Managing Reading Lists

To manage a course’s reading list, you must have one of the following roles:

- Course Reserves Operator/Manager attached to a course department
- Course Reserves Viewer (read-only access)
- Fulfillment Services Operator/Manager attached to a course department

After adding courses, you can manage the reading lists for the courses. A reading list is blank until you add content to it. A typical reading list includes textbooks, additional books, book chapters, journal articles, newspaper articles, or Web sites. Each item on the list is called a *citation*.

See also Managing a Course’s Reading Lists for reordering or copying reading lists within or between courses. For information on citations, see Managing Citations. To publish course and reading list information to Primo, see Configuring Course Reserves in Primo.

You access reading lists on the Reading Lists Task List page, either by selecting *Reading list* in the row actions list for a specific course on the Courses page or by navigating to *Fulfillment > Course Reserves > Reading Lists*. This page has *Assigned* and *Unassigned* tabs (see Assigned to Me, Unassigned, and Assigned to Others Tabs). In addition, the page has an *All* tab that contains all of the reading lists that appear in the other tabs. When accessing this page from the persistent menu, the default view is the *Assigned to Me* tab with the *Processing Department* filter set to your department.

You can also access this page by searching for reading lists; see Searching in Alma.

You can also access this page by selecting one of the *Reading List* tasks in the task list (see Tasks in the Task List).

- If the task contains the words *Assigned to Me*, *Unassigned*, or *Assigned to Others*, then that tab is pre-selected by default. Otherwise, the *All* tab is pre-selected by default.
- The last part of the task name indicates a pre-selected option for the *Status* facet or *Alert* filter.

**Note**

The alert *List has new note* only appears on the Reading List Tasks List page. This alert is associated with the list, not a specific citation. All other alerts are associated with one or more citations in the reading list.
The fields on this page are as follows (note that some columns are initially hidden, by default):

- **Code** - The reading list code
- **Name** - The reading list name
- **Status** - The reading list status

**Note**

The reading list status does not affect whether the reading list is published in Primo. For a list of predefined reading list statuses, see [Reading List and Citation Statuses](#) in the Leganto Administration Guide. You can define other reading list statuses, see [Configuring Additional Reading List Statuses](#).

- **Assignee** - The user assigned to manage this reading list. (This column is only useful in the **Assigned to Others** tab.)
- **Owner/s** - The reading list's owners; ownership is relevant only to Leganto customers (see [Configuring Reading List Ownership](#)). If there are multiple owners, **Multiple** appears.
- **Due Back Date** - The default due back date for the citations on the reading list. This value is inherited from the course.
- **Alerts** - A checkmark appears if there is at least one alert about the reading list
- **Request for Review** (Leganto only) - The date that the instructor submitted the list to the library for processing
- **Review Requester** (Leganto only) - The name of the instructor who submitted the list to the library for processing
- **Academic Department** (hidden by default) - The course's academic department
- **Processing Department** (hidden by default) - The course's processing department
- **Start Date** (hidden by default) - The course's start date
- **End Date** (hidden by default) - The course's end date
- **Course Code** (hidden by default)
- **Course Section** (hidden by default) - The course section (not the reading list section)
- **Course Terms** (hidden by default)
- **Publication Status** (Leganto only; hidden by default) - The read list's publication status in Leganto

**Note**

The publication status does not affect whether the reading list is published in Primo.

- **Creation Date** (hidden by default) - Reading list creation date
- **Modification Date** (hidden by default) - Reading list last updated date
- **Advisor Score** (Leganto, only; hidden by default) - The reading list's advisor score, if enabled
• **Campus** (hidden by default) - The course's campuses, if defined

Reading lists are managed by librarians based on personal assignment (**Assigned to Me** or **Unassigned tabs**) and not by their respective courses. To manage reading list assignments, see [Releasing and Reassigning a Reading List](#). Note that only managers can view and reassign reading lists that are assigned to others.

Reading lists can have multiple owners and collaborators. Ownership of a reading list is relevant only in Leganto. For more information, see [Managing Reading List Owners and Collaborators](#).

A reading list can have multiple sections. Sections can be managed only using Leganto. Reading lists created in Alma or using the Alma Web service API have a single default section.

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**Note**

- Reading lists can be exported into your course management system using the Alma Web services. For information on the relevant Alma Web services, see [https://developers.exlibrisgroup.com/alma/apis/courses](https://developers.exlibrisgroup.com/alma/apis/courses).

