure Leganto: Electronic citations “Complete” automatically
Enable Broken-Link Reporting

Instructions to enable broken-link reporting
Enable Electronic Citations to “Complete” Automatically

Instructions to configure default statuses for citations and reading lists
Citations that Some Institutions Review

• E-Resources and CDI Citations
  • Check for broken links
  • Identify concurrent user licenses

• Websites

• Uploaded Files
Checking Concurrent-User Licenses

Use the Citation Insights job to identify such licenses

- Only works if you use the concurrent user field on license records.
- Consider starting with collections you know to be problematic.
- Run the job on a regular basis, especially during busy times
Identify Concurrent User Licenses

Run a Job - Enter Task Parameters

Citation Insights job

- High demand loan insight. Number of loans per copy:
- Low demand loan insight. Number of loans per copy:
- High demand reserve loan insight. Number of loans per copy in library:
  - On location:
- Low demand reserve loan insight. Number of loans per copy in library:
  - On location:
- High usage insight. Views for concurrent license: 0
- Low usage insight. Views for concurrent license:
# Identify Concurrent User Licenses

## Events Report

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Reading List Name</th>
<th>Title</th>
<th>Citation ID</th>
<th>Mms ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ARC-707</td>
<td>American Architecture: Frank Lloyd Wright</td>
<td>383136763000...</td>
<td>90135049900121</td>
<td>Num of full text view: 0, Concurrent users: 5</td>
</tr>
<tr>
<td>2</td>
<td>ARC-707</td>
<td>American Architecture: Frank Lloyd Wright</td>
<td>383136749000...</td>
<td>99135049900121</td>
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<tr>
<td>3</td>
<td>PHIL 100</td>
<td>Introduction to Philosophy</td>
<td>540561327000...</td>
<td>99125816200121</td>
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</tr>
</tbody>
</table>
Analytics Can Identify Problematic Collections

Finding citations that are problematic because they:

- Can’t be used in courses
- Link to resources from old storage system
- etc.

- In Alma Analytics, use the **Course Reserves** subject area:
  - Use resource metadata: for example, filter for citations from a particular journal title
  - Use the Source URL string
Citations that Some Institutions Review

• E-Resources and CDI Citations

• Websites
  • Broken website links
  • Problematic websites

• Uploaded Files
Check Citations for Broken Links to Websites

1. Rely on broken-link reporting, as in previous example

2. Use Process and Enrich Citations job (Fulfillment menu)
   - Validate external links
     - HTTP Errors 500, 404, 504
     - View report for broken links
Check Citations for Problematic Websites

Proactively check all citations “just in case”

Monitor only specific websites

Configure **Cite-It Filtering**

1. Define Whitelist or Blacklist
2. Add websites to the list

**Blacklist:**
- amazon.com
- youtube.com
- .net

**Whitelist:**
- [your institution]
- .edu
- .gov
Enable Cite-It Filtering

- Section Menu
- Citation Menu
- Citation default thumbnails

List Management
- Settings
- Publishing
- Cite it filtering

Copyright Settings

Course Reserves Automatic Statuses

- File Upload Copyright Options
- Declaration Texts
- Instructor Rollover Operations

| cite_it_filter | system    | blacklist | Cite it filter val |
## Define Cite-It Websites

### Configuring: Alma University

- Section Menu
- Citation Menu
- Citation default thumbnails

### List Management

- Settings
- Publishing

### Cite it filtering

### Mapping Table

<table>
<thead>
<tr>
<th>Cite It Url Domains</th>
<th>Enabled</th>
<th>URL Domain/Regular expression</th>
<th>Description</th>
<th>Updated By</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>🔴</td>
<td>amazon.com</td>
<td>Amazon</td>
<td>jransom</td>
<td>09/01/2020</td>
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<tr>
<td>2</td>
<td>🔴</td>
<td>books.google.com</td>
<td>Google Books</td>
<td>jransom</td>
<td>11/17/2020</td>
</tr>
</tbody>
</table>

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Citations that Some Institutions Review

• E-Resources and CDI Citations

• Websites
  • Broken Site Links
  • Problematic Sites

• Uploaded Files
Check Uploaded Files

1. Configure **File Upload Copyright Options**
2. Instructor uploads file and attests to the content:
   - Upload a File
     - File name: Chapter 3.pdf (32162 bytes)
     - Use of this resource complies with our institution's Fair Use Policy
   - I would like the library to review this resource for copyright compliance
3. Leverage the Task Lists
4. Automatically set other uploaded-file citations to “Complete”
File Upload Copyright Options

