



Ex Libris Leganto
Implementation
Methodology

Course resource lists
made easy

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Introduction

This document provides an overview of the typical Ex Libris Leganto implementation process and tasks to help customers prepare for an Ex Libris Leganto implementation project.

Ex Libris Implementation Strategy

Ex Libris teams strive for 100% customer satisfaction. We assign a project manager to guide the customer from the planning through to project completion and Go Live; representing an initial launch of Leganto. This is done while collaborating to create a mutually agreed-upon plan for the project scope, roles, and timeline during the implementation. We take a service-oriented approach, whereby Ex Libris provides guidelines and, based on the customer's input and data, performs the initial configuration and third-party integration setup, and data analysis, including course and reading list data (when relevant) loading. Training is generally Web-based and is planned as part of the implementation project.

Implementation Project Lifecycle

The Ex Libris implementation strategy leverages the extensive implementation experience and technical knowledge of our staff, enabling our customers to bring Ex Libris solutions into production mode efficiently and effectively.

The active implementation will start after a preparation phase where the customer will gather a project team and key stakeholders, plan an adoption approach, including a planned initial launch (Go Live) date (typically beginning of a new semester) and, based on clear Ex Libris requirements, prepare the technical inputs required for the system setup. The active implementation will start about 10 to 14 weeks before the agreed Go Live and will include: Leganto activation, Leganto configuration, integration with a third-party learning management system (LMS), course loading, reading list loading (when relevant), training, and testing.

For customers implementing Alma and Leganto, it is highly recommended to start the preparation phase during the Alma deploy phase, and plan the Leganto Go Live for the following semester.

A high-level project plan indicating the key significant milestones is prepared and agreed upon mutually. This plan serves as a commitment for the customer and Ex Libris to allocate the relevant resources, complete relevant assigned tasks, and meet agreed-upon deadlines for the implementation of Leganto.

Campus Engagement

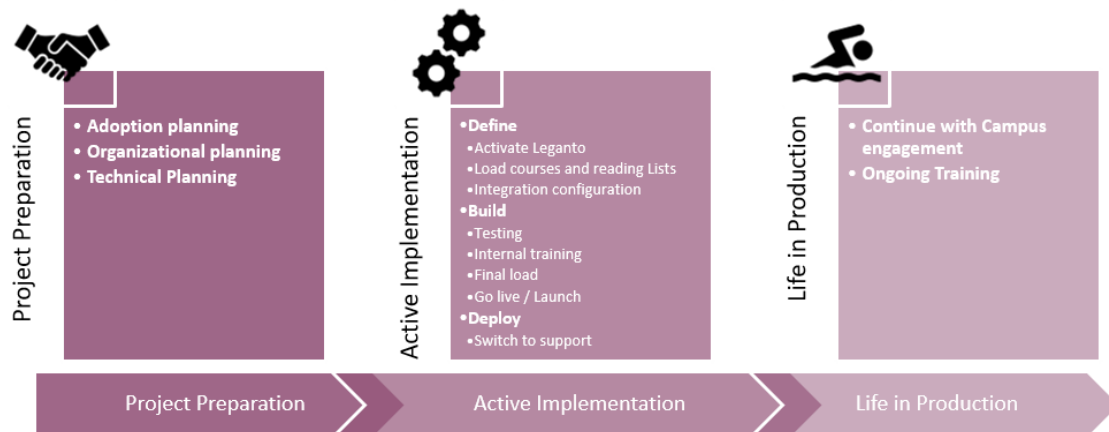
To help meet customers' unique educational needs and carry out administrative processes as smoothly as possible, Ex Libris has developed the Leganto Campus Engagement program. The Campus Engagement Program starts as early as the Onboarding phase to coach and guide library staff throughout the adoption process. The program is designed to help the library assess the institution's needs, define its vision for success, and create a customized adoption model that enables the library to achieve its unique goals. Depending on local needs, a Campus Engagement Manager (CEM) may engage to actively work with the customer throughout their journey with Leganto. In this case, Collaboration starts during the onboarding phase of implementation,

continues to the campus launch and extends to post-launch follow-up sessions to ensure success and encourage growth. For more information on the Campus Engagement program, please see [here](#).

Although the Leganto implementation project is under the purview of the Ex Libris Professional Services group, the Campus Engagement Manager (CEM), when relevant, will be kept in the loop, right from the start. The CEM will have an active role during customer kickoff meetings and have scheduled follow-up meetings to discuss adoption, implementation, launch, and post-launch strategies

Leganto Implementation Methodology

The implementation methodology is a framework of phases, tasks, and milestone dates based on best practices of Ex Libris' Professional Services experience. The method enables agile cycles along with the management of expectations, which are critical to the success of Leganto implementation.



Project Preparation: Preparing for the Implementation Project

Upon signing a contract with Ex Libris, customers receive a welcome letter that includes a product “Welcome” kit. This kit contains guides and forms to help libraries, technical (IT) staff and other stakeholders to prepare for Leganto implementation and Go Live.

