Bulk Rollover in Leganto

Kevin Lane-Cummings, Senior Customer Education Trainer
Jessie Ransom, Senior Manager, Product Management
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• Overview of three options for re-using reading lists
  ▪ Bulk Rollover
  ▪ Instructor Rollover
  ▪ Reset

• Bulk Rollover Workflow

• Resources
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 (some) additional training for instructors.

• Requires (some) additional steps for instructors

• (or) Lots of effort by library staff.
New UI – Instructor Rollover
New UI - Instructor Rollover
New UI - Instructor Rollover

Create new list

Advanced Settings

Customize which fields will be copied to the new list

Main Information
- [ ] Item due dates
- [ ] List and section dates
- [x] Notes for students
- [x] Tags for students

Information for library
- [x] Tags for library
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
• Overview of three options for re-using reading lists

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

• Resources
Rollover Steps

1. Create file for course loader that maps old courses to new courses (each term)
2. Configure course loader integration profile (once)
3. Run course-loader job on the course file
4. Instructor accesses the new (copied) reading list from the LMS

Duplicate copy of each reading list is created.
Status of the old list can be changed (draft; archived, etc.).
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!
• Overview of three options for re-using reading lists

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Agenda

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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

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Question Time