Ex Libris
Part of Clarivate
IGeLU
International Group of Ex Libris Users
Streamlining Your Library Workflows
Kevin Browne September 2023

Welcome and Introduction

Kevin Browne

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ExL / ProQuest/Clarivate for 15 years plus

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

Agenda

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

These are all recommendations, not requirements!

Assumptions

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

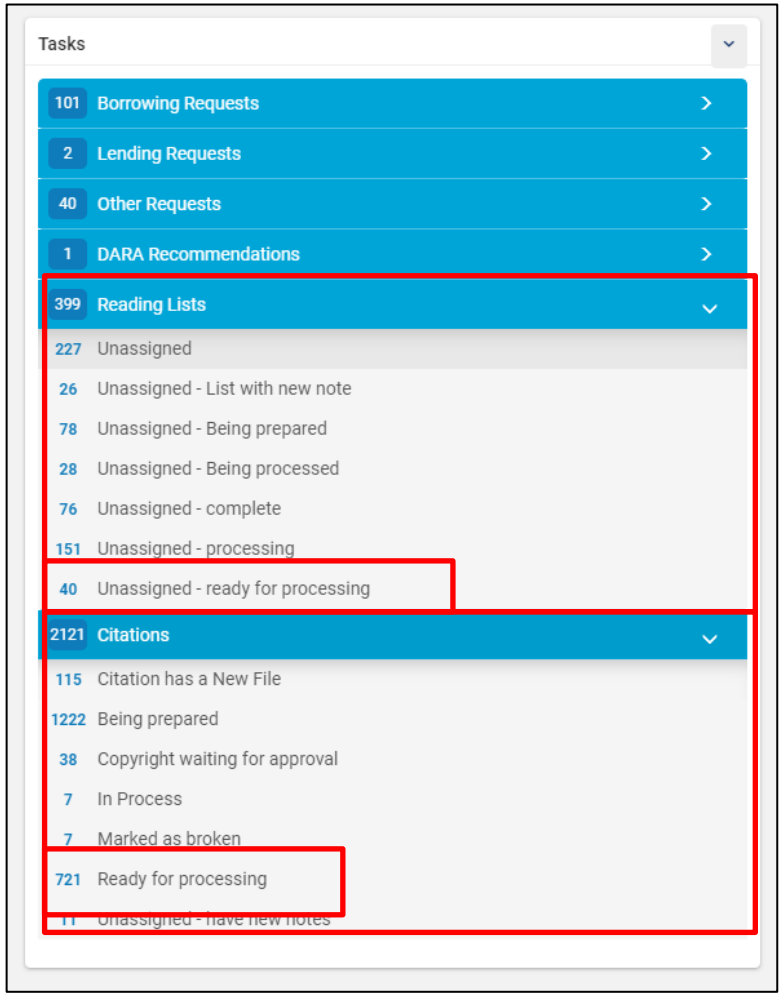
Your library staff are working from Alma tasks

Leverage Alma Tasks

Reading Lists – Ready for Processing

Citations – Ready for Processing

Alma's workflows are intended to be used with these task lists



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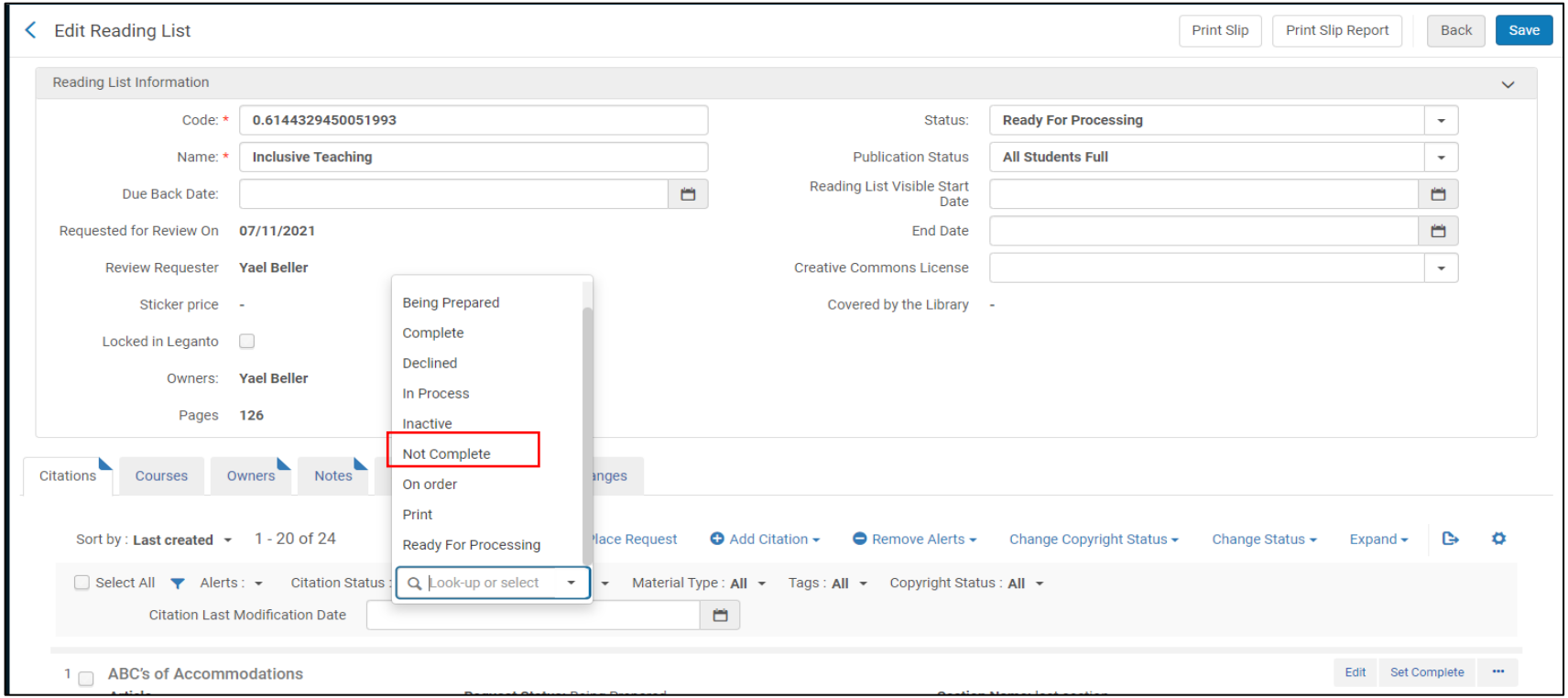
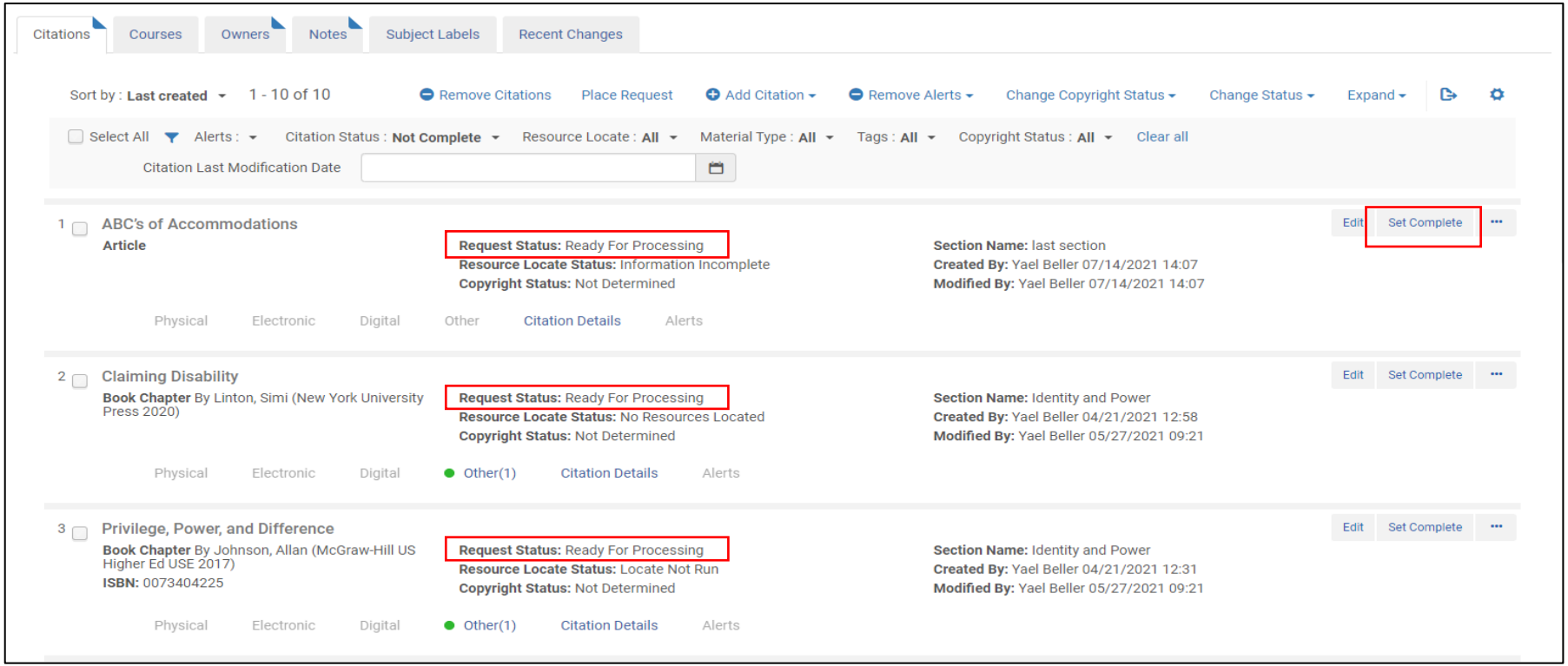
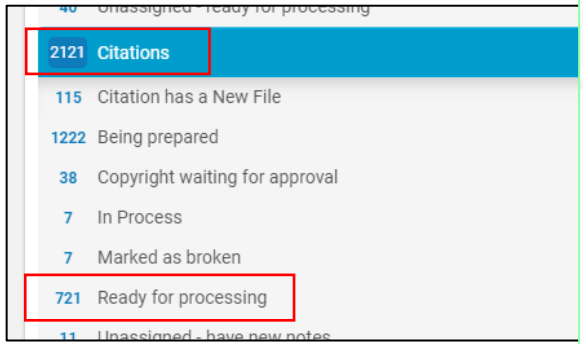
Filter Citation Status to Not Complete