- If Leganto is enabled for your institution, instructors can use Leganto to create the reading lists. For more information, see the Leganto [Product Overview](#). After creating the lists, instructors send them to the library for processing. Librarians can use the Alma interface described here to make changes to the lists.

- Archived reading lists continue to appear in Analytics. Deleted and purged lists do not.

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**Facets/Filters:**

The page (depending on the tab) includes the facets **Processing Department**, **Academic Department**, **Terms List**, **Course Year**, **List Assigned To**, **Assigned Date**, **Status** (see [Reading List and Citation Statuses](#)), **Publication Status** (see [Reading List and Citation Statuses](#)), **List creation date**, **List modification date**, and **Request for review**, as well as the filter **Alerts** (see [Removing alerts from citations](#)).

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**Note**

The following descriptions of the possible values are true for the facets **Assigned Date**, **List creation date**, **List modification date**, and **Request for review**:

- Today - Requests created on current date

- Yesterday - Requests created day before current date

- Up to three days ago - Requests created two or three days before current date (excluding today and yesterday)

- Up to a week ago - Requests created between four to seven days before current date (excluding above three options)

- Up to a month ago - Requests created between eight days and a month before current date (excluding above four options)

- Older - Requests created more than one month before current date

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In addition, for Leganto:
• The status **Processing** matches reading list that is not marked as **Complete**, including **Inactive** or **Declined**.

• For publication status, **Published** matches all reading lists that are not **Draft**, **Archived**, or **Deleted**, and **Active** (which is selected by default) matches all reading lists that are not **Archived** or **Deleted**.

• The processing department **Undefined** matches any reading list that does not have an associated course.

• If you have reading lists associated with multiple courses, some facet values are counted once for each course, and so their combined totals may be higher than the number of read lists on the page.

You can perform the following actions on reading lists on the Reading List Task Lists page:

• **View** - Select **View** in the row actions list. When you view a reading list, you cannot make changes to it.

• View all reading lists of one course - Select **All Reading Lists for this Course** in the row actions list; see Managing a Course's Reading Lists. If the reading list is associated with multiple courses, this action is not available. You can view all reading lists associated with a course on the Courses page; see Managing a Course’s Reading Lists.

• **View in Leganto** (Leganto only) - Select **View in Leganto** in the row actions list. Relevant for active lists.

• **Associate with a course or change course association** - Select **Associate this list with a course** in the row actions list. See Editing a Reading List. Relevant for active lists.

• **Clear association with a course** - Select **Remove associated course** in the row actions list. See Editing a Reading List. Relevant for active lists.

• **Release from being assigned to you** - Select **Release Assign** in the row actions list on the Assigned to Me or Assigned to Others tab. See Releasing and Reassigning a Reading List. Relevant for active lists.

• **Reassign to someone else** - Select **Reassign** in the row actions list. See Releasing and Reassigning a Reading List. Relevant for active lists.

• **Edit (work on)** - Select **Work On** in the row actions list. See Editing a Reading List. Relevant for active lists.

• **Unarchive** - Select **Unarchive** in the row actions list. Resets the list publication status to **Draft**. Relevant for archived lists.

• **Duplicate** - Select **Duplicate** in the row actions list. Modify the new reading list as needed. When you duplicate a course in Alma via the Reading List Task List, the course associated to the original list will not show up in the duplicated list.

• **Delete** - Select **Delete** in the row actions list and select **Confirm** in the confirmation dialog box. If you delete a reading list while the course is active, any citation requests that were fulfilled are canceled. Requests that were fulfilled remain at the circulation desk until they are due back. If you are using Leganto, then you can configure whether deleted reading lists are immediately purged or remain in Alma, where they can then be purged or restored (see Configuring What Happens to Deleted Lists). Otherwise, the reading list is immediately purged from Alma. Not relevant for deleted lists.

• **Purge** - Select **Purge** in the row actions list. Purges a deleted list (removes it from Alma entirely); this action cannot be undone. Relevant for deleted lists.

• **Restore** - Select **Restore** in the row actions list. Restores a deleted list; this action cannot be undone. Relevant for deleted lists.
Adding a Reading List

You can define one or more reading lists for a course, based on the reading list material identified by the course instructor. Each reading list is generally specific to a particular topic.

To add a reading list:

1. On the Courses page (Fulfillment > Course Reserves > Courses), select Reading List in the row actions list for the course to which you want to add a reading list. The Course’s Reading List page appears.

