

Streamlining Your Library Workflows

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EX LIBRIS
Knowledge Days

Leganto

ExLibris[®]
Part of Clarivate

Welcome and Introduction

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- Lead Product Manager for Leganto
- Denver, USA
- ExL / CLVT for 8 years; previous 6 years as a librarian

Kevin Lane-Cummings

- Senior Customer Education Trainer, Global Education
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- SerSol / PQ / ExL / CLVT for 14 years





Question: Which citations does your library *really* need to review?

Agenda

- **Introduction: Using Alma tasks**
- Automation Options
- Bulk Jobs

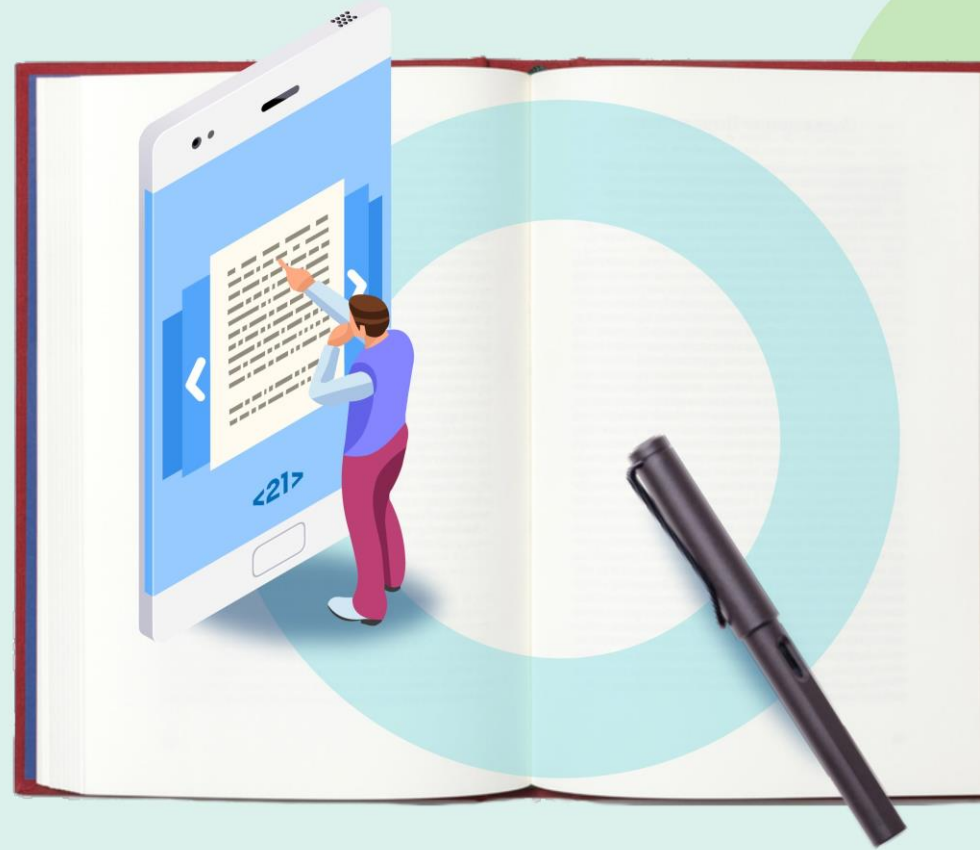


These are all
recommendations,
not requirements!

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

The screenshot displays the 'Tasks' interface in Alma. It shows a list of task categories and their sub-items. The 'Reading Lists' category is expanded, showing 399 items, with 40 items highlighted in a red box. The 'Citations' category is also expanded, showing 2121 items, with 721 items highlighted in a red box.

Task Category	Sub-Item
101	Borrowing Requests
2	Lending Requests
40	Other Requests
1	DARA Recommendations
399	Reading Lists
227	Unassigned
26	Unassigned - List with new note
78	Unassigned - Being prepared
28	Unassigned - Being processed
76	Unassigned - complete
151	Unassigned - processing
40	Unassigned - ready for processing
2121	Citations
115	Citation has a New File
1222	Being prepared
38	Copyright waiting for approval
7	In Process
7	Marked as broken
721	Ready for processing
11	Unassigned - have new notes

