Leganto Roadmap

2024-25

Jessie Ransom, Senior Manager, Product Management
December 6, 2023

View it yourself

Leganto Focus Areas

Simplified onboarding – Easy list creation workflows

Library efficiency – Make time for the work that matters

End-user experience – Give the best service to your patrons

Analytics – Enable data-driven decisions, demonstrate impact

Simplified onboarding

Easy list creation workflows

A note about the new UI…

Search the library ✕

Search everything ⌄ | Search for print, digital, audio and visual resources 🔍

Advanced search

☐ Include records without full-text access

Search Library Resources

Search in: Search everything ▼

Enter search criteria:

Enter title, author, and keyword (etc.) 🔍

☐ Include records without full-text access

Advanced Search

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"This is easier to navigate…

It seems like the search is a lot easier. I think the older search got a little bit cumbersome at times. It would take me a second to figure out where I needed to go. This seems like it's a little more intuitive, a little more clean, a little simpler to navigate through."

-an instructor

Resources to help you switch to the new UI

- This <u>quick video</u> shows how to get started testing the new UI

- We also have a <u>Frequently Asked Questions</u> page to review

- There is a <u>Known Issues</u> page, which you can use to check the status of pending developments

- Via our <u>Webinars</u> page you can see the recordings from past presentations about the new UI

- There is a training kit, <u>Managing Lists</u>, which teaches users how to use Leganto

- There is written documentation for <u>Managing Lists in Leganto</u> and the <u>Leganto Student View</u>. We also updated our existing documentation to indicate configurations or features that only available in either the new or classic UI.

Plan your switch date now...

All institutions must switch to the new UI by January 2025

Create item from DOI, ISBN, ISSN

What's New	Highlights	Impact
Create new items using only a single metadata fie, rather than having to fill in a form or search for an item	Add items to Leganto lists by entering only DOI, ISBN or ISSN Additional metadata fields will be filled in automatically	Leganto users will only need to enter a single piece of metadata to create a citation, saving users time in adding items to the list

Early mockup

Integration with EndNote

What's New	Highlights	Impact
Integrate Leganto with EndNote via API	Pull resources into Leganto directly from EndNote	Save users time in working across two systems by making it easier to utilize citations they have already saved

Import reading list from syllabus (proof of concept)

What's New	Highlights	Impact
Begin testing a prototype which enables a user to upload an existing file containing citations, such as a course syllabus, to create a reading list	Upload a file that contains citations alongside other information about the course Leganto will identify citations within the file and create a reading list that contains those citations	Save time for users who create reading lists from an existing file, such as a course syllabus

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Syllabus upload (proof of concept)

Course Name
Course 1234
Time: 1:30-4:15pm, Monday
Location: Building 4
Instructor: Professor Professor
Office: 555 South Street
Office Hours: 9:00-10:30am, Tu
Phone: (123) 456-7890 (offi
Email: email@email.com

COURSE DESCRIPTION
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Fei, Xiaotong. 1992. *From the Soil: The Foundations of Chinese Society*, trans. Gary G.
    Hamilton and Wang Zheng. Berkeley and Los Angeles, CA: University of California Press.
Chan, Anita, Richard Madsen, and Jonathan Unger. 2009. *Chen Village: Revolution to
    Globalization* (3rd Edition). Berkeley and Los Angeles, CA: University of California Press.

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Syllabus upload (proof of concept)

Added flexibility when searching library collections

H2 2024

What's New	Highlights	Impact
Add additional searching and filtering options to the discovery search in Leganto	Additional material type facets Filter by publication date Select multiple facets Contains, starts with, and exact phrase searches	Provides users, especially advanced users, with advanced searching options required to locate and add the correct resources from within Leganto

