

A horizontal bar with a teal segment on the left and an orange segment on the right, positioned above the title.

Simplifying the approach to identifying new editions for reading lists

IGeLU & ELUNA Leganto Product Working Group

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A person standing on a dark, rocky cliff at night, holding a flashlight that illuminates the scene. The background is a dark, misty landscape with silhouettes of mountains and trees.



Overview

Background

Report demonstration

Report creation

Report in use

Q&A



Background

1

- Top voted NERS request for 2022 (#7747)
- Current “Suggest Replacement” feature in Leganto developed from #7747

2

- #8417 expanded on 2022 development
- Top voted NERS request for 2023 (#8417)
- #8417 withdrawn due to being out of scope for Leganto



Background

3

- Highlights the complexity of the desired functionality
- Involves Leganto and Alma (and eventually Rialto)

4

- Each institution has different workflows
- Defining the details of every scenario proved very difficult
- NERS may not be the right forum for this kind of development



So what did we do next?

We started looking at Analytics for a solution...

Report demonstration

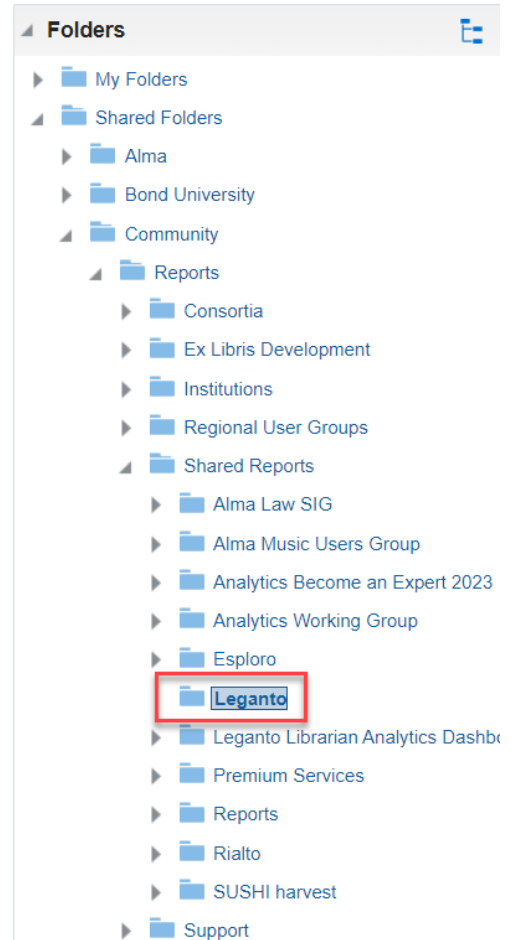




Finding the report

From Alma, open Analytics and go to:

Shared Folders > Community > Reports > Shared Reports >
Leganto > New edition suggestions on active course reading
lists



Folders

- ▶ My Folders
- ▶ Shared Folders
 - ▶ Alma
 - ▶ Bond University
 - ▶ Community
 - ▶ Reports
 - ▶ Consortia
 - ▶ Ex Libris Development
 - ▶ Institutions
 - ▶ Regional User Groups
 - ▶ Shared Reports
 - ▶ Alma Law SIG
 - ▶ Alma Music Users Group
 - ▶ Analytics Become an Expert 2023
 - ▶ Analytics Working Group
 - ▶ Esploro
 - ▶ **Leganto**
 - ▶ Leganto Librarian Analytics Dashbr
 - ▶ Premium Services
 - ▶ Reports
 - ▶ Rialto
 - ▶ SUSHI harvest
 - ▶ Support



