

IGeLU 2022 - Cardiff

Leganto Rollover at Edinburgh University



Alex Forrest

Alex.Forrest@ed.ac.uk

University of Edinburgh

Leganto at the University of Edinburgh

- We have a team who manage Reading Lists service (7 FTE)
- We have a team who manage Alma/Leganto/Primo/RapidILL/Rialto (2.5 FTE equivalent)
- Live with Leganto on 12th June 2017 (migrated from Talis)
- We have 16987 Reading Lists records on the system (not all for current year) – 47,000 Course records on Alma.
- We migrated with 1855 lists in 2017
- **Current year lists – 2973**
- **Current year courses – 7104**
- We keep a separate record for each course for each year
- Blackboard VLE (and some Moodle)

Rollover – service requirements

- Rollover 2nd week in June (aligns with Blackboard rollover)
- Manage separate rollover for Courses with different Reading List viewing settings.
- Rollover courses from previous 3 years (hierarchically going backward)
- Obligated to provide continued access to previous year's lists (read only)
- Don't rollover permalinks
- Haven't enabled instructor rollover

Leganto rollover what is it

- It is actually Course rollover.
- You specify which existing course rolls over to which new course
- They don't need to have a reading list attached.
- Any Reading Lists attached will be rolled over – as well as course collaborators.
- The settings which control the job are in ***Alma>Configuration>Integration***
- *You can have multiple profiles (we have update, rollover and delete)*
- The only things you need are a formatted file (txt), an FTP server to store the file. And patience...
- Key IDs are ***Course Code/Course Section*** – they have to be a unique combination.

Course data

- Course data from Student Systems – automatically loaded.
- API/Swagger interface for admin – we switch off during rollover and switch years after rollover.
- We only load current year's courses
- **!!**Course data changes all the time! (we rollover in June and by September things might be different)
- Course Rollover is best endeavour!
- Difficulty with different versions of course information
 - (Registry, Student Systems...etc) – try to take the golden copy.
 - We have a unique version of a course for each Academic year (c7000 courses p/yr)
- One course organiser in Golden Copy Course Information
 - For Reading Lists - Multiple course collaborators on Alma

Steps for rollover

What reading lists need to roll over?

- How do you know what courses (and which versions of courses) are running next year
- How do you know which lists to rollover (last year...year before...year before that)

Dependencies

- Blackboard course name format (we include the current year in each course name)
- Timing – link to Blackboard rollover

Communication

- who needs to know what's happening (we use mail lists and blog posts)
- **Downtime?** – we are not 'down' but tell people not to make changes to Reading Lists.

How will we do it on Alma

- Format rollover file (we use analytics export to excel – edit file then save as txt)
- Put file on ftp server
- Setup Integration profile settings
- **Testing** – Sandbox
- **Rollback** – same process but use DELETE profile and a txt file with DELETE instead of ROLLOVER
- **Troubleshooting**/reporting checks – Alma/Analytics

Pre-rollover

- **Provide analytics to the Reading List team**
 - **What is expected to rollover**
 - **Any oddities which might prove exceptions**
 - Duplicate lists
 - Lists linked to multiple course codes
 - Non-standard codes (manual rollover)
 - 'restricted lists' – view All students full- (separate rollover)
 - Deleted lists and 'purge'
 - Check course files to be loaded
- **Test runs**

Small batch on files on sandbox, then on live, then run full test
load on sandbox/live
- **Comms to Course organisers** via mailing list and blog to advertise service interruption.