Early mockup
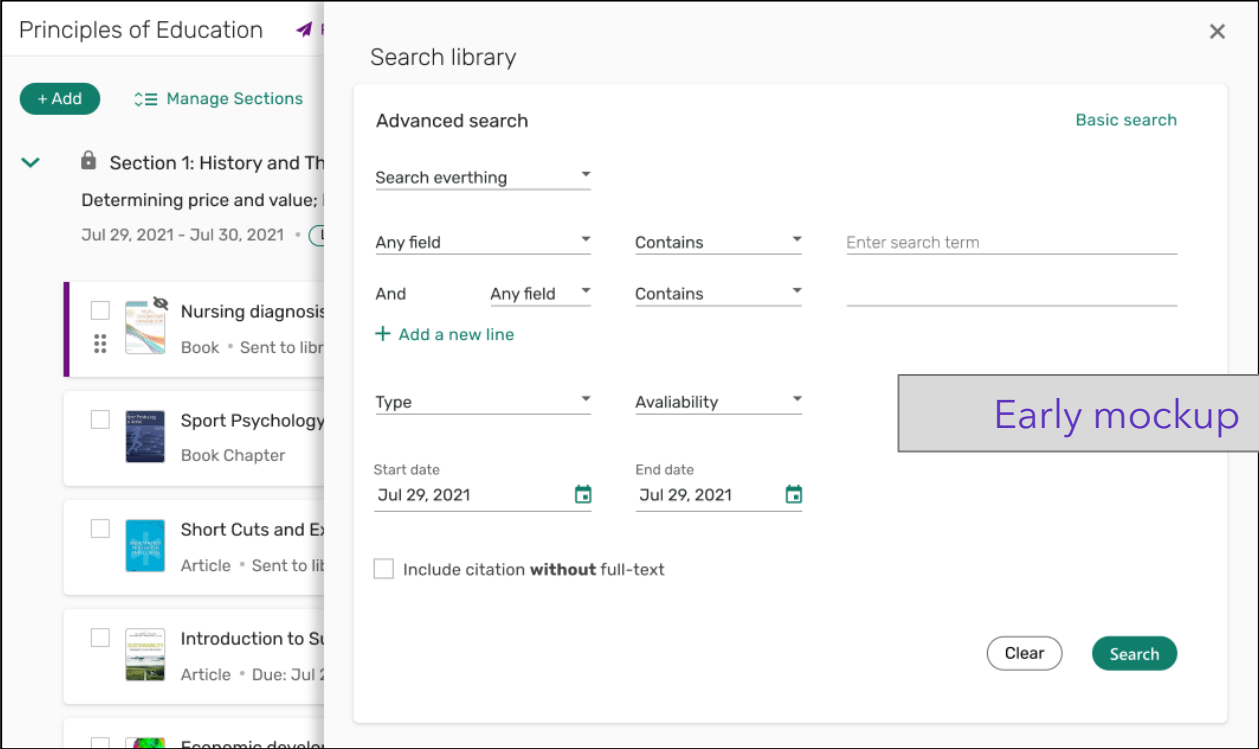
Reuse existing lists and resources

What's New	Highlights	Impact
Make it easier for list creators to reuse their existing lists and resources	While working on a list, import resources from another list Easily import items from Sample lists	Save users time by making it easier to re-use work that either they or others withing the institution have already done

Early mockup

Import reading list citations in bulk

What's New	Highlights	Impact
Provide a means to upload an existing file containing multiple citations to create a reading list	Leganto will identify individual citations within the file and create a reading list that contains those citations Exact solution will be determined according to the results of the import reading list from syllabus (proof of concept) scheduled for H1 2024.	Save time for users who create reading lists from an existing list of references, such as a course syllabus