New edition suggestions on active course reading lists

Publication year of current edition	MMS ID of current edition	Title	Academic Department Description	Number Of Citations	Publication year of new edition	MMS ID of new edition	Num of Active Physical Items	Num of Active Portfolios
2012	990005896310402381	Global health 101 /	Null	2	2019	9930636977302381	0	1
2013	990006240940402381	Health economics : an international perspective /	Null	2	2020	9930704389602381	0	1
2015	9930217590002381	Global mental health : anthropological perspectives /	Null	2	2016	9930905728002381	0	1
2015	9930282489802381	WHS : a management guide /	Health Sciences	10	2020	9930782505302381	0	1
2018	9930534993102381	Essential cell biology /	Medicine	4	2023	9930907080202381	2	0
2019	9930452789902381	Understanding pathophysiology /	Medicine	5	2023	9930863080002381	2	0
2019	9930542192802381	Moore's essential clinical anatomy /	Medicine	4	2024	9930878278802381	2	0
2020	9930475889702381	Rang and Dale's pharmacology /	Medicine	5	2024	9930882180402381	2	0
2020	9930476417802381	Rang and Dale's pharmacology /	Medicine	4	2024	9930882180402381	2	0

Facets



Edit Citations (1 - 8 of 8) | 9930542192802381

Course Status ▾

Inactive (5)

Active (4)

Processing Department ▾

Bond Course Reserve (8)

List Status ▾

Processing (1)

Complete (7)

Being Prepared by Ed... (1)

List Assigned to ▾

Assigned to others (8)

Publication List Visibility ▾

Published (8)

All Students Full (6)

Course Students (2)

Citation Status ▾

Complete (8)

 Select All Sort by : Last modified ▾[Suggest Replacement](#)[Change Copyright Status ▾](#)[Change Status ▾](#)[Expand ▾](#)1 **Moore's essential clinical anatomy**

Citation ID: 7308346470002381

MMS ID: 9930542192802381

Book By Moore, Keith L. author. (Wolters Kluwer 2019)

ISBN: 9781496369659

Pages: xxvi, 730 pages

Citation Status: Complete

Resource Locate Status: Resource Located

Copyright Status: Not Determined

[Edit](#)[Manual Locate](#) Physical (1) Electronic Digital Other[Citation Details](#)[Alerts](#)[More Info](#)**Tags:** Recommended resource, Add to Reserve Collection, 3 Hour Loans, 7 Day Loans**Section Name:** Highly recommended for Science and Scholarship domain**Course Name:** Challenges to Health Part B, Challenges to Health Part B**Course Code:** MEDI12-202_2023_MAY_STD_02, MEDI12-202_2023_MAY_STD_01**Reading List:** Challenges to Health Part B**Current Request for Review:** 03/04/2023

Demand in other lists, other courses.

Created By: System 21/03/2023 13:38:47 AEST**Modified By:** System 21/03/2023 13:38:47 AEST



FAQs

Why do titles appear more than once in the report?

- Both the print and electronic is available for the new edition and/or the current edition
- The title appears on lists for multiple Academic Departments

Why do titles of the same edition appear in the report?

Sometimes print and electronic of the same title and edition will have different Begin Publication Dates. If the print edition has 2019 and the ebook of the same edition has 2020, the title will appear in the report because the 2020 is more recent, even though it's technically not a new edition.



Report creation

Based on the instructions from [Using JOIN in Analytics to combine data from two subject areas](#) by Geoff Sinclair, Trent University (Ex Libris Developer Network Tech Blog)

The blog post steps you through how to create an analytics report combining and presenting information from two subject areas using a JOIN query.

For the new editions report we used the Course Reserves and Titles subject areas to join together.



Define the columns to include in the report

From Courses Reserves:

"Bibliographic Details"."Begin Publication Date"

"Bibliographic Details"."MMS Id"

"Bibliographic Details"."Title"

"Courses"."Academic Department Description"

"Reading List Citations"."Number Of Citations"

From Titles:

"Bibliographic Details"."Begin Publication Date"

"Bibliographic Details"."MMS Id"

"Title Measures"."Num of Active Physical Items"

"Title Measures"."Num of Active Portfolios"



Filters: Course Reserves subject area

"Courses"."Course Status" = 'Active'