The onboarding phase is used as a preparation period to ensure that organizational readiness as well as technical readiness are in place for the Leganto kickoff and project. During the onboarding phase, the customer and Ex Libris should identify project stakeholders and define project teams (organizational planning). As part of the preparation, the customer will fill out an implementation questionnaire that allows the Ex Libris project team to understand the specific setup requirements needed for the implementation project. The customer is asked to review the “Getting Ready for Leganto” document to ensure the technical readiness. When relevant, the customer will be asked for a sample data extract of their course/s and reading list/s to ensure a smooth technical implementation.

During or soon after the initial onboarding phase, a Campus Engagement Manager (CEM) will also work closely with customers in participating regions, specifically the library, to develop a customized adoption plan and provide resources, tools, and support as libraries engage key teaching and learning stakeholders to take part in the Leganto adoption process at their institution. The customer will assemble a launch team and actively recruit partners throughout Leganto's lifecycle. The customer will also appoint a project sponsor that will serve as the primary contact for Ex Libris teams. The project sponsor will be responsible for providing access to data and third-party systems, participating in project meetings, and providing updates as well as feedback to Ex Libris teams throughout the overall process. Campus Engagement and onboarding teams will provide a checklist that will serve as a readiness guide to the sponsor as they prepare to advance to the implementation phase of the Leganto project.

Ensuring technical readiness as well as stakeholder, adoption, and engagement readiness will be the outcomes of the preparation phase and drive a successful kickoff and active implementation project.

Ex Libris Professional Services follow an implementation approach that pairs an Ex Libris project team with the customer project team. Approximately ten weeks before the planned initial launch (which will represent the Go Live with Leganto), the Ex Libris project manager coordinates with the customer's project manager to schedule the project kickoff and formally begin the active implementation project.

Active Implementation

During the Active implementation, the product configuration is performed. The configuration includes an Integration with your institution's LMS, setup for loading courses, assignment of roles for the academic users, creation of Reading lists (batch loading by Ex Libris if reading list data is provided in the appropriate format, or manual creation by the customer) and other general Leganto settings. Relevant training is provided and the active implementation culminates with the Go Live / Initial Launch.

The three phases of active implementation are – Define (Basic Setup), Build (configuration testing and final setup for going live) and Deploy (production system).

Communication throughout the on-boarding and active implementation is primarily based on an online project communication tool, Basecamp. This tool provides a platform and serves as a repository for the discussions, documents, weekly based To-Dos, and project schedule. Additional communication channels are handled via regular project status meetings (Web-based) that take place throughout all phases of the implementation project to help ensure follow-up and progress. Project status calls are usually conducted between the Ex Libris project manager and the customer team project lead. Other project team members may participate in such requests, as required.

Phase 1: Define

The Define phase starts with the kickoff meeting. The Ex Libris project manager (PM) partners with the customer project lead to define a detailed project plan and agree on significant milestones, based on the preparation phase outcome plans for Go Live.

At the kickoff meeting, the Ex Libris and customer project teams review all project stages, roles, and responsibilities, and milestones which culminates in a mutually agreed Leganto project plan and timeline; including agreed Go Live and project completion dates.

At the beginning of the Define phase, and using the defined formats, tools, and protocols provided by Ex Libris, the customer should proceed with extracting, validating, and delivering the course data an for Ex Libris to load to Leganto. Additionally, reading list data may also be provided (in the Ex Libris defined formats) for loading. When relevant, data analysis will be done on sample data to mutually decide on the best loading approach of the data to Leganto.

Further into the Define phase, integration inputs needed for establishing integrations with the LMS, the Ex Libris discovery system and authentication should be established. The Ex Libris project team works on configuring the customer environment based on the customers' inputs.

The phase is completed with the initial configurations setup in the Leganto environment ready for customer testing.

Phase 2: Build (Initial Launch Setup and Cutover when relevant)

During the Build phase, the Leganto environment integrations are tested and configuration refinements are applied based on feedback. Additionally, course data is loaded and reading list data, when relevant, is also entered to the Leganto system. The data and relevant integrations are reviewed and tested by the customer.

Once Leganto setup is refined to completion and is technically ready to be used, it is recommended that the customer will conduct internal training sessions for the key stakeholder instructors. Additionally, the early involvement of students in testing is strongly recommended to ensure a smooth adoption of the system after the initial launch.

Once all configurations are tested and approved, the customer confirms that the system is operationally ready, and the production loads can begin to ensure the latest data is present and the system is ready for Go Live. The Build phase ends upon Leganto Go Live, when Leganto is initially launched with at least one instructor and student/s.

Phase 3: Deploy

The Deploy phase starts upon Leganto Go Live and continues typically for another 3-4 weeks until the customer is switched to support. The Ex Libris project team helps the customers with any topics raised during the initial launch and the subsequent period following it, to ensure smooth system function and readiness for continued long term use and adoption.

Upon conclusion of the Deploy phase, the customer is formally transitioned to the Ex Libris Customer Support team for ongoing support and life in production. The implementation project is considered complete once the customer is transitioned to Support.