2025: To be determined

Long-term roadmap will be determined according to the results of the syllabus import proof of concept
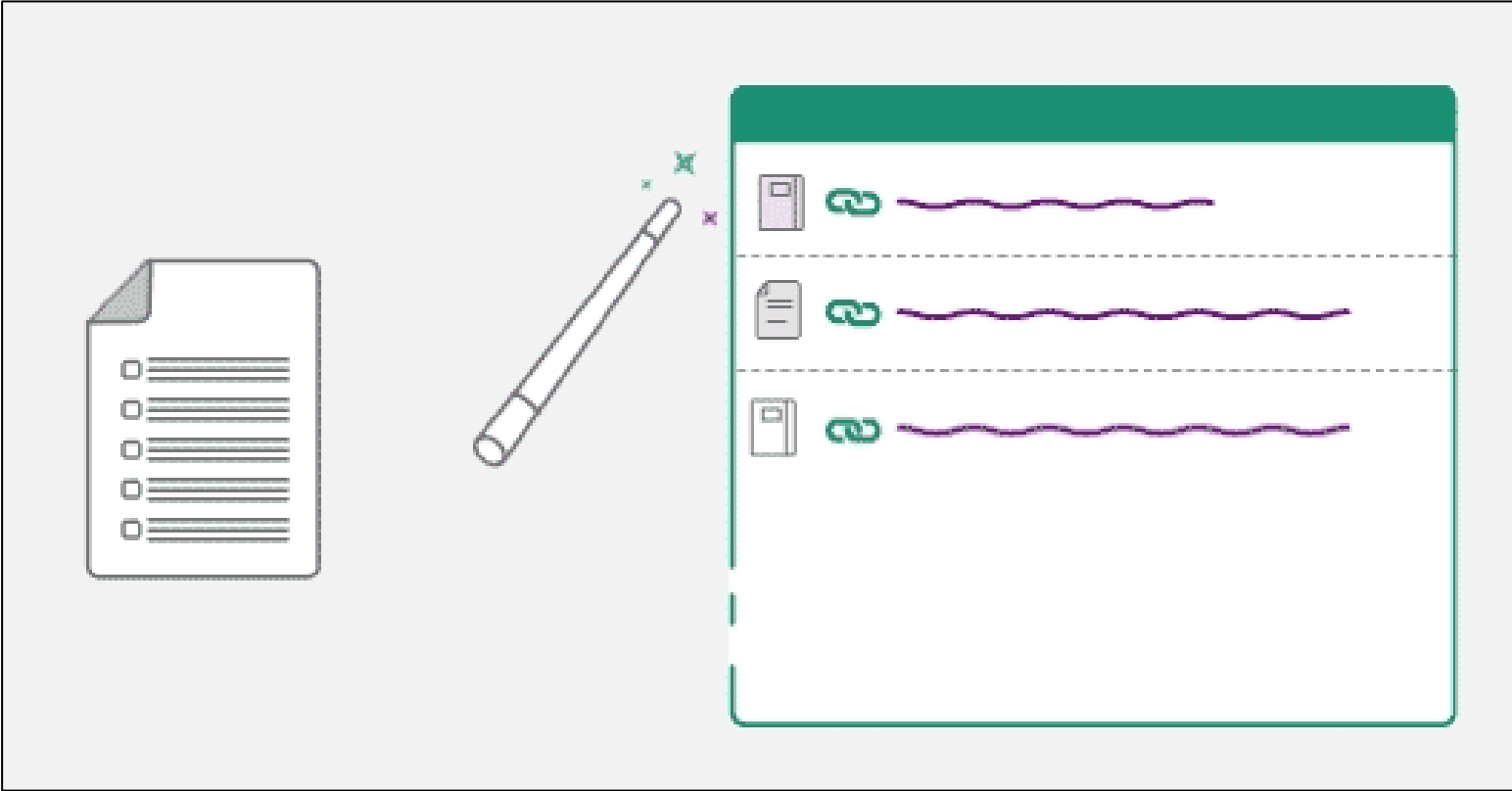
Library efficiency

Make time for the work that matters

Block instructors from creating lists

H1 2024

What's New	Highlights	Impact
Flexibility to control whether instructors can create new lists in the Leganto UI	Configuration option to block instructors from creating their own lists	Give libraries more control over how reading lists are created, and ensure library staff does not need to spend extra time cleaning up duplicate lists created by mistake

Streamlined set creation

What's New	Highlights	Impact
An easier process for making sets of course-related records in Alma	Save a set of courses, reading lists, and items directly from the Alma search results	Make it easier for libraries to leverage the bulk jobs for courses, reading lists, and items

Early mockup

Automatic citation statuses

What's New	Highlights	Impact
Additional options to automatically set citation statuses under certain conditions	Automatic status for citations based on digitization requests Automatic status for citations with a copyright request	Give libraries more options to automate their processing workflows, and to identify citations requiring library review