AND

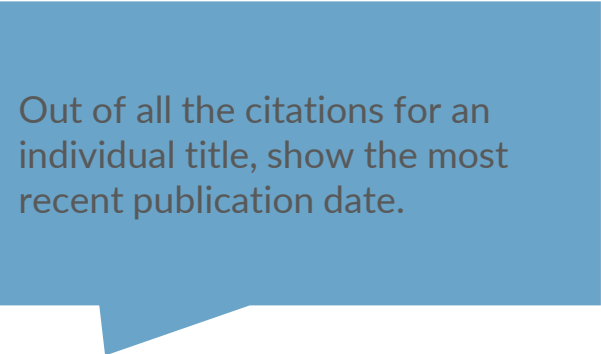
"Reading Lists"."Leganto Publication List Visibility" NOT IN ('Archived',

AND

"Bibliographic Details"."Material Type" = 'Book'

AND

"Bibliographic Details"."Begin Publication Date" IN (MAX("Bibliographic Details"."Begin Publication Date" BY ("Bibliographic Details"."Title Author Combined and Normalized")))



Out of all the citations for an individual title, show the most recent publication date.



Filters: Titles subject area

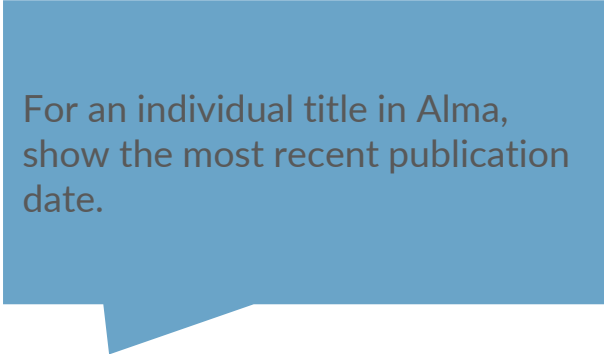
"Bibliographic Details"."Lifecycle" = 'In Repository'

AND

"Bibliographic Details"."Suppressed From Discovery" = 'No'

AND

"Bibliographic Details"."Begin Publication Date" IN (MAX("Bibliographic Details"."Begin Publication Date" BY ("Bibliographic Details"."Title Author Combined and Normalized")))



For an individual title in Alma, show the most recent publication date.



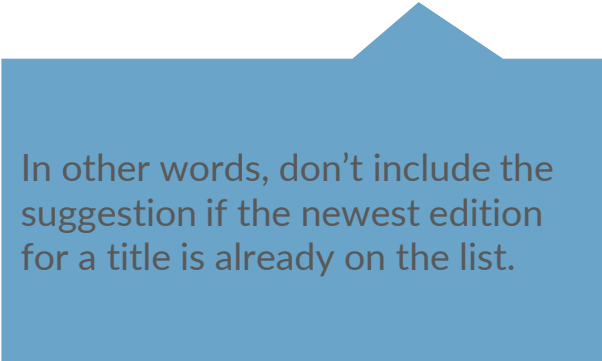
Link the two subject areas together

"Course Reserves"."Bibliographic Details"."Title Author Combined and Normalized"
=
"Titles"."Bibliographic Details"."Title Author Combined and Normalized"



Final filter for the overall report

"Course Reserves"."Bibliographic Details"."Begin Publication Date"
!=
"Titles"."Bibliographic Details"."Begin Publication Date"



In other words, don't include the suggestion if the newest edition for a title is already on the list.



```
SELECT
  A."Publication year of current edition" saw_0,
  A."MMS ID of current edition" saw_1,
  A."Title" saw_2,
  A."Academic Department Description" saw_3,
  A."Number Of Citations" saw_4,
  B."Publication year of new edition" saw_5,
  B."MMS ID of new edition" saw_6,
  B."Num of Active Physical Items" saw_7,
  B."Num of Active Portfolios" saw_8
FROM (
```

Report columns

```
SELECT
  O s_0,
  "Course Reserves"."Bibliographic Details"."Title Author Combined and Normalized" "Title Author Combined and Normalized",
  "Course Reserves"."Bibliographic Details"."Begin Publication Date" "Publication year of current edition",
  "Course Reserves"."Bibliographic Details"."MMS Id" "MMS ID of current edition",
  "Course Reserves"."Bibliographic Details"."Title" "Title",
  "Course Reserves"."Courses"."Academic Department Description" "Academic Department Description",
  "Course Reserves"."Reading List Citations"."Number Of Citations" "Number Of Citations"
```

