Reading List Management Best Practice

Overview

This page presents a typical example of managing a reading list as a course reserve operator/manager. In this example, the instructor has created the reading list in Leganto. Other librarians are assumed to be responsible for handling acquisitions of new materials and/or fulfillment tasks such as handling requests (move, booking, general hold, digitization, or other, as required).

Workflow

The following picture illustrates the best practices workflow. For information on the areas of this workflow, see the rest of this document.
## Preparation: Set the **Submit By** Date for a Course

To ensure that instructors complete their reading lists with enough time for you to fulfill the citations on them, set the **Submit By** date for each course on the Courses page. You can also configure **Submit By** dates in bulk using the course loader integration profile; see Configuring Course Loading.
1. From Alma’s home page, open the Courses page (Fulfillment > Course Reserves > Courses).

![Courses Page](image1)

**Courses Page**

Use the filters or secondary search on the page to locate the courses for which you want to set **Submit By** dates.

2. Select **Edit** in the row actions list for a course. The Manage Course Information page appears for that course.

![Manage Course Information Page](image2)

**Manage Course Information Page**

3. Enter the date that the reading lists should be submitted in the field **Submit Lists By**. Select **Save**.

4. Repeat for each list.

The **Submit By** dates appear to the relevant instructors in Leganto in the list of Upcoming Due Dates.
Submit Lists By in Leganto

The instructor creates the reading list in Leganto. To submit the list to the library for processing, the instructor selects **Send List**. You can see the date that a list was submitted in Alma (see below).

**Monitoring the Task List for Reading Lists that Require Your Attention**

When an instructor sends a reading list to the library to process, the reading list’s status (and all of its citations statuses) changes from **Being Prepared** to **Ready for Processing**. Log in to Alma and check the task list for any reading lists that are ready to be worked on.

**Note**

Reading lists are "tasks" for Alma operators: tasks that must be completed by an operator. Like other tasks in Alma, reading list are unassigned when they are first created. A manager can assign a reading list to a specific operator, or you can assign a reading list to yourself by beginning to work on it.

On the Alma home page, select the task list icon (or expand the Tasks widget) to see tasks that may be relevant to you. You are looking for tasks of type Reading List, for example, **Reading Lists - Unassigned** or **Reading Lists - Unassigned - Processing**.
The tasks are divided into the following types:

- **Unassigned - Complete** - Reading lists that are 1) unassigned, and 2) already complete. These reading lists do not require attention.

- **Unassigned - Processing** - Reading lists that 1) are unassigned, and 2) have a status of either **Being Prepared** (are still being worked on by the instructor) or **Ready for Processing** (were submitted by the instructor).

- **Unassigned** - All reading lists that are unassigned, regardless of status.

- **Assigned to me - Ready for Processing** - Reading lists that a) are assigned to you, and b) have a status of **Ready for Processing**.

- **Unassigned - citation has a new note** - Reading lists that a) are unassigned, and b) have at least one citation with an unread note. An unread note is typically one added by the instructor since last time you (or any librarian) looked at it.

- **Assigned to me - citation has a new note** - Reading lists that a) are assigned to you, and b) have at least one citation with an unread note.

Selecting any reading list entry opens the Reading Lists Task List page with filters preset according to the task you selected. You can also open the Reading Lists Task List page (without preset filters) by navigating to **Fulfillment > Course Reserves > Reading Lists**.

The actions you can do on the Reading Lists Task List page depend on whether you have the **Course Reserves Operator** or **Course Reserves Manager** role, but in either case you can select reading lists in the **Unassigned** and **Assigned to Me** categories.
tabs to work on. If you begin working on a task in the Unassigned tab and save any changes, the task is moved automatically to the Assigned to Me tab, where you will see it the next time you open the task list page.

Use the filters and sorting features to find reading lists that are ready for processing. For example:

- You can sort the lists by the date on which the list was submitted for review (Request for Review).
- If you filter reading lists according to Last Modification Date, you can view all reading lists that were modified in the last week, for example. If the instructor resubmits this list, this date is updated.

