Working With Citations

Adding a Note to a Citation

Also see Discussing the Citation with the Library.

When viewing a citation, you can add public and private notes. Public notes can be seen by students. Private notes can be seen only by other list owners.

Citation public notes are visible when viewing the reading list.

Copying Citations

You can copy a citation to the same or another reading list. You can also copy one or more citations by temporarily adding them to My Bag and then inserting all bagged sections after another section in the list. In addition, you can copy a citation to My Collection.

To copy a single citation to a reading list, select Copy citation in the citation menu, select the list and section, and select Confirm.
To copy one or more citations in multiple steps:

1. Select **Bag it** in the citation menu of a citation that you want to copy. The citation is added to My Bag. Repeat for all citations that you want to copy.
2. Hover your mouse at the bottom of the section after which you want to copy all of the citations in My Bag and select Copy. The citations in My Bag are copied beneath this citation and My Bag is emptied.

My Bag - Prompt to Copy Citations
Creating a Citation

Aside from copying a citation to create a new one (see Copying Citations), there are several options for adding citations to a reading list (actually, to a section in a reading list):

- Search for a resource in the library's repository and add it to your reading list as a citation (or to My Collection).
- Manually, by entering all of the citation's details and (optionally) uploading a file containing the resource.
- Select an item previously saved to My Collection or an external citation manager.
- When on a website, add a citation using Leganto Cite It!, a bookmarklet that you can add to your browser bookmark bar.
- Select an item that was suggested by a user or automatically by Leganto.

Certain actions can only be done after the citation is created. See, in particular:
Adding a Citation from the Library

Your library configures whether your library search is in Alma, Summon, or Primo, and/or whether you can select the Primo scope in which to search.

When viewing a reading list, select the Add Items icon

. The right sidebar changes, offering several options to add citations. You search for library resources on the Search tab, which is selected by default.

When available, select the search scope (Search in), and enter search criteria (Enter search criteria).

Optionally select whether to include or hide records that do not provide full-text access.

For additional search options, select Advanced Search. You can select which fields in which to search.
Select **Search**. The results appear in the sidebar.
The search results include information about each resource, as well as several options.

- Select **Add to list**, select the section, and select **Add** to add the resource as a citation to the selected section. You can also drag and drop the citation to a specific location in the list.
- Select **Add to bag** and selected **Bag It** to add the resource to My Bag. You can add several resources to My Bag and add all of them to a reading list at once. For more information, see [Copying Citations](#).
- Select **Add as a suggestion**, enter a note for the suggestion, and select **Suggest** to add the resource as a suggestion. For more information, see [Suggesting an Item from My Collection for a Reading List](#).

**Adding a Citation Manually**

When viewing a reading list, select the Add Items icon.

The right sidebar changes, offering several options to add citations. Select the **Create** tab.
Reading List - Add Items Option

Reading List - Create Citation

Select the type. The sidebar refreshes with fields that are appropriate for the selected type.

The fields that appear depend on the type. Some of these fields appear only if you select More item details.

- All types include the following fields – Additional Person Name, Creative Commons License, DOI, Edition, LCCN, OCLC Number, Place of Publication, Publication Date, Publisher, Resource Notes, Source, and Volume. For all types, you can upload a file and add a public note.

- Article, Electronic Article, and Journal include the following additional fields – Author, End Page, ISSN, Issue, Journal Title, Pages, Start Page, and Title (mandatory).

- Book, Conference, and E-book include the following additional fields – Author, ISBN, Title (mandatory), Total Pages.

- Book chapter includes the following additional fields – Book Author, Book Title, Chapter Author, Chapter Number,
Chapter Title (mandatory), Editor, End Page, ISSN, Pages, and Start Page.

- All other types include the following additional fields – Author, Chapter, End Page, ISBN, ISSN, Issue, Journal Title, Pages, Start Page, Title, Total Pages.

- Additional field information:
  - To upload a file, you can drag a file to the right sidebar or select the file area and then browse for the file. After uploading a file, license options appear beneath the file name. You can select whether the citation requires no license (because you are the author), can be copied under your country's fair use guidelines, or requires a copyright review. If you intend to select a Creative Commons license, do not select any of these options.
  - When enabled by your library, you can delete the file (select the trash icon to the right of the file). You cannot delete the file if:
    - A copyright request was approved for the citation.
    - The file is a CCC (pay-per-use) file.