Filter Citation Status to Not Complete

The screenshot shows the 'Edit Reading List' interface. At the top right, there are buttons for 'Print Slip', 'Print Slip Report', 'Back', and 'Save'. Below this is a 'Reading List Information' section with a dropdown arrow. The form contains several fields: 'Code' (0.6144329450051993), 'Name' (Inclusive Teaching), 'Due Back Date' (calendar icon), 'Requested for Review On' (07/11/2021), 'Review Requester' (Yael Beller), 'Sticker price' (-), 'Locked in Leganto' (checkbox), 'Owners' (Yael Beller), and 'Pages' (126). On the right side, there are dropdowns for 'Status' (Ready For Processing), 'Publication Status' (All Students Full), 'Reading List Visible Start Date' (calendar icon), 'End Date' (calendar icon), 'Creative Commons License', and 'Covered by the Library' (-). A dropdown menu is open over the 'Citation Status' field, showing options: 'Being Prepared', 'Complete', 'Declined', 'In Process', 'Inactive', 'Not Complete' (highlighted with a red box), 'On order', 'Print', and 'Ready For Processing'. Below the form, there are tabs for 'Citations', 'Courses', 'Owners', and 'Notes'. A 'Sort by' dropdown is set to 'Last created' with '1 - 20 of 24' items. A search bar contains 'look-up or select'. Below the search bar, there are filters for 'Material Type: All', 'Tags: All', and 'Copyright Status: All'. At the bottom, a list item '1 ABC's of Accommodations' is visible with 'Edit', 'Set Complete', and a menu icon.

Set Complete to Track Progress

Citations Courses Owners Notes Subject Labels Recent Changes

Sort by: Last created 1 - 10 of 10 Remove Citations Place Request Add Citation Remove Alerts Change Copyright Status Change Status Expand

Select All Alerts: Citation Status: Not Complete Resource Locate: All Material Type: All Tags: All Copyright Status: All Clear all

Citation Last Modification Date

1	<input type="checkbox"/> ABC's of Accommodations Article	Request Status: Ready For Processing Resource Locate Status: Information Incomplete Copyright Status: Not Determined	Section Name: last section Created By: Yael Beller 07/14/2021 14:07 Modified By: Yael Beller 07/14/2021 14:07	Edit Set Complete
<p>Physical Electronic Digital Other Citation Details Alerts</p>				
2	<input type="checkbox"/> Claiming Disability Book Chapter By Linton, Simi (New York University Press 2020)	Request Status: Ready For Processing Resource Locate Status: No Resources Located Copyright Status: Not Determined	Section Name: Identity and Power Created By: Yael Beller 04/21/2021 12:58 Modified By: Yael Beller 05/27/2021 09:21	Edit Set Complete
<p>Physical Electronic Digital Other(1) Citation Details Alerts</p>				
3	<input type="checkbox"/> Privilege, Power, and Difference Book Chapter By Johnson, Allan (McGraw-Hill US Higher Ed USE 2017) ISBN: 0073404225	Request Status: Ready For Processing Resource Locate Status: Locate Not Run Copyright Status: Not Determined	Section Name: Identity and Power Created By: Yael Beller 04/21/2021 12:31 Modified By: Yael Beller 05/27/2021 09:21	Edit Set Complete
<p>Physical Electronic Digital Other(1) Citation Details Alerts</p>				

Set Complete to Track Progress

The screenshot displays the 'Edit Citations' interface. On the left, a sidebar menu shows '2121 Citations' selected. The main area shows a list of citations with filters and actions. The 'Citation Status' filter is set to 'Ready For Processing'. Two citations are visible:

- 1 Elements of yacht design**
 - Book:** By Skene, Norman L. (Kennedy bros inc [c1938])
 - Subject:** Yacht building.
 - Request Status:** Ready For Processing
 - Resource Locate Status:** Resource Located
 - Copyright Status:** Not Determined
 - Section Name:** Week 1 Required Reading
 - Course Name:** Marine Engineering
 - Course Code:** ME-2016
 - Reading List:** Wooden Boat Building
 - Created By:** System 03/24/2017 16:38
 - Modified By:** System 09/18/2020 15:08
 - Actions:** Edit, Set Complete, ...
- 2 Concepts of modern art.**
 - Book:** By Στάγγκος (Thames and Hudson 1994.)
 - ISBN:** 0500202680
 - Subject:** Τέχνη*, Σύγχρονη*
 - Request Status:** Ready For Processing
 - Resource Locate Status:** Resource Located
 - Copyright Status:** Not Determined
 - Section Name:** Week 1: Introduction and Early Period
 - Tags:** Essential
 - Course Name:** Amedeo Modigliani: his life and art
 - Course Code:** ART-708
 - Actions:** Edit, Set Complete, ...

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.