Post-rollover

- **Remove 'Collaborators'** from previous year's Reading Lists ([Run job 'Reading List Bulk Update'](#) – this is to stop any new edits by instructors)
- **Change Reading List code** – scripted via API (course code rolls over as a number string e.g. o.1234567890 etc)
- **Provide analytics for Reading List team:**
 1. Identify changes to Semester
 2. Identify changes to Course Organisers
 3. Identify lists which didn't rollover
- **Comms to Course Organisers-** check your lists have rolled over!
- **Switch automated course load back on** for the new year (this will overwrite any non-current information for the rolled over courses and will also create new courses for the year (either completely new or courses which have never had a reading list))



Course Rollover procedure in a nutshell

- Identify the list of courses whose lists you want to rollover and create a load file
 - Analytics – import report from Student Systems data for next year’s courses (output from Oracle BI report)
 - Matchpoint on current Alma course information from last three years (hierarchically – year 1,2,3)
 - Export file (already formatted most of the data in the Analytics output)
 - Make changes to the fields which need to be updated (Excel):
 - New course name/New Section/Year
 - Once you have a file ready save at a text file (binary is fine)
 - Check any spurious characters e.g. “”
 - Upload to FTP server (having first setup an FTP server 😊) – be careful with directory structure
 - Check integration profile settings
 - Run job
 - You can monitor progress by doing a Course search in Alma client.
 - Rinse and repeat....

Course Load File formatting – Our data

Date format - yyyy-MM-dd (n.b. this can be changed in the Alma import profile)

Alma Course Codes match the Blackboard (LEARN) course code. We generate them from Student Systems data. The codes change during rollover to reflect the academic year– e.g. **ARCH110282021-22SV1SEM1** rolls over to **ARCH110282022-23SV1SEM1**. We create the code from the following Student System (SS) fields:

SS Course Code - 9 digit DRPS course code used at institutional level (format: [ABCD12345] e.g. ARCH11028)

SS Course Year (format: [2021-22])

SS Course Availability (content: (SV1; SS1; VV) = available to all students; not available for visiting students; available to part year visiting only)

SS Course Period (content: (SEM1; SEM2; YR; SB5+; FLEX))



Integration Profile

- configuration>general>Integration
 - On rollover – visibility of old reading lists = **“Anyone Restricted, All Students Full”**
 - On rollover – **Copy citation statuses/RL Publication Status/Copyright approvals**
 - On rollover – Reading List Status = **“Complete”**
- Separate profiles for
 - ROLLOVER
 - DELETE
 - UPDATE

The screenshot shows the 'Integration Profile' configuration page for 'COURSE_ROLLOVER' in the Alma system. The page is titled 'Integration Profile' and has a sub-header 'COURSE_ROLLOVER'. There are three tabs: 'General Information', 'Actions', and 'Default Info'. The 'General Information' tab is selected. The page contains a list of configuration options for 'COURSE_IMPORT', each with a checkbox and a value field. The 'Active' status is set to 'Active'. The 'Input File Path' is 'rollover'. The 'Date format' is 'dd/MM/yyyy'. The 'Overwrite' options for 'instructors', 'number of participant', 'title', 'academic department', 'processing department', 'term', 'start date', 'end date', 'weekly hours', and 'year' are all checked. The 'On rollover' options include 'set instructors as owners' (checked), 'include Archived Lists' (unchecked), 'delete existing reading lists' (unchecked), 'copy citation tags' (checked), 'copy section tags' (checked), 'copy citation statuses' (set to 'Copy'), 'copy reading list statuses' (set to 'Complete'), 'copy reading list publication statuses' (set to 'Copy'), 'copy copyright approvals or copyright status' (set to 'Copy'), 'list creation mode' (set to 'Single'), 'copy public note' (checked), 'copy private note' (checked), 'copy student discussion' (unchecked), 'copy reading list owners' (checked), 'send owner subscription letter' (unchecked), 'copy reading list collaborators' (checked), 'reset old list owners' (unchecked), 'existing permalinks will point to the new list once the list is published' (unchecked), 'copy syllabus' (unchecked), 'Copy Assignee' (checked), 'copy only newest list' (unchecked), 'copy internal library note' (unchecked), 'copy instructor note' (unchecked), 'copy list created before' (unchecked), 'overwrite course instructors' (set to 'Anyone Restricted, All Students Full'), and 'visibility of old reading list' (set to 'Anyone Restricted, All Students Full'). The 'Schedule' is set to 'Not scheduled'. A 'Run' button is at the bottom right.