  When not enabled, ask your librarian to delete the file.

  - The options available for Creative Commons license depend on your location. The Creative Commons license declaration for the reading list itself, if any, does not apply to citations in the reading list. If you intend to select one of the file upload licenses, do not select a Creative Commons license.
  - A public note appears in the reading list and when viewing the citation details. A resource note appears at the top in the resource information area when viewing the citation details.

After configuring the fields, do one of the following:

- Select **Add to list**, select the section, and select **Add** to add the citation to the selected section. You can also drag and drop the citation to a specific location in the list.
- Select **Add to bag** and select **Bag It** to add the citation to My Bag. You can add several items or citations to My Bag and add all of them to a reading list at once. For more information, see [Copying Citations](#).

**Adding a Citation from My Collection or a Citation Manager**

When viewing a reading list, select the Add Items icon . The right sidebar changes, offering several options to add citations. To add items from My Collection, select the **My Collection** tab.

![Reading List - Add Items Option](image)
To add an item from an external citation manager, ensure that you have configured the citation manager for Leganto (see Linking Leganto to an External Citation Manager) and select the More tab and then (if you have configured more than one external citation manager) the citation manager sub-tab.

Select a citation and then perform one of the following actions.

- Select **Add to list**, select the section, and select **Add** to add the citation to the selected section. You can also drag and drop the citation to a specific location in the list.
• Select **Add to bag** and selected **Bag It** to add the citation to My Bag. You can add several citations to My Bag and add all of them to a reading list at once. For more information, see [Copying Citations](#).

• Select **Add as a suggestion**, enter a note for the suggestion, and select **Suggest** to add the citation as a suggestion. For more information, see [Suggesting an Item from My Collection for a Reading List](#).

### Adding a Citation from A Website (Using Cite It!)

Leganto Cite It! is a bookmarklet, a small javascript-based bookmark that you can add to your browser's bookmark bar. When you are browsing any web site, Cite It! enables you to add the resource on the current page as citation to a reading list in Leganto.

### Adding Cite It! to a Browser's Bookmarks Bar

To add Cite It! to your browser's bookmarks bar, select **Cite It!** in the user menu.

![Cite It!](dragging_cite_it_button_tobookmarks_bar.png)

**Cite It! Option**

Drag the Cite It! button to your browser's bookmarks bar.

The list of sites that Leganto is specifically known to support appears in the Cite It! pane. Even if a website is not listed, Leganto is likely to work on the site if the resource information is easily identifiable to the bookmarklet code, so give it a try.

![Supported Sites](supported_sites.png)

**Dragging Cite It! Button to A Bookmarks Bar**

### Using Cite It!

You must be logged in to Leganto to use Cite It! However, you don't have to have a specific tab with Leganto open in your browser. If you try to use Cite It! but you are not logged in, you are prompted to log in.

While on a website that contains a resource that you would like to add to a reading list, select the bookmarklet. The Cite It! pane appears.
Cite It! Pane

This pane functions exactly like the pane you see in the right sidebar when manually adding a citation; see Adding a Citation Manually for information about all of the fields.

After configuring the fields, do one of the following:

- Select Add to list, select the reading list and section, and select Add & Close to add the resource as a citation to that reading list and section.
- Select Add to Collection and select Add & Close to add the resource as an item in My Collection.

Adding a Suggested Citation

Leganto offers several features that present you with suggestions for resources to add to a reading list. Some of these features must be enabled by your library.

- A user can suggest an item to add to your reading list. These suggestions appear in the right sidebar when viewing the list.

You can drag and drop a suggested item to the reading list. Select the trash icon at the top of the suggestion to remove the suggestion.