Agenda

- Introduction: Using Alma tasks
- **Automation Options**
 - Automatically “Complete” certain citation types
 - Change citation status based on other actions
- Bulk Jobs

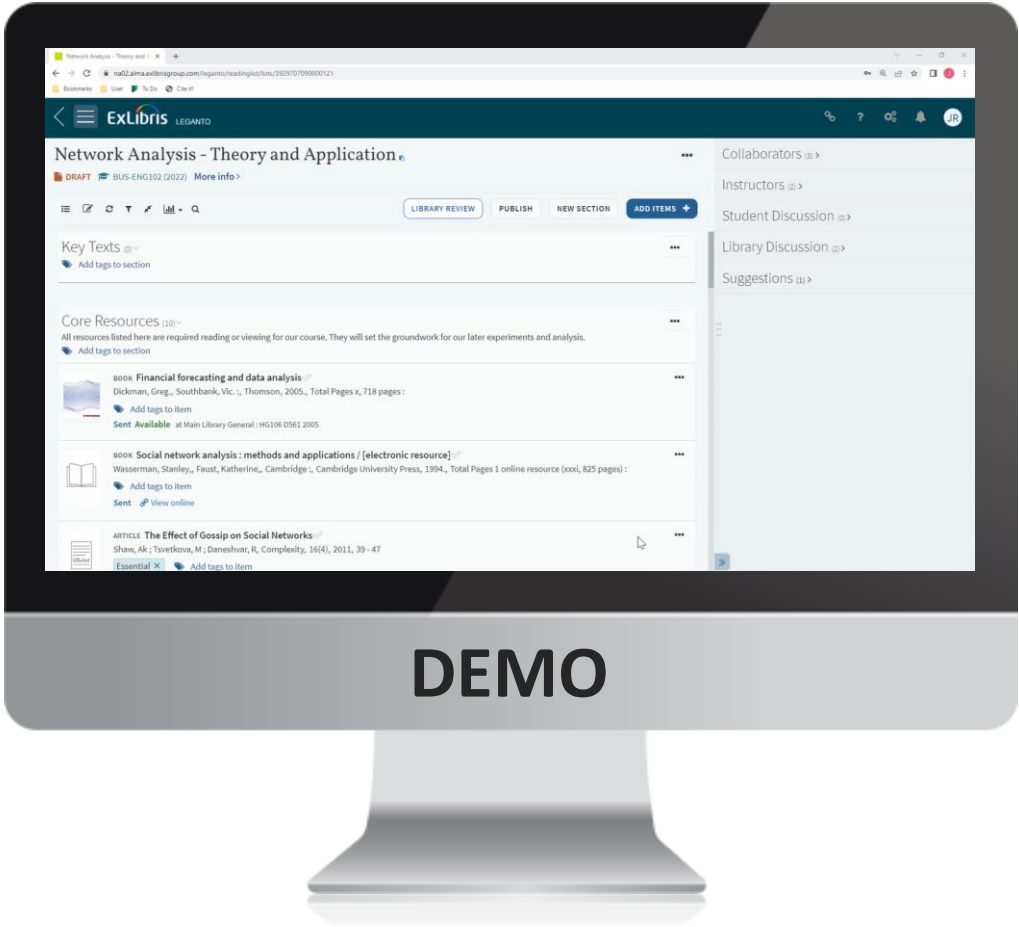


Default Review Settings

- Physical items
- Uploaded files
- Citations with no inventory

Leganto automatically sets all other citations to “Complete”





Citations Some Libraries 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/instructors marking links as broken?
- How quickly can you respond to broken links?

Checking for Broken Links



Proactively check all citations "in case"



Reactively fix links you know to be broken

Links & Availability

[View online](#) (Access Ebook Central Perpetual Subscription & DDA Titles)

Mark as broken

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

Enable Broken-Link Reporting

ExLibris Alma University

Configuring: Alma University

- Alma
- Leganto
- Fulfillment

- File Upload Copyright Options
- Declaration Texts
- Instructor Rollover Operations
- Item Request Questions
- Item Request Answers
- Features**
 - Leganto Features**
 - Guided Tours
 - Guided Videos
 - Notifications - instructors
 - Notifications - students

Mapping Table

	parameter key		
41	like		
42	list_analysis		
43	list_analysis_student_	system	instructor
44	mark_as_broken	system	all
45	modify_course_details	system	true
46	other_formats_and_ed	system	all

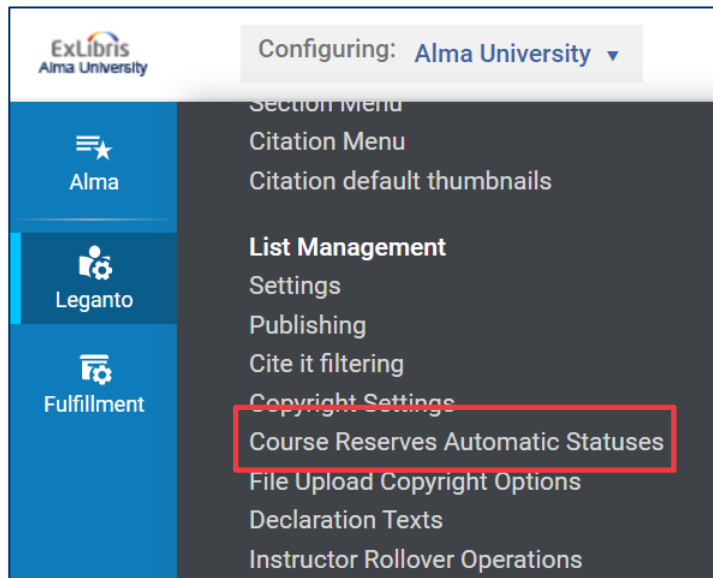
Are you sure you want to mark this link as broken?

