Front-Line Leganto implementation stories: Learning from those that have made the journey
Introductions

- **Carl Grant**, Associate Dean, Knowledge Services & Chief Technology Officer, University of Oklahoma Libraries (Moderating)
- **Charlotte Keys**, Director, Library Technology Services, Tufts University Library
- **Lisa Wheeler**, Cataloging Librarians, University of Minnesota Library (but addressing aspects of University of Miami Leganto experience)
- **Leland Deeds**, Head of Systems, University of Miami Libraries
- **Sue Harmer**, Manager, Application Support, University of New South Wales
- **Blake L. Galbreath**, Core Services Librarian, Washington State University

*Each person, at the at end of their section, will tell you the one thing they want you to know before you start the Leganto implementation journey!*
Agenda

• Preparing for Leganto
• Implementing Planning
• Loading/Interfacing
• Promotion
• Q & A
Topic 1: Preparing for Leganto

Charlotte Keys, Director, Library Technology Services, Tufts University Library
Leganto for Tufts
A small part of our plan

ELUNA 2017
Charlotte Keys
Director, Library Technology Services
charlotte.keys@tufts.edu
Tufts University

Boston area
Decentralized schools
Multiple campuses
R1 Carnegie, Private

11,000+ students
5500 staff & faculty
We’re at a crossroads
Leaving Millennium
and Summon (JumboSearch)
Implementing Alma and
Primo RIGHT NOW
Go-Live June 19, 2017
LMS crossroads too

TRUNK
Used by many schools
Sakai based

TUSK
Locally developed by Health Sciences Library
This is where Leganto comes in

An opportunity to acquire it might not come again

LMS integration
Faculty participation
Reserves and R&I want it

Pilot first
Image credits:

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Steve McFarland, tufts sunset: https://www.flickr.com/photos/presta/143261034/

Steve McFarland, library roof: https://www.flickr.com/photos/presta/143260799/

Mike Champion, Mighty Jumbo: https://www.flickr.com/photos/downtree/654551817/
Topic 2: Implementing/Planning

Lisa Wheeler, Cataloging Librarians, University of Minnesota Library (but addressing aspects of University of Miami’s Leganto experience)
Implementation planning stage:

Leganto as product replacement – used Ares and had an established workflow

Steps were being duplicated in Ares and in Alma

Small implementation team – systems and access services staff

Initial implementation intention to keep workflow essentially similar for staff and faculty – primarily library staff mediated reading list creation
Implementation goals:

Improve staff efficiency – reduce duplication of steps, reduce amount of data entry

No disruption of services for faculty and students

Eventually may see more faculty involvement in reading list creation, but not a major goal for the first stage of implementation
Take away

One thing everyone should know before Leganto Implementation?

Understand your faculty and user culture in regards to proactive participation and structure implementation goals accordingly.
Topic 3a: Loading/Interfacing

Leland Deeds, Head of Systems, University of Miami Libraries
Front-line Leganto Implementation Stories
Before: III & ATLAS

Pre-Leganto:

• ATLAS Systems Ares v. 4.5
• Blackboard Building Block integration
• “Course Reserve Search” in ILS OPAC

• No course data loading – fully manual process*
  • Course entry
  • Manual connection with Blackboard
  • Duplication of work for OPAC/discovery layer
  • Allowed for reading list retention & slow record growth
Current Status

Phase 1 “Soft Roll out”:

• Blackboard Q2 2016 release / LTI version 1.X
  • Data load twice weekly
  • Blackboard Staging interoperates with Leganto/Alma Premium Sandbox
• Alma-D for scanned book chapters and articles
• Primo MT SaaS for 1 of our 3 views

Still also using:

• ATLAS Systems Ares v. 4.5
• Blackboard Building Block

Next steps:
• Roll out for all course reserves over summer terms into Fall 2017
• Course deletion API
• Review desired external services
Take away

What was easy:

• LTI Tool integration & basic configuration

What was hard:

• Impact of required data ingestion source for Course ID
  • Unplanned delay to walk request through IT Governance
  • Mushrooms course record growth
  • Compounds difficulty of pending primary/instructor ID flip

What is left:

• Read List ‘archiving’ for re-use
One thing everyone should know before Leganto Implementation?

Know the structure of your Student Information System data, how it compares (IDs, terms, uniqueness, field mappings) to whatever reserve structure you’ve used, and what your institution’s process is for obtaining this data as a scheduled feed.
Topic 3b: Loading/Interfacing

Sue Harmer, Manager, Application Support, University of New South Wales
UNSW Library

Front-line Leganto implementation stories
Leganto@UNSW

- Moodle 3.1 / LTI version 1.X
- Moodle Staging interoperates with Leganto/Alma Premium Sandbox
- External Services:
  - bX Recommender Service
  - RefWorks
  - Zotero
  - Mendeley [June 2017 release]
  - Google Preview [May 2017 release]
- Alma-D for scanned book chapters and articles where content is not available in electronic format
- Primo local [moving to Primo MT SaaS July 2017]
- Next steps: integration with campusM and Moodle Mobile app
### Alma Course Information End-to-End Flow

<table>
<thead>
<tr>
<th>Source System</th>
<th>Library</th>
<th>Alma</th>
<th>Leganto</th>
<th>Primo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Feed Files</td>
<td>Load courses to VLE (Moodle)</td>
<td>Transform feed files to Alma Course CSV</td>
<td>Alma Course CSV</td>
<td>Course Loader job</td>
</tr>
</tbody>
</table>

- At the end of semester, delete Courses without RL
- * CNO tag contains Course Information (e.g. Course Code, Name, Acad Dept, etc.)
### Mapping of Alma Course CSV file - SiMS