   ![Course's Reading List Page](image)

   **Course’s Reading List Page**

2. Select Add Reading List. The Add Reading List dialog box appears.

   ![Add Reading List Dialog Box](image)

   **Add Reading List Dialog Box**

3. Enter the reading list information. A description of the configurable fields appears in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code (Required)</td>
<td>The reading list code</td>
</tr>
<tr>
<td>Name (Required)</td>
<td>The reading list name</td>
</tr>
<tr>
<td>Status</td>
<td>The reading list's initial status. For a list of predefined reading list statuses, see Reading List and Citation Statuses in the Leganto Administration Guide. You can define other reading list statuses, see Configuring Reading List Statuses.</td>
</tr>
<tr>
<td>Due back date</td>
<td>The due back date for the course’s resources. The default date is the course’s end date. For details on managing a course’s due back date, see Managing Reading List Due Back Dates</td>
</tr>
</tbody>
</table>

4. Select one of the following:
   - **Add** – Add the reading list and leave the dialog box open to configure additional reading lists.
   - **Add and Close** – Add the reading list and close the dialog box.

5. The new reading list appears in the Course’s Reading List page.
Editing a Reading List

Once the reading list has been created, you can add the required reading material to it. You can select from resources in the repository, or use the system to suggest and locate an item. You can then edit a reading list to modify the material on the list.

For information about managing citations, see Managing Citations. This section presents how to edit general reading list information.

Note

- You can edit only reading lists that are unassigned or assigned to you.
- When you edit a reading list that is unassigned, it becomes assigned to you. To configure this, set the ri_auto_assign parameter; see Configuring Other Settings.
- While you edit a reading list, the reading list is locked and cannot be edited by other library staff.

To associate a reading list with a course, or change or remove the association:

You can associate a reading list with multiple courses. Selecting Associate this list with a course opens the Courses tab of the Edit Reading List page. Selecting Remove associated course also opens the Courses tab of the Edit Reading List page, unless there is only one course associated with the list.

Note

- If you have Leganto, you can enable or disable the ability to associate a reading list with multiple courses. See Managing Multiple Courses for Reading Lists. When disabled, the workflow is slightly different: Select Associate this list with a course in the row actions list, select or search for the course to associate to the list in the dialog box, and select Change Course Association.

To remove a course association, select Remove associated course in the row actions list.

To edit a reading list:

On the Reading Lists Task List page (Fulfillment > Course Reserves > Reading Lists), select the reading list or select Work on in the row actions list. The Citations tab of the Edit Reading List page appears.
On this page, you can manage the reading list using the following actions:

- In the **Reading List Information** pane, you can edit the reading list parameters, including the **Code**, **Name**, **Status** (the reading list status), and (the default) **Due Back Date**. The reading list parameter fields are described in **Adding a Reading List**.

The sum total of all pages of all citations appears in this pane. The total includes the total pages of each citation that has pages defined. The total is determined from the **Start Page** and **End Page** fields in each citation; if either of these is not defined, the total is determined from the **Pages** field. Citations without pages, or whose pages cannot be parsed by Alma, are not included in the total.

- If your institution has Leganto enabled, you can perform the following Leganto-related tasks in the **Reading List Information** pane (for more information, see **Leganto Administration Guide**):
  - Edit the start and end date for the reading list's visibility (**Publication Status**) in Leganto, if it is shorter than the course's active date range. The reading list is visible to students only between the indicated dates (if the list's **Publication Status** is not **Draft**). If you enter only a start/end date, then the list is visible only after/before the indicated date.
  - Edit the reading list's visibility (**Publication Status**) for Leganto (this is not the reading list status, but whether and how the list is visible to students in Leganto). The statuses are described in **Reading List and Citation Statuses** in the Leganto documentation.

  **Note**
  This setting does not affect the reading list's publication status in Primo.

  - Select a creative commons license for the entire reading list, if your country supports this license type (see **copyright_region** in **Configuring Other Settings**). Also see **Configuring the Default Creative Commons Value for a Reading List**.
  - Lock/unlock the list in Leganto - Select **Locked in Leganto** to prevent any changes to the list in Leganto. Leganto users can still add a private note, like or add comments to citations, or mark a citation as read. The list can be unlocked in Alma by any librarian or in Leganto by the user who locked it.
  - Open this reading list in Leganto - select **View in Leganto** in the page header.
  - View the Reading List Advisor score (not shown above) and list owners.

- You can change the order of the citations in the list using the **Sort by** field. You can sort the citations by citation title.
On the **Citations** tab, you can manage citations, as described in Managing Citations.