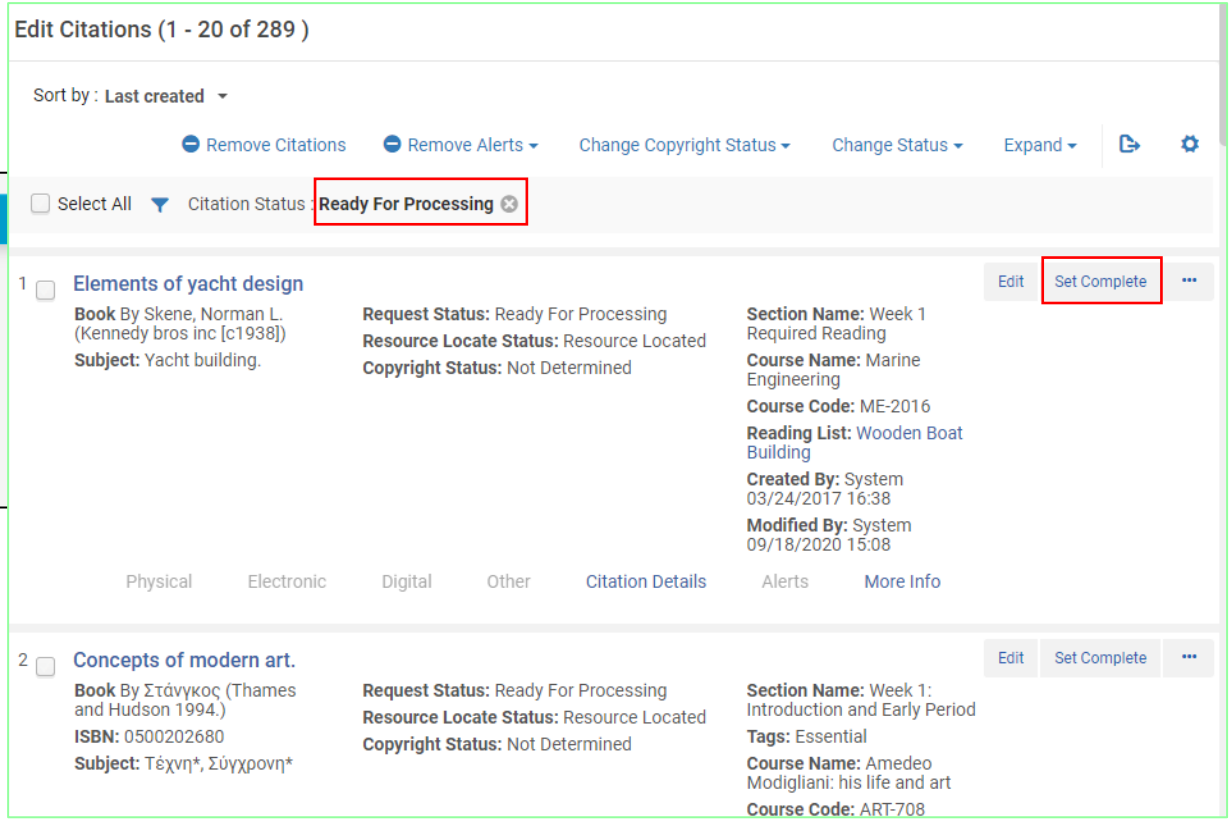


Set Complete to Track Progress



Set Complete to Track Progress





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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

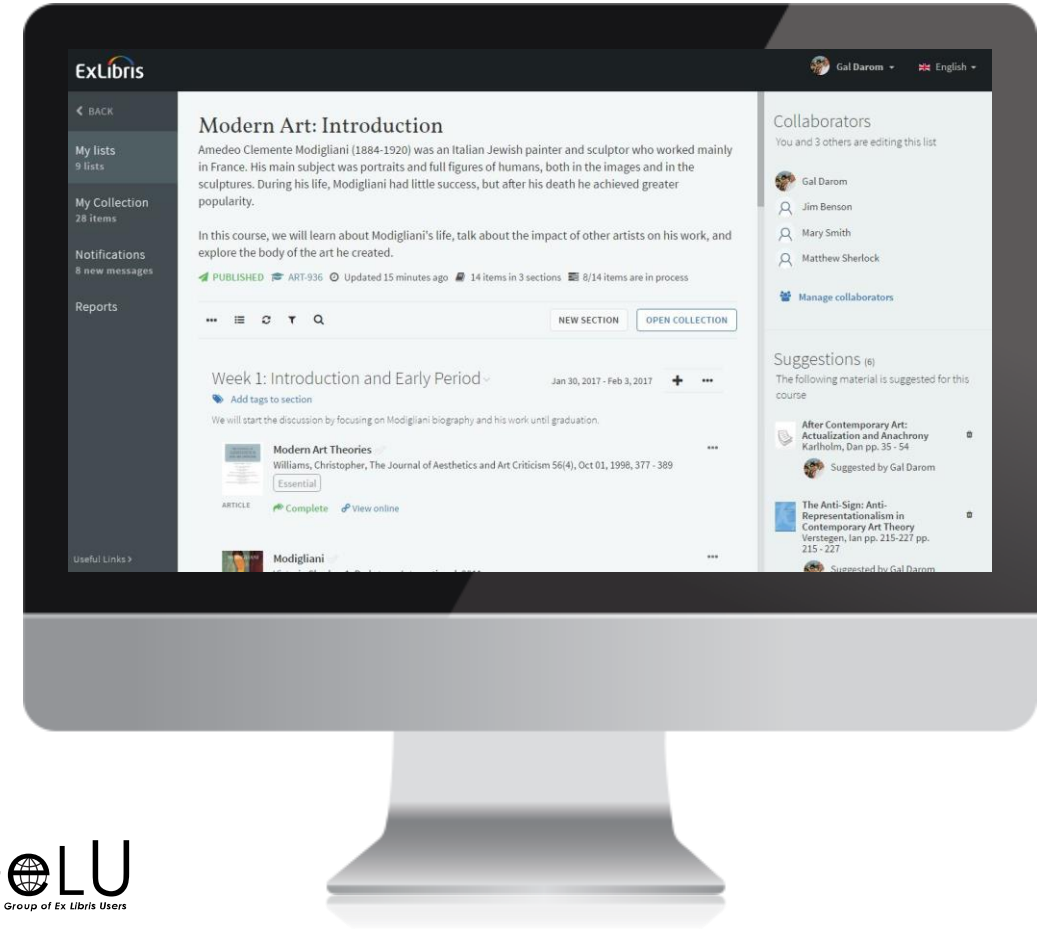
- Introduction: Using Alma tasks
- **Automation Options**
    - **Automatically "Complete" certain citation types**
    - Change citation status based on other actions
- **Bulk Options**

