

ExLibris
Part of Clarivate

IGOLU
International Group of Ex Libris Users

Streamlining Your Library Workflows

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Welcome and Introduction

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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



Tasks

- 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 the 'Reading List Information' section with various fields: Code (0.6144329450051993), Name (Inclusive Teaching), Due Back Date, Requested for Review On (07/11/2021), Review Requester (Yael Beller), Sticker price (-), Locked in Leganto (checkbox), Owners (Yael Beller), Pages (126), Status (Ready For Processing), Publication Status (All Students Full), Reading List Visible Start Date, End Date, Creative Commons License, and Covered by the Library (-). A dropdown menu is open over the 'Citation Status' field, listing options: Being Prepared, Complete, Declined, In Process, Inactive, Not Complete (highlighted with a red box), On order, Print, and Ready For Processing. Below the menu are tabs for Citations, Courses, Owners, and Notes. The bottom section includes sorting options (Last created, 1 - 20 of 24), a 'Select All' checkbox, and filter options for Alerts, Citation Status (look-up or select), Material Type (All), Tags (All), and Copyright Status (All). At the bottom left, a citation entry '1 ABC's of Accommodations' is visible with 'Edit' and 'Set Complete' buttons.

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
	Physical Electronic Digital Other Citation Details Alerts			
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
	Physical Electronic Digital Other(1) Citation Details Alerts			
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
	Physical Electronic Digital Other(1) Citation Details Alerts			

Set Complete to Track Progress

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

Edit Citations (1 - 20 of 289)

Sort by : Last created ▾

Select All **Ready For Processing**

1	<input type="checkbox"/> 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	<input type="button" value="Edit"/> <input type="button" value="Set Complete"/> <input type="button" value="More"/>
2	<input type="checkbox"/> Concepts of modern art. Book By Στάνγκος (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	<input type="button" value="Edit"/> <input type="button" value="Set Complete"/> <input type="button" value="More"/>

Physical Electronic Digital Other Citation Details Alerts More Info

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



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

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

The screenshot displays the ExLibris Alma University configuration interface. On the left, a navigation menu includes Alma, Leganto, and Fulfillment. The main content area shows configuration options for Alma University, with 'Leganto Features' highlighted. A 'Mapping Table' is visible, listing various parameter keys. The 'mark_as_broken' parameter is highlighted in red. To the right, a confirmation dialog asks, 'Are you sure you want to mark this link as broken?' and provides a 'CONFIRM' button.

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_		
44	mark_as_broken		
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:

Click here to drag or upload a file

CANCEL CONFIRM

Instructions to enable broken-link reporting

Enable Electronic Citations to "Complete" Automatically

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

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 w/
12	citation_reading_list_i	system	Complete	Automatic status
13	citation_resolved	system	Complete	Automatic status
14	citation_resource_loc.	svstem	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



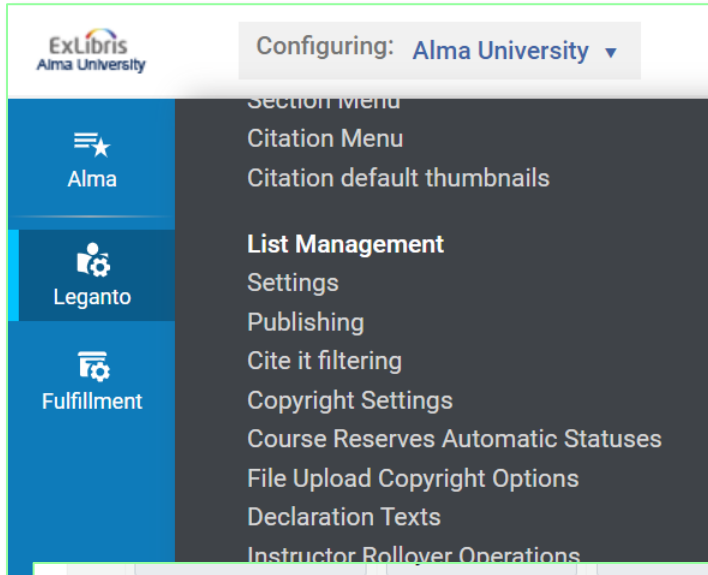
Proactively check all citations
"just in case"