When you find the reading list on which you want to work, select Work On in the row actions list. The Edit Reading List page appears.

![Edit Reading List Page](image)

When you start to work on a list, change the reading list status (any Status) to Being Processed. The list now appears to you when you select the Reading Lists - Assigned to me - Ready for Processing filter and no longer appears to other operators when they select the Unassigned - Processing filter.

**Fulfilling Reading List Citations**

Fulfilling a reading list means ensuring that the course's students have access to all of the course materials.

**Note**

Your library can configure that certain citations are automatically marked as fulfilled (Complete) the moment that they are added to a reading list. For more information, see Configuring Default Statuses for Citations/Reading Lists.

When the instructor submits the list for processing (which changes the reading list's status from Being Prepared to Ready for Processing), the statuses of all citations that were Being Prepared change to Ready for Processing. Citations that are already fulfilled have the status Complete, either because they were automatically marked as Complete (see the note, above) or because you have already marked them as Complete.
Filtering Citations

Use the filters on the Edit Reading List page or the Citations page (see Managing Citations) to find all citations of a certain type, in order to work on them as a group.

For example:

- Select **Citation/Locate Status > Information Incomplete** to view all citations that are missing information required for Alma to locate the item in the repository (for physical citations) or to create an OpenURL link (for electronic citations).

- Select **Citation Status > Ready for Processing** to view all citations that are ready for you to process.

- Select **Tags > Essential** (if this tag is configured) to find all citations that are marked as essential, indicating that they have high priority.

- Select **Tags > Digitization** (if this tag is configured) to find all physical citations for which the instructor requested that copies be made by photocopying (digitizing) the physical copy.

Completing Citation Information

If any citations are missing information, or have incomplete or incorrect information, select **Edit** to edit the citation, correct or complete the required information, and select **Save**.
If the citation is not matched to an item/portfolio in your inventory, and you changed any important information, select Resource Locate to see if you can connect the citation to your inventory. For more information, see Managing a Citation's Attachment to an Inventory Item. If you successfully locate the inventory in your repository, the citation becomes attached to the inventory and inherits some information from the inventory entry.

Fulfilling Citations

Fulfilling citations depends on numerous factors and may require assistance from other Alma operators at your institution. If required, you can also ask instructor for more information (see Communicating with the Instructor).

Some steps that you may need to perform include:

Fulfilling Physical Citations

<table>
<thead>
<tr>
<th>General Status</th>
<th>General Approach</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>The library has enough copies for your students</td>
<td>If required, move the copies to course reserves. Otherwise, no action required.</td>
<td>Verify the number of items and their locations by viewing the information in the physical holdings of the citation (expand the tab). You can also view item information by selecting the Items citation action. To initiate a move request you must have the Fulfillment Services Operator role or ask another librarian with this role for assistance. 1. Select the checkbox in the citation row and select Place Request in the top actions list. The Create Request page appears. 2. Create a temporary move request as described in Creating a Request. You may want to print out a slip containing location and other information about the resources to be moved: select the resources and select Print Slip in the top actions list.</td>
</tr>
<tr>
<td>There are not enough copies for your students</td>
<td>Search for alternate editions and versions of your citation.</td>
<td>You can use the persistent search box. Alternately, when configured by your library, you can easily locate and provide access to alternate editions of the citation or electronic versions of the citation on the Edit Reading List page: 1. Select Other Formats and Editions in the row actions list for the citation. The Other Formats &amp; Editions page appears. 2. If there are any other results, select Add to List or Add to Citation, as described in Configuring the Display of Other Formats and Editions of Citations.</td>
</tr>
</tbody>
</table>
### General Status