Default Review Settings

- Physical items
- Uploaded files
- Citations with no inventory

Leganto automatically sets all other citations to “Complete”

DEMO


ExLibris
Gal Darom
English
BACK
My lists
9 lists
My Collection
28 items
Notifications
8 new messages
Reports
Useful Links
Modern Art: Introduction
Amedeo Clemente Modigliani (1884-1920) was an Italian Jewish painter and sculptor who worked mainly in France. His main subject was portraits and full figures of humans, both in the images and in the sculptures. During his life, Modigliani had little success, but after his death he achieved greater popularity.
In this course, we will learn about Modigliani's life, talk about the impact of other artists on his work, and explore the body of the art he created.
PUBLISHED
ART-936
Updated 15 minutes ago
14 items in 3 sections
8/14 items are in process
NEW SECTION
OPEN COLLECTION
Week 1: Introduction and Early Period
Jan 30, 2017 - Feb 3, 2017
Add tags to section
We will start the discussion by focusing on Modigliani biography and his work until graduation.
Modern Art Theories
Williams, Christopher, The Journal of Aesthetics and Art Criticism 56(4), Oct 01, 1998, 377 - 389
Essential
ARTICLE
Complete
View online
Modigliani
Collaborators
You and 3 others are editing this list
Gal Darom
Jim Benson
Mary Smith
Matthew Sherlock
Manage collaborators
Suggestions (6)
The following material is suggested for this course
After Contemporary Art: Actualization and Anachrony
Karlholm, Dan pp. 35 - 54
Suggested by Gal Darom
The Anti-Sign: Anti-Representationalism in Contemporary Art Theory
Verstegen, Ian pp. 215-227 pp. 215 - 227

Citations Some Libraries Review

- E-Resources and CDI Citations

- **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”

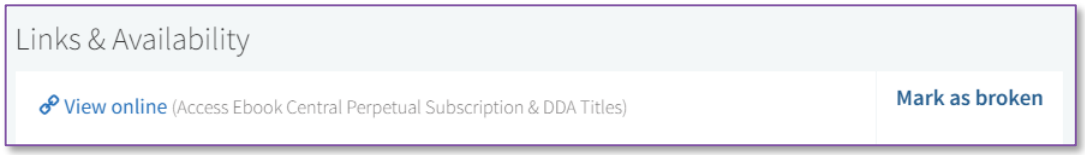
- **Consider:**

- 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

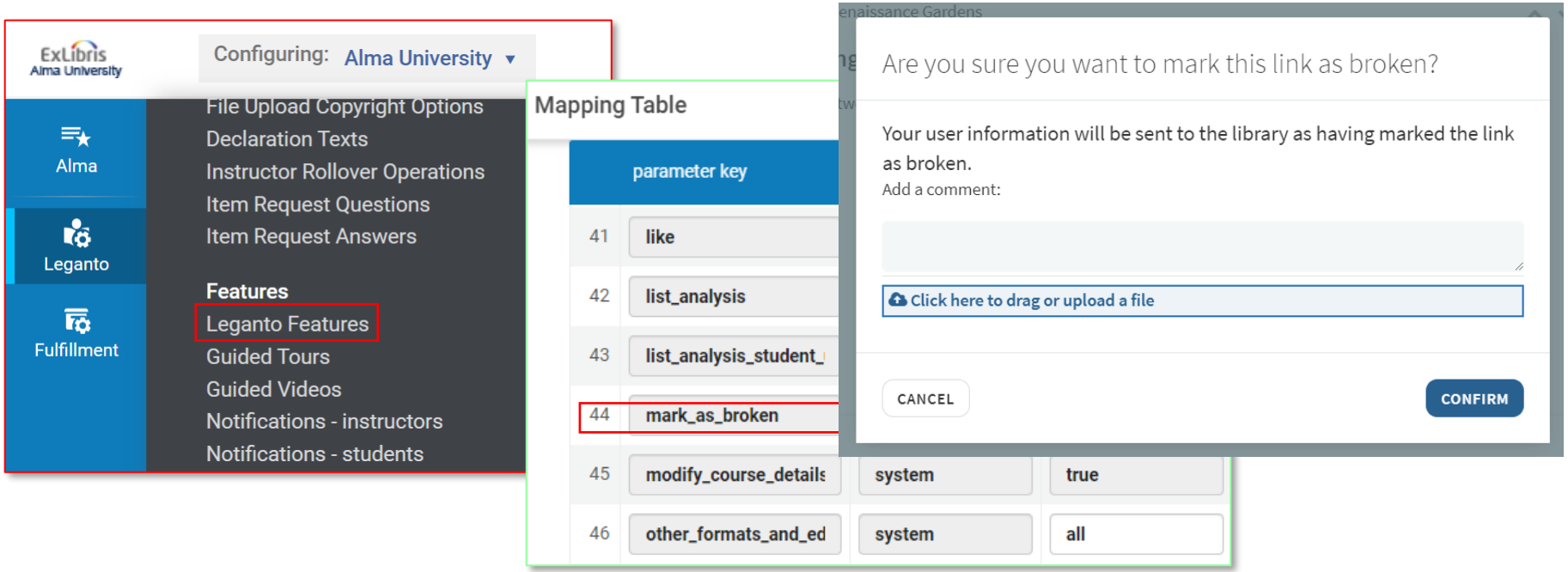
Proactively check all citations "just in case"

Reactively fix links you know are broken



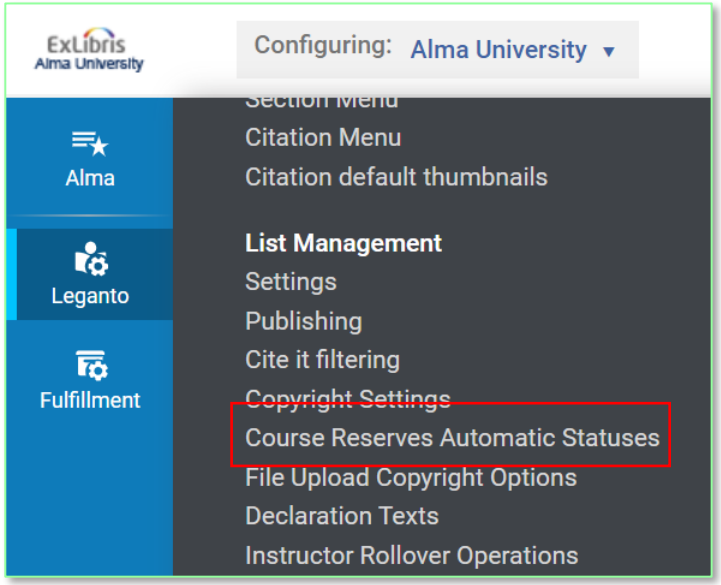
1. Enable broken-link reporting
2. Inform users they can mark links as broken
3. Monitor task list: Citations – Marked as Broken
4. Configure Leganto: Electronic citations "Complete" automatically

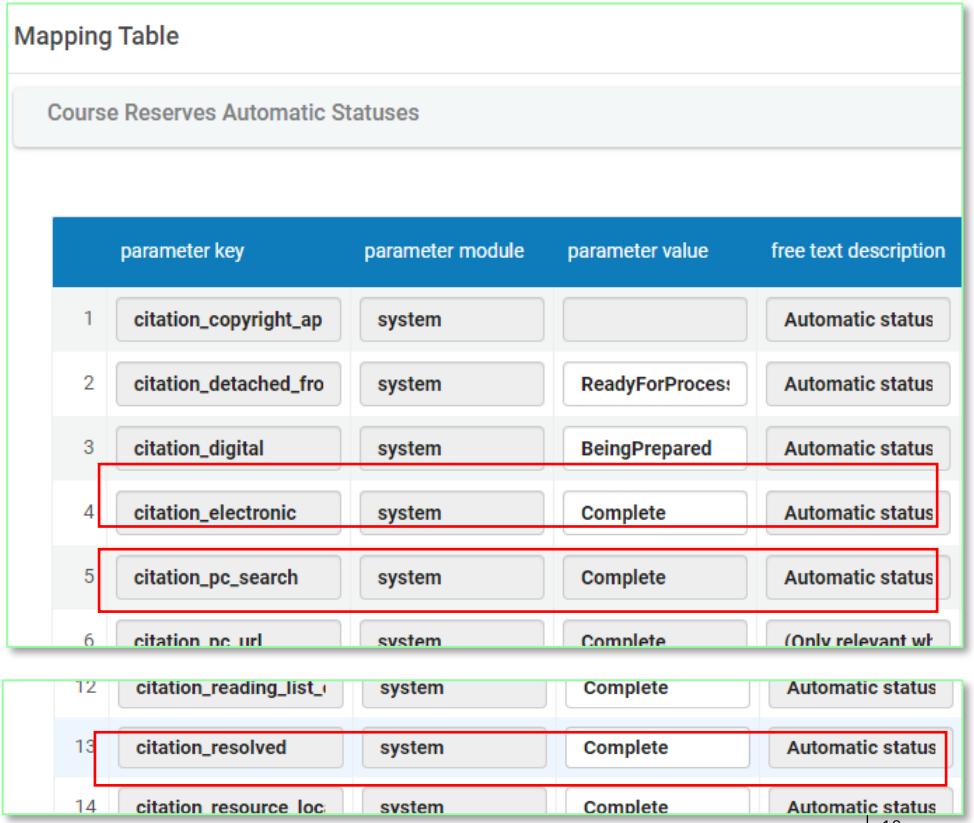
Enable Broken-Link Reporting



Instructions to enable broken-link reporting

Enable Electronic Citations to “Complete” Automatically





Instructions to configure default statuses for citations and reading lists

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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

