

Leganto Course Rollover @ CQUniversity

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CQU is part-way through setting up an automated integration between the course/student information management system and Alma. It is partially manual at the moment. With further testing, it will become fully automated, hopefully by the beginning of 2019.

CQU currently automatically creates the file to load via the course integration profile. We have used the course loader to:

- Create or update courses
- Rollover existing courses and lists
- All fields are updated

Course loader integration profile Settings

Field	Setting	Comment/Description
Active	Active	
Delete associated reading lists when deleting a course	Selected	We have not deleted any courses yet, but plan to write a script to delete courses and reading lists if there are two or three newer ones for that course. This script will be run once a year.
When deleting associated reading lists, delete copyright records	Unselected	CQU does not use copyright functionality in Alma.
Add instructor role to users	Unselected	This doesn't stop instructors that link through to Leganto from Moodle from being given the instructor role automatically, but in the 'Leganto Customer Setting' table, you can set 'auto_add_instructor_role' to false to stop this from happening. With these settings lecturers linking through from Moodle will be able create new reading lists, but won't be able to edit existing lists unless they are manually added as owner/collaborator in Alma.
Date format	dd/MM/yyyy	Default
Overwrite Options <ul style="list-style-type: none">• Overwrite Instructors• Overwrite number of participant• Overwrite title	All selected except weekly hours since we are not populating that field.	When updating courses, CQU puts a '+' sign in the ALL_INSTRUCTORS column. This adds any new instructors in the

Field	Setting	Comment/Description
<ul style="list-style-type: none"> • Overwrite academic department • Overwrite term • Overwrite start date • Overwrite end date • Overwrite weekly hours • Overwrite year 		<p>file, but doesn't delete existing ones.</p> <p>In general, for any new values you would like to add to a rolled over course you will need to tick the overwrite option.</p> <p>Also, any field with 'overwrite' checked work in this way:</p> <ul style="list-style-type: none"> • + sign -> Old information is kept and any new info added. • New value -> will override the old value. • Blank field -> Empty (old value is removed)
On rollover set instructors as owners	Unselected *field will not appear if auto_set_instructors_as_owners parameter is set to true in Fulfillment > Leganto > Customer Settings	CQU's initial approach is for the library to create reading lists for lecturers, and only make lecturers owners in special circumstances.
On rollover delete existing reading lists	Unselected	Reading lists need to remain as rollover occurs before the previous term reading list becomes inactive.
On rollover copy citation tags	Selected	
On rollover copy section tags	Selected	
On rollover citation statuses	Copy	In order to reduce Library staff time, reading lists are copied as is without the need for staff intervention. Reading lists can be edited as required.
On rollover reading list statuses	Complete	As above
On rollover reading list publication statuses	Copy	As above
On rollover copy copyright approvals	None	CQU does not use copyright functionality in Alma.
On rollover copy public note	Selected	
On rollover copy private note	Selected	
On rollover copy student discussion	Unselected	
On rollover copy reading list owners	Selected	Saves Library staff from having to add owners again.

Field	Setting	Comment/Description
On rollover copy reading list collaborators	Selected	Saves Library staff from having to add collaborators again.
On rollover, existing permalinks will point to the new list once the list is published	Unselected	At CQU, new reading lists are created by rollover while existing ones are still active and being used by students.
On rollover:	Overwrite course instructors	
On rollover visibility of old reading list	All Students Restricted	Consistent with publishing (always All Students Restricted)
Schedule	Not Scheduled	CQU currently run the integration profile manually

Tips

- When you rollover reading lists, the code for the new reading list gets a (1) added to the end, which means that over time you get endless ...(1)(1)(1)... Users won't see the code so it's only in Alma that it can be seen. This may only happen if you don't delete reading lists on rollover (haven't tested it). We may write a script to remove the excess (1)s using the Alma API. There is no maximum character limit documented, but if you reach it, Ex Libris will work with you to deal with it.
- The active/inactive status of courses updates overnight when you add new courses or update dates.
- Beware of programs like Excel adding quotation marks to your file – it causes errors.
- Any existing Alma reading lists won't have section names or descriptions which results in 'Section name n/a' and 'Section description n/a' showing in the Leganto view. You either have to manually edit them in Leganto or in bulk via the API.