- When viewing a list, your library may have enabled a recommendation service (bX, videos including Alexander Street Press (ASP), and/or shelf browsing) to offer suggested citations based on the citations already on your list. In the Video Recommendations pane, can toggle to view only ASP recommendations.
Select the item and perform one of the following actions:

- Select **Add to list**, select the section, and select **Add** to add the resource as a citation to the selected section. You can also drag and drop the citation to a specific location in the list.
- Select **Add to bag** and selected **Bag It** to add the resource to My Bag. You can add several resources to My Bag and add all of them to a reading list at once. For more information, see [Copying Citations](#).
- Select **Add as a suggestion**, enter a note for the suggestion, and select **Suggest** to add the resource as a suggestion to this list. For more information, see [Suggesting an Item from My Collection for a Reading List](#).

- When viewing a citation's details, your library may enable a pane that displays other formats and editions of the citation.

Select the item and perform one of the following actions:

- Select **Add to List** to add the edition to the reading list.
- Select **Add to Citation** to add the edition to the citation as an alternate edition.

- When viewing a citation's details, your library may enable a pane that displays a citation's related items, as marked in the discovery service.
Select the item and select Add to List to add the item to the reading list.

Deleting a Citation

To delete a citation, select Delete item in the citation menu and select OK in the confirmation dialog box.

Digitizing Citations and Clearing Copyrights

There are several options for managing a citation's copyright, depending on your citation's material type.

- For physical material, such as a book or DVD, if there are enough copies in the library then no copyright issues apply. If there are not enough copies, you can, when enabled by the library, initiate a purchase request for more copies, in which case, again, no copyright issues apply.
- Similarly, if your library already provides access to an electronic resource for all of your students, or the material is freely available on a public website and you are simply linking to the material, no copyright issues apply.
- In all other cases, you are requesting that the library digitize the material so that there are enough copied for your students. In which case, you can let the library figure this out or supply as much information as you can to help in the process.
- If you believe that the material can be freely copied by the library because it is covered under a Creative Commons license, indicate that when creating or editing the citation.
- If you upload a file,
  - that you wrote, and therefore no copyright clearance is required, select that after uploading the file.
  - and believe that that making copies falls under a Fair Use clause (or Fair Dealing or any similar term or concept), select that after uploading the file.
  - and believe that the contents are in the public domain, or alternatively require copyright clearance of any kind but don't want to create a detailed copyright request, select Needs review after uploading the file.
- When enabled by your library, and when the reading list is associated with a course, you can initiate a specific digitization and/or copyright request with the library. (For a digitization request, there must not already be an another open request and the citation must be a physical title with at least one item. For a copyright clearance request, the citation must be an uploaded file, and the copyright must not be already set as self-declared or marked as Creative Commons.) These requests are handled manually or automatically by the library, depending on the library's back-end configurations.
A copyright request asks the library to clear copies for specific pages and/or chapters. Use this option when you plan to initiate a digitization request or you plan to make copies of the material yourself (such as photocopies) or upload a file.

A digitization request asks the library to make copies of specific pages and/or chapters.

A copyright approval may be relevant for a specific date range, and the library may require you to enter a date range when making the request. In this case, students cannot access the material before and after the range, regardless of the visibility settings of the material, citation, section, and/or reading list. A warning notice may appear when accessing the material and during the final days before the last date (according to your library's configuration).

- In the UK, copyright clearance is ultimately handled by the UK's Digital Content Store (DCS) which uses the Copyright Licensing Agency (CLA). When enabled by your library, and when available for the citation, CLA information appears on the citation details page, indicating allowable procedures for the material. CLA information is available only if enough information is provided about the citation, such as ISBN.

- In the US, your institution may use the Copyright Clearance Center to clear and purchase digitized materials on a pay-per-use basis. As an instructor, you see the cost per use in the citation, as well as the total cost for the reading list (the sum total of all pay-per-use fees in the reading list) and how many transactions have already occurred. A student simply sees the download link, similar to any other uploaded material.

![Pay-Per-Use in Leganto, Instructor](image)

The institution is charged only once for all accesses to the same resource by a single student, no matter how many times the student accesses that resource. Instructor accesses to a resource do not count as transactions and the institution is not charged for them.

### Discussing the Citation with the Library

When viewing a citation, you can write messages to the library, and read their replies.
Messages that you enter into the Library Discussion pane create alerts for librarians in Alma, and you can view their responses in this pane. Students cannot see this pane.