Course Reserves fields

```
FROM "Course Reserves"
WHERE
  (((("Courses"."Course Status" = 'Active') AND ("Reading Lists"."Leganto Publication List Visibility" NOT IN ('Archived', 'Deleted')) AND ("Bibliographic Details"."Material Type" = 'Book')
  AND ("Bibliographic Details"."Begin Publication Date" IN (MAX("Bibliographic Details"."Begin Publication Date" BY ("Bibliographic Details"."Title Author Combined and
  Normalized"))))))
```

Course Reserves filters

```
) A LEFT OUTER JOIN (
SELECT
  O s_0,
  "Titles"."Bibliographic Details"."Title Author Combined and Normalized" "Title Author Combined and Normalized",
  "Titles"."Bibliographic Details"."Begin Publication Date" "Publication year of new edition",
  "Titles"."Bibliographic Details"."MMS Id" "MMS ID of new edition",
  "Titles"."Title Measures"."Num of Active Physical Items" "Num of Active Physical Items",
  "Titles"."Title Measures"."Num of Active Portfolios" "Num of Active Portfolios"
FROM "Titles"
```

Titles fields

```
WHERE
  ("Bibliographic Details"."Lifecycle" = 'In Repository') AND ("Bibliographic Details"."Suppressed From Discovery" = 'No') AND ((("Bibliographic Details"."Begin Publication Date" IN
  (MAX("Bibliographic Details"."Begin Publication Date" BY ("Bibliographic Details"."Title Author Combined and Normalized"))))))
```

Titles filters

```
) B ON A."Title Author Combined and Normalized" = B."Title Author Combined and Normalized"
WHERE
  A."Publication year of current edition" != B."Publication year of new edition"
```

Link the two subject areas

Final filter



Report in use

Bond University

University of Minnesota



Bond University

2023 reading list statistics:

- 3 semesters
- 1150 lists
- 1500 courses (some share a list)

Reading list integrated to every course in BlackBoard Ultra (using LTI 1.3).

Responsibilities:

- **Instructors, Technology Enhanced Learning Designers and Faculty Librarians:** Creates and edits lists, and suggest replacements for unavailable readings.
- **Customer Services team:** Digitises readings and moves physical items to high demand locations.
- **Information Resources team:** Purchases resources and new editions.



Bond University

Changes to the report

- Removed the course status = active filter
- Added the reading list status = rolled over filter

How the report was used

- Trialled the report with the course status = active filter
- Faculty Librarians reviewed the report for their assigned Academic Department.
- They decided whether to suggest replacements to the instructor, either via the "Suggest Replacement" feature, by liaising with them individually, or by not suggesting a replacement at all.
- The report will be run and provided to Faculty Librarians after rollovers for the upcoming semester.



University of Minnesota Twin Cities

- Fall 2022 Statistics
 - 18,000 course/sections each with a reading list
 - 16,400 3 base links only
 - 1,600 lists with additional print and digital resources
 - Reading list integrated into every Canvas course
- Textbook Partnership with Bookstore
 - Libraries purchase unlimited use e-books for textbooks available through Bookstore
 - Student affordability
- Lists Created / Processed
 - Library Staff (Course Rollover / Manual)
 - Instructors, Teaching Assistants, Academic Technologists, Disability Resource Center (added through Canvas)



University of Minnesota Twin Cities

Changes to report:

Limited print reserves use so focused on:

- Print editions to Electronic editions
- Electronic to Electronic editions

Available for Group (Campus)

Course Code

Past six terms (Fall, Spring, Summer for 2 years)



University of Minnesota Twin Cities

Next steps:

- Working with reserves staff on how to most effectively use the list.
 - Nearly 730 courses identified in the initial report run
 - Determine how many titles are tied to other projects, i.e. Bookstore Project
- Create reports for other system campuses



Q&A

What filters or columns would you need in the report?

Additional formula examples available here:

<https://z.umn.edu/formulaexamples>



Thank you

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