Your user information will be sent to the library as having marked the link as broken.

Add a comment:

[Instructions to enable broken-link reporting](#)

Enable Electronic Citations to “Complete” Automatically



[Instructions to configure default statuses for citations and reading lists](#)

Mapping Table

Course Reserves Automatic Statuses

	parameter key	parameter module	parameter value	free text description
1	citation_copyright_ap	system		Automatic status
2	citation_detached_fro	system	ReadyForProces:	Automatic status
3	citation_digital	system	BeingPrepared	Automatic status
4	citation_electronic	system	Complete	Automatic status
5	citation_pc_search	system	Complete	Automatic status
6	citation_pc_url	system	Complete	(Only relevant wt
12	citation_reading_list_t	system	Complete	Automatic status
13	citation_resolved	system	Complete	Automatic status
14	citation_resource_loc	system	Complete	Automatic status

Citations that Some Institutions Review

- E-Resources and CDI Citations
- **E-Resources and CDI Citations**
 - Check for broken links
 - **Identify concurrent user licenses**
- Websites
- Uploaded Files



Checking Concurrent-User Licenses



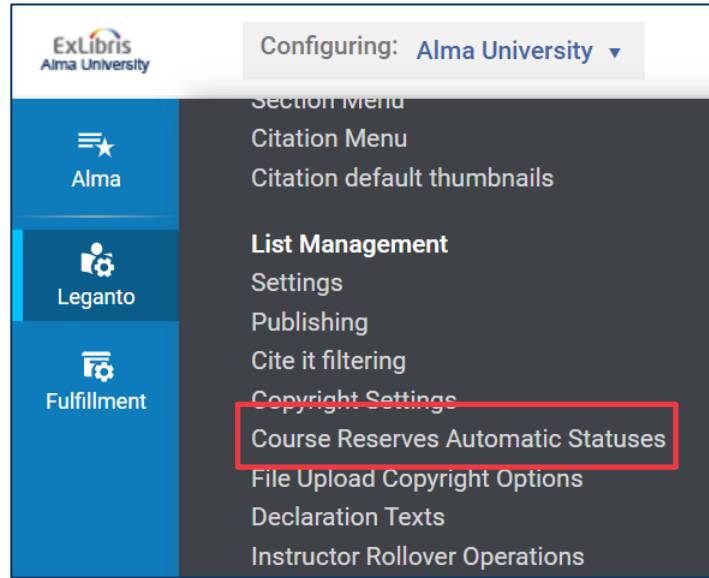
Previously “check all citations in case”



Review only citations that don't have unlimited 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.

Enable Electronic Citations with Specific Licenses to Complete Automatically



[Watch a video](#)

26	unlimited_access_cit	system	Complete	Automatic statu	jransom	05/01/2023	...
27	unlimited_access_m	system	PUR-UU, UA, U-L	Define the Acces	-	-	...

Checking Concurrent-User Licenses



Proactively check all
citations in case”



Identify concurrent-user
licenses in bulk

Use the **Citation Insights** job to identify such 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

Identify Concurrent User Licenses

Run a Job - Enter Task Parameters

1 2 3 4 Cancel Back Next

Citation Insights job

High demand loan insight. Number of loans per copy:

Low demand loan insight. Number of loans per copy:

High demand reserve loan insight. Number of loans per copy: in library:

on location:

Low demand reserve loan insight. Number of loans per copy: in library:

on location:

High usage insight. Views for concurrent license:

Low usage insight. Views for concurrent license:

Identify Concurrent User Licenses

Events Report Back

1 - 20 of 24 📄 ⚙️

Course Code	Reading List Name	Title	Citation ID	Mms ID	Description
1 ARC-707	American Architecture: Frank Lloyd Wright	Architecture and Mathematics from Antiquity to the Future [electronic resource] ...	383136763000...	99135049900121	Num of full text view: 0, Concurrent users: 5
2 ARC-707	American Architecture: Frank Lloyd Wright	Architecture and Mathematics from Antiquity to the Future [electronic resource] ...	383136749000...	99135049900121	Num of full text view: 0, Concurrent users: 5
3 PHIL 100	Introduction to Philosophy	Locke's essays: An essay concerning human understanding, and A treatise on the c...	540561327000...	99125816200121	Num of full text view: 0, Concurrent users: 10
		European			

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 that Some Institutions Review

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



Check Citations for Broken Links to Websites



Previously, check all citations "just in case"



