IGeLU 2022 - Cardiff

Leganto Rollover at Edinburgh University



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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)
- Obliged 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. 0.1234567890 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])

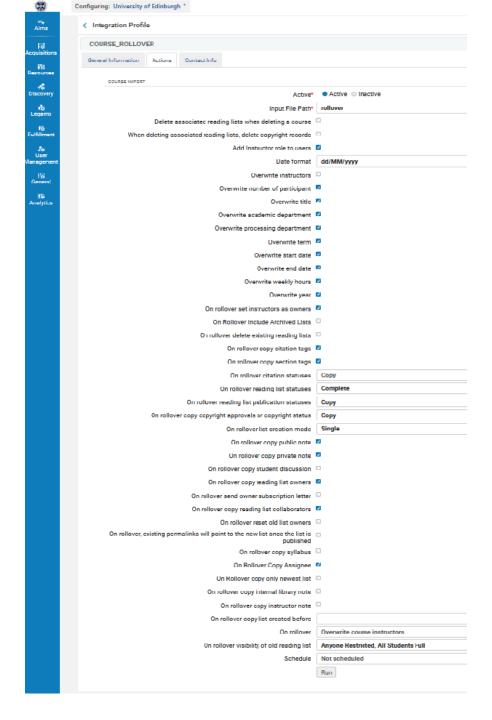
SS Course Availability (content: (SV1; SS1; VV) = available to all students; not available for visiting students; available to part year visiting only)

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



Load file (edit in Excel save to Text)

NEW_CODE	Course Name	Section	Academic Department	Processing Department	Term	T2 7	Γ3 T4	Start_date	End_date	Number C V	Veekly Hc <mark>Co</mark> u	ırse_Year
HIST103602022-3SS1YR	Becoming Mode	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 Languag	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 Proc	2022_23	Chemical	Leganto Team	Semester			01/06/2022	31/08/2023	5	0	2022
HIAR100872022-3SV1SEM1	City as a Work o	2022 23	HIARSU791	Leganto Team	Semester			01/06/2022	31/08/2023	0	0	2022

Searchabl Searcha	bl(ALL_SIDS	INSTR1	i2 i3	i4	i5	i6	i7	i8	i9	i10	Operation	OLD_COURSE_CODE	OLD_COURSE	SECTI
HIST10360 SU792	HIST10360	128203									ROLLOVER	HIST103602019-0SS1YR	2019_20	
DESI08075 SU791	DESI08075	146266									ROLLOVER	DESI080752019-0SV1SEM2	2019_20	
INFR11157SU747	INFR11157	88350									ROLLOVER	INFR111572019-0SV1SEM2	2019_20	
ANHI1007 SU792	ANHI1007	164662									ROLLOVER	ANHI100782019-0SV1SEM2	2019_20	
ELCG0800 SU795	ELCG0800	127036									ROLLOVER	ELCG080092019-0SV1SEM2	2019_20	
CLLC11132SU795	CLLC11132	145318									ROLLOVER	CLLC111322019-0SS1SEM2	2019_20	
CHEE0801 SU748	CHEE0801	141802									ROLLOVER	CHEE080132019-0VV1SEM1	2019_20	
HIAR1008 SU791	HIAR1008	109732	####								ROLLOVER	HIAR100872019-0SV1SEM1	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)
- <u>Leganto Course Rollover Ex Libris Knowledge Center</u> (<u>exlibrisgroup.com</u>)
- <u>Video Course Rollover in Bulk via Course Loader Ex Libris</u>
 <u>Knowledge Center (exlibrisgroup.com)</u>

Questions...

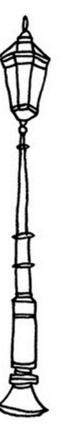
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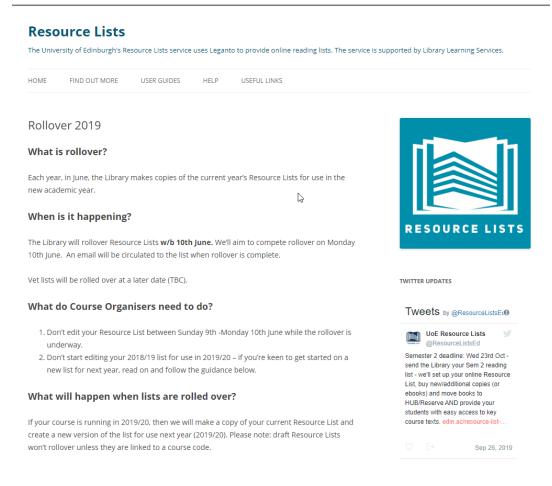
Note 1 – Academic Department table

- 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



Note 3 - Searchable IDs – mainly for Analytics

Loaded in one string separated by commas.