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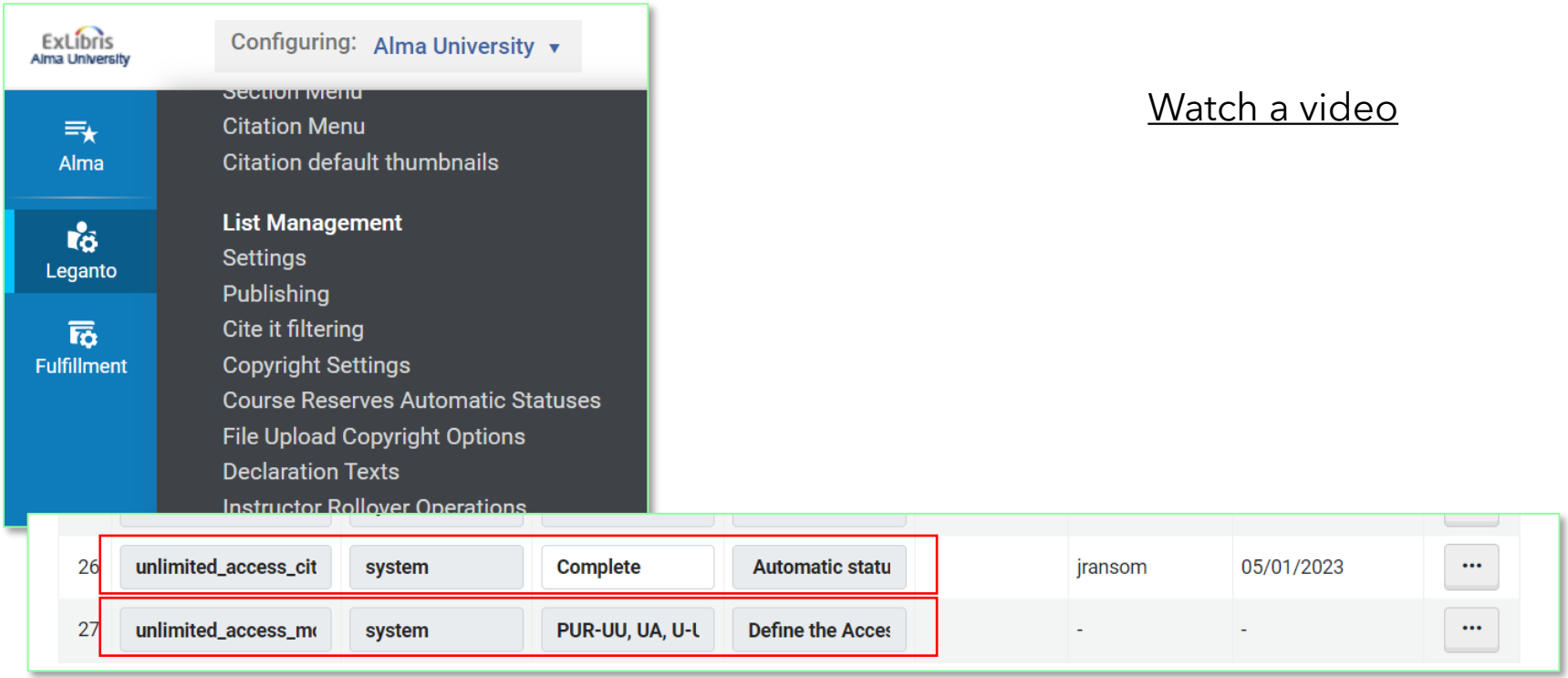
Checking Concurrent-User Licenses

Proactively check all citations "just 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

Checking Concurrent-User Licences

Proactively check all citations “just 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