Editing a Citation

To edit a citation, on the reading list page select **Edit** in the citation menu. Alternately, select **Edit** when viewing citation details. The right-pane displays the citation’s parameters. See [Adding a Citation Manually](#) for information about the fields. When you are done, select **Save**.

Also see:

- [Adding a Note to a Citation](#)
- [Digitizing Citations and Clearing Copyrights](#)
Linking to a Citation

You can link to a citation using the citation permalink (for embedding on any web site, email, and so forth) or citation CMS link (for embedding in your CMS). When anyone accesses Leganto using the link, they see the citation details page.

You can find the citation permalink by selecting Permalink in the citation menu. To link to a citation from the CMS, select LTI Direct Access in the citation menu and add the parameter to the link from the CMS.

When enabled by your library, an additional citation option, ReLink LTI Link to Here, appears when you arrive at Leganto using an LTI link to the reading list or section. When arriving at Leganto using an LTI link to the citation, the option Unlink LTI Link appears in this menu.
When you select **Relink LTI Link to Here**, the LTI link used to arrive at this reading list or section changes to arrive directly to this citation (no change is required in the parameter; the parameter is remapped inside of Leganto). The option changes to **Unlink LTI Link**. When you select **Unlink LTI Link**, the LTI link changes to the reading list level.

For more information, see the video [Leganto: Link from LMS to a Specific Section or Citation in Your List](1:59).

### Managing a Citation's Due Date

You can edit a citation's due date, which is the date by which the student should read/view the citation's resources.

Set the due date on the citation details page: select the calendar icon, select the date, and select **Close** (or simply select **Today** for today's date). Upcoming due dates for all citations in a reading list appear in the right sidebar when viewing the reading list.
Managing a Citation's Electronic Links and Physical Availability

The citation details page presents electronic links and physical availability of a citation, when available. Physical availability includes the barcode, status, and location, as well as several options to make requests about the citation. When enabled by your library, you can select whether to hide or display this information (all physical availability) to students.

Other availability, including electronic, digital, and file uploads include the following row actions for each availability link, when made available by your library:

- Mark the link as broken. This hides the link from students and also notifies the library to fix the issue at their discretion.
- Hide / display the link to students.
- Embed / do not embed the link directly on the page in an iFrame.
Managing a Citation's Files

See Adding a Citation Manually.

Managing Citation Tags

When enabled by your library, citations can have tags. The list of tags is maintained by your library.

Tags, as well as an icon
to manage the tags, appear beneath the citation name.

Citation Tags Line

To manage citation tags, select the icon.
To add a tag, enter all or part of a tag and select the tag from the drop-down list. To remove a tag, select the X in the tag box. When you are done, select Save.

You may see internal tags associated with a citation. These tags (with a dashed border) may be generated by Ex Libris due to an internal process, such as DCS flow. They cannot be created, deleted, or managed. If you do not see them, there is no cause for concern.

Managing Visibility Dates for Citation and/or Materials

By default, the citation and its resources (materials, such as links or uploaded files) are visible as long as the section and reading list are visible.

You can set the visibility dates of both the citation and its resources. When configured, resources are visible only during the configured dates, as long as the citation is visible, as well. A citation is visible during the configured dates, as long as the section is visible, as well.

Set the citation and resource date on the citation details page: For each date, both from and to, select the calendar icon, select the date, and select Close (or simply select Today for today’s date).
Moving Citations

To copy a citation to the same reading list or to another reading list, see Copying Citations.

You can move a citation within a reading list by dragging and dropping a single citation or by temporarily adding one or more citation to My Bag and then inserting all bagged citations after another citation in the list.

You can move all citations in a reading list at once by reordering them.

To drag a citation, select the selection bar to the right of the citation.

Drag and Drop Citation

To move one or more citation in multiple steps:

1. Select Bag it in the citation menu of a citation that you want to move. The citation is added to My Bag. Repeat for all citations that you want to move.
To order all citations in all sections in a reading list, select **Order Citations in All Sections** > `<sort type>` and select **OK** in the confirmation dialog box. The sort types are by title (ascending or descending) or by author (ascending or descending).
Purchasing Citations

In US institutions, when the institution is integrated with the Copyright Clearance Center and non-funded licenses are enabled, students can purchase non-funded citations using PayPal. The student sees the option to purchase the resource.