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](#)

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 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

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:

conv: on location:

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

conv: 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... European	540561327000...	99125816200121	Num of full text view: 0, Concurrent users: 10

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

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 left shows the ExLibris logo and 'Alma University'. A dropdown menu is open, showing 'Configuring: Alma University'. The left sidebar has three main sections: 'Alma', 'Leganto', and 'Fulfillment'. The 'Fulfillment' section is active, and a sub-menu is open showing various settings. 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	blocked	Cite it filter values c:

Define Cite-It Websites

ExLibris
Alma University

Configuring: Alma University ▾

- Section menu
- Citation Menu
- Citation default thumbnails
- List Management**
 - Settings
 - Publishing
 - Cite it filtering**
 - Copyright Settings

Alma

Leganto

Fulfillment

Mapping Table Save

Cite It Url Domains i >

Import + Add Row ▾

	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 "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"

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

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 Statuses
 - File Upload Copyright Options**
 - Declaration Texts
 - Instructor Rollover Operations
- Alma
- Leganto
- Fulfillment

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

Import + Add Row

Enabled	Name	Text	Copyright Status	Updated By	Last Updated	
<input checked="" type="checkbox"/>	Fair Use	Use of this resot	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 shows the ExLibris Alma University configuration interface. The top navigation bar includes the ExLibris logo and a dropdown menu for 'Configuring: Alma University'. The left sidebar contains three main sections: 'Alma', 'Leganto', and 'Fulfillment'. The 'List Management' section is expanded, showing options like 'Settings', 'Publishing', 'Cite it filtering', 'Copyright Settings', 'Course Reserves Automatic Statuses', 'File Upload Copyright Options' (highlighted with a red box), 'Declaration Texts', and 'Instructor Rollover Oper...'. Below this, a table displays configuration details for 'citation_uploaded_file', with the 'Complete' status highlighted by a red box.

16	citation_uploaded_file	system	Complete	Automatic status
17	cite_it_filter	system	blacklist	Cite it filter value

