

Managing Reading Lists and Tasks in Alma

Hello, Once a reading list is added, you can see it in the Alma task list. Like other tasks in Alma, reading lists are unassigned when they are first created. In this training session we'll **view and assign reading lists and tasks**. You may see any of the following tasks, assigned to you or unassigned:

List with new note: the instructor has added a note to a reading list. You may review this note separately, or as part of processing the reading list

Being Prepared: The instructor is building the reading list. You can see it in Alma, but you don't need to review it yet. Once the instructor submits the list to the library, it triggers this Ready for Processing task. Your workflow for processing reading lists will start here.

You may also see additional reading list tasks:

Complete: The list is complete and doesn't require any action

Processing: This shows all of the lists which are not completed, combining all other statuses. If your institution uses the being processed status to indicate lists which are being worked on, you will find those lists here.

The task lists will take you to the reading lists which are ready to work on, but you can also search for a specific reading list using the persistent search or view all reading lists under Alma's Fulfillment menu, Course Reserves area, Reading Lists. Let's open the assign to me-ready for processing task lists.

The Reading Lists Tasks List page opens on the Assigned to Me tab filtered by status of Ready for processing. Note that there are tabs for all reading lists, those that are assigned to you, and those that are currently unassigned. You may also see a tab for lists assigned to others, depending on your permissions.

You also have the option to customize this view to remove some of the default fields or to include additional fields. Like publication status, which determines whether the lists are visible to students. You can sort the reading lists by different columns, and there are a number of filtering options, including processing department, term or year, list status or publication status. Note that Reading lists with a Draft publication status are not visible to students.

You can read more about publication statuses in the Leganto documentation.

Click on the row action tool to View the list or choose the Work On option to edit the list. You can view the list in Leganto, Release assign to move a reading list to the unassigned queue or assign the list to someone else. In the Assign To field, choose the name of a library staff member who will receive the assignment. Optionally, the Send as Email checkbox can be enabled to send an email notification to the library staff member to whom the task is being assigned.

Note, that the names of library staff that appear in the Assign to option box will be limited to users with roles that are relevant for working with Reading lists.

You can also duplicate the list, associate a reading list with a new Course or remove a course/reading list association. Note, that With Leganto, you may have reading lists that are not associated with a Course. They will be linked to EXLIBRIS_Default Course.

You can also delete or purge a reading list. Let's edit it. [click work on].

When you work on a reading list, Alma will automatically assign the list to you. If you prefer that reading lists are not automatically assigned when someone works on them, you can

configure Alma to not automatically assign reading lists.

Now we are on the Edit Reading List page on the citations tab. Scrolling down, you can see a list of citations for your reading list.

This brings us to the end of this training session, working with reading lists and tasks in Alma.

Thank you for joining!