

Leganto Course Rollover

USC currently manually create the file to load via the course integration profile, we have used the course loader to:

- Create new courses without rollover
- Rollover existing lists (this creates a new course and reading list)
- Update courses with:
 - participant numbers
 - submit by date
 - instructors

Course loader integration profile Settings:

Field	Setting	Comment/Description
Active	Active	Although this is set as active - new courses will always be inactive even if the start date for the course is today's date or earlier. The courses will activate overnight if the Activate/Deactivate Courses job is scheduled to run.
Delete associated reading lists when deleting a course	Selected	This will delete and purge the reading list regardless of the Leganto Customer Setting delete_reading_list setting which is only applicable when deleting the reading list rather than the course.
When deleting associated reading lists, delete copyright records	Unselected	Preserve copyright information
Add instructor role to users	Selected	This is just a backup as we also have an Automatic Role Assignment Rule to add the instructor role to our faculty staff. There was a Leganto Customer setting called auto_add_instructor_role but it's now disappeared?? I presume it was there as indicated in documentation
Date format	dd/MM/yyyy	Had in my notes that date works best as dd/mm/yyyy although I didn't record why.

Field	Setting	Comment/Description
Overwrite Options <ul style="list-style-type: none"> • Overwrite Instructors • Overwrite number of participant • Overwrite title • Overwrite academic department • Overwrite term • Overwrite start date • Overwrite end date • Overwrite weekly hours • Overwrite year 	Leave values unselected and select the options to be updated manually	Values populated in the spreadsheet must be consistent with selections.
On rollover set instructors as owners	Not visible	<p>This does not appear as an option on the integration profile if the Leganto Customer Setting auto_set_instructors_as_owners is set to <i>true</i></p> <p>We have set this to true so we don't have to manually update reading lists with owners.</p>
On rollover delete existing reading lists	Unselected	Reading lists need to remain for a set period as per USC policy.
On rollover copy citation tags	Selected	This saves considerable time for the instructor if the citation tags are copied on rollover. We don't use section tags.
On rollover copy section tags	Selected	
On rollover citation statuses	Being Prepared	Instructors must "Send to Library" for each new reading list then the status will change to Ready for Processing. Filters on citation status facilitate workflow
On rollover reading list statuses	Being Prepared	When Instructors "Send to Library" the reading list status changes to "Ready for Processing". Filters on reading list status facilitate workflow
On rollover reading list publication statuses	Draft	We require instructors to send the list then we publish.
On rollover copy copyright approvals	None	Haven't tested the other options available on this setting. Prefer instructors to check new reading lists and will process each reading list and copyright request as they are sent to library. First in, first served.
On rollover copy public note	Selected	

Field	Setting	Comment/Description
On rollover copy private note	Selected	This saves considerable time for the instructor if the notes are copied on rollover.
On rollover copy student discussion	Unselected	
On rollover copy reading list owners	Selected	
On rollover copy reading list collaborators	Selected	
On rollover, existing permalinks will point to the new list once the list is published	Unselected	Whether existing permalinks should point to the new list (once it is published) or remain pointing to the old list. This is a new option, haven't explored this yet.
On rollover:	Keep course instructors	
On rollover visibility of old reading list	Course Students	Consistent with publishing (always course students) *We did consider Archive however this doesn't work with our list accessibility requirements.
Schedule	Not Scheduled	USC run the integration profile manually

Spreadsheet – tips (we found this when we first started things may have changed since then)

- Must be txt (tab delimited) - csv does not read
- Cannot rollover a reading list if the course already exists. The file is not processed even though job results may indicate updates etc are processed. Refer to SF case 00610450
- Many row values must be in capitals e.g. (Operation) ROLLOVER
- Currently issues with Campus data - If updating campus data the system adds the campus again, SF case 00592189.
- If considering multiple course association to one reading list, course rollover is not yet supported. (October release notes)

Rollover and New – examples of spreadsheets loaded

Process	Fields populated	Comment
Rollover	Column A - CODE Column B - COURSE_TITLE Column D – ACAD_DEPT Column E – PROC_DEPT = COURSE Column F – TERM1 Column J – START_DATE Column K – END_DATE	Reading list names are manually changed to reflect the new name as the rollover copies the name of the rolled over reading list and adds a (1) Reading lists that have citations with digitisations are copied over. Our system is configured to Manage Digital

	<p>Column N – YEAR Column AC - OPEARTION = ROLLOVER Column AD – OLD_COURSE_CODE Column AF – SUBMIT_BY_DATE</p>	<p>Representations, therefore library staff must select the corresponding digital file/s for each citation.</p>
New lists	<p>Column A - CODE Column B - COURSE_TITLE Column D – ACAD_DEPT Column E – PROC_DEPT = COURSE Column F – TERM1 Column J – START_DATE Column K – END_DATE Column N – YEAR Column AF – SUBMIT_BY_DATE</p>	<p>Year and Term are used in many reports Submit by date is populated for all lists so a notification to instructors is triggered. Start and end dates default on digitisation requests which impacts copyright.</p>

Updating examples of spreadsheets loaded

Process	Fields populated	Comment
Update number of participants	<p>Column A - CODE Column B - COURSE_TITLE Column L - NUM_OF_PARTICIPANTS Column AC - OPEARTION = UPDATE</p>	<p>Participant numbers up to date for reporting purposes. If using Operation this must be in capitals.</p>
Update instructors	<p>Column A - CODE Column B - COURSE_TITLE Column R – INSTR1 (primary ID) Column AC - OPEARTION = UPDATE</p>	<p>Instructor override on the course does not override the instructor on the associated reading list</p>
Update Submit by Date	<p>Column A - CODE Column B - COURSE_TITLE Column AC - OPEARTION = UPDATE Column AF – SUBMIT_BY_DATE ensure format is consistent with Date format in integration profile</p>	<p>Submit by Date is one of the notifications we send to instructors and from what we can gather the only way of informing instructors that their reading list has been created.</p>