Monitor only broken links

1. Rely on broken-link reporting, as in previous example
2. 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

Resource locate:
link resolver

Validate external
links

Enable purchase
request creation

Run Process and Enrich Citations Job

Check Citations for Problematic Websites



Proactively check all citations "just in case"



Monitor only specific websites

Configure [Cite-It Filtering](#)

1. Define Blocked or Allowed
2. Add websites to the list

Blocked:

- amazon.com
- youtube.com
- .net

Allowed:

- [your institution]
- .edu
- .gov

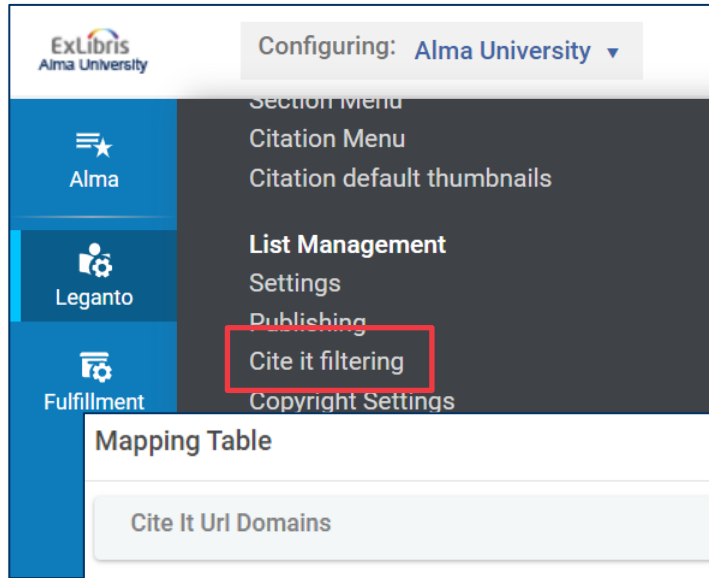
Enable Cite-It Filtering

The screenshot displays the ExLibris Alma University configuration interface. The top navigation bar shows 'Configuring: Alma University'. The left sidebar contains three main sections: 'Alma', 'Leganto', and 'Fulfillment'. The 'Fulfillment' section is expanded, showing a list of options: 'Section Menu', 'Citation Menu', 'Citation default thumbnails', 'List Management', 'Settings', 'Publishing', 'Cite it filtering', 'Copyright Settings', 'Course Reserves Automatic Statuses', 'File Upload Copyright Options', 'Declaration Texts', and 'Instructor Rollover Operations'. The 'Cite it filtering' option is highlighted with a red box. Below the menu, a configuration table is visible with the following data:

ID	Field Name	Value	Label
17	cite_it_filter	system	Cite it filter values c:

The 'blocked' value in the table is highlighted with a red box.

Define Cite-It Websites



The navigation menu shows the following items:

- Section Menu
- Citation Menu
- Citation default thumbnails
- List Management**
 - Settings
 - Publishing
 - Cite it filtering** (highlighted with a red box)
 - Copyright Settings

Mapping Table

Cite It Url Domains

Import **+ Add Row** (highlighted with a red box)

	Enabled	URL Domain/Regular expression	Description	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	<input type="text" value="amazon.com"/>	<input type="text" value="Amazon"/>	jransom	09/01/2020	...
2	<input checked="" type="checkbox"/>	<input type="text" value="books.google.com"/>	<input type="text" value="Google Books"/>	jransom	11/17/2020	...

Citations that Some Institutions Review

- E-Resources and CDI Citations
- Websites
- **Uploaded Files**



Check Uploaded Files





Proactively check all citations “in case”



Check only specific citations, as requested by instructor

1. Configure **File Upload Copyright Options**
2. Instructor uploads file and attests to the content:

Upload a File

 File name: Chapter 3.pdf (32162 bytes) 

Use of this resource complies with our institution's Fair Use Policy

I would like the library to review this resource for copyright compliance

3. Leverage the Task Lists
4. Automatically set “fair-use-compliant” citations to “Complete”

File Upload Copyright Options

ExLibris Alma University

Configuring: Alma University

- Section Menu
- Citation Menu
- Citation default thumbnails
- List Management
- Settings
- Publishing
- Cite it filtering
- Copyright Settings
- Course Reserves Automatic Stat
- File Upload Copyright Options**
- Declaration Texts
- Instructor Rollover Operations

Upload a File

File name: Chapter 3.pdf (32162 bytes)

Use of this resource complies with our institution's Fair Use Policy

I would like the library to review this resource for copyright compliance

Mapping Table

File upload copyright options

Enabled	Name	Text	Copyright Status	Updated By	Last Updated	
<input checked="" type="checkbox"/>	Fair Use	Use of this resou	Self Declared	circ	09/20/2021	...
<input type="checkbox"/>	No Declaration	I would like the li	Waiting for App	MGerbi	12/07/2021	...