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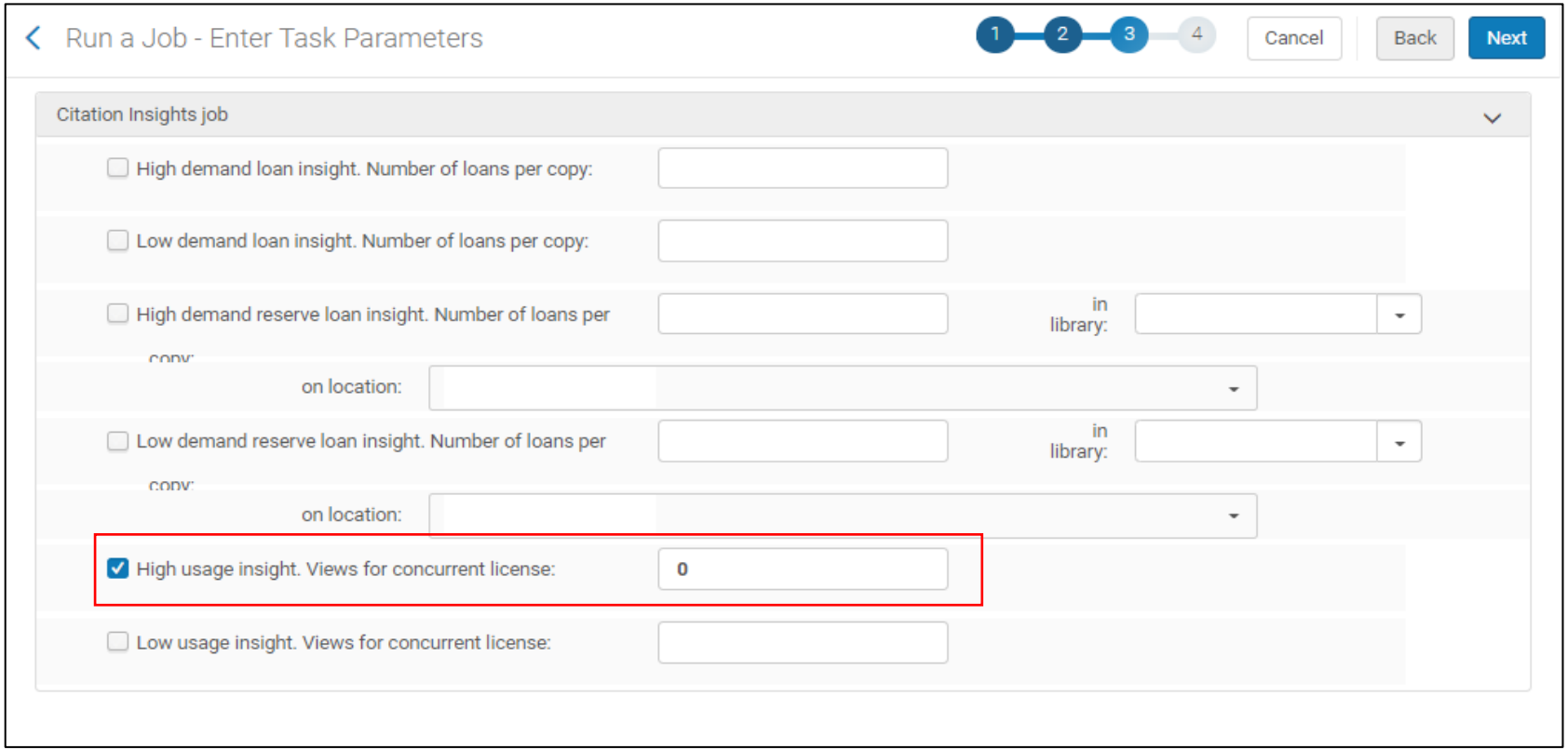
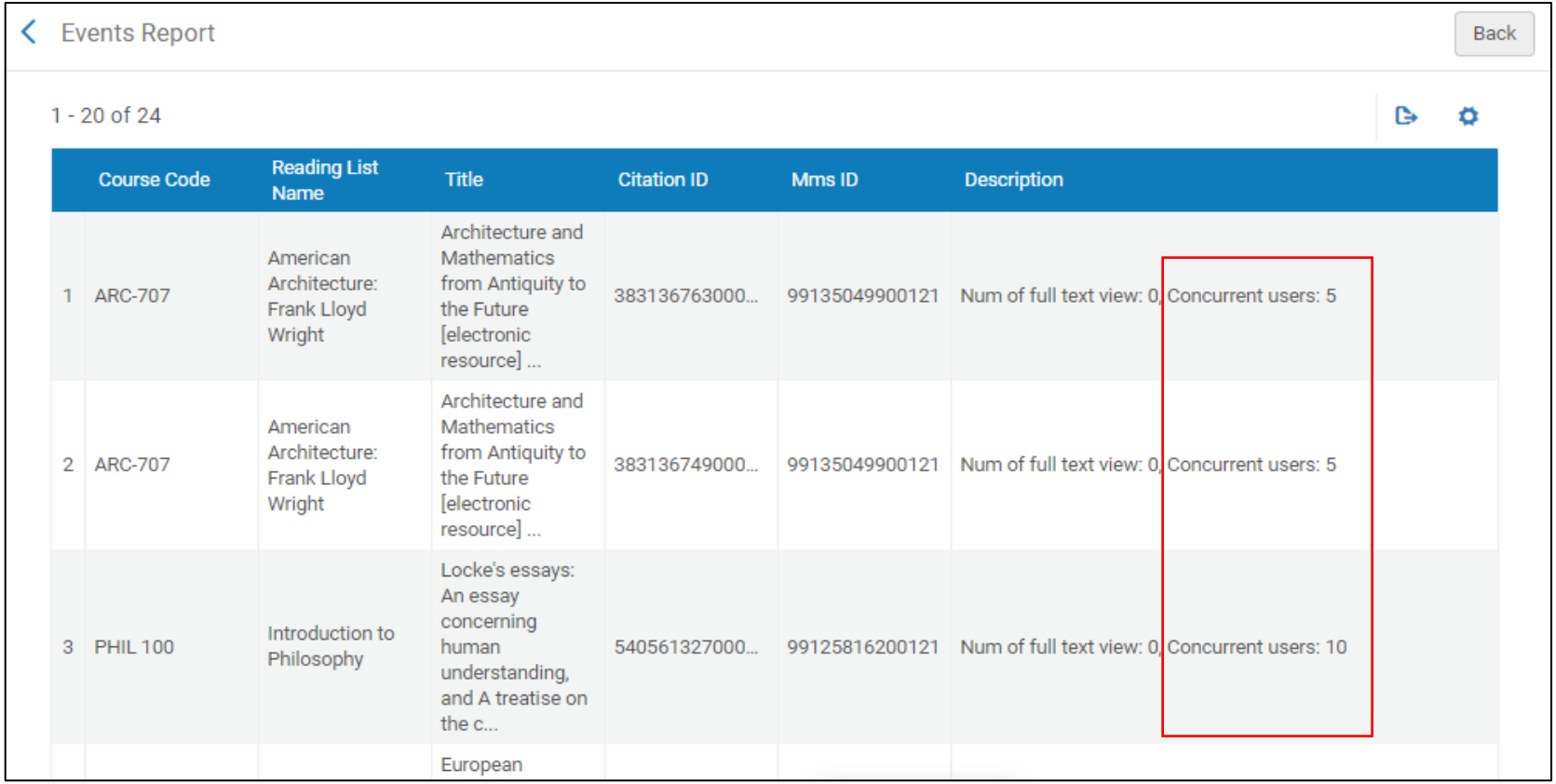
Identify Concurrent User Licenses



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

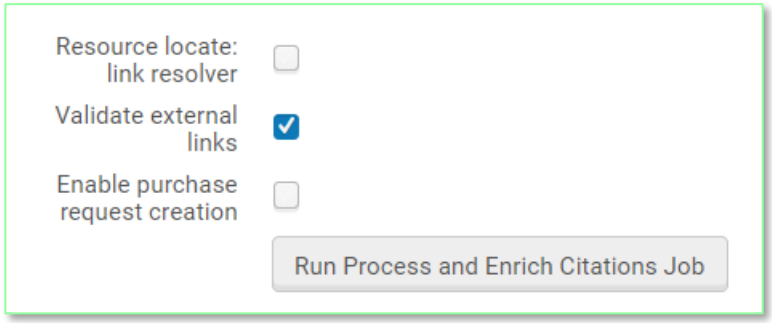
Check Citations for Broken Links to Websites

Proactively 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



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

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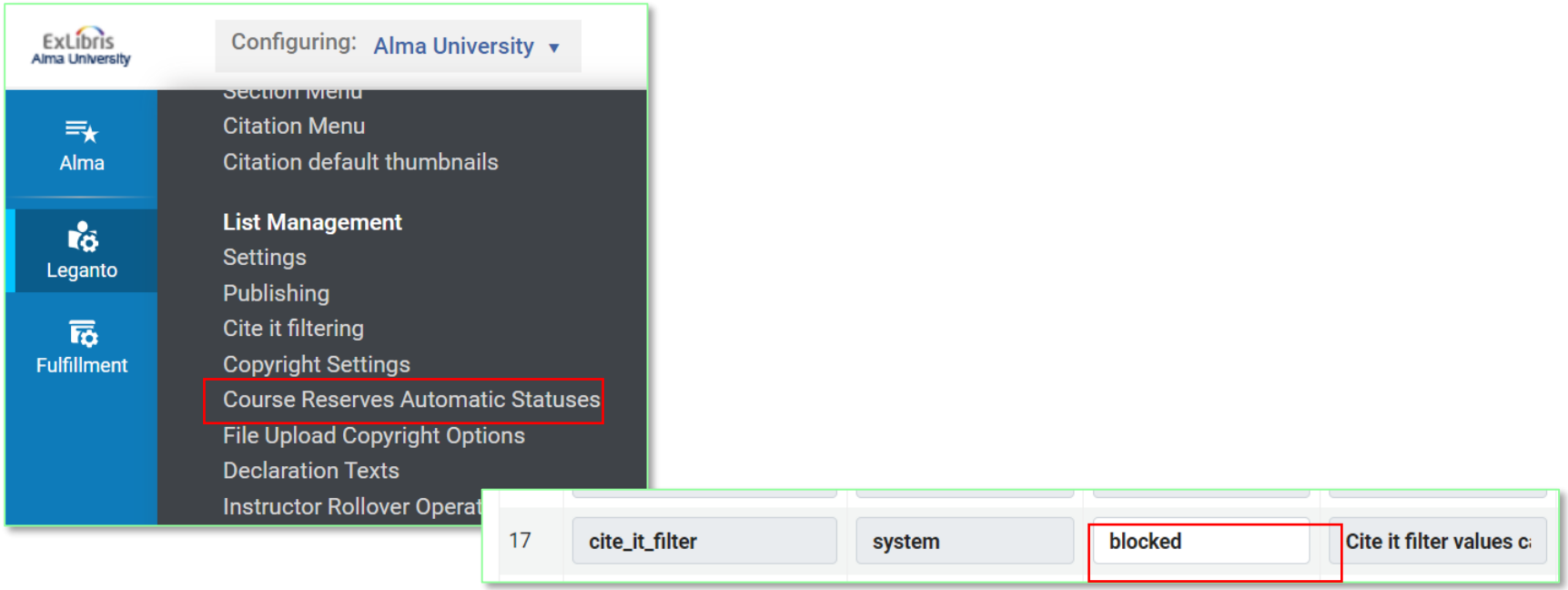
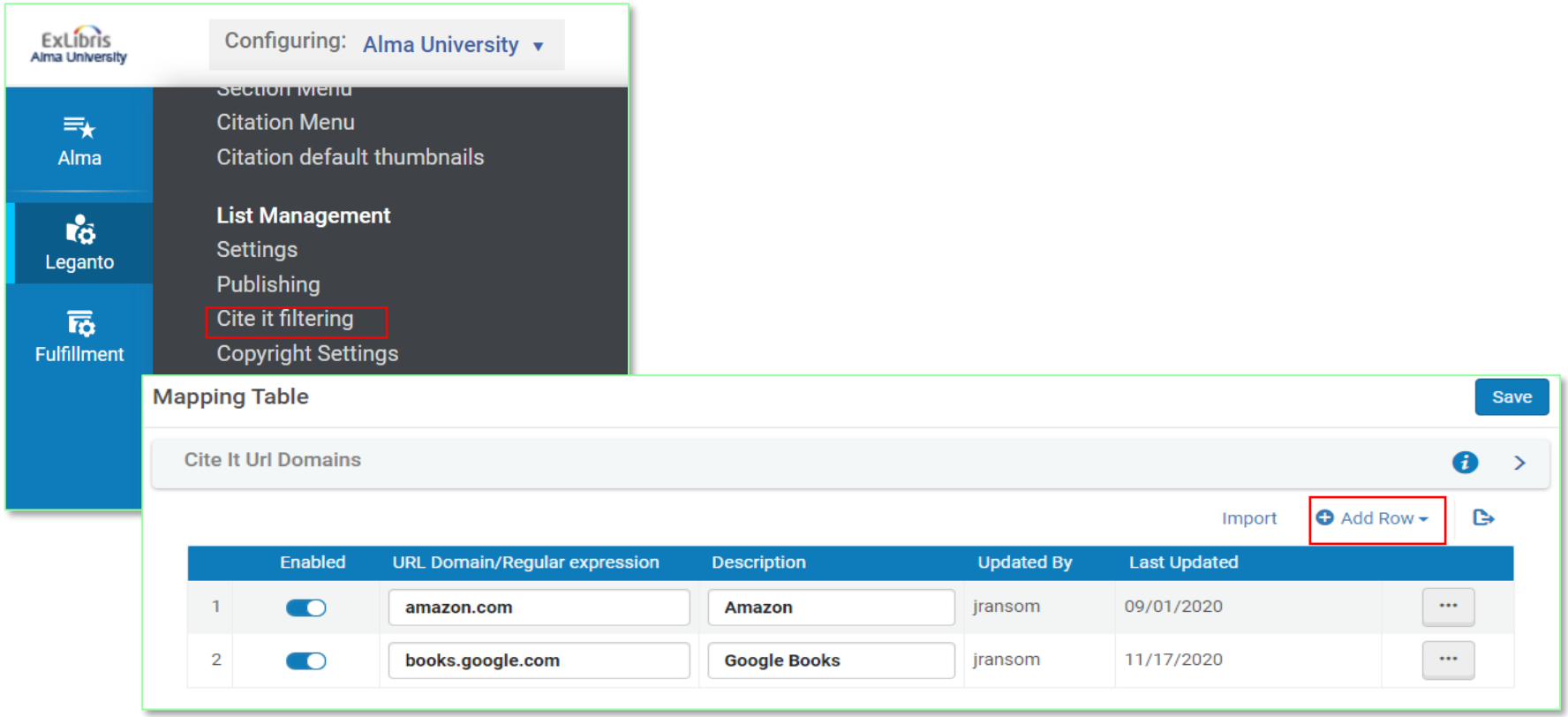
Enable Cite-It Filtering