Instructions for
- Configuring File Upload - Copyright Status Options
Enable Citation Upload Auto-Complete

Configuring: Alma University

- Section Menu
- Citation Menu
- Citation default thumbnails

List Management
- Settings
- Publishing
- Cite it filtering

Copyright Settings

- Course Reserves Automatic Statuses
- File Upload Copyright Options
- Declaration Texts
- Instructor Rollover Options

Table:

<table>
<thead>
<tr>
<th>Citation_Uploaded_file</th>
<th>System</th>
<th>Complete</th>
<th>Automatic status</th>
</tr>
</thead>
<tbody>
<tr>
<td>citation_uploaded_file</td>
<td></td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>cite_it_filter</td>
<td></td>
<td></td>
<td>blacklist</td>
</tr>
</tbody>
</table>

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Agenda

• Introduction: Using Alma tasks

• Automation Options
  • Automatically “Complete” certain citation types
  • Change citation status based on other actions

• Bulk Jobs
Review Specific Citations, by Tag

- Monitor only resources tagged as “Essential” or “Required” by instructors.
- Monitor only resources that instructors mark as Library-Inform, or some other custom tag you create as a flag.
Enable Citation Upload Auto-Complete

- Configuring: Alma University
- Section Menu
- Citation Menu
- Citation default thumbnails

List Management
- Settings
- Publishing
- Cite it filtering
- Copyright Settings

Fulfillment
- Course Reserves Automatic Statuses
- File Upload Copyright Options
- Declaration Texts
- Instructor Rollover Operations

- revert_citation_status_by_adding_tags
- revert_citation_status_by_removing_tags
- revert_completed_citation_status_by_metadata
- revert_completed_citation_status_to
- revert_list_status_to
Change citation status when:

- Copyright is approved
- File is removed
- Citation is detached from the repository
- A tag is removed
- Purchase request or resource-sharing request is created

- Change the **reading list** status back to Ready for Processing if the instructor adds an additional citation

All of these are on the Course Reserves Automatic Status mapping table!
Set Reading Lists as Complete

When all citations are complete

(whether completed manually or automatically)

Leganto Configuration Menu >
Course Reserves Automatic Status mapping table
Agenda

• Introduction: Using Alma tasks

• Automation Options

• Bulk Jobs
Bulk Jobs for Citations, Reading Lists, and Courses

Video on Bulk Update Options
Course Bulk Update instructions
Reading List Bulk Update instructions
# Reading List Citation Update Task

<table>
<thead>
<tr>
<th>Task Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete citations</td>
<td>Remove selected citations.</td>
</tr>
<tr>
<td>Citation status</td>
<td>Update citation status.</td>
</tr>
<tr>
<td>Citation type</td>
<td>Change citation type.</td>
</tr>
<tr>
<td>Due date</td>
<td>Set due date for the task.</td>
</tr>
<tr>
<td>Remove tags</td>
<td>Remove selected tags.</td>
</tr>
<tr>
<td>Add tags</td>
<td>Add new tags to the citation.</td>
</tr>
<tr>
<td>Remove alerts</td>
<td>Remove selected alerts.</td>
</tr>
<tr>
<td>Delete public note</td>
<td>Delete public note for the citation.</td>
</tr>
<tr>
<td>Detach from repository</td>
<td>Detach citation from the repository.</td>
</tr>
<tr>
<td>Remove files</td>
<td>Remove selected files.</td>
</tr>
<tr>
<td>Use Leganto Viewer (PDFs only)</td>
<td>Select Leganto Viewer for PDFs.</td>
</tr>
<tr>
<td>Sticker Price from Bfelo</td>
<td>Set sticker price from Bfelo.</td>
</tr>
</tbody>
</table>

Instructions:

1. Select the citations to update.
2. Choose the desired options from the task.
3. Set the due date if necessary.
4. Apply the changes.

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Citation Insights Job

Citation Insights Job instructions
Process and Enrich Citations

instructions
Next Month: Bulk Rollover

- Options for reusing a reading list
- Process of rolling-over in bulk

Thursday February 17
Thank you!

Please fill out the survey that will appear when you close the WebEx meeting.