

Citation Metadata: From Library Data to Student View

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Welcome and Introduction





Jessie Ransom

- 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
- Seattle, USA
- SerSol / PQ / ExL / CLVT for 14 years

Agenda



- Overview: How Leganto Leverages Library Data
- Configure Leganto to Work for You
- Leverage Leganto to Support Your Workflows



How Citations Link to Inventory







How Citations Link at Your Institution







Hands-On Exercise

EX LIBRIS Knowledge Days

- 1. In your Alma, find a physical item in your IZ that is a book
- 2. Note the title and ISBN
- 3. In your Leganto, create a new reading list (or open an unused or test list)
- 4. Add Items > Blank Form
- 5. Fill in metadata:
 - Title: [enter the wrong title]
 - Type: Book
 - ISBN: [use the correct ISBN]
 - Add & Close





How the magic happens

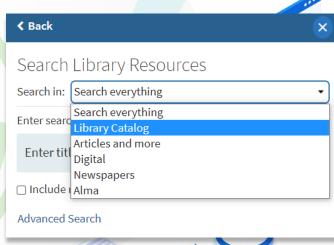


Items added directly from discovery



Items added directly from discovery are automatically linked to library collections





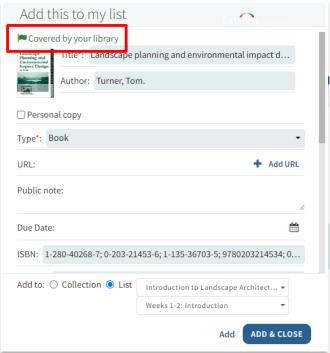


Items added without checking library collections



For items added in other ways (using Blank form, Cite it!, File upload, etc) Leganto attempts to locate the resource in the library.







Why connect bibliographic record and citation?



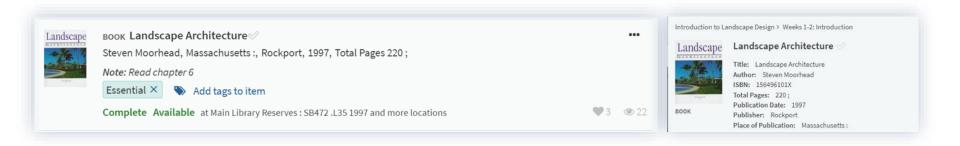
The connection automatically adds:

1 | Availability

library inventory is added automatically students always know what your library has and how to access it

2 | Metadata

no need to manually update citation information where instructors might not have added enough information (or added wrong information)

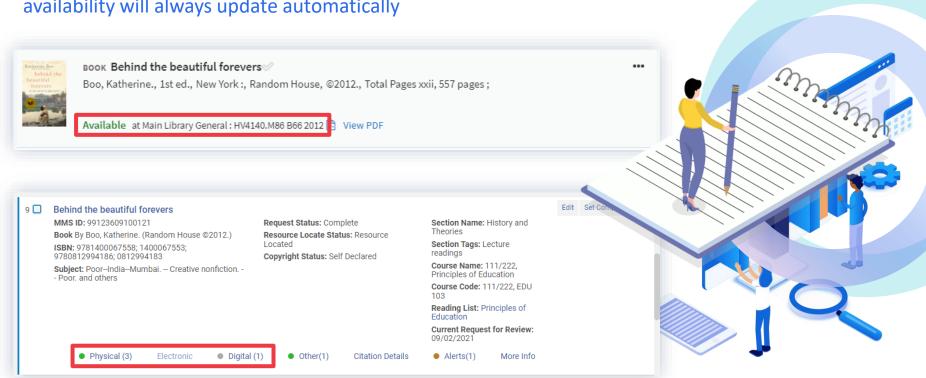




Automatically add and update inventory



Once linked to a bib record, physical, electronic, and digital availability will always update automatically