Define Cite-It Websites



Citations that Some Institutions Review

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

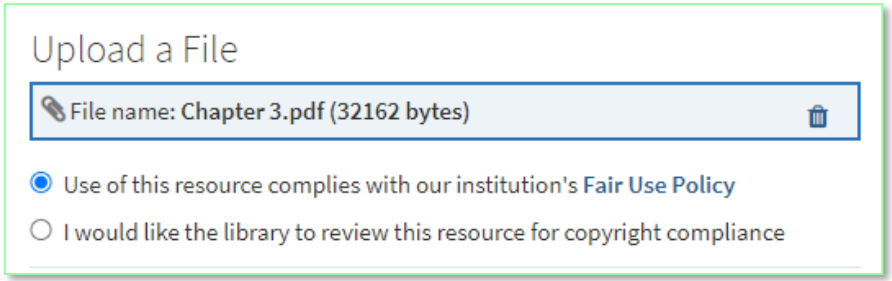
Check Uploaded Files

Proactively check all citations “just in case”

Check only specific citations, as requested by instructor

Configure File Upload Copyright Options

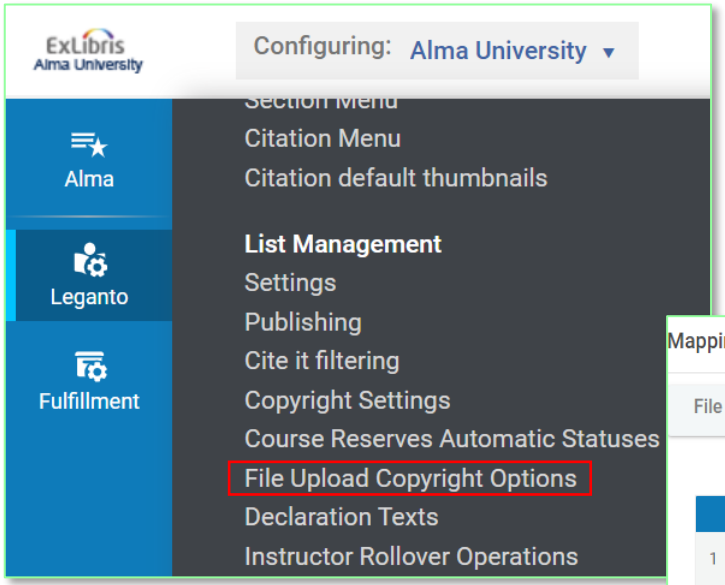
Instructor uploads file and attests to the content:

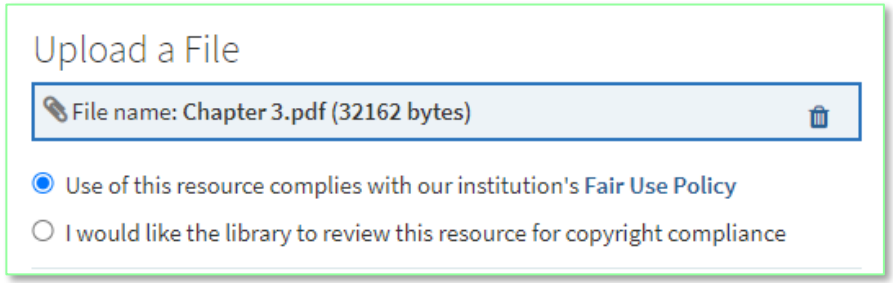


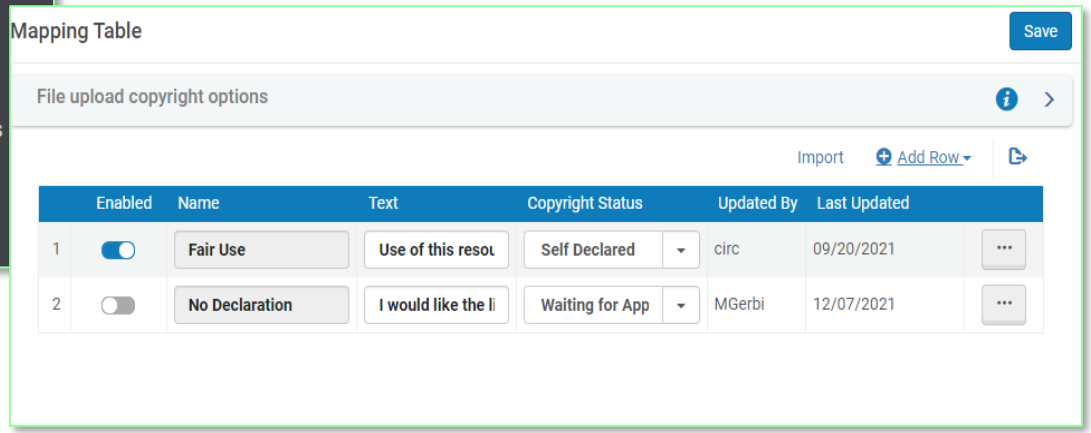
Leverage the Task Lists

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

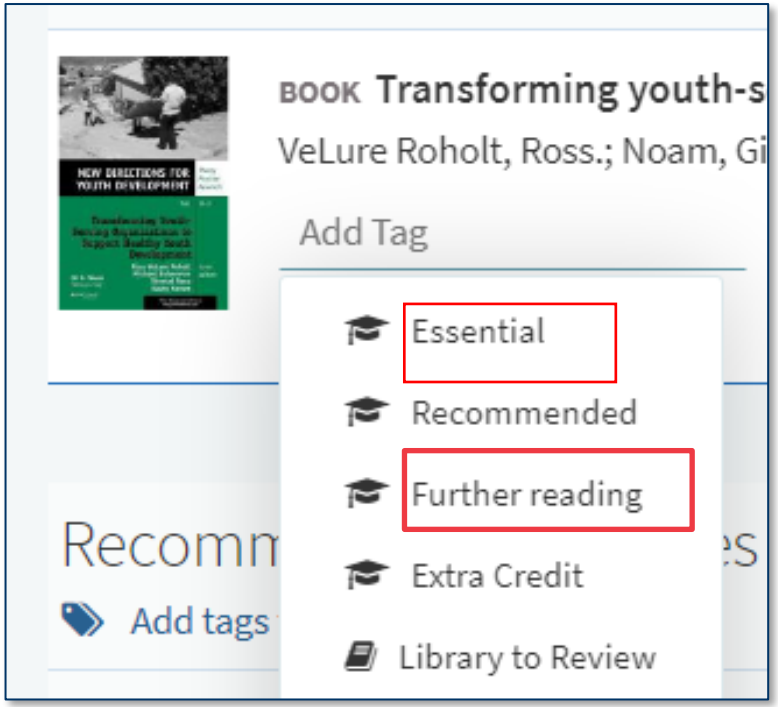
Agenda

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

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



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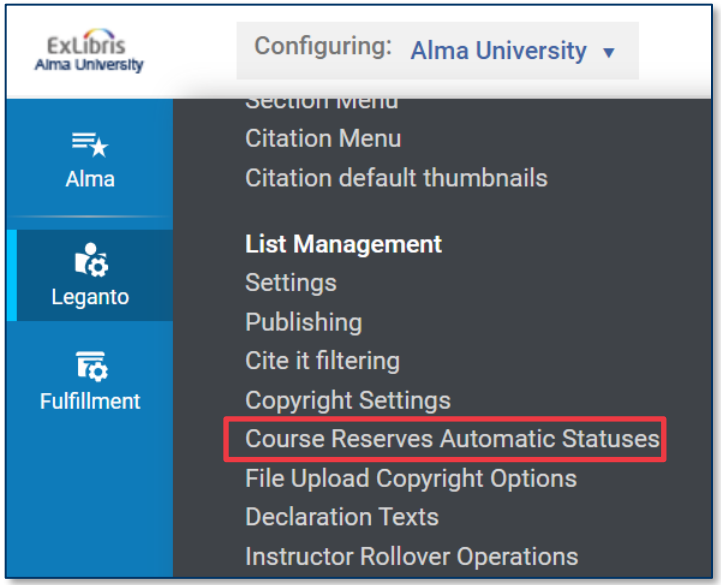
Enable Citation Upload Auto-Complete



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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

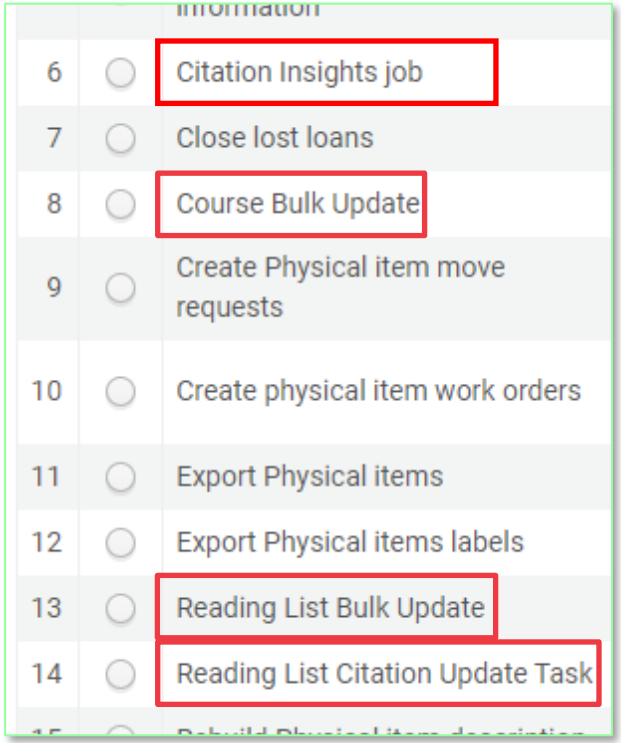
Agenda

Introduction using ALMA tasks

Automation options

Bulk Jobs

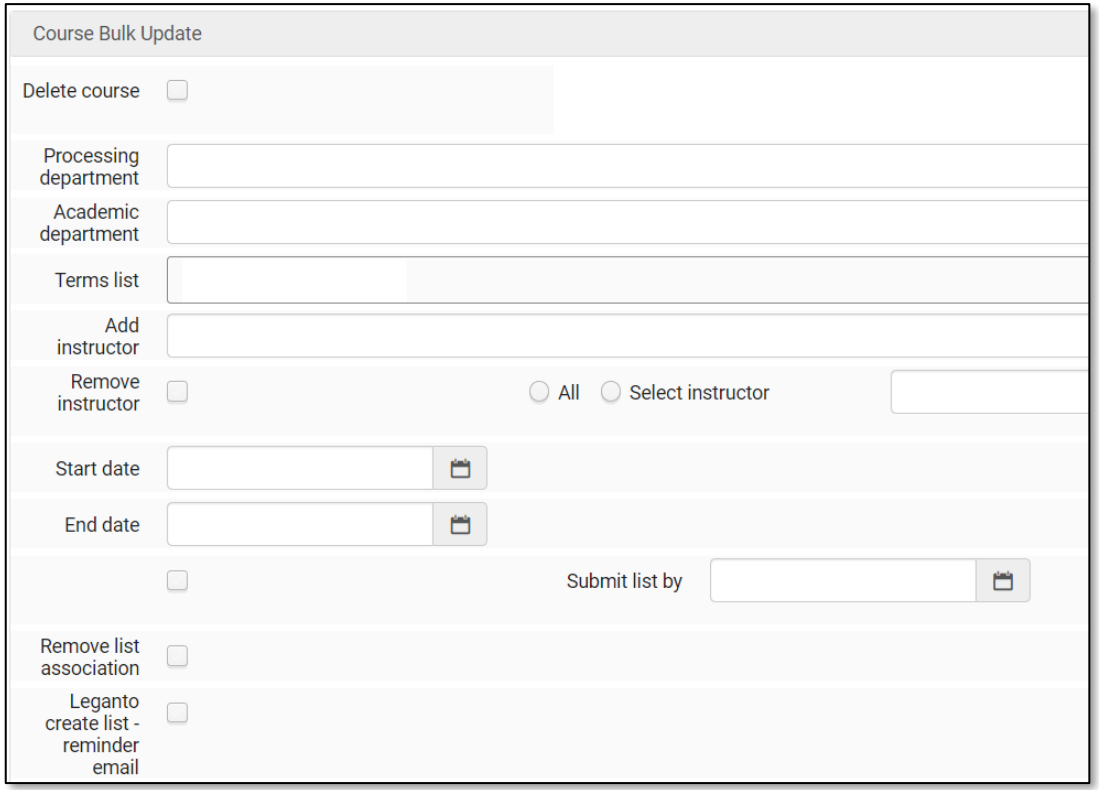
Bulk Jobs for Citations, Reading Lists, and Courses