Life in Production: After the Implementation Project

A customer's relationship with Ex Libris does not end once Leganto is operational and the project is complete. Rather, Ex Libris is committed to ensuring that a customer's journey and needs continue to be met. Our dedicated Ex Libris Support team is available to assist customers with any product-related issues via self-service online help tools as well as direct interactive assistance via

our CRM for logging and receiving updates on cases submitted. The CRM can be accessed from the Ex Libris customer portal.

Depending on regional needs, the Customer Engagement Manager (CEM) continues to check in with the library throughout the campus wide launch and subscription period, helping the library adjust and adapt plans to meet the institution's changing needs. Once the initial launch is complete, the CEM may also assist the library in building a robust plan for increasing Leganto usage over time.

Customer Education

Training is provided during the Leganto adoption lifecycle and is as an integrative part of the project and product lifecycle. High quality recorded sessions are available via the Ex Libris Knowledge Center aiding new implementing customers at the initial learning and adoption stages. These sessions also highlight new features as they are introduced in the Leganto monthly releases.

A significant part of the training can be done at the customer's own pace. Training is reinforced with tutorials, comprehensive user guides, and context-sensitive online help. There are designated training sessions for the the Leganto stakeholders.

Implementation Project Details

General Project Activities

Listed below are typical project activities to help a customer plan and prepare for their Ex Libris project

Phase	Milestone/Task	Customer	Ex Libris
Leganto Project Preparation (Onboarding)	Onboarding Kickoff	V	V
	Customer call with Campus Engagement Team to plan adoption and rollout for participating regions	V	V
	Complete and review Leganto implementation form	V	V
	Establish Project Logs (e.g. Risks)		V
	Review and apply technical readiness	V	
	Agree project schedule based on Go Live / Initial Launch date	V	V
	Engagement plan confirmed – timeline, technical readiness, adoption plan and operational readiness	V	V
	Schedule Kickoff	V	V
Active implementation			
Define phase	Implementation Kickoff	V	V
	Activate Leganto on Production		V
	Establish Leganto - Discovery integration		V
	Training activities	V	
	Set a roll-out plan for Customer Training for instructors	V	
	Leganto custom domain name – FQDN (optional)		V
	Environment Preparation		V
	Environment Delivery		V
Build Phase	Testing & Feedback	V	
	Customer verification of loaded data (courses, users, and reading lists (as relevant)	V	
	Functional testing, report issues and amend	V	V
	Embed LTI link in the relevant courses in LMS	V	V
	Customer test embedded LTI links with a real user/course	V	
	Review reading Lists by instructors	V	
	Customer verify students can access Leganto through LMS	V	
	Pre-Launch	V	V
	System is ready for Initial Launch	V	V
	Initial Launch with instructors	V	

Deploy Phase	Live with Leganto – instructors and students initial launch		
	Switch to Support: Life in Production after project completion and continued CEM assistance w/ expanding Leganto adoption and usage		

Ex Libris and Customer Project Team & Responsibilities

Ex Libris Team

The implementation team will include:

Role	Responsibility
Project Manager	<ul style="list-style-type: none"> - Coordinate all activities related to Leganto implementation - Provide a detailed project plan - Perform all activities that are under Ex Libris' responsibility as will be detailed in the project plan - Perform Leganto implementation - activation, configuration, sample courses, and reading lists (as relevant) loading - Coordinate testing activities - Provide documentation and training
Ex Libris Project Sponsor	<ul style="list-style-type: none"> - Senior leader for Ex Libris Professional services - Designate all relevant project resources - Serve as escalation point for Project team, as needed

Customer Project Team

Guidelines for the Leganto implementation team – customer side

The implementation team should include:

Role	Responsibility
Project Sponsor	<ul style="list-style-type: none"> - Interact with the project team, stakeholders (executive and senior management) & relevant staff during the project phase. - Coordinate to ensure the necessary and timely project resources - Champion within the Institution to drive successful adoption of Leganto
Project Manager	<ul style="list-style-type: none"> - Lead and coordinates activities related to the implementation of Leganto for the institution - Ensure that institutional staff resources are available to assist as necessary for successful adoption (inside & outside of the library) - Manage internal and external communications about the status and priorities of the project - Keep the project moving and on track - Help to mitigate project risks - Act as primary point of contact with the Ex Libris project manager including the following specific activities: <ul style="list-style-type: none"> o Provide data extracts based on Ex Libris requirements o Ensure LMS & IT staff are available, as needed o Prepare training activities for the library staff and instructors

	<ul style="list-style-type: none"> ○ Attend project meetings ○ Review project plans ○ Manage / oversee the testing processes and provides feedback ○ Set and communicate relevant priorities with the Ex Libris project manager
Leganto Technical Team	<ul style="list-style-type: none"> - Library staff – Has overall familiarity with workflows of the reading lists and course reserves management - Instructor – It is highly recommended to have instructors as part of the project team, especially to provide end user feedback and experience - IT administrator – A critical point is having the institution’s Learning Management System (LMS) staff engaged and willing to assist with the LTI integration with courses, which will allow Leganto to support single sign-on and role-transfer from the LMS to Leganto reading lists