On the **Courses** tab you can manage the courses associated with the reading list. (Leganto only) This tab does not appear if the ability to associate multiple courses with a reading list is not enabled. If you are using Leganto, see Managing Multiple Courses for Reading Lists.

On the **Owners** tab, you can manage Leganto owners or collaborators (see Configuring Reading List Ownership).

Add, edit, or delete notes in the **Notes** tab. For more information about this tab, see Notes Tab. Select an option in the Update Notes table action to mark notes as unread (Activate Notes) or read (Dismiss Notes). When you add a library note type, only other librarians can see the note. When you add an instructor type note, also instructors can see the note, in Leganto (Leganto users only). You cannot change the note type after creating the note.

In the **Subject Labels** tab, you can manually add or remove subject tags to the reading list; these tags are useful primarily for Leganto customers. Instructors can add or remove these subjects in Leganto. Administrators can configure this list; see Configuring Reading List Subjects.

**Note**

- Reading list subjects are not related to the **Subject** bibliographic record field of a citation.
- This tab can be disabled by Leganto customers; see Disabling Reading List Subjects.

In the **Recent Changes** tab, you can view changes made to the list. For more information about these changes, see Configuring Notifications in the Leganto Administration Guide.

After modifying the Edit Reading List page as required, select **Save**.

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**Managing Reading List Due Back Dates**

An item shelved at a temporary location can be assigned a due back date either from the Change Item Information tab (see Changing Item Information) or by the bulk items update job (see Change Physical Items). However, when a reading list is attached to a course and an item is moved to a temporary location, the item's due back date is derived from the course's end date.

When a due back date arrives, an automatic job picks up items shelved at temporary locations and places a restore request on them. This triggers a process that moves the items back to their permanent location. (Note that at this stage, the descriptive record may be suppressed from publishing or deleted.)

The following procedure describes the process of managing the due back date when a reading list is attached to a course:

1. The reading list's due back date is by default identical to the course's end date. The due back date can be modified in the Add Reading List dialog box. For details on the fields displayed in the Add Reading List dialog box, see the Add Reading List Fields table in Adding a Reading List.
2. Citations are created in the reading list (see Managing Citations).
3. If a move request is generated to temporarily move an item linked to a citation and the item moves to the specified location, the item automatically inherits the reading list's due back date and is labeled with it.
4. An automatic job picks up all temporarily moved items and places a Restore request to restore the items to their permanent location when the due back date arrives. For details on this job, see Viewing Restore Request Jobs.

If a reading list citation is linked to an item with a due back date earlier than its own due back date, the **Update move expiry** action in a row actions list on the List of Items page advances the item's due back date to the due back date of the citation's reading list. See Working with the List of Items.
For example:

- The due back date of Item A is March 1
- The due back date of Citation B is April 1
- Citation B is temporarily linked to Item A

When selecting **Update move expiry** in a row actions list on the List of Items page (see Managing Citation Fulfillment Options), the due back date of Item A updates to April 1.

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**Releasing and Reassigning a Reading List**

Reading lists are assigned to Course Reserves Operators/Managers or Fulfillment Services Operators/Managers. You can release an assigned reading list that is assigned to you. This removes the reading list from your tasks.

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**Note**

Only a manager (Course Reserves Manager or Fulfillment Services Manager) can view or reassign a reading list assigned to someone else. Operators can only view and reassign reading lists that are unassigned or assigned to them.

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**To release an assigned reading list:**

On the Reading Lists Task List page (**Fulfillment > Course Reserves > Reading Lists**), select **Release assignment** in a row actions list.

The reading list is moved to the **Unassigned** tab.

**To reassign a reading list:**

1. On the Reading Lists Task List page (**Fulfillment > Course Reserves > Reading Lists**), select **Reassign** in the row actions list for a reading list. The **Assign to** dialog box appears.

   ![Assign To Dialog Box]

2. In the **Assign to** drop-down list, select the user to whom you want to assign the reading list. Only users with the relevant roles appear in this list.
3. To notify the new assignee of the reading list task assignment, select **Send as e-mail**.
4. Optionally add a note to the new user.
5. Select **Assign To**. The user is assigned to work on the reading list.

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**Managing Reading Lists in Bulk**

You can edit reading lists in bulk using the **Reading List Bulk Update** job. For more information, see Managing Search.
Queries and Sets to create a set of reading lists and then Running Manual Jobs on Defined Sets.

Also see Matching Reading List Citations to Inventory in Bulk and Rolling Over Courses.