Video on Bulk Update Options

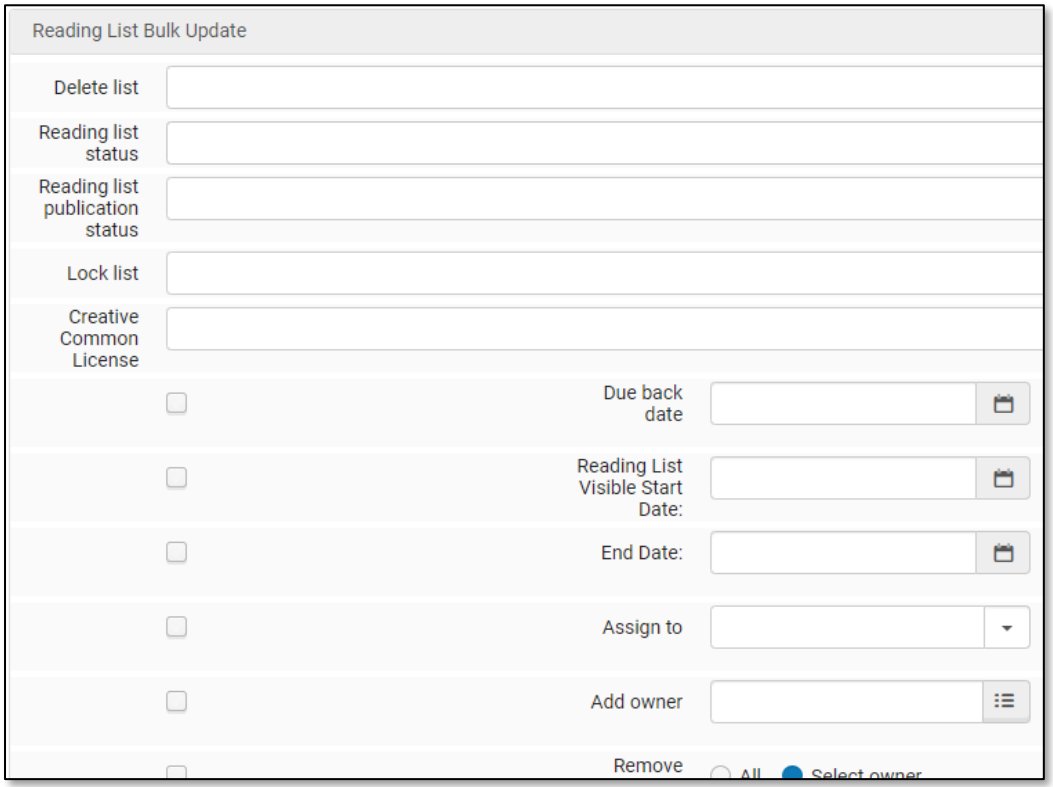
Course Bulk Update

Course Bulk Update instructions



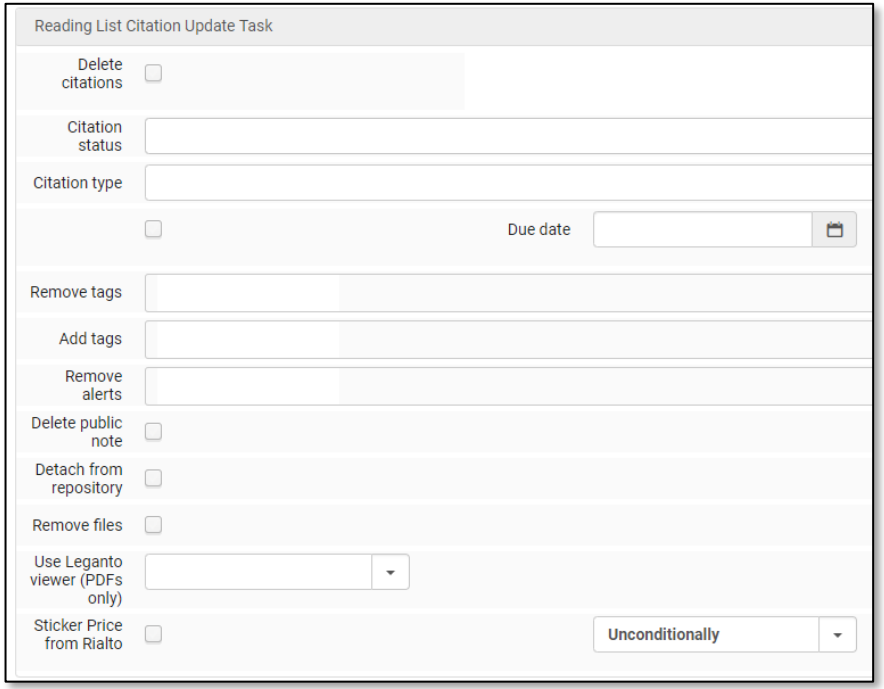
Reading List Bulk Update

Reading List Bulk Update instructions



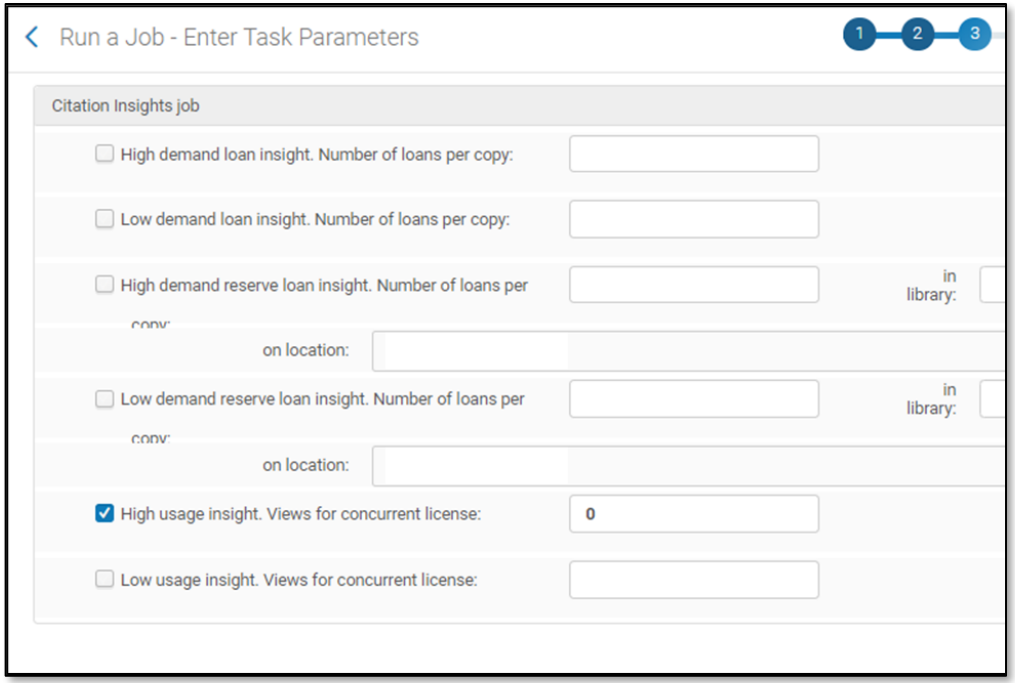
Reading List Citation Update Task

Reading List Citation Update Task instructions



Citations Insights Job

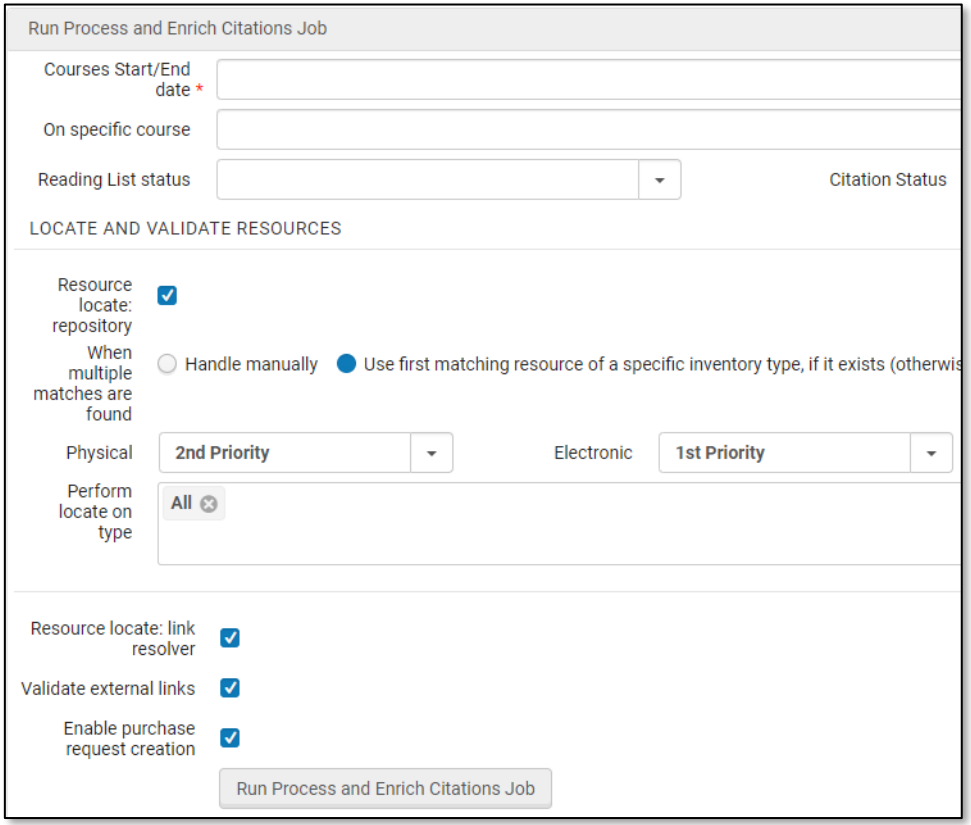
Citation Insights Job instructions



Process and Enrich Citations

Process and Enrich Citations instructions (by course dates)

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



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Additional Resource

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

Question Time