Liaison Assistant Reading List Workflows

TRIAGE AND QUALITY CHECKING USING LEGANTO AND ALMA

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# Reading lists: Liaison Assistant workflows

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1. Introduction

Liaison Assistants are likely to be involved, at any given time, in every part of the reading list workflow in the university library. The Liaison Assistant has a supportive role, and can assist with the processing of lists when required, provide training to colleagues and respond to resource queries which may arise from library staff and academics. They are also responsible for reporting to the Liaison Librarians about any issues that may arise.

The main responsibilities include:

- Development and updating reading list training materials, e.g. manuals, library guide, FAQs
- Main point of contact for the Reading List Editors wider team from both Customer Services and Technical Services
- Supporting reading list training for academic staff where required
- Planning and organising the regular (monthly/termly) ‘housekeeping’ tasks required as part of the reading list workflow, e.g. requesting/producing reports for untagged citations, long lists, etc.
- Quality checking completed reading lists in Leganto
- Planning and participating in the reading list ‘triage’ work on a daily/weekly basis
- Responding to reading list queries from academics and colleagues in Technical Services and Customer Services

2. Supervising the reading list team

The library reading list editors team consists of staff from Customer Services who work across site in the Philip Robinson, Marjorie Robinson and Law Library. Staff in the Walton Medical Library have their own system of processing reading lists but are part of the editors team and participate in meetings, etc.

As Customer Services Staff all have different levels of experience in using Leganto and working with reading lists it is important that they have support in place to answer any questions/concerns and to give them updates on any new releases and system changes. As part of the triage rota, Liaison Assistants should also be carrying out (random) quality checks to ensure that lists are being dealt with correctly and efficiently. This will also feed into any staff training needs.

Other duties may include:

- Checking Library Help tickets are picked up correctly/in the correct order
- Checking tickets not claimed for too long (Liaison Assistants have admin rights so can ‘unclaim tickets’ where required
- Ensuring Ref Analytics is being used for recording time

3. Triage work

Triage involves overseeing the reading list workflow. Liaison Assistants work on a weekly rota, which is published on the Google calendar in the Reading List Workflows library guide here: https://libguides.ncl.ac.uk/rlworkflows/home
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All staff who are involved with the reading list workflow can see the calendar so they can identify who to contact if they have any queries. They should contact both staff with queries if the triage duties are being shared.

3.1 Reading List Quality Checks

As part of the reading list workflow, it is necessary for a quality check to be carried out on any new or updated lists, which are either sent via email, or added directly to Leganto by academic staff. Liaison Assistants carry out the ‘triage’ process as part of their weekly rota. See Section 3.1 (pages 4-6) in the Library Help Workflow Manual for the detailed procedures. The main duties involved in the quality checks are as follows:

- In Library Help, claiming new reading list tickets, checking the information sent by academics, responding to any queries
- Opening attached reading lists to check that essential/recommended/background sections or categories are included
- Reply to academic to ask for more information if required
- Check that all ‘question actions’ fields are completed for the ticket in Library Help to include ‘Owning School’, ‘Semester’, ‘Teaching location’, ‘Module name’ and ‘Module leader’ and ‘Number of students’— see screenshot below
  *Please note – the number of students important as this is used by Technical Services for ordering. For new modules it is important to get an estimate of the number from lecturer if not then we use 20 as default.

- Add any notes/instructions for staff who will be processing the list.
4
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- When checks are completed, and the list is ready for processing, add ‘RL to do’ tag in Library Help. There is a macro in Library Help which adds these tags and sends the email to the lecturer to advise them that the list is being processed.

![Figure 2: Tagging Library Help tickets](image1)

- Unclaim the Library Help ticket and submit the ticket back to the Reading Lists queue

![Figure 3: Releasing ticket to reading list queue](image2)
3.1.1. Quality checks for Law School reading lists

Lists that are submitted for processing from the Law School are dealt with in Library Help. The same quality checks are done as with lists from other schools, however only books, book chapters and journal articles are added to Leganto.