Metadata is copied to the citation

Leverage work you've already done to catalog library



Introduction to Landscape Design > Weeks 1-2: Introduction

BOOK

Landscape Architecture

Title: Landscape Architecture Author: Steven Moorhead

ISBN: 156496101X Total Pages: 220;

Publication Date: 1997

Publisher: Rockport

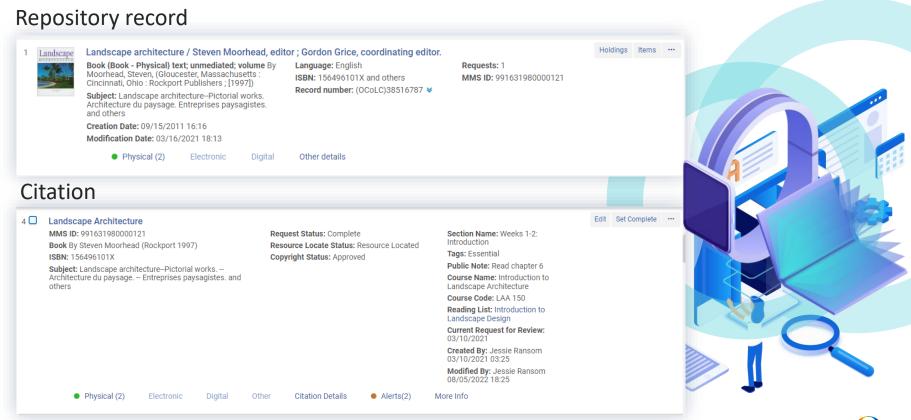
Place of Publication: Massachusetts:



Krowledge Days

Citations and bibliographic records are not the same



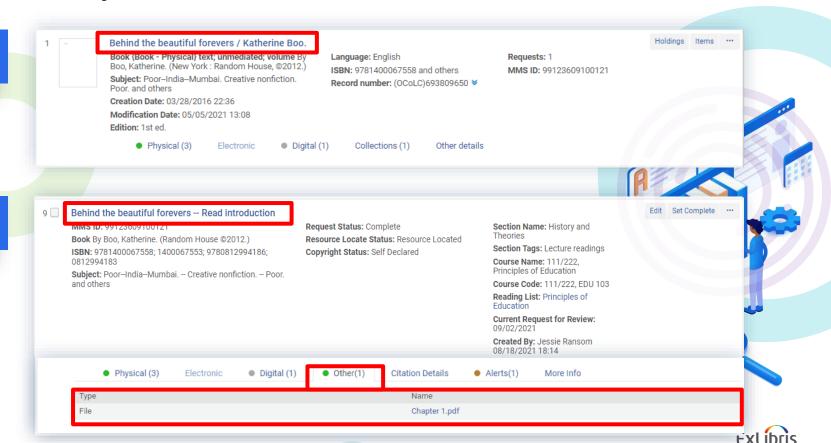


Citation can be updated without updating bib/inventory



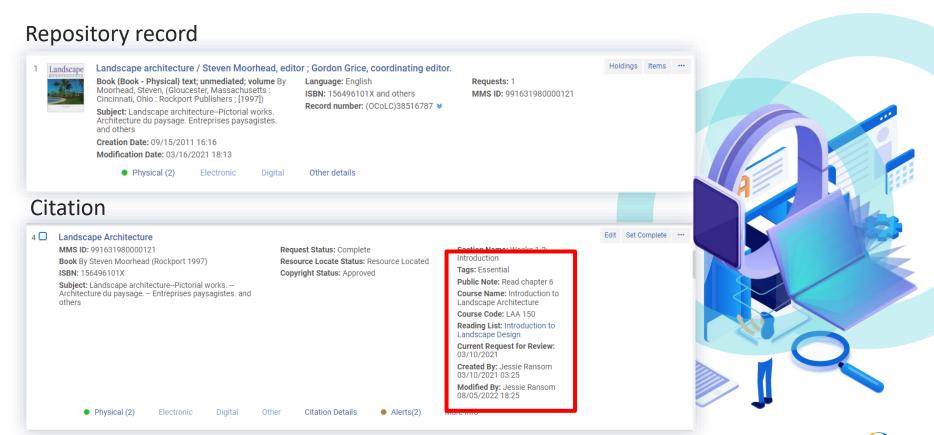
Part of Clarivate





Citation includes additional details







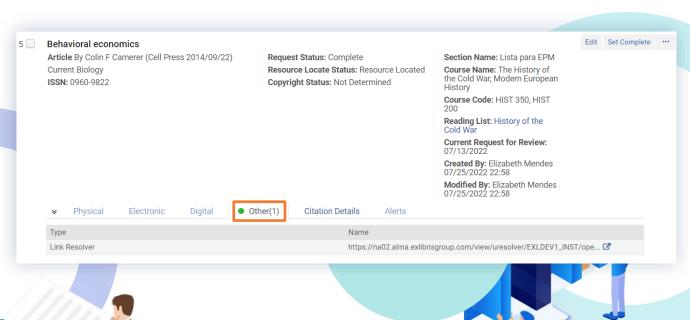
Small side note – OpenURL resolving



Leganto also attempts to add links to library inventory via the link resolver.

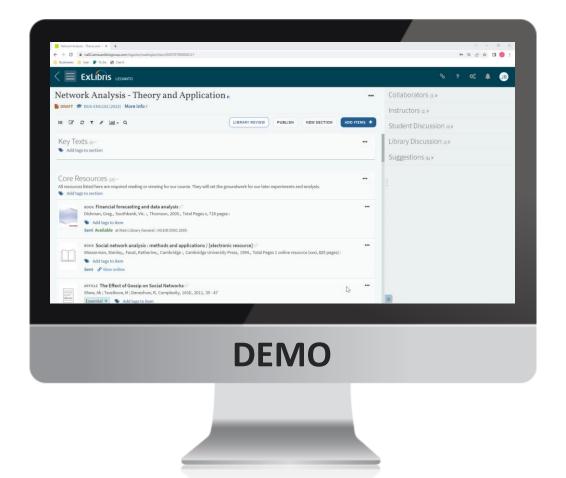
The minimum information for an OpenURL request for electronic resource is:

ISSN, volume, issue, start page, and publication year OR DOI.











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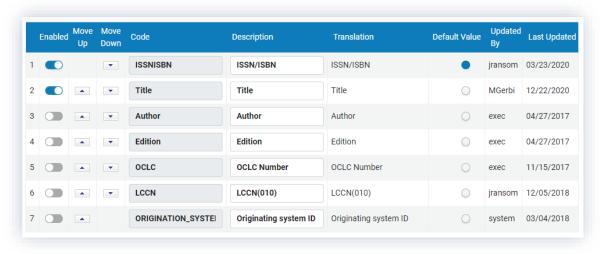
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How do we match citation to bib?

Configure the fields used for matching citation and bib

TIP: Balance risks of overmatching with risks of undermatching





- > Enable/disable specific fields
- > Move fields priority up/down (relevant only for OR operator)
- > Configure AND or OR mode
 between fields
 (resource_locate_mode, Fulfillment
 Configuration > General > Other
 Settings)

Recommend ISBN/ISSN only or ISBN/ISSN AND Title

Fulfillment Configuration > Courses > Locate Citation By Fields



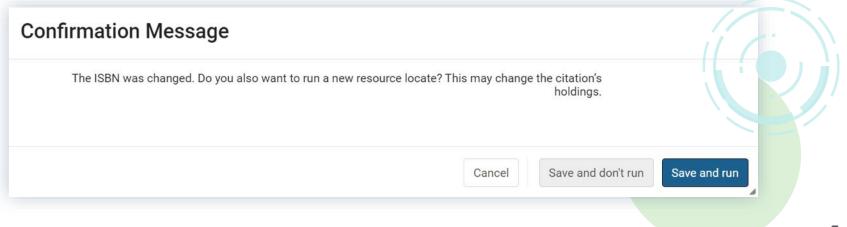
Configure locate to run when a citation is updated



You can configure whether another resource locate is performed on an already located citation when the citation's resource identifier, such as ISBN, is changed.

