Leganto Release Notes - November 2020

December 2020 Sneak Peek

• Update assets of courses in bulk
• New reminder email for instructors to submit their reading lists
• Add chapter number to the citation brief view in Alma
• Two upgrades to existing NERS features (#6863 and #6804), including supporting two page ranges for the Book Extract type and showing full permalink in exported Word files.

Main Enhancements

Control the Locate Citation Process with New Configuration

November 2020 Fulfillment Course Reserves
You can now configure Leganto to locate citations based on any or all the fields indicated in the Locate Citations By Fields mapping table (Fulfillment Configuration > Courses > Locate Citation By Fields), using the new `resource_locate_mode` field in the Other Settings table (Fulfillment Configuration > General > Other Settings).

• If you set the value of the `resource_locate_mode` field to "OR", then Leganto will locate citations based on any of the fields in the Locate Citations By Fields mapping table.
• If you set the value of the `resource_locate_mode` field to "AND", then Leganto will locate citations based on all of the fields in the Locate Citations By Fields mapping table.

Note

The default value of the `resource_locate_mode` field is "AND".

You can now also configure Leganto to locate only citations of specific material types (e.g. book, journal article, presentation, etc.), by entering in the codes for the material types into the new `resource_locate_by_type` field in the Other Settings table (Fulfillment Configuration > General > Other Settings), separated by commas.

The codes for the material types are defined in the Citation Material Type table (Fulfillment Configuration > Courses > Citation Material Type). For more information, see General (Configuring Other Settings) and Managing a Citation's...
In addition, in the Process and Enrich Citations job (Fulfillment > Advanced Tools > Process and Enrich Citations), a new "Perform locate on type" field allows you to select which material types to perform the locate action on. The field is automatically populated with the material types corresponding to the code(s) entered in the `resource_locate_by_type` parameter in the Other Settings table (see figure above). In this case, the field will be automatically populated with the "Book" and "Article" material types.

For more information on the Process and Enrich Citations job, see [Process and Enrich Citations in Bulk](#).

**Insert Hyperlink in Public Notes**

**November 2020 Leganto**

You can now insert hyperlinks in public notes, by entering a URL followed by the link text surrounded by pipes in the citation full view. For instance, you can create a hyperlink to www.google.com that says "Google Home Page" by entering the following: `http://www.google.com | Google Home Page |`. This creates a hyperlink to the www.google.com url.

For more information, see [Adding a URL to a Public Note](#).
Adding/Removing Tags

November 2020 Leganto

NERS Enhancement (ID #6444)
For citations in completed status, you can now configure Leganto to revert the citation to a different status whenever a certain tag for the citation is added or removed.

Whenever you add a tag to a citation matching one of the values entered into the `revert_citation_status_by_adding_tags` parameter in the Course Reserves Automatic Status mapping table (Leganto Configuration > List Management > Course Reserves Automatic Statuses), the citation will revert to the status defined in the `revert_completed_citation_status_to` parameter.

Likewise, whenever you remove a tag from a citation matching one of the values entered into the `revert_citation_status_by_removing_tags` parameter in the Course Reserves Automatic Status mapping table (Leganto Configuration > List Management > Course Reserves Automatic Statuses), the citation will revert to the status defined in the `revert_completed_citation_status_to` parameter.

In the example in the image above, if you add an "OPT" or "TEST" tag to a citation in "Completed" status, the citation's status will revert to "Declined". Likewise, if you remove an "OPT" or "MND" tag from a citation in "Completed" status, the citation's status will revert to "Declined".

For more information, see Configuring Default Statuses for Citations/Reading Lists.

Edit Multiple Citations

November 2020 Leganto
In Leganto, you can now perform actions on multiple selected citations, using the new Edit Multiple Items icon in the reading list view.
When this icon is selected, checkboxes appear to the left of each citation, allowing you to select them for further action.

You can also select all the citations by clicking on the checkbox in the icon row.

When you have selected one or more items using the checkboxes, you can delete the selected items by clicking **Delete Items**, or you can click **Edit multiple items** to perform a variety of actions on the selected items.
If you select **Edit multiple items**, the following actions are available to you:

- Add a tag
- Remove a tag
- Select a new due date - you can select a new due date using the calendar icon, or tick the checkbox to reset the due date to null.
- Public note - you can enter a new public note, or tick the checkbox to reset the public note to null.
- Private note - you can enter a new private note, or tick the checkbox to reset the private note to null.