When the lists are processed in Leganto by Customer Services staff they are not be published immediately but stay in ‘draft’ format and the Library Help ticket reassigned to the Law Team for final checks (see page 10 of the Library Help Workflow Manual and Appendix 3 of the Leganto Manual).

This is so that staff from the Law Library can do detailed searching for articles found in legal databases such as Westlaw and Lexis. Some of these cannot currently be found by searching within Leganto.

To do initial checks on Law School lists, follow the same procedures as outlined in 3.1. above, however please highlight the sources to be added to Leganto rather than deleting the rest of the content of the document.

When recording time in Ref Analytics please insert ‘LAW’ in the Internal note field, see screenshot below.

![Figure 4: Ref analytics recording for law](image)

Note: Some Law School modules will have two reading lists associated with it. One will be the readings that students will see before they start the programme (Book list). The other will be the ‘Handout’ list, which will be referred to during the programme (see screenshot below). Most of the reading lists that we will deal with in Library Help will be the Handouts. The team in the Law Library usually check and publish the Book Lists over the summer.
3.2. Working on the Task List in ALMA
The task list in ALMA highlights reading lists (and citations within the lists) that require an additional ‘quality check’ before they can be saved and published. This includes the following scenarios:

- Academic staff have submitted a reading list by uploading a document in Leganto (this option is being disabled)
- Academic staff have changed/amended citations on an existing list in Leganto
- Academic staff have created a reading list in Leganto and have published it so students can see it but it needs checking by the Library
  Reasons could be:
  - Incorrect bibliographic information
  - Illegal PDFs uploaded to the list
  - Incorrect module (course) code which doesn’t match to one of Newcastle’s
- A reading list has been created and the resource has not been located in some/all of the citations
- An item has been added to Leganto and an incorrect URL has been included, e.g. Amazon or Blackwell’s where the resource is not located
- Checking whether additional copies are required (in some instances)

There may be other reasons why a list is displayed in the Task List. However, it is important that checks be done to ensure that it is in the correct format in order to be published.

3.2.1 Viewing the Task List in Alma
Please note that this section gives you an overview of the ALMA side of the reading list, however, most of the work in the scenarios above can be completed by accessing the list in ALMA then viewing the list in Leganto to complete the checks and publish the list.

Login to ALMA [http://library.ncl.ac.uk/login/alma](http://library.ncl.ac.uk/login/alma) with your team’s account

1. From the Task List in ALMA at the top right of the screen select tasks requiring your attention:

![Figure 5: Task list in ALMA](image-url)
2. Go to ‘Reading List- Unassigned – ready for processing’.

![Figure 6: Lists ready for processing](image)

3. Click on the “All” tab.

![Figure 7: Reading list task list](image)

In order to work on a list for the first time, you need to consider whether someone else is assigned or working it on already. See the ‘Assignee’ column. **Please note** that until 2019/20 academic year anyone who picked up the list in Alma would become the ‘Assignee’. This could be someone from TS, CS or Liaison. (However, the automatic assign is now switched off so should not apply from 2019/20)
You can also filter the list by using the ‘Facets’ menu on the left side.
So, for example, if you want to focus on recently created lists, or
lists recently modified, you can do this.

The module code in the ‘Code’ column will identify the Reading List from the Task List (it is useful to sort by system number code then alphabetically by module code. The latest 2019/20 lists just have system number — see screenshot below. There is no need to change this to the module code as it is hidden from public view.

You can also use the button to the right of the screen to manage the list. Here you can ‘View’ or ‘Work On’ the list.
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Figure 11: Working on a list in ALMA

Opening an entry by clicking on it in the code column. This gives you details of which citations are included, see screenshot below. **Please note;** only open a list that you are tasked to work on. E.g., Walton library currently processes its own lists.