Ex Libris, a ProQuest Company
Pay-Per-Use Non-Funded in Leganto: Student

If the student selects Add to Cart, the resource is added to their personal shopping cart, which the student can view by selecting the shopping cart icon at the top right of the page (the cart appears only if there is at least one item in it).

Pay-Per-Use Non-Funded: Shopping Cart

The student can remove items from the cart or purchase the items. Note that Leganto adds the PayPal commission to the total. If the student orders multiple items, there is a small discount in PayPal fees, which is noted in the cart. After purchasing the resources, the student can download the same as for funded resources.

When the instructor views the list, the instructor sees the download link as well as the cost per use and whether the resource is institution funded or student funded. In addition, the instructor sees the total cost for the reading list (the sum total of all pay-per-use fees, funded and non-funded, in the reading list) as well as how many transactions have already occurred.

Pay-Per-Use in Leganto, Instructor

Instructor accesses to a resource do not count as transactions and the institution is not charged for them.

Sending a Citation to the Library for Fulfillment

Select Send to Library in the citation menu to notify the library that the citation is ready for processing.
After sending the citation to the library, the option becomes disabled. When the library has fulfilled the citation, they will mark it with status **Complete**. They can ask you questions using the library discussion pane on the citation details page.

A librarian can select **Set complete** directly in the citation menu to mark the citation as **Complete**. This option is not available to instructors.

### Viewing a Citation

Brief information about a citation is available on the reading list page.

Different fields appear in the rows, depending on the material type (and your library's configuration), but the field generally include title and author, due date, public note, tags, and availability information or a link to the resource, as well as other information.

To view and edit all citation and resource fields, see [Editing a Citation](#).

To view complete citation details, select the citation title or anywhere in the citation that is not otherwise a link. The citation details page appears.
Select the up or down arrows at the top right of the central pane to navigate to the previous or next citation. The following sections appear / may appear on this page:

- Citation details appear at the top of the page; select More details to view additional fields. You can use this section to add tags (see Managing Citation Tags) and to edit the citation (see Editing a Citation).

When enabled by your library, the total pages for a citation appears. When the total number of pages is entered manually, it appears as usual, for example: 11. When the total number of pages is calculated from the start and end page, it appears in parentheses, for example: (10). When both numbers are available, they appear with the manually added number, followed by the calculated number in parentheses, for example: 11 (10).

- Links & Availability - Links to electronic resources and/or physical availability information. See Managing a Citation's Electronic Links and Physical Availability.

- Additional Services - When enabled by your library, additional services related to the citation, such as Google preview and any others configured by your library, appear here.

- Due Date - See Managing a Citation's Due Date.

- Public Note / Private Note - See Adding a Note to a Citation.

- CLA - For UK institutions, when enabled by your library, CLA information about the citation appears here. This information informs you of the rights you have to photocopy, scan, or otherwise digitize the citation's resource.

- Visibility - See Managing Visibility Dates for Citation and/or Materials.

- Appears on these reading lists - Each entry in this section links to other reading list that also contain this citation.

The following pans may appear in the right sidebar:

- The number of times that a student has liked the citation appears at the top of the sidebar.

- Related Items - When enabled by your library, related items (defined in Alma records) appear here, if any.

- Recommendations - When enabled by your library, recommendations of various kinds appear here.

- Other Formats & Editions - When enabled by your library. See Adding a Suggested Citation.

- Student Discussion - You can send messages to the student and the students can send messages to you or each others about the citation. To configure this pane, see Configuring the Reading List/Citation Student Discussion and Discussing the Reading List with Students and the Library.

- Library Discussion - Send and receive messages to/from the library. See Discussing the Citation with the Library.

- Select the contraction icon.
at the bottom of the sidebar to contract or expand the sidebar.

Select the large X at the top left of the page to close the citation details page.

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**Viewing Analysis About a Citation (Reading List Analytics)**

See [Viewing Analysis About a Reading List](#).