When you change any of the citation metadata listed in the Match by Fields table (in Fulfillment Configuration > Courses > Locate Citation by Fields), a new resource locate is performed.

Configure relocate_modified_citation parameter in Configuration Menu > Leganto > General > Settings





What happens if there are multiple matches?



If there are multiple matches you can:

manually select the correct match: potentially more accurate, but more manual work

OR

set priority by inventory type



If you set priority by inventory type, set the priority between **electronic**, **physical**, and **digital**.

For example, first look for a match to electronic inventory, then physical, then digital.

Configuration Menu > Fulfillment > General > Other Settings

resource_locate_multiple_matches
resource locate multiple matches priority



Connect only material types you need

You may not want to locate all material types if you don't manage them in your Alma repository (consider ignoring blogs, legislation documents, poems, transcripts, websites, etc.)

Minimize mismatched items by configuring that only specific material types will be located

Configure with resource_locate_by_type in Fulfillment Configuration > General > Other Settings





Configure how the citation metadata is updated



Upon locate, metadata from the bibliographic record is copied to the citation. The system can be configured to:



OVERLAY

Override information in the citation with information in the bib



MERGE

Only missing citation information is filled in using information from the bib



IGNORE

Ignore the information in the bib, keeping only the citation metadata



Recommend Overlay or Merge, to take advantage of cataloging work already done

Define with *on_locate* parameter in Configuration Menu > Fulfillment > General > Other Settings



Customize how metadata is mapped to citations



After a match is found, you can configure what fields are copied to the citation

For Primo – Configuration Menu > Leganto > Discovery > Primo Mapping

For Summon – Configuration Menu > Leganto > Discovery > Summon Mapping

For Alma - Configuration Menu > Fulfillment > Courses > Bibliographic Mapping Rules

Configure what happens to Source URL after adding citation using Cite it!

In move_source_url in
Configuration Menu > Leganto > General > Settings





Configure what happens to the source URL after adding citation using Cite it!



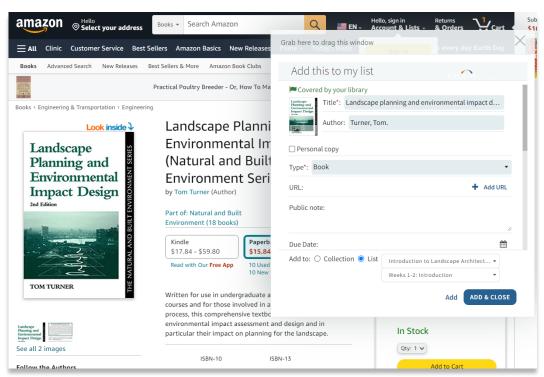
After a match is found, you can configure that the source URL is automatically moved to the note

field.

When matched to bib record

- When matched to CDI record
- When matched to either bib or CDI record (recommended)
- Disabled (keep source URL)

In move_source_url in
Configuration Menu > Leganto >
General > Settings





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What if something changed after the citation was added?