DCS integration improvements

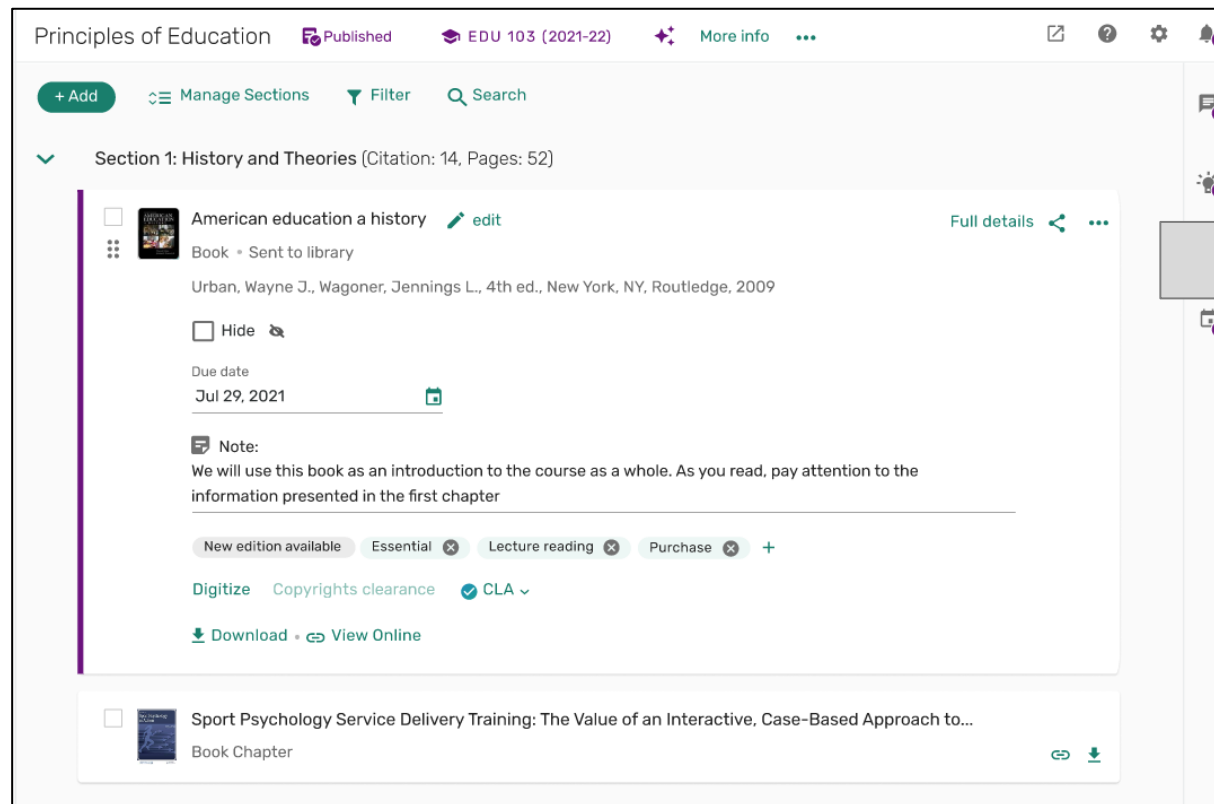| What's New	Highlights	Impact
Improvements to workflows between Leganto and the UK CLA Digital Content Store	Change the course code when there are DCS items Associate a citation to multiple requests in the DCS	Give libraries more control over managing citations and reading lists which have approved copyrights, making the DCS integration more valuable

Expanded notifications

What's New	Highlights	Impact
Provide more extensive notifications on reading list activity	Provide more details about reading list activity in the letter sent to instructors, such as the text of notes, the tags added, and more Notification for lists marked as complete Email notifications to library staff about changes to reading lists Combine list and item discussion into a single notification area in Leganto	Make it easier for library staff and instructors to understand the changes that have happened to reading lists and respond quickly when needed

Librarian workflows in the Leganto UI

What's New	Highlights	Impact
Features to support more advanced list editing and processing in the Leganto UI	One-click metadata editing Set citation status in bulk in Leganto View broken link alerts in Leganto	Give library staff the flexibility to work in the Leganto interface for some list processing workflows, saving staff from having to switch between Leganto and Alma

Early mockup

Bolk integration improvements

What's New	Highlights	Impact
Improvements to workflows between Leganto and the Bolk service used in Norway	Enhancements will be determined in partnership with customers	Give library staff and instructors more flexibility when managing copyrighted files with Bolk

