Moving the goalposts: aligning project milestones to development schedules

IGeLU 2019, Singapore
Driving change, creating value together

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Discovery Services & Systems Librarian
Macquarie University
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Introduction to Macquarie University

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“While only 50 years young, Macquarie has risen to be a progressive and influential institution both locally and internationally. Our campus brings together 40,000 students and 2000 staff in one thriving hub of discovery.”

- Located in Australia’s largest high-tech precinct
- 126 hectares, with open green space
- Top two percent of universities in the world
- Bold. Innovative. Unconstrained by tradition

https://www.mq.edu.au/about/about-the-university/the-macquarie-story
Five faculties:

- Faculty of Arts – 12 departments
- Faculty of Human Sciences – 4 departments
- Faculty of Science & Engineering – 9 departments
- Faculty of Medicine & Health Sciences – 5 departments
- Macquarie Business School – 6 departments
• New, purpose-built library
• Opened 2011
• 1.2 million physical items & 900,000 electronic titles
• Alma, Primo, Leganto & CampusM
Collections & Discovery Services

- Portfolios:
  - Research & Scholarly Information Services (8 staff)
  - Collection Assessment & Continuations (9 staff)
  - Collections & Content Development (20 staff)
  - Discovery Services & Systems (4 staff)
<table>
<thead>
<tr>
<th>Period</th>
<th>Faculty of Arts</th>
<th>Faculty of Arts</th>
<th>Faculty of Arts</th>
</tr>
</thead>
<tbody>
<tr>
<td>May – Nov 2017</td>
<td>- Demonstration to Learning and Teaching Committee</td>
<td>- Approached all Session 3 unit convenors</td>
<td>- 3 departments</td>
</tr>
<tr>
<td></td>
<td>- Call for volunteers</td>
<td>- 11 Unit Convenors agreed (1 repeat)</td>
<td>- Multiple volunteers</td>
</tr>
<tr>
<td></td>
<td>- 8 unit convenors, 9 reading lists</td>
<td>- Library created 10 reading lists</td>
<td>- 2 departments</td>
</tr>
<tr>
<td></td>
<td>- Library created reading lists</td>
<td></td>
<td>- Faculty of Medicine and Health Sciences:</td>
</tr>
<tr>
<td></td>
<td>- Individual training</td>
<td></td>
<td>- 2 departments</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Faculty of Human Sciences:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- 2 volunteers</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Overall, 120 reading lists created</td>
</tr>
<tr>
<td></td>
<td>July – Dec 2018</td>
<td>Feb – May 2019</td>
<td>Current</td>
</tr>
<tr>
<td>----------------</td>
<td>----------------</td>
<td>----------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Reading lists</td>
<td>180 reading lists</td>
<td>285 reading lists in Leganto</td>
<td>400 reading lists in Leganto</td>
</tr>
<tr>
<td>Faculties</td>
<td>3 faculties using Leganto</td>
<td>4 faculties using Leganto</td>
<td>All 5 faculties using Leganto</td>
</tr>
<tr>
<td>Project</td>
<td>Pilot project completed</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Influencing the development of the product

- NERS (New Enhancements Request System) 2018
# Alma Link Resolver
**LINKS TO FREE RESOURCES**

## Links & Availability
- **View online** (Highwire Press Journals)
- **View online** (DOAJ Directory of Open Access Journals)
- **View online** (Free E-Journals)
- **View online** (Highwire Press Free)
- **View online** (PubMed Central)

### New Online
- **2010s**
  - January 1/8: 321 (1): 7-114
  - January 15: 321 (2): 119-216
- **2019**
  - February 5: 321 (5): 423-520
  - February 12: 321 (6): 523-620
  - February 19: 321 (7): 623-716

### Current Issue
- **2018**
- **2017**
- **2016**
- **2015**
- **2014**
- **2013**

### Past Issues
- **2000s**
  - March 26: 321 (12): 1135-1228
  - April 2: 321 (13): 1229-1320
  - April 9: 321 (14): 1325-1418
  - April 16: 321 (15): 1429-1542
  - April 23/30: 321 (16): 1547-1642
  - May 7: 321 (17): 1647-1738

- **1990s**
  - June 4: 321 (21): 2045-2142
  - June 11: 321 (22): 2143-2252
  - June 18: 321 (23): 2255-2376
  - July 2: 322 (1): 3-90
  - July 9: 322 (2): 95-180
  - July 16: 322 (3): 183-282

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**Citation in Leganto**

**Journal homepage**
Give instructors ability to hide the display of link in Leganto citation when links come from link resolver

*We request that there is the ability to hide links that do not work when one is broken/not satisfactory. This option would display for librarians and instructors but not for students.*

When multiple links appear in a Reading List, it would be extremely helpful to have a method of managing which links display within the Leganto interface. Links currently come from a variety of places: 1. Uploaded files 2. Citation's Source field(s) url(s) 3. Alma U-Resolver links (based on the citation's metadata) 4. Citation's associated bib record's electronic portfolios and/or digital representations. 5. Citation's associated bib record's related records electronic portfolios Ideally, it would be as easy as hiding the links you don't want to display with the push of a button (for instance an X next to the link). If that is technologically impossible, then provide functionality such as a method to "Disable Resolving" and a method to "Detach from Repository" from the edit citation screen in Leganto, available both to library staff and instructors.
Development of new functionality