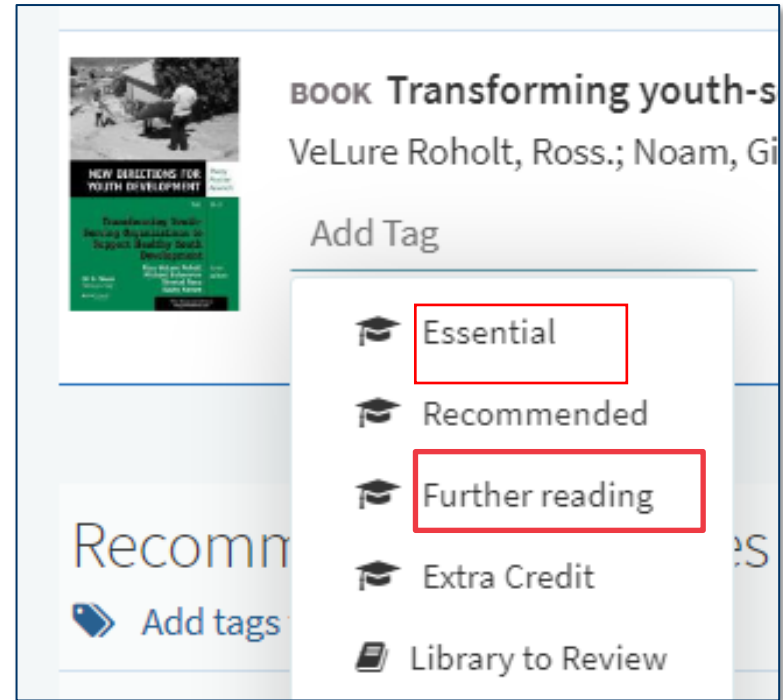
Agenda



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



DEMO



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

Alma

Leganto

Fulfillment

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

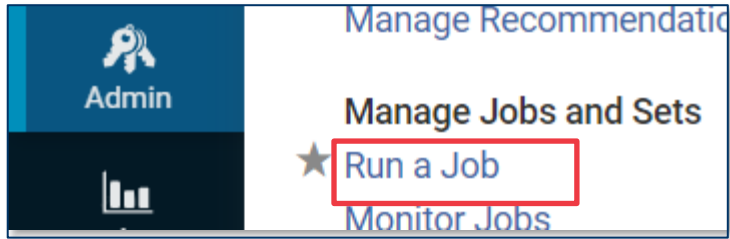
Introduction using ALMA tasks

Automation options

Bulk Jobs



Bulk Jobs for Citations, Reading Lists, and Courses



		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 items description

[Video on Bulk Update Options](#)

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 Unconditionally

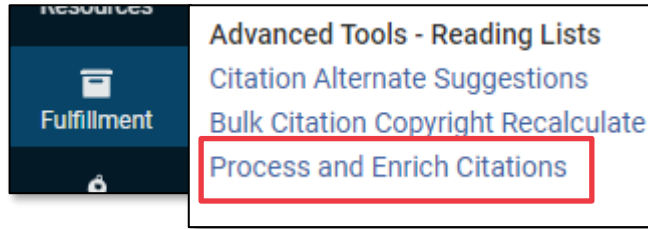
Citations Insights Job

Citation Insights Job instructions

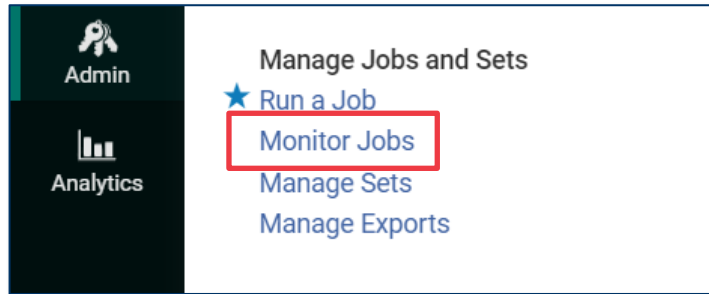
The screenshot shows a web interface titled "Run a Job - Enter Task Parameters" with a progress indicator showing steps 1, 2, and 3. The main section is titled "Citation Insights job" and contains several rows of input fields:

- High demand loan insight. Number of loans per copy: [input field]
- Low demand loan insight. Number of loans per copy: [input field]
- High demand reserve loan insight. Number of loans per copy: [input field] in library: [input field]
- conv: on location: [input field]
- Low demand reserve loan insight. Number of loans per copy: [input field] in library: [input field]
- conv: on location: [input field]
- High usage insight. Views for concurrent license: [input field with value 0]
- Low usage insight. Views for concurrent license: [input field]

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 a web application's configuration page for running a job. The page is titled 'Run Process and Enrich Citations Job'. It contains several input fields and checkboxes. The 'Courses Start/End date' field is required and empty. The 'On specific course' field is empty. The 'Reading List status' field is a dropdown menu. The 'LOCATE AND VALIDATE RESOURCES' section has a 'Resource locate: repository' checkbox checked. Below it, there are two radio buttons: 'Handle manually' (unchecked) and 'Use first matching resource of a specific inventory type, if it exists (otherwise...)' (checked). The 'Physical' field is a dropdown menu set to '2nd Priority'. The 'Electronic' field is a dropdown menu set to '1st Priority'. The 'Perform locate on type' field is a dropdown menu set to 'All'. The 'Resource locate: link resolver' checkbox is checked. The 'Validate external links' checkbox is checked. The 'Enable purchase request creation' checkbox is checked. At the bottom, there is a button labeled 'Run Process and Enrich Citations Job'.

Additional Resource

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

Question Time