Enhanced user experience for Alma course reserves

H1 2025

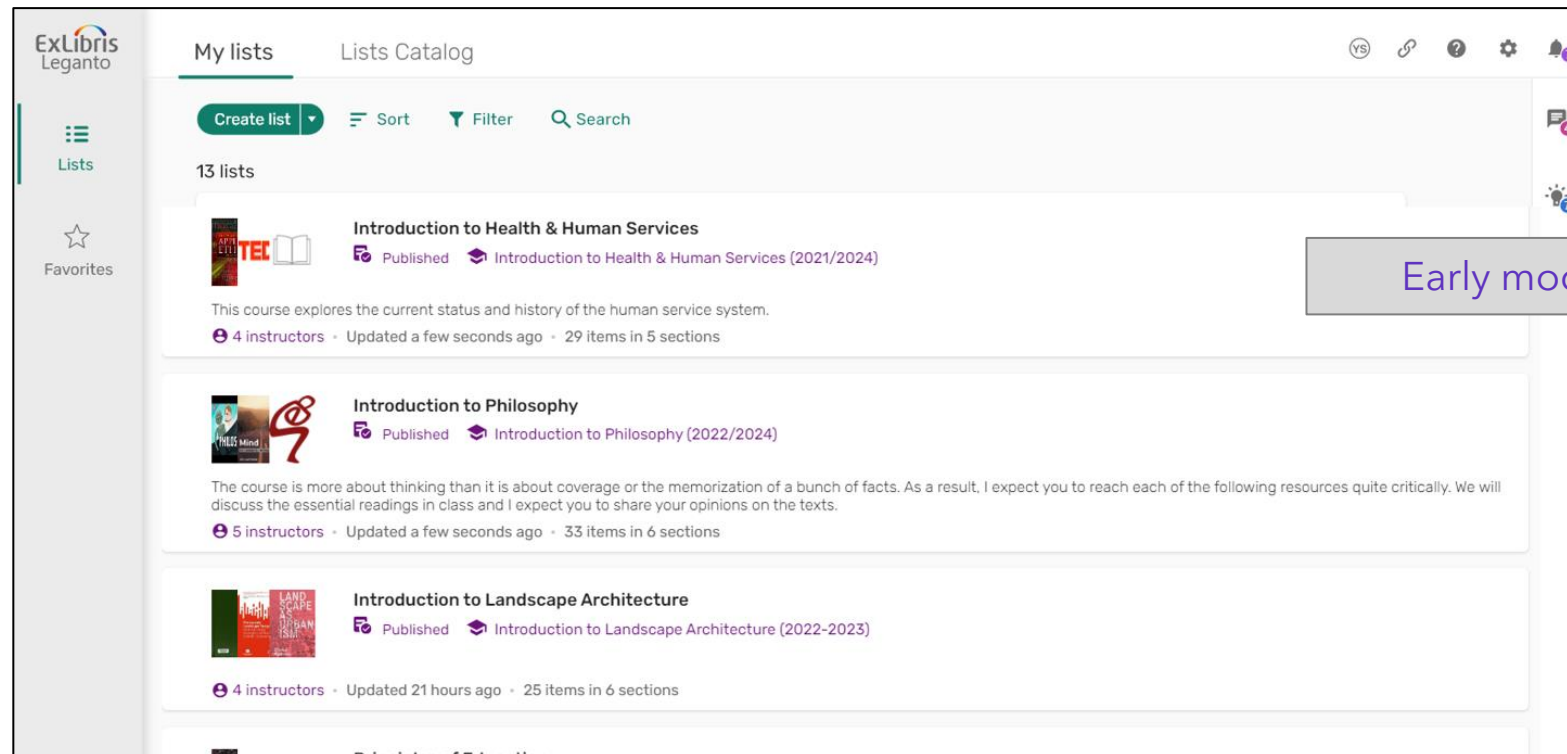| What's New	Highlights	Impact
The course reserves task lists will be updated to use the <u>Alma New Layout</u>. They will be redesigned for better usability, performance, productivity, and overall user experience	More options for editing and processing citations from within the Alma screens The project will begin in early 2025	Provide library staff with easier workflows for managing course materials in Alma

Example from Resource Sharing task list

End-user experience

Give the best service to your patrons

Improvements to the new user experience

H1 2024

What's New	Highlights	Impact
Incorporate changes as a result of customer feedback and feedback from usability studies with instructors	Visual solution for subsections/indented sections Separate My lists/All lists search into tabs Additional improvements will be according to ongoing feedback	Provide students and list creators with an intuitive, easy-to-use platform for building, managing, and accessing resource lists

Early mockup

Automatically trigger workflows

What's New	Highlights	Impact
Prompt instructors to complete the next step for specific types of citations	Automatically trigger a copyright request form when uploading a file Automatically trigger the digitization request form when adding a chapter	Reduce errors and confusion by prompting instructors and other list creators to complete the relevant requests for citations

Expanded bulk actions

What's New	Highlights	Impact
Additional means for managing resources in bulk	One-click deselect option Bulk actions on sections Favorites: bulk actions for private tag and private notes	Save time in creating and managing resource lists by managing resources in bulk