There are newly acquired/added resources



Change in the bib record



Bib record was deleted





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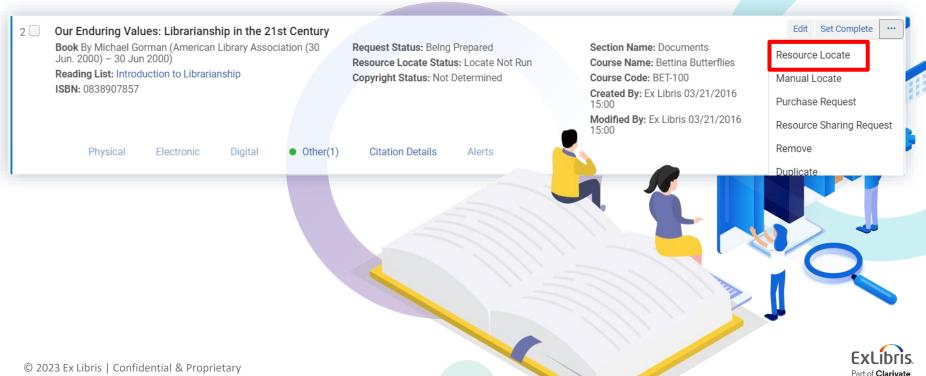
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 - Manage updated/deleted records
 - Override defaults



Link single citations to new repository records



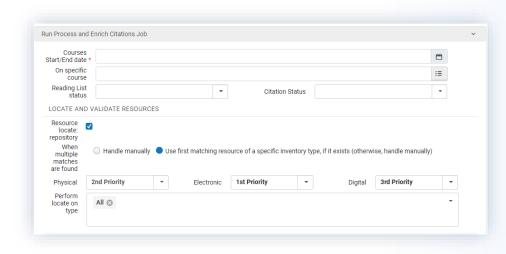
Initiate the automated Resource Locate process on demand from the citation menu



Connect multiple citations to new repository records in bulk



Fulfillment > Advanced Tools > Process and Enrich Citations





Use the Process and Enrich Citations job to connect multiple citations to your repository records (resource locate in bulk)

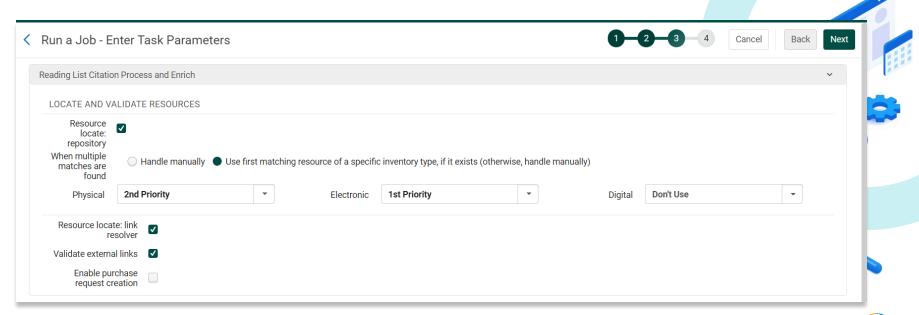
Match all citations in a specific course, or all courses within a date range



New in May! Link a set of citations



Use the Reading List Citation Process and Enrich job (Admin > Run a job) to link a set of citations





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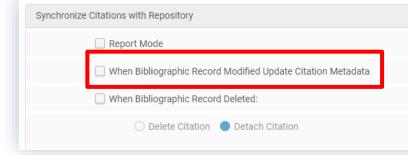


Update the citation metadata in bulk



When the bib record is edited or overlayed, the citation metadata is not updated automatically.

Update citation metadata in bulk using Reading List Citation Update Task



Admin > Manage Jobs and Sets > Run a Job



Detach deleted bibs from citations in bulk

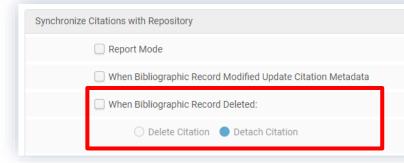


When bib records are deleted:

The citation remains linked

Availability will be updated automatically

Detach the citation using **Reading List Citation Update Task**



Admin > Manage Jobs and Sets > Run a Job

Tip: Run in report mode to see a list of deleted bibs but not make changes to citations



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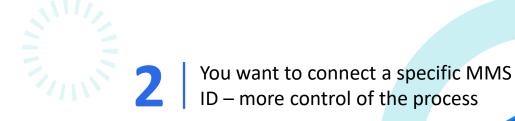