You can then click **Save** to apply all the actions to the selected items in the reading list. For more information, see [Editing a Citation](#).

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**Accessibility Features**

**November 2020 Leganto**

New accessibility features have been added to Leganto.

In this release, Leganto UI elements like the menus, tooltips, dropdown lists were upgraded.

Two examples of such upgrades are:

- You can move a citation up or down in a reading list using the new up and down arrows, in addition to dragging the citation up and down.

**Move citation arrows**

- When you tab through the various actionable icons and buttons on the screen, the tooltip for each icon/button now appears.
Create Reading Lists by Importing a CSV or XLS File

November 2020 Fulfillment Course Reserves

NERS Enhancement (ID #6490)
You can now create reading lists by importing a .txt or .csv file, using a new integration profile job called Reading List Loader. You can view a sample file [here](#).

For more information on the file requirements, see [Reading List Loader](#).

To create reading lists by importing a .txt or .csv file:

1. Add a new integration profile by navigating to the Integration Profile List page ([Configuration Menu > General > External Systems > Integration Profiles](#)) and selecting Add Integration Profile.

2. In the Integration Profile screen, select "Reading List Loader" from the Integration Type dropdown.

3. In the S/FTP Connection Type dropdown, select a connection type.

4. Fill in the remaining required fields and click Next.

5. In the Reading List Import screen, enter the Input File Path. This is the path to the .csv or .xls input file on the ftp server.

6. Select to run the job in Report Mode if you wish. If selected, the job will not create reading lists, but will rather simulate the creation and produce a job report as if reading lists were created.

7. If there are data files you wish to associate to the citations in the upload, you must put them into a folder named files, and put the folder into the same location as the input file.
files folder and input file

For each citation in the .csv or .txt input file to which you wish to associate a data file from the files folder, the value of the file_name field in the .csv/.txt file must be identical to the name of the data file that you wish to associate to the citation.

If there is a problem reading/uploading a file, the upload process will continue and only that file will fail to attach.

8. Click Save to save the integration profile.

9. In the Integration Profile List screen, select the integration profile you have created and select the Actions tab. Click Run to run the job.

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Note

A Reading List Loader job can be aborted at any time via the Monitor Jobs screen in Alma. When a job has been aborted, any reading list that has already been loaded will remain in the system.

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Prior to running the job, the system validates the data in the input file, to check for the following errors:

- Missing columns
- Rows with a corrupted row length (tab count is less than the required amount)
- Reading list code already exists
- The list is not in one block.
- The section is not in one block.
- Any of the following mandatory fields are missing for any rows:
  - Reading list code
  - Reading list name
  - Section name
When the job runs, a reading list set (type-itemized) is created with all list IDs created during the job. The set will be visible (type "Public"). The set name will be ReadingListLoader_<JOB_ID>.

Once the job has run, you can view the results of the job by finding the integration profile in the Integration Profile List screen and selecting Job History from the ellipsis menu. The Job History screen appears for this job.

For each Job ID, you can select View from the ellipsis menu to view the results for each job.

In the example above, a total of four reading lists were creating without warnings, 11 reading lists were created with warnings/errors, and one file was not found. You can click on each category of event to view details on the events.
The following is an example of the events report for the lists created without warnings/errors.

![Events report--lists created without warnings/errors](image)

The following is an example of the events report for the lists created with warnings.

![Events report--Lists created with warnings/errors](image)

For each warning/error that the job produces, there will be a reference to the list and row number in the input file.

**To perform updates on the created set:**

Once the job has finished running, you can also perform updates on the created set, including deleting the set, using the Reading List Bulk Update job (see Reading List Bulk Update).

### Additional Enhancements

- **November 2020 Fulfillment Course Reserves**
  When you duplicate a list that is associated with a course in Leganto (via the Reading List menu) or in Alma (via the Reading List Task List), the new (duplicated) list will not be associated with that course. However, when duplicating a list via the Courses page in Alma, or via the API, the associated course will be duplicated as well.