- Reading list roll over
- Instructor roll over
Re-use of reading lists

DUPLICATION

Option to duplicate list

Find Lists

- ahis101

Course Status: All

Publication Status: Published

Advanced Search

No reading list found

Can’t find lists published to ‘course students’
Workflow:
1. 'Duplicate' the reading list
2. 'Associate this list with a course' to assign the new course instance
3. Select to 'Work On' reading list
4. 'Edit' citation
5. Click on 'Copyright Attributes' tab
6. Tick 'Copyright Auditing Required'
7. The 'Copyright Attributes' form appears with some fields pre-populated with data from the Citation tab

EXPECTED OUTCOME: Any fields that contained information on the original citation would be populated with the same data. But the 'Number of Students', 'Date Available From' and the 'Date Available To' fields would contain the information from the newly associated course.
Description: When manually duplicating a reading list, provide the institution with the ability to configure how the duplicated citation's copyright is dealt with:

1. Provide a configuration option for the Copyright Status - the ability to either keep the existing Copyright Status of each citation or assign a configurable default Copyright Status for all citations.

2. Provide a configuration option for the Copyright Auditing form in the Copyright Attributes tab - provide institutions the ability to configure whether to keep key information in the Copyright Auditing form, e.g. secondary page ranges, required chapters, if the item includes images and the source for copyright.

This was the 3rd top enhancement voted in 2018 NERS enhancements ballot.

Votes: 273
ExL Complexity Points: 12
Planned delivery: October 2018
NERS Enhancement

DUPLICATION

Roll Over

Select the course to which to roll over this list: TWAI TWAI TEST Course

Do you want existing permalinks to point to the new list once the list is published: Yes

Due dates: Reset

Citation statuses: Recalculate

Library-Internal tags: Reset

Reading list status: Rolled Over

Reading list collaborators: Reset

Public tags: Reset

CANCEL

Librarian roll over options

Roll over options configuration

- Instructor-Library tags
  - system
  - Copy

- Library-Internal tags
  - system
  - Copy

- List and section dates
  - system
  - Reset

- Move Permalinks
  - system
  - No

- Public note
  - system
  - Copy

- Public tags
  - system
  - Copy
Issues Encountered

• Reading list roll over
• Course loader job
Reading List Roll Over

COURSE LOADER

- New course codes are already stored in Alma.
- Existing to new course code mapping is available to the library.

- The library uses the course loading integration profile to copy existing reading lists to new reading lists associated with the new courses.
- The library selects whether or not to redirect permalinks to the new Leganto entities.

Information in online help contradictory to behaviour in Alma.

“Staff convening Units in Session 1, should create their reading lists in Leganto or send to the Library by email by Monday 21st January 2019.” - Library communication
Reading List Roll Over (Cont’d)

COURSE LOADER

Collaborators [0] ▼

Letters not sent

Reading List Collaborator Notification

No owners assigned

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
<th>Status</th>
<th>Assignee</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANTH106_FHFYR_2019</td>
<td>Drugs Across Cultures (Rolled Over)</td>
<td>Rolled Over</td>
<td>Kousek, Kendall</td>
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<tr>
<td>ANTH106_FHFYR_2018</td>
<td>Drugs Across Cultures</td>
<td>Compl...</td>
<td>Kousek, Kendall</td>
</tr>
</tbody>
</table>

Reading list assignees remained
Reading List Roll Over (Cont’d)

• Manual processing required

• Automation probably not possible

• Carried out multiple times per year
Roadblocks along the way

• Reading list access
LTI link in Moodle

LEGANTO ACCESS

OOTB Moodle LTI link

Custom Moodle LTI block

Unit Readings - Leganto

Unit Readings

Leganto

Learn to use Leganto
Moving to the next stage of implementation

- Resource recommender in Primo
- Embed functionality in citation
- Find Lists for Leganto Course Operators
Reading List Discovery
RESOURCE RECOMMENDER

UNIT READINGS - LEGANTO
PHIX365 - Film and Philosophy
Click here to view the full reading list in Leganto.

To access your reading list ensure that you have clicked the 'Unit Readings - Leganto' link in your iLearn unit page at least once to be recognised as a student enrolled in this unit.

Resource recommender record for reading list

Custom Moodle LTI block to link to reading list

Unit Readings - Leganto
Unit Readings
Leganto
Learn to use Leganto
User Experience Feedback

Embedded Alma Digital Viewer
A new user role, **Leganto Course Operator**, enables a user to view and modify all reading lists in Leganto. Like a librarian, a Leganto course operator can search for all lists on the Find Lists page in Leganto, including ones that are in draft status. In contrast, an instructor can only search published lists and can only modify reading lists of the course to which he or she is associated or is an owner.
Milestones achieved

• Pilot completed
• Uptake from each faculty
• Library staff confident with system
Feedback

STAFF & STUDENTS

Students:
Everything is laid out clearly and it is far easier to use than the last system.”

“Loved it! Saved so much time chasing readings and content plus I could track my reading so far each week easily.”

Unit Convenors:
“It’s a much easier way of putting a list together”

“It just saves a lot of time for me and it is all in one place”

Library Staff:
“It’s quite an intuitive system which allows for a little bit of experimentation and exploration in the way we can do things.”

"I appreciate how simple it is to create reading lists, and in particular how seamless it is to collaborate with other Library teams."
Those yet to come

- Increased uptake across institution
Summary

• NERS
• Rollovers
• List access & discoverability
• Embedded readings
• Library support
Get Involved

- Salesforce
- Ideas Exchange
- NERS
Any questions?

- Email: kendall.kousek@mq.edu.au
END

THANK YOU!