Session 2: Bulk Rollover

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

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Register for upcoming sessions:

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Agenda

• Overview of three options for re-using reading lists
  • Bulk Rollover
  • Instructor Rollover
  • Reset
• Bulk Rollover Workflow
Bulk Rollover

The library rolls over reading lists in bulk using the course loader.

The rollover process creates a copy of each of the old lists and attaches it to the new course.
Bulk Rollover – Advantages

• Easy for instructors

• Library configures how data from previous reading lists will map to new reading lists.

• Information about all previous versions of reading lists is preserved in Alma and Analytics.
Bulk Rollover -- Disadvantages

• Requires the use of the course loader integration profile

• Sufficient data to map the old course codes to the new course codes.

• The library must consider the timing of rollover
Instructor Rollover

Instructors (or library staff) roll over the reading lists one by one, manually.

The rollover process creates a copy of the previous reading list and links it to the new term of the course.
Instructor Rollover – Advantages

• Instructors can roll over their lists at the point of need.
• Instructors can define which aspects of the reading list should be copied or reset.
• The library does not need to map course information from term to term.
• The library does not need to use the course loader.
Instructor Rollover – Disadvantages

- Requires additional training for instructors.
- Requires additional steps for instructors
- (or) Lots of effort by library staff.
Reset Reading Lists

Reading list is re-used, instead of copied, for the new term

Previous-term’s reading list is cleaned up: student discussion, instructor usage-reports, etc., is reset
Reset Reading Lists - Advantages

- Simplest process
- No additional work for instructors
- Fewer lists to be managed in Alma
Reset Reading Lists - Disadvantages

• Historical versions not preserved

• Library may need to manually add, remove, or change course codes from one year to the next

• Can’t reset copyright information
Agenda

• Overview of options for reusing reading lists

• Bulk Rollover Workflow
  • Detailed Explanation
  • Create Import File
  • Configure Course Loader
  • Run the Rollover Courses Job
Steps

1. Create file for course loader that maps old courses to new courses (each academic term)

2. Configure course loader integration profile (once)

3. Run course-loader job on the course file
   - Duplicate copy of each reading list is created
   - Status of the old list can be changed (draft; archived, etc.)

4. Instructor accesses the new (copied) reading list from the LMS
Why is this so hard?

• Potential complexity of the data
  • Mapping course codes from one term to the next
• Many (many!) configuration options
  • Unexpected surprises
  • Implications of configurations
• No “undo” button
Quick tips

• Test on a few sample courses first
• Confirm via job report, review lists created, review old list
• Delete courses as needed, change configuration, try again
• Take a deep breath
• Jump in!
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Additional Resources

• **Course Rollover/Reset Overview**

• **Trainings:**
  - **Bulk Rollover**
  - **Instructor Rollover**

• **Documentation:**
  - **Leganto course rollover** (bulk and instructor)
  - **Resetting reading lists**
  - **Configuring Course Loading**
  - **Configuring Normalization Rules**
Questions?
Thank you!

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