Figure 12: Viewing a reading list in the task list

The reading list in ALMA is listed alphabetic order by citation title and will indicate who it was created by and who last modified it. You can often identify citations that need checking because they have the module tutor’s name next to ‘Created By’ or ‘Modified By’. In the screenshot above you can see that the citation was created and last modified by a Library Assistant.
3.2.2. Receiving lists from academics via the Task List in Alma

Working on lists where the academic has added the citations, published, and sent to Library:

Follow steps 1 to 4 shown above to access the module via the task list.

1. Open Stephen’s workflow chart (see Appendix 1 flowchart 3) and work with these further instructions relating to the checking and processing of material received

2. You should be in a module list and see the citations, as in Figure 5 shown above. From the menu bar, filter the Citation Status:

3. The default is status “ready for processing” please see unassigned ready for processing snip examples below

4. Select all
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Click on the module code to view the list and its associated citations. From here you can select ‘View list in Leganto’ to complete your checks and update the list. See page 14.

Figure 15: View in Leganto function

1. From those citations CHECK:
   i) If already in stock: check if there sufficient stock levels using Stephen’s stock calculator (https://internal.ncl.ac.uk/library/reading-lists-stock-calculator/) Liaison Assistants/Customer Services - order additional copies if required, remember to check for new editions. (Current practice as of 31/7/19)
   ii) If not in stock: check if there is a newer edition of the book (unless a particular edition has been specified by the academic). Use the ‘Cite It’ button to provide bib details on the reading list (remember to check material type and 13 digit ISBN, also to take out publisher link for Blackwells or Amazon)). This will alert Acquisitions from their daily reports that orders will need to be placed and when the books come into stock the link will appear on ALMA/Leganto. Acquisitions staff have details of ratios/fund codes in order to make adequate provision.
   iii) If the citation is for a chapter of a book (in stock or title not held and only chapter required) add “Requires CLA scanning’ tag to the citation.
   iv) If citation is for journal article: ensure we have a subscription to the journal and check to see if the link is correct.
   v) If we do not subscribe to the journal, ensure that it is held by the BL and tag the item ‘Requires CLA scanning’.
   vi) The Scanning Team in CS will be alerted to scan requests from their daily reports.
   vii) See process for “No Resources Located’ status on page 12, which is also part of the quality checks done in the task list.
   viii) Check for any illegally uploaded scans. You will need to search for legal versions of these and edit the citation to include the link to the correct source. If not in the current library holdings it may be necessary to request a CLA scan or go back to the lecturer for more information.

2. Remember to remove Liaison/Library ownership from the reading list before saving. The list should only include the academic owners if it has been completed.
3. Once all the relevant checks have been completed and sent orders/scan requests tag have been placed, select relevant citations or select all and change the status to
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‘Complete’ using the ‘Change Status’ link on the menu bar: (Note that you can also do this in Leganto)

4. When all the citations are in a status of ‘Complete’, using the drop-down menu in the status box in the ‘Reading List Information’ section near the top of the page:

5. Remember to SAVE all changes to the list by clicking the blue ‘Save’ button at the top of the page:
6. The list will now be removed from the ‘Ready for processing’ list in ALMA.  
*Note: this can now also be done in Leganto
Select “edit” then “complete” from the drop down list in reading list status.

![Image: Changing the list status to Complete in Leganto]

*Figure 20: Changing the list status to Complete in Leganto*
3.3. Working on Task List items in Leganto

It is also possible to work on the task list from the Leganto side. Many of the checks for the scenarios mentioned above and highlighted below can be worked on from this side. When you have identified a list from the task list, click on ‘View in Leganto’.

![Figure 21: Moving to Leganto from ALMA](image1)

![Figure 22: Leganto view](image2)
The advantages of working on the list from the Leganto side are:

- The list is easier to manage and more user friendly as appears as student would see (citations not listed alphabetically as in ALMA)
- You can check the availability/links as the student would see the list
- You can check whether the citations are in a status of ‘complete’ or ‘sent’ (see below