Early mockup

Improvements to the new user experience

What's New	Highlights	Impact
Incorporate changes as a result of customer feedback and feedback from usability studies with instructors	Improvements will be according to ongoing feedback	Provide students and list creators with an intuitive, easy-to-use platform for building, managing, and accessing resource lists

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Accessibility of resources

What's New	Highlights	Impact
Convert PDFs uploaded to Leganto to a format which can be read by a screen reader	Support OCR for files uploaded to citations	Ensure students are able to read content uploaded to Leganto lists via a screen reader

Enhancements to suggestions

What's New	Highlights	Impact
Expand the suggestions functionality to make it easier for students to suggest resources and easier for instructors to use suggestions	Students will be able to add suggestions for new reading list content directly from the suggestions pane Users will be able to access the suggested content without adding it to the list	Encourage student engagement beyond the resources already available on the resource list

Early mockup

Additional inventory options

What's New	Highlights	Impact
Integrate with additional inventory options for Leganto citations	Integrate with Unpaywall Integrate with BrowZine HTML links	Provide students with quick access to course materials via additional inventory options

Student workspace in Leganto

What's New	Highlights	Impact
A means for students to manage, engage with, and share resources	Mark items to read and organize activities Make students collaborators on specific lists Provide exploration paths for further reading	Provide students with expanded opportunities for engagement and more ownership over resources

Analytics

Enable data-driven decisions, demonstrate impact
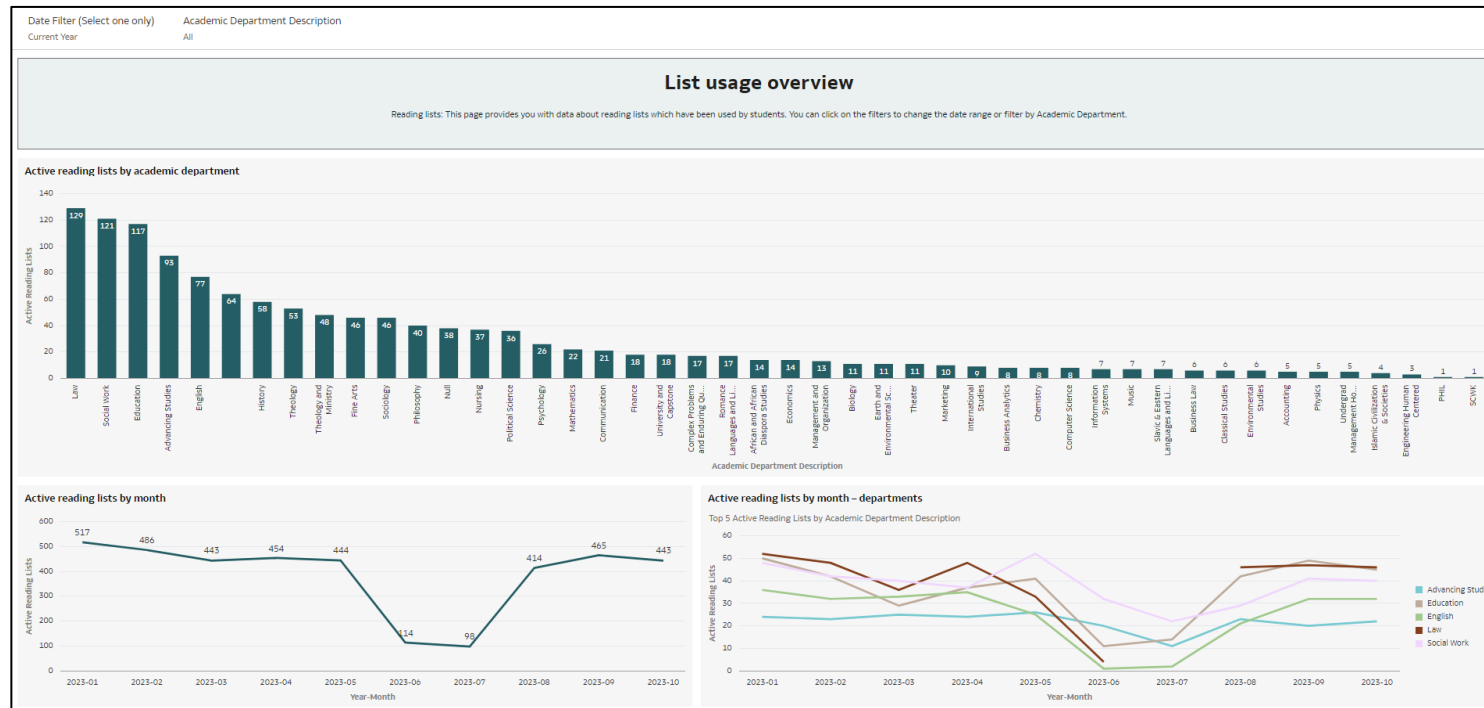
Leganto usage dashboard

