

## *Course Rollover in Bulk via Course Loader*

With Leganto the institution can roll-over existing courses and their associated reading lists for use in the next semester or academic year. During the rollover, existing reading lists are copied and become the new reading lists that are assigned to the new courses

A Leganto course rollover is different from simply assigning an existing reading list to a new course or duplicating an existing list and assigning it to a new course; in terms of the available configurations. In addition to copying the citations with their metadata and files, the library can decide whether to transfer or reset copyright records and data associated with the citations, such as tags, statuses, notes, and discussion threads.

There are two ways to perform Leganto course rollover:

Option 1: The library runs a bulk process using the Course Loader integration profile. This is usually the recommended way. It requires that you map old course codes to new course codes.

Option 2: Each instructor rolls over his or her reading lists, one at a time. This option is recommended when the mapping of existing course codes to new course codes is not available to the library.

You can find documentation on both methods, and guidance on when to use which method, in the "Leganto Course Rollover" Article in the Ex Libris Knowledge Center.

In this session, we'll demonstrate bulk course rollover by the library. Rollover by the Instructor will be covered in a separate session.

Now let's demonstrate course rollover by the library.

The process consists of preparing an input file listing all the courses that need to be rolled over, and then running the Course Loader Integration.

Let's first look at the input file.

Here is a sample course loading input file for rollover, presented in an Excel format so we can see the columns, the actual file is a tab-separated values file. The exact specs of the file can be found in the Configuring Course Loading article in the Knowledge Center, along with a sample file.

The first row must include all of the column names as shown. The next rows each represent a course to be rolled over.

The COURSE\_CODE column contains the new course code.

The next columns provide course information such as titles, sections, academic department and start and end dates.

The OPERATION column should have the value ROLLOVER

The OLD\_COURSE\_CODE is the original course code before rollover, from which the reading lists are to be copied. So in this example the course with the code English 120 2019 1 will be rolled over to the course code English 120 2020 2

In the `READING_LIST_NAME` column we can give the list a new name, or, if this column is blank, the list will have the previous name plus any suffix specified in the course loader integration profile.

When we run the rollover job, It will first create the listed new courses, using the information in the first several columns, then, using the information in the last few columns it will roll-over the previous list into this course.

Here is a view of this same file, this time as a text file, in tab-separated value format, which is the format used for the rollover. So it has all of the same values separated by tabs. The institution must prepare this file based on the course information. When the file is ready, place it on the S/FTP server, and make note of the path.

Now back in Alma, with the file in place, let's run the Course Loader integration.

Go to Alma Configuration > General > External Systems > Integration Profiles.

Filter by Integration Type: Course Loader.

You may need to set up a new integration profile via Add Integration Profile. It's common to require several Integration Profiles, if different configurations are required for different situations.

In this example, we'll use the Integration called Leganto Course Rollover. Let's look at its parameters, before running it.

The first tab defines the general information of the integration, including its Code, its Name and its FTP server where we place our file.

The Actions tab is where you define how the rollover is going to occur.

The course loader integration profile can be used to create courses, perform rollover, and delete courses. You can do all of these actions in one job, or in separate jobs. You will need to select the appropriate options for what you are trying to do.

Let's look at the options we've filled in for this rollover integration, you can learn more about all the options by looking up Configuring Course Loading in the Knowledge Center.

The Input file Path is the path on the FTP server where we've placed our file.

Selecting Add Instructor Role to Users will automatically add the Instructor role to all users listed in columns as instructors.

Make sure the date format matches that of your input file.

The overwrite options determine whether new values overwrite existing values for fields such as instructors, number of participants, and course title. The Overwrite configuration is relevant only if there is already a matching course in Alma. Perhaps we are updating courses with new information.

The On rollover options are relevant for the rollover process. Here we can define what will happen as the list is being rolled over. In this example the rollover will copy citations and sections text, it will recalculate citation statuses, it will set the reading list statuses to being prepared the publication status of the list will be draft copyright approval will be recalculated, On rollover list creation mode will be set to either multiple or single. Multiple

means that in the case of rollover an old course into two courses each new course will get a copy of the reading list. And single means that only one reading list will be created for both of those courses and that same list will be associated to each one. Our rollover will also copy public and private notes, copy the reading lists owners and collaborators, and additionally, the existing permalinks to the previous lists will now redirect to the corresponding new lists. We've also selected to copy only the newest list during rollover. This avoids duplicated lists if, for some reason, multiple lists are associated to your course.

We've selected to overwrite course instructors with those in the input file. The old reading lists will be archived and we can select to run this job on a given schedule or, what is more likely, to run it once manually.

Let's run the job now. This process may take several minutes.

We can see that the job was submitted successfully, and to view the job results, back in the Integration Profile List, go to your jobs and select Options > Job History. Our rollover job is currently In Process. Once the job is completed, we can see its job report under Options > View. Let's look at the new courses rolled over. And we can see Alma created a new course with the code ENGL 120\_2020\_2 from an old course called ENGL 120\_2019\_1.

The new course is now the active one, and you can work on it in Alma and Leganto.

Thanks for joining!