Instructions for
[Configuring File Upload -
Copyright Status Options](#)

Enable Citation Upload Auto-Complete

The screenshot displays the ExLibris Alma University configuration interface. The top navigation bar shows 'Configuring: Alma University'. The left sidebar contains three main sections: 'Alma', 'Leganto', and 'Fulfillment'. The 'Fulfillment' section is expanded, showing a list of settings. The 'Copyright Settings' option is highlighted with a red box. Below this, the 'Course Reserves Automatic Statuses' table is visible, with the 'citation_uploaded_file' row highlighted by a red box. The 'Complete' value in the 'Automatic status' column for this row is also highlighted with a red box.

ID	Key	System	Value	Label
16	citation_uploaded_file	system	Complete	Automatic status
17	cite_it_filter	system	blacklist	Cite it filter value

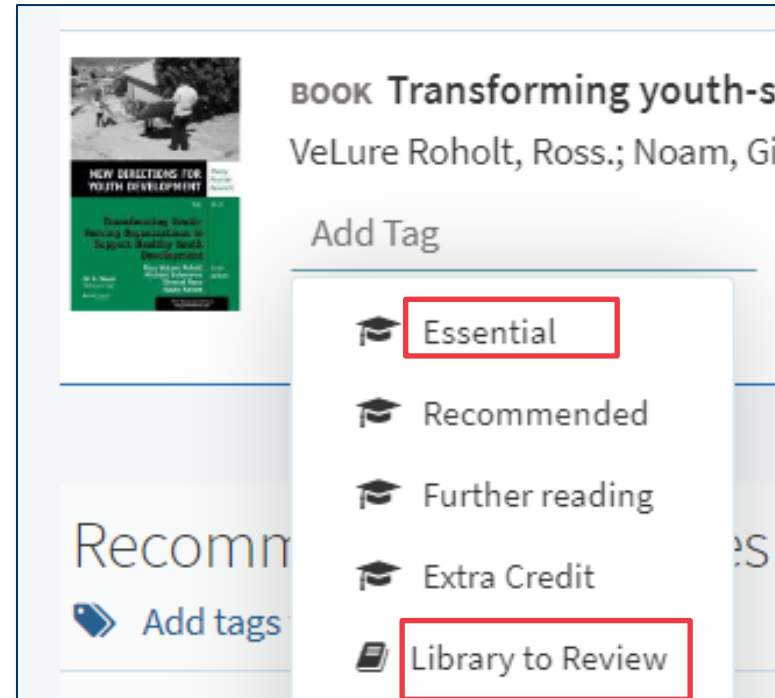
Agenda

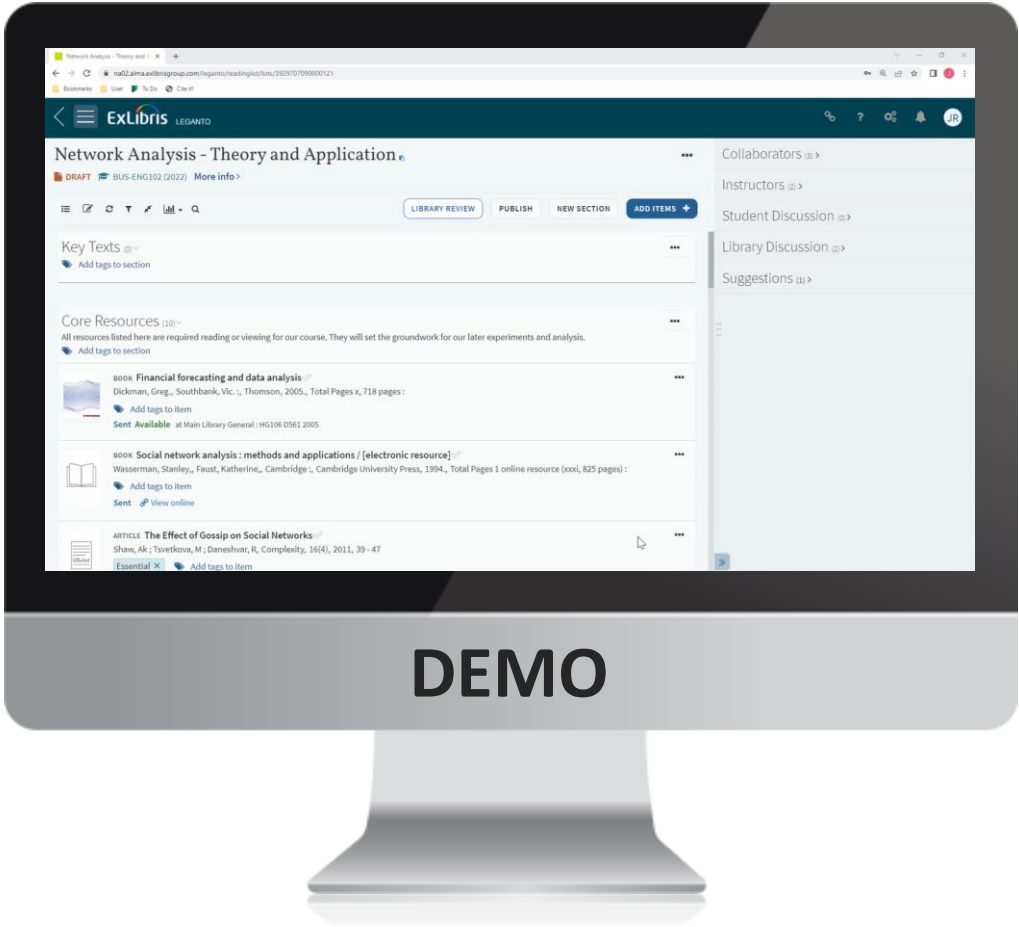
- Introduction: Using Alma tasks
- **Automation Options**
 - Automatically “Complete” certain citation types
 - **Change citation status based on other actions**
- Bulk Jobs