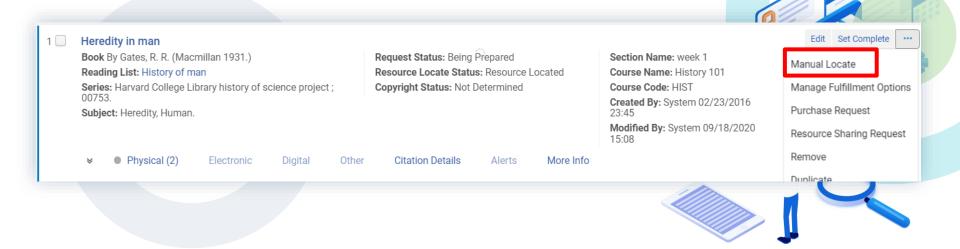
Manually link/relink to a specific resource



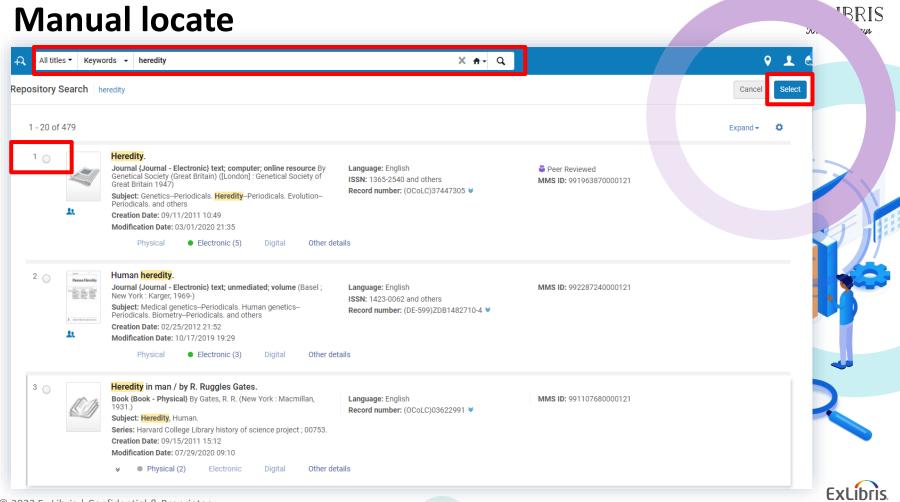
Use if:

If you want to replace the current link to an MMS ID







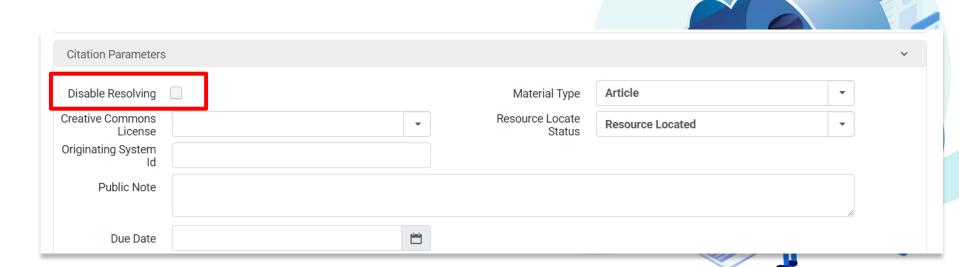


Part of Clarivate

Disable resolving



For article citations added using Cite It!, disable resolving to hide the OpenURL link resolver links





Learn more...

Documentation:

- Leganto Workflow Citation Availability
- Configuring Fulfillment Jobs
- Process and Enrich Citations in Bulk
- Manual job Reading List Citation Update Task
- <u>Citation Enrichment</u>

Customize the overlay and merge for **on_locate**Mapping Bibliographic Record Fields to Citation Fields





Question Time



Thank you!





https://forms.office.com/r/kFKZ9jLLhY



