Streamlining Your Library Workflows

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Jessie Ransom, Senior Manager, Product Management
## Become an Expert: Leganto

<table>
<thead>
<tr>
<th>Session</th>
<th>Topic</th>
<th>Date</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Streamlining Your Library’s Leganto Workflows</strong></td>
<td>May 22</td>
</tr>
<tr>
<td>2</td>
<td>Bulk Rollover in Leganto</td>
<td>May 29</td>
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<td>3</td>
<td>Digitization and Copyright</td>
<td>June 5</td>
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<td>4</td>
<td>Optimizing the New Leganto User Interface</td>
<td>June 12</td>
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<td>5</td>
<td>Getting the Most out of Leganto Analytics</td>
<td>June 19</td>
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<td>6</td>
<td>Increasing Adoption and Engagement with your Leganto Service</td>
<td>June 26</td>
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Overall Question

Which citations does your library really need to review?
• Introduction: Using Alma Tasks
• Automation Options

These are all recommendations, not requirements!
Assumptions

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

• Your library staff are working from Alma tasks
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
Set Complete to Track Progress
Training Resources about Working with Leganto Tasks

• 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.
• Introduction: Using Alma tasks

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

• Physical items
• Uploaded files
• Citations with no inventory

Leganto automatically sets all other citations to “Complete”
Citations
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 and 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

Proactively check all citations “just in case”

Reactively fix links you know to be broken
Enable Broken-Link Reporting

Instructions to enable broken-link reporting
**Broken-Link Letters**

- Email library staff when links are marked as broken
  - Documentation
  - Video
- Notify users when broken links are resolved
  - Documentation
  - Video
Enable Electronic Citations to “Complete” Automatically

Instructions to configure default statuses for citations and reading lists

<table>
<thead>
<tr>
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Citations

Some Institutions Review

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

- Websites

- Uploaded Files
Checking Concurrent-User Licenses

- Only works if you use the “public access model” field on the electronic portfolio
- Consider adding as items are added to reading lists.

Proactively check all citations “just in case”

Review only citations that don’t have unlimited user licenses
Enable Electronic Citations with Specific Licenses to Complete Automatically

Watch a video
Checking Concurrent-User 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.

Proactively check all citations “just in case”

Identify concurrent-user licenses in bulk

Use the Citation Insights job to identify such licenses
### Identify Concurrent User Licenses

#### Run a Job - Enter Task Parameters

**Citation Insights job**

- **High demand loan insight. Number of loans per copy:**
  - [ ] checkbox

- **Low demand loan insight. Number of loans per copy:**
  - [ ] checkbox

- **High demand reserve loan insight. Number of loans per copy:**
  - [ ] checkbox

- **Low demand reserve loan insight. Number of loans per copy:**
  - [ ] checkbox

- **High usage insight. Views for concurrent license:**
  - [ ] checkbox
  - **Views for concurrent license:** 0

- **Low usage insight. Views for concurrent license:**
  - [ ] checkbox
## Identify Concurrent User Licenses

### Events Report

<table>
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<tr>
<th>Course Code</th>
<th>Reading List Name</th>
<th>Title</th>
<th>Citation ID</th>
<th>Mrms ID</th>
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<td></td>
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ExLibris
Part of Clarivate
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
Some Institutions Review

• E-Resources and CDI Citations

• Websites
  • Broken website links
  • Problematic websites

• Uploaded Files
Check Citations for Broken Links to Websites

- Rely on broken-link reporting, as in previous example
- Use **Process and Enrich Citations job** (Fulfillment menu) or Reading List Citation Process and Enrich job (Admin > Run a job)
- Validate external links
- HTTP Errors 500, 404, 504
- View report for broken links
Check Citations for Problematic Websites

**Configure Cite-It Filtering**
- Define Blocked or Allowed
- Add websites to the list

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

**Allowed:**
- [your institution]
- .edu
- .gov

**Proactively check all websites “just in case”**

**Monitor only specific websites**
Enable Cite-It Filtering
Define Cite-It Websites

Mapping Table

<table>
<thead>
<tr>
<th>Cite It Url Domains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enabled</td>
</tr>
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<td>---------</td>
</tr>
<tr>
<td>1</td>
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</table>
Some Institutions Review

- E-Resources and CDI Citations
- Websites
  - Broken website links
  - Problematic websites
- Uploaded Files
Check Citations for Problematic Websites

- Proactively check all citations “just in case”
- Monitor only specific citations, as requested by instructors

- Configure File Upload Copyright options
- Instructor uploads file and attests to the content:
  - Use of this resource complies with our institution’s Fair Use Policy
  - I would like the library to review this resource for copyright compliance

- Leverage the Task Lists
- Automatically set “fair-use-compliant” citations to “Complete”
File Upload Copyright Options

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

• Introduction: Using Alma tasks

• Automation Options
  - Automatically “Complete” certain citation types
  - Change citation status based on other actions
Review Specific Citations, by Tag

- Monitor only resources tagged as “Essential” or “Required” by instructors

- Monitor only resources that instructors mark as Library Review, or some other custom tag you create as a flag
Demonstration of Tags
Enable Citation Upload Auto-Complete
Change citation status when:

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

• 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
Framework for Workflow Review

Help your library understand your current workflows and identify opportunities for streamlining tasks.

See the Knowledge Center page for this course:

Leganto > Training > Webinars > Become an Expert: Leganto
Question Time
Next Week
(Wed. May 29)

Bulk Rollover of Reading Lists
Thank You