<table>
<thead>
<tr>
<th>General Approach</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scan a physical copy (digitize) to create digital copies for all students.</td>
<td>You must have the <strong>Fulfillment Services Operator</strong> role or ask another librarian with this role for assistance. 1. Select the checkbox in the citation row and select <strong>Place Request</strong> in the top actions list. The <strong>Create Request</strong> page appears (see above). 2. Create a library physical digitization request as described in Creating a Request. Alma notifies you about the progress of your request, and sends you a link to the digitized material when the process is completed successfully.</td>
</tr>
<tr>
<td>Your library can set rules to approve digitization requests automatically as well as how to handle copyright approval for these requests.</td>
<td>Initiate a purchase request for additional physical copies. Your library can set rules to have this happen automatically when a citation is created or edited. You can initiate a purchase request on the Purchase Request page (<strong>Acquisitions &gt; Purchase Requests &gt; Create Purchase Request</strong>; see Creating Purchase Requests). When enabled by Ex Libris, a <strong>Course Reserves Operator/Manager</strong> can initiate the request from the Edit Reading List page (select <strong>Purchase Request</strong>), in which case the Purchase Request page is prefilled with information from the citation. Alma notifies you about the progress of your request, and sends you a link to the inventory when the process is completed successfully.</td>
</tr>
</tbody>
</table>

### Fulfilling Electronic Citations

<table>
<thead>
<tr>
<th>General Status</th>
<th>General Approach</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full text available and licensed</td>
<td>No action required.</td>
<td>For the various options you have to view the citation's resource and to ensure that you have access to the resource, see Viewing information about a citation.</td>
</tr>
<tr>
<td>Full text not available</td>
<td>Check the citation's <strong>Locate Status</strong>. Although the repository locate process is entirely different from the Alma link resolver process, both require the same essential information. If the <strong>Locate Status</strong> is <strong>Incomplete Information</strong>, the OpenURL request to the link resolver requires more information. The minimum information for an OpenURL request for electronic resource is a) ISSN, volume, issue, start page, and publication year, or b) DOI.</td>
<td>Select <strong>Edit</strong> in the row action list for the citation, enter the missing information, and select <strong>Save</strong>.</td>
</tr>
</tbody>
</table>
### Fulfilling Other Citations, such as Uploaded Files

<table>
<thead>
<tr>
<th>General Status</th>
<th>General Approach</th>
<th>Steps</th>
</tr>
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<tbody>
<tr>
<td>All</td>
<td>Clear the copyright of the resource.</td>
<td>Your library may configure an automatic approval process, or you may need to perform this manually. For more information, see <a href="#">Managing a Citation's Copyright Status</a>.</td>
</tr>
</tbody>
</table>

### Changing the Citation / Reading List Status

After ensuring that there are enough copies of the resource / that access to the resource is cleared and available, manually mark the citation's status to **Complete**: For one citation, select the **Set Complete** row action and save the reading list. For multiple citations:

1. Select the citations.
2. Select **Change Status** in the page actions.
3. Select **Complete**.
4. Select **Change Status**.
5. Select **Save** to save the reading list.

After marking all citations in a reading list as **Complete**, mark the reading list as **Complete**:

1. In the page header, select **Complete** for the **Status**.
2. Select **Save**.

Either you or the instructor can then publish the list (make the list visible to students) so that students can view it in Leganto. To do this as the librarian:

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Alma’s link resolver is run automatically, unless you specifically disabled it by selecting **Disable Resolving** while editing an article citation.
1. Select a publication status other than Draft or Archived for the Publication Status.
2. Select Save. The instructor is notified about the change in Leganto.

## Communicating with the Instructor

Reading lists that contain citations with unread notes added by the instructor (or another librarian) are listed as a task in the task list.

### Citation with New Note Task

To view the note, open the reading list, filter the list by the alert Citation has a New Note, edit the citation, and select the Notes tab.

### Notes Tab

To mark the notes as read, select Update Notes > Dismiss Notes (and select Save).

To add a note (for the instructor or another librarian), select Add Note, enter the note, select Add (and select Save). The instructor sees the note on the citation page in Leganto if they select the librarian discussion thread.
Library Discussion Link in Leganto

Library Discussion Thread in Leganto