- **November 2020 Leganto**
  In the Notifications tables ([Leganto Configuration > Features > Notifications – instructors](#)) and ([Leganto Configuration > Features > Notifications – students](#)), you can configure Leganto and Alma to show a notification whenever a note has been added to a list, using the new **A new note was added to a list** parameter.

  ![New parameter](image)

  For more information, see [Notification Types](#).

  When the value of this parameter is set to "Yes", whenever a new note is added to a reading list, a notification will appear in the Notifications dialog in Leganto as well as in the Recent Changes tab in Alma.
In addition, in the Notifications dialog, you can now select "New item was added to a list" in the Select notification types filter, to view only notifications for when a new item was added to a list.

**November 2020 Leganto**

For Primo VE customers, in the full citation view, the Links & Availability iFrame now supports SSO (Single Sign-On). Previously, to view the Request Options area in the iFrame, you would need to sign in again.

Now, if you configure the flag `primove_getit` to "true" in the Primo Settings table (Leganto Configuration > Discovery > Primo Settings), you will see the availability as a logged-in user.

**November 2020 Leganto**

You can now configure the default section name to appear when a reading list is created in Alma or imported into Leganto, using the new `defaultSection.title` label in the Labels configuration table (Leganto Configuration > General > Labels). Whenever you import references into Leganto or create the list in Alma, the value of this label will appear in Leganto as the section name. Previously, the section name was hard-coded to default to “section name NA”, and now its default value is “Resources”.

When creating a reading list in Alma or importing a reading list into Leganto, the description will now default to blank.
For more information, see Creating or Duplicating a Section.

• **November 2020 Fulfillment Course Reserves**
  When performing a simple search for courses in Alma, you can now search by the Course ID. For more information, see Course Search Fields.

Search by Course ID

• **November 2020 Fulfillment Course Reserves**
  In the Course Terms code table (Fulfillment Configuration > Courses > Course Terms), a new **FALL** course term code has been added.

Fall course term code

**Resolved Issues**

• **November 2020 Leganto SF: 00878433**
  In Leganto, the move citation action didn't work when the list was filtered. This was fixed.

• **November 2020 Leganto SF: 00755999**
  In Leganto, when using student preview mode, the breadcrumbs didn't work. This was fixed.

• **November 2020 Leganto SF: 00869107**
  In Alma, the "List has a new note" alert was missing from the Alerts filter. This was fixed.

• **November 2020 Leganto SF: 00873506**
  When entering the Leganto Find List as a guest, clicking on Login displayed the internal Leganto login. This was fixed.

• **November 2020 Leganto SF: 00872292**
  In Alma, a list could have been associated with the same course multiple times. This was fixed.

• **November 2020 Leganto SF: 00853071**
  In Alma, the personal copy functionality didn't work in some cases. This was fixed.

• **November 2020 Leganto SF: 00868267**
  The instructor usage reports weren't reset even though the reset was run in Alma. This was fixed.

• **November 2020 Leganto SF: 00868212**
  In Alma, the digitization requests didn't take into account the chapter information. This was fixed.

• **November 2020 Leganto**
  When a citation with a due date was deleted, the due dates area in Leganto didn't reflect the deletion. This was fixed.

• **November 2020 Leganto**
  In Alma, the recent changes tab didn't always work. This was fixed.

• **November 2020 Leganto SF: 00812595**
  In Leganto, when arriving from an LTI link, the instructor role used to be added to Librarians. This was fixed.

• **November 2020 Leganto SF: 00860629**
  Citing Springer didn't work properly. This was fixed.
• **November 2020 Leganto SF: 00735118**  
  For Primo VE customers, in the availability section, the location dropdown was truncated. This was fixed.

• **November 2020 Leganto SF: 00729467**  
  In Alma, when entering a string longer than 40 characters when searching for a course, no warning message was displayed. This was fixed.

• **November 2020 Leganto SF: 00634201**  
  In Alma, when creating a brief citation, the 'Suppress from Discovery' option didn't work as required. This was fixed.

• **November 2020 Leganto SF: 00872292**  
  In Alma, the system allowed a reading list to be associated with the same course multiple times. This was fixed.