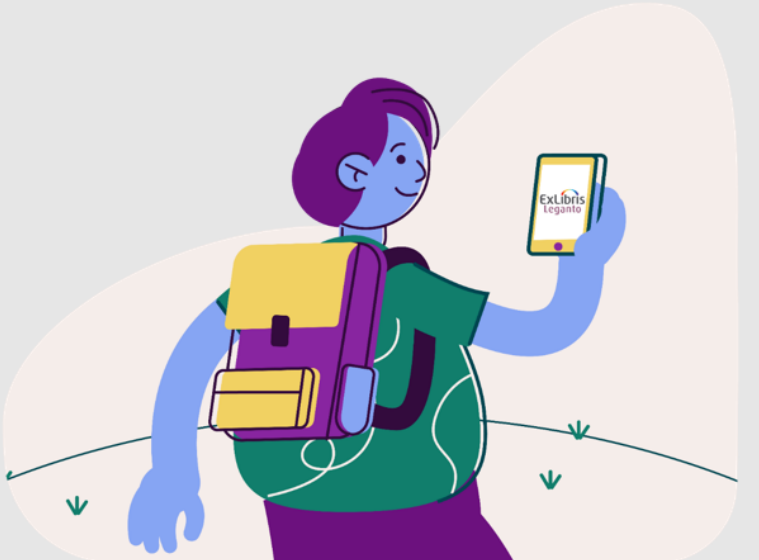| What's New	Highlights	Impact
Finish the Leganto Usage data visualization dashboard introduced in 2023	List usage overview Detailed list usage Citation usage Year over year summary	Libraries will be able to easily report on the usage of Leganto lists and citations, with options to drill down to specific date ranges and academic departments

Library workflow reports

What's New	Highlights	Impact
Out of the box reports to enable libraries to measure and report on processing workflows	Additional measurements to track citation status changes Out of the box reports to measure library processing workflows	Once libraries can measure the turnaround time for processing reading lists and citations, they will be able to identify staffing requirements and provide more accurate estimates to instructors

Learning affordability reports

What's New	Highlights	Impact
Out of the box reports to measure the library's impact on learning affordability	Out of the box student savings reports Additional options for updating sticker prices in bulk Expanded fields for tracking student savings	Provide libraries with expanded tools to quickly and easily report on the financial impact that the library collection and library services has on students in their courses.