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





Enable Citation Upload Auto-Complete

ExLibris Alma University

Configuring: Alma University ▾

- Section Menu
- Citation Menu
- Citation default thumbnails
- List Management**
- Settings
- Publishing
- Cite it filtering
- Copyright Settings**
- Course Reserves Automatic Statuses
- File Upload Copyright Options
- Declaration Texts
- Instructor Rollover Operations

21	revert_citation_status_by_addi	system	LIB
22	revert_citation_status_by_remc	system	
23	revert_completed_citation_stat	system	
24	revert_completed_citation_stat	system	ReadyForProcessing

Change citation status when:

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

- 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

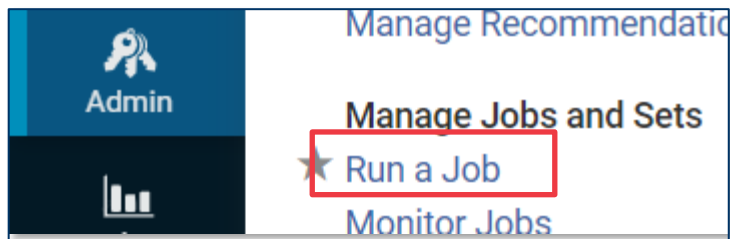
19	list_new_citation_in_completed_	system	Ready for processing	New reading list status to
20	reading_list_citations_complete	system	Complete	Status to set the reading l
21	revert_citation_status_by_addin	system		When adding these tag co

Agenda

- Introduction: Using Alma tasks
- Automation Options
- **Bulk Jobs**



Bulk Jobs for Citations, Reading Lists, and Courses



[Video on Bulk Update Options](#)

		Information
6	<input type="radio"/>	Citation Insights job
7	<input type="radio"/>	Close lost loans
8	<input type="radio"/>	Course Bulk Update
9	<input type="radio"/>	Create Physical item move requests
10	<input type="radio"/>	Create physical item work orders
11	<input type="radio"/>	Export Physical items
12	<input type="radio"/>	Export Physical items labels
13	<input type="radio"/>	Reading List Bulk Update
14	<input type="radio"/>	Reading List Citation Update Task
15	<input type="radio"/>	Rebuild Physical Item Association

Course Bulk Update

Course Bulk Update instructions

Course Bulk Update

Delete course


Processing department


Academic department


Terms list

Add instructor

Remove instructor All Select instructor

Start date 

End date 






Submit list by 

Remove list association

Leganto create list - reminder email

Reading List Bulk Update

Reading List Bulk Update instructions

Reading List Bulk Update	
Delete list	<input type="text"/>
Reading list status	<input type="text"/>
Reading list publication status	<input type="text"/>
Lock list	<input type="text"/>
Creative Common License	<input type="text"/>
<input type="checkbox"/>	Due back date <input type="text"/> 
<input type="checkbox"/>	Reading List Visible Start Date: <input type="text"/> 
<input type="checkbox"/>	End Date: <input type="text"/> 
<input type="checkbox"/>	Assign to <input type="text"/> 
<input type="checkbox"/>	Add owner <input type="text"/> 
<input type="checkbox"/>	Remove <input type="radio"/> All <input checked="" type="radio"/> Select owner

Reading List Citation Update Task


Reading List Citation Update Task instructions

Reading List Citation Update Task

Delete citations

Citation status

Citation type

Due date 

Remove tags


Add tags


Remove alerts

Delete public note

Detach from repository

Remove files

Use Leganto viewer (PDFs only) 

Sticker Price from Rialto 

Citations Insights Job

Citation Insights Job instructions

Run a Job - Enter Task Parameters

1 2 3

Citation Insights job

High demand loan insight. Number of loans per copy:

Low demand loan insight. Number of loans per copy:

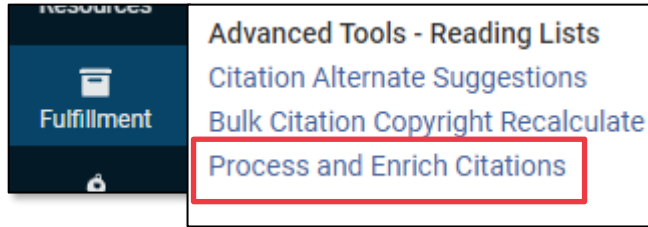
High demand reserve loan insight. Number of loans per in library:
conv: on location:

Low demand reserve loan insight. Number of loans per in library:
conv: on location:

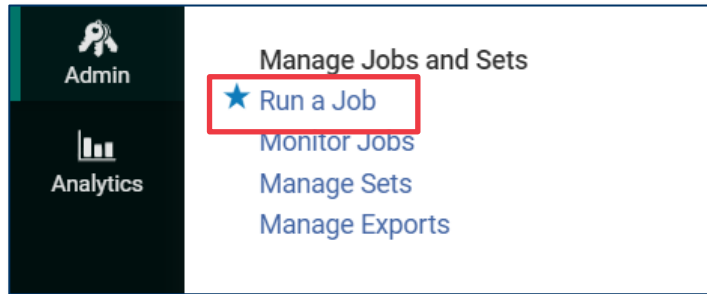
High usage insight. Views for concurrent license:

Low usage insight. Views for concurrent license:

Process and Enrich Citations



[Process and Enrich Citations instructions](#) (by course dates)



[Reading List Citation Process and Enrich instructions](#) (set of citations)

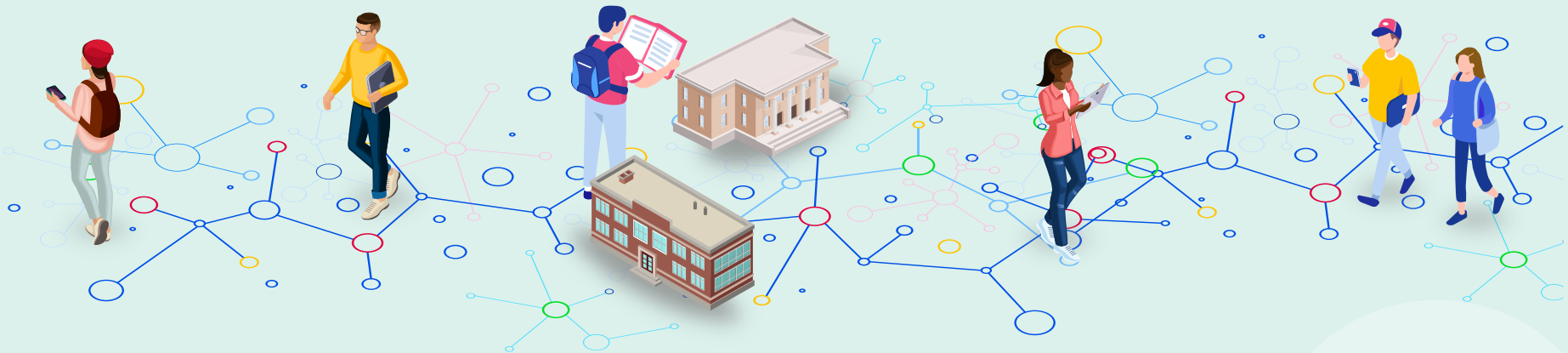
A screenshot of the 'Run Process and Enrich Citations Job' configuration form. The form includes the following fields and options:

- Courses Start/End date ***: A text input field.
- On specific course**: A text input field.
- Reading List status**: A dropdown menu.
- Citation Status**: A dropdown menu.
- LOCATE AND VALIDATE RESOURCES**: A section header.
- Resource locate: repository**: A checkbox that is checked.
- When multiple matches are found**: Two radio buttons: 'Handle manually' (unchecked) and 'Use first matching resource of a specific inventory type, if it exists (otherwise...)' (checked).
- Physical**: A dropdown menu set to '2nd Priority'.
- Electronic**: A dropdown menu set to '1st Priority'.
- Perform locate on type**: A dropdown menu set to 'All'.
- Resource locate: link resolver**: A checked checkbox.
- Validate external links**: A checked checkbox.
- Enable purchase request creation**: A checked checkbox.
- Run Process and Enrich Citations Job**: A button at the bottom.

Additional Resource

- Framework for Workflow Review
 - Help your library understand your current workflows and identify opportunities for streamlining tasks





Question Time



<https://forms.office.com/r/4YrjGTApww>

EX LIBRIS
Knowledge Days

ExLibris
Part of Clarivate