<table>
<thead>
<tr>
<th>Alma Course CSV column</th>
<th>SiMs Course files (File.column)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>Course.COURSE_ID</td>
<td>e.g. SiMs Course ID is 5174_00520. 5174 denotes S1 2017.</td>
</tr>
<tr>
<td>Title</td>
<td>Course.COURSE_NAME</td>
<td>SiMs Course Name contains course code(s). Course Code(s) will be populated to Searchable IDs 1 – 3. e.g. SiMs Course Name “MINE8115-Mine Processes, Systems &amp; Analysis (S2, 2015)”</td>
</tr>
<tr>
<td>Section ID</td>
<td>Not available</td>
<td>Section will be blank.</td>
</tr>
<tr>
<td>Academic Department</td>
<td>Catgmem. EXTERNAL_CATEGORY_KEY</td>
<td></td>
</tr>
<tr>
<td>Processing Department</td>
<td>Not available</td>
<td>Fixed to “COURSE_UNIT”.</td>
</tr>
</tbody>
</table>
| Term1, Term2, Term3, Term4 | Not available                   | Currently: Term is derived from SiMS course file name.  e.g. file name: “LIB_NSSR5472_courses_5174.txt.20161128.012931”  
Work In Progress: working with Central IT to include Terms information in the feed file as some courses have different terms. |
| Start Date             | Course.START_DATE               |       |
| End Date               | Course.END_DATE                 |       |
| Number of Participants | Student_Enroll file             | The value is calculated from number of students from SiMS Student_Enroll file. |
| Weekly Hours           | N/A                             | Fixed to 0. |
| Year                   | Course.START_DATE               | Get the Year from Course.START_DATE column. |
| Searchable ID1         | Course.COURSE_NAME              | Extract the course code from COURSE_NAME column of SiMS Course file, and populate to Searchable ID1-3. |
| Searchable ID2         | Course.COURSE_NAME              | See note in SearchableIDs1. |
| Searchable ID3         | Course.COURSE_NAME              | See note in SearchableIDs1. |
| Instructor 1 - 10      | Staff_Assign file               | Load the first 10 instructors to these columns to Alma/Leganto CSV. In Alma, Instructor role will automatically be added to user account listed in this columns. |
One thing you should know before Leganto Implementation?
+ 1 University of Miami

Know the structure of your Student Information System data, how it compares (IDs, terms, uniqueness, field mappings) to Alma and your VLE, and what your institution’s process is for obtaining this data.
Want to hear more?

Implementing Leganto powered by SIPX with Blackboard: Lessons Learned

• Blake Lee Galbreath, Washington State University
  – 11:15 am – 12pm, Thursday, Innovation
Topic 4: Promotion

Blake L. Galbreath, Core Services Librarian, Washington State University
Promotion

Blake L. Galbreath
Core Services Librarian
Washington State University
Promotion: In a Nutshell

★ Pilot Solicitation
★ WSU Announcements
★ Live Demonstration
★ Shared Documentation
★ Rinse and Repeat
Pilot Solicitation

October 6, 2016: Implementation began with ExLibris

⭐ We immediately contacted Global Campus (our online campus) and the Blackboard Administrator to set up a meeting

December 1, 2016: We sent out ~50 emails, inviting instructors to participate in our pilot

⭐ These emails resulted in 17 willing participants

Late December, 2016: Blast to WSU Announcements
Live demonstration of new course reserves system set for Jan. 5

Washington State University Libraries will hold a live demonstration of a new course reserves system, ExLibris Leganto, from 10 a.m.-noon and 2-4 p.m. Thursday, Jan. 5 in Terrell 20E. A pilot of the new system will be introduced in select courses during spring semester, with a campus-wide rollout planned in the summer.

“The ultimate goal of any course reserves management tool is to provide students with the best materials for their courses at the lowest cost, and to do so in an easy-to-use interface,” said Blake Galbreath, WSU Libraries’ core services librarian. “We believe that Leganto does a great job of accomplishing this.”

Leganto replaces the libraries’ current system, Docutek ERes. Students will find Leganto easier to use, as it integrates directly into Blackboard (i.e., no additional passwords), Galbreath said. The product utilizes modern web design, is mobile friendly and can be customized for better accessibility, such as increasing font size and contrast.

Instructors can incorporate citations directly from a database into a reading list and communicate online with students about resources and more. WSU librarians will use the system to support faculty in developing reading lists, handling copyright clearance and providing course materials more efficiently.

To learn more about Leganto, visit [http://www.exlibrisgroup.com/category/Leganto](http://www.exlibrisgroup.com/category/Leganto). (Nella Letizia: Public Relations/Communications Coordinator)
Live Demonstration

Jan 5, 2017: Ophir Yoggev and Mary-Lynn Bragg flew in

- It was cold!!!
- Large turnout for library staff
- Small turnout for instructors

Demo

- We gave demonstration on different features
- We asked instructors to create list and troubleshooted issues
Shared Documentation: Icons

Using Course Reserve Reading Lists in Leganto

WSU Libraries have transitioned to a new course reserves management system, called Leganto. We piloted this system in the spring of 2017 and are now permanently using Leganto as of summer 2017. This system uses a new tool in Blackboard, labeled “Leganto” (as opposed to the previous tool, which was labeled “eReserves”). … To navigate to your course reading list link in Blackboard:
One Thing You Must Know

Communication is key to this project. You need to be able to work with (at least):

★ Course Reserves Operators
★ Blackboard Administrators
★ Curriculum Coordinators
★ Teaching Faculty
★ Public Relations/Communications Coordinator
★ ExLibris Implementation Team

Don’t be afraid to get out ahead of the project and engage with instructors directly - and early. The vast majority of those who did participate were very flexible.
Wrap-Up

Q & A