Load file (edit in Excel save to Text)

NEW_CODE	Course Name	Section	Academic Department	Processing Department	Term	T2	T3	T4	Start_date	End_date	Number C	Weekly Hc	Course_Year
HIST103602022-3SS1YR	Becoming Model	2022_23	History	Leganto Team	Yearly				01/06/2022	31/08/2023	14	0	2022
DESI080752022-3SV1SEM2	Animation 2C: D	2022_23	Design	Leganto Team	Semester				01/06/2022	31/08/2023	19	0	2022
INFR111572022-3SV1SEM2	Natural Language	2022_23	Informatics	Leganto Team	Semester				01/06/2022	31/08/2023	161	0	2022
ANHI100782022-3SV1SEM2	Roman Judaea	2022_23	Ancient History	Leganto Team	Semester				01/06/2022	31/08/2023	16	0	2022
ELCG080092022-3SV1SEM2	The Contempora	2022_23	European Languages and	Leganto Team	Semester				01/06/2022	31/08/2023	9	0	2022
CLLC111322022-3SS1SEM2	Translating the S	2022_23	Common Courses (Schoo	Leganto Team	Semester				01/06/2022	31/08/2023	16	0	2022
CHEE080132022-3VV1SEM1	Separation Proce	2022_23	Chemical	Leganto Team	Semester				01/06/2022	31/08/2023	5	0	2022
HIAR100872022-3SV1SEM1	City as a Work of	2022_23	HIARSU791	Leganto Team	Semester				01/06/2022	31/08/2023	0	0	2022

Searchabl	Searchabl	ALL_SIDS	INSTR1	i2	i3	i4	i5	i6	i7	i8	i9	i10	Operation	OLD_COURSE_CODE	OLD_COURSE_SECTIO
HIST10360	SU792	HIST10360	128203										ROLLOVER	HIST103602019-OSS1YR	2019_20
DESI08075	SU791	DESI08075	146266										ROLLOVER	DESI080752019-OSV1SEM2	2019_20
INFR11157	SU747	INFR11157	88350										ROLLOVER	INFR111572019-OSV1SEM2	2019_20
ANHI1007	SU792	ANHI1007	164662										ROLLOVER	ANHI100782019-OSV1SEM2	2019_20
ELCG0800	SU795	ELCG0800	127036										ROLLOVER	ELCG080092019-OSV1SEM2	2019_20
CLLC11132	SU795	CLLC11132	145318										ROLLOVER	CLLC111322019-OSS1SEM2	2019_20
CHEE0801	SU748	CHEE0801	141802										ROLLOVER	CHEE080132019-0VV1SEM1	2019_20
HIAR1008	SU791	HIAR1008	109732	####									ROLLOVER	HIAR100872019-OSV1SEM1	2019_20

Running the Alma job

- Upload rollover file to FTP server
- Run the job from the Integration Profile.
- Monitor in Alma client (Alma search for courses by year)
- This year it took about 4 days to complete all jobs. One job ran over two days
- Once all jobs are complete
 - Run an api script to change the default Reading List Code to match Course Code
 - Run an Alma job to change the information on previous year's lists (create an Alma set of Reading Lists in Analytics – remove owner)
 - Switch course load scripts back on so new courses can be updated with correct information and courses which have no lists are loaded directly from central data.