Alma University Library

has saved students a potential

$740,025

in course materials costs in 2023

User engagement reports

What's New	Highlights	Impact
Integrate with Mixpanel for analytics about user activity in the Leganto interface	Out of the box reports to track user activity and user journeys in Leganto Reports will include distinctions between student users and instructors users	Provide libraries with a better understanding how students and instructors use Leganto. Provide a means to measure the user experience, track the user journey, and identify features to promote or disable in Leganto.
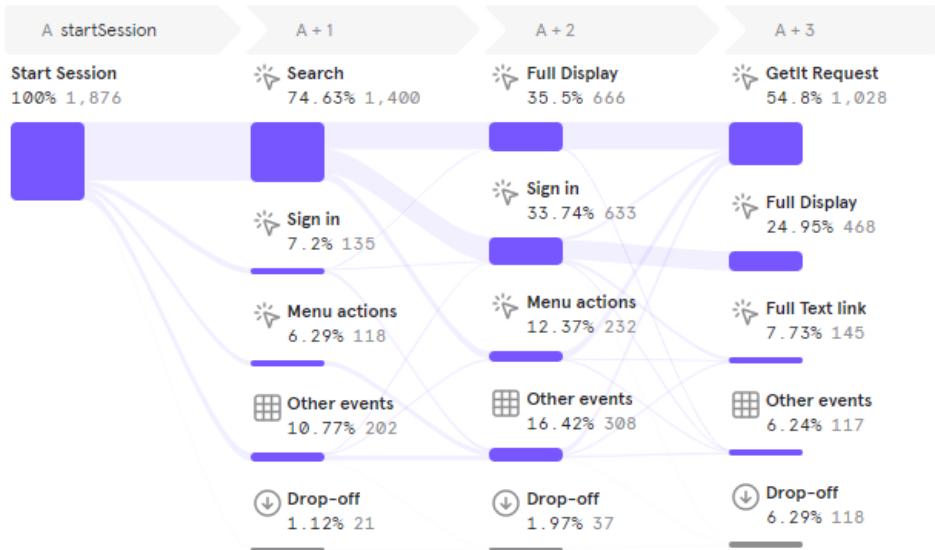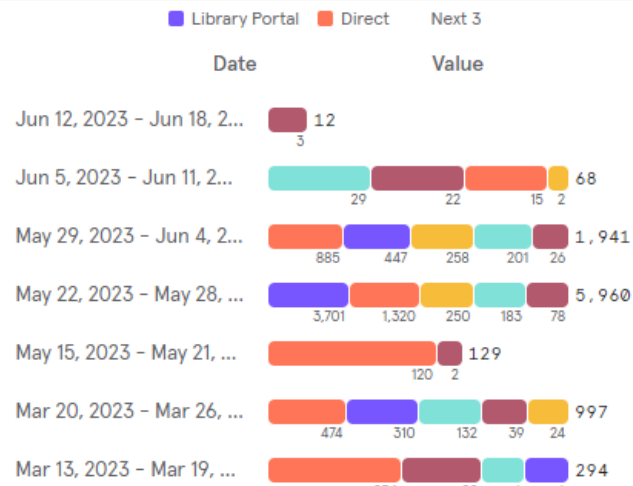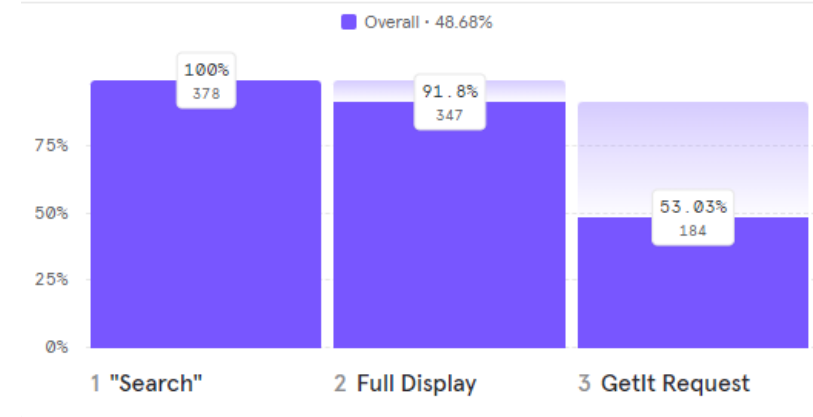
Advanced analytics for instructors

What's New	Highlights	Impact
An expanded usage dashboard for instructors	Identify trends in citation usage Flexible configurations for libraries	Provide instructors with more detailed usage information to make it easier to understand student engagement, identify usage trends, and improve reading lists over time.

General

Ongoing work to ensure Leganto continues to meet your needs

Accessibility Update

- Ongoing accessibility improvements

- VPAT 2.4 (2021) is available on Knowledge Center and describes the Leganto support of WCAG 2.1

- A VPAT will be published for the new UI in Q1 2024

https://knowledge.exlibrisgroup.com/Leganto/Product_Materials/Product_Accessibility

NERS

- Leganto developments will be determined by the community in the NERS enhancement process

- Submit your ideas now for 2024

Dates	Actions
Jan 29 2024	Last chance to submit new enhancement requests for this year's voting in NERS
Jan 30 - Mar 23 2024	The WG reviews, dedupes, scopes, verifies, transfers to other NERS when necessary, and sets up the vote
Mar 27 - April 10 2024	First round of voting
April 11-12 2024	The Enhancements Team reviews the results, and prepares them for Ex Libris to assign complexity points.
April 13- June 11 2024	Ex Libris adds complexity points to the top voted results. The Enhancements Team determines if a second round of voting is needed
June 12 - 26 2024	If necessary, a second round of voting takes place

Questions?

Please share feedback with jessie.ransom@clarivate.com

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Thank you

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