



BECOME AN EXPERT

Leganto

ExLibris
Part of Clarivate

Bulk Rollover in Leganto

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Become an Expert: Leganto

Session	Topic	Date
1	Streamlining Your Library's Leganto Workflows	May 22
2	Bulk Rollover in Leganto	May 29
3	Digitization and Copyright	June 5
4	Optimizing the New Leganto User Interface	June 12
5	Getting the Most out of Leganto Analytics	June 19
6	Increasing Adoption and Engagement with your Leganto Service	June 26

Agenda

- Overview of three options for re-using reading lists
 - Bulk Rollover
 - Instructor Rollover
 - Reset
- Bulk Rollover Workflow
- Resources

Bulk Rollover

The library rolls over reading lists in bulk using the course loader.

The rollover process creates a copy of each of the old lists and attaches it to the new course.

Bulk Rollover

Bulk Rollover - Advantages

- Easy for instructors
- Library configures how data from previous reading lists will map to new reading lists.
- Information about all previous versions of reading lists is preserved in Alma and Analytics.



Bulk Rollover - Disadvantages

- Requires the use of the course loader integration profile
- Sufficient data to map the old course codes to the new course codes.
- The library must consider the timing of rollover



Instructor Rollover

Instructors (or library staff) roll over the reading lists one by one, manually.

The rollover process creates a copy of the previous reading list and links it to the new term of the course.

Instructor Rollover

Instructor Rollover - Advantages

- Instructors can roll over their lists at the point of need.
- Instructors can define which aspects of the reading list should be copied or reset.
- The library does not need to map course information from term to term.
- The library does not need to use the course loader.



Instructor Rollover - Disadvantages

- Requires (some) additional training for instructors.
- Requires (some) additional steps for instructors
- (or) Lots of effort by library staff.



New UI - Instructor Rollover

The screenshot displays the Ex Libris instructor rollover interface. On the left is a dark sidebar with navigation icons and labels: Account, Dashboard, Courses, Calendar, Inbox, History, and Help (with a notification badge for 10). The main content area is titled 'PHIL 201 > Course Materials'. Below this is a sub-header 'Create a reading list for: Modern Philosophy (2023): Modern Philosophy'. The interface offers two primary options: 'Create a new list from scratch' and 'Create list from an existing list'. The 'Create list from an existing list' option is highlighted with a red rectangular box, and its 'Select existing list' button is also highlighted. Below these options, a link 'Ask your library to create your list' is visible. The bottom left corner features the 'Ex Libris' logo and the text 'Part of Clarivate'.

PHIL 201 > Course Materials

Create a reading list for: **Modern Philosophy (2023): Modern Philosophy**

Create a new list from scratch

Build a list of course materials by adding items from the library collection, from the web, or from your computer.

Create list from an existing list

Copy an existing reading list to get started. You will be able to add, edit, or remove items as needed.

OR

Ask your library to create your list

New UI - Instructor Rollover

PHIL 201 > Course Materials

Home
Announcements
Syllabus
Modules
Course Materials
Assignments
Discussions
Files
Quizzes
Grades
People
Ex Libris Leganto
urm08
Pages
Outcomes
Rubrics
BigBlueButton
Collaborations
New Analytics
Resources List

Select existing list

Search Sort Filter

My lists (4)

Introduction to Philosophy Updated a day ago • 33 items in 6 sections [Link course to this list](#) [Duplicate list](#)

The course is more about thinking than it is about coverage or the memorization of a bunch of facts. As a result, I expect you to reach each of the following resources quite critically. We will discuss the essential readings in class and I expect you to share your opinions on the texts.

Published Introduction to Philosophy (2024) 4 instructors

Philosophy and human nature (spring) Updated a month ago • 3 items in 1 sections [Link course to this list](#) [Duplicate list](#)

Published Philosophy and Human Nature (WINTER) (2023) Blair Reed

Philosophy and human nature (Winter) Updated a month ago • 3 items in 1 sections [Link course to this list](#) [Duplicate list](#)

Published Philosophy and Human Nature (2023-2024) 2 instructors

Philosophy and Human Nature--SU MMER (2)(1) Updated 2 months ago • 3 items in 1 sections [Link course to this list](#) [Duplicate list](#)

Draft

New UI - Instructor Rollover

The screenshot displays the 'Create new list' page in the ExLibris system. The sidebar on the left contains navigation links: Home, Announcements, Syllabus, Modules, Course Materials (selected), Assignments, Discussions, Files, Quizzes, Grades, People, Ex Libris Leganto, urm08, Pages, Outcomes, Rubrics, and BigBlueButton. The main content area is titled 'Create new list' and includes a 'Create list' button. The form fields are: 'List name' (with a red asterisk) containing 'Introduction to Philosophy (2)', 'List description', and 'Link to course' (a dropdown menu showing 'PHIL201/Modern Philosophy'). Below these is the 'Advanced Settings' section, which includes a gear icon and the text 'Customize which fields will be copied to the new list'.

PHIL 201 > Course Materials

< Create new list

Create list

List name *
Introduction to Philosophy (2)

List description:

Link to course
PHIL201/Modern Philosophy X v

⚙️ Advanced Settings

Customize which fields will be copied to the new list ⓘ

⚙️ Advanced Settings

Customize which fields will be copied to the new list ⓘ

Main Information

- ☐ Item due dates
- ☐ List and section dates
- ☒ Notes for students
- ☒ Tags for students

Information for library

- ☒ Tags for library

Reset Reading Lists

Reading list is re-used, instead of copied, for the new term

Previous-term's reading list is cleaned up: student discussion, instructor usage-reports, etc., is reset

Reset

Reset Reading Lists - Advantages

- Simplest process
- No additional work for instructors
- Fewer lists to be managed in Alma



Reset Reading Lists - Disadvantages

- Historical versions not preserved
- Library may need to manually add, remove, or change course codes from one year to the next
- Can't reset copyright information



Agenda

- Overview of three options for re-using reading lists
- **Bulk Rollover Workflow**
 - **Detailed Explanation**
 - Create Import File
 - Configure Course Loader
 - Run the Rollover Courses Job
- Resources

Rollover Steps

1. Create file for course loader that maps old courses to new courses (each term)
2. Configure course loader integration profile (once)
3. Run course-loader job on the course file
4. Instructor accesses the new (copied) reading list from the LMS

Duplicate copy of each reading list is created.

Status of the old list can be changed (draft; archived, etc.).

Why is this so hard?

- Potential complexity of the data
 - Mapping course codes from one term to the next
- Many (many!) configuration options
 - Unexpected surprises
 - Implications of configurations
- No “undo” button

Quick Tips

- Test on a few sample courses first
- Confirm via job report, review lists created, review old list
- Delete courses as needed, change configuration, try again
- Take a deep breath
- Jump in!

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Additional Resources

- Course Rollover/Reset Overview
- Trainings:
 - Bulk Rollover
 - Instructor Rollover
- Documentation:
 - Leganto course rollover (bulk and instructor)
 - Resetting reading lists
 - Configuring Course Loading
 - Configuring Normalization Rules

**Knowledge Center > Leganto >
Training > Webinars > Become an
Expert: Leganto**

Question Time

Next Week

(Wed., June 5)



Digitization and Copyright



Thank You