Gotchas and troubleshooting

1. **Mistakes** -The job will run on a wrongly configured file so be aware – if you don't have the exact format you may skew the information in the new course. If that happens DELETE and start again!
2. **Time** – the job takes a VERY long time to run.
3. **Mismatches** – if a semester changes we don't pick it up – so we have some complex logic to check for Semester changes and Availability changes - so we end up running 5 different rollover files.
4. **Reading Lists 'resurrecting'** – run a pre-check in Analytics of deleted lists.
5. **Formatting file using Analytics** – some output in slightly different format than needed for input file (e.g. processing department)
6. **Rollover rule – Activate Course flag does not work** – need to wait until daily job is run
7. **API – check defaults on fields** (statuses changed when we ran a change on the RL Code. According to API specs VISIBILITY is not a mandatory value. If not included when API call is made it defaults to DRAFT - this is NOT in the API spec. When we ran a script to update RL codes they all suddenly were in DRAFT rather than retaining existing visibility)
8. **Bulk changing end date on Reading Lists does not change physical item Due Back date** – check your due back dates are not restrictive (bulk job can be used to change these)

Things we didn't cover which might be useful are at the end of the PP Notes 1-3

- Note 1 - Loading Academic department – we don't need to do this any more but there are quite a few gotchas with this process.
- Note 2 - Comms to instructors/collaborators – sample of what we tell people
- Note 3 – Searchable IDs and what we use them for

Useful links

- [Configuring Course Loading - Ex Libris Knowledge Center \(exlibrisgroup.com\)](#)
- [Managing Courses - Ex Libris Knowledge Center \(exlibrisgroup.com\)](#)
- [Leganto Course Rollover - Ex Libris Knowledge Center \(exlibrisgroup.com\)](#)
- [Video - Course Rollover in Bulk via Course Loader - Ex Libris Knowledge Center \(exlibrisgroup.com\)](#)

Questions...

- Alex.forrest@ed.ac.uk



Note 1 – Academic Department table

- We no longer load Academic Department prior to running rollover.
- But if you do....
- **ACADEMIC DEPARTMENT load:**
 - Update Alma Academic department table first!
 - Make sure the codes match those you have in the Course Load file
 - Sort the file in Description order before importing!
 - Has to be in Excel 97!
 - Filename has to be CodeTable
 - NO DUPLICATES!
 - N.B. Option to export from Alma – add new codes to the file, resort then reload.



Note 2 - Sample comms to Instructors/Collaborators

Resource Lists

The University of Edinburgh's Resource Lists service uses Leganto to provide online reading lists. The service is supported by Library Learning Services.

[HOME](#) [FIND OUT MORE](#) [USER GUIDES](#) [HELP](#) [USEFUL LINKS](#)

Rollover 2019

What is rollover?

Each year, in June, the Library makes copies of the current year's Resource Lists for use in the new academic year.

When is it happening?

The Library will rollover Resource Lists **w/b 10th June**. We'll aim to complete rollover on Monday 10th June. An email will be circulated to the list when rollover is complete.

Vet lists will be rolled over at a later date (TBC).

What do Course Organisers need to do?

1. Don't edit your Resource List between Sunday 9th -Monday 10th June while the rollover is underway.
2. Don't start editing your 2018/19 list for use in 2019/20 - if you're keen to get started on a new list for next year, read on and follow the guidance below.

What will happen when lists are rolled over?

If your course is running in 2019/20, then we will make a copy of your current Resource List and create a new version of the list for use next year (2019/20). Please note: draft Resource Lists won't rollover unless they are linked to a course code.



TWITTER UPDATES

Tweets by @ResourceListsEd



Semester 2 deadline: Wed 23rd Oct - send the Library your Sem 2 reading list - we'll set up your online Resource List, buy new/additional copies (or ebooks) and move books to HUB/Reserve AND provide your students with easy access to key course texts. [edin.ac/resource-list-...](#)

Sep 26, 2019

Note 3 - Searchable IDs – mainly for Analytics

Loaded in one string separated by commas.

SID₁ = base code from DRPS (University course code) e.g. **ARCH11028**

SID₂ = School e.g. **SU******

SID₃ = Moodle Code: Base code/Course Period[Year] e.g.

ARCH11028/SEM1[2021/22]

SID₄ = Postgraduate or Undergraduate course e.g. [**PG;UG**]

SID₅ = Distance Learning flag e.g. [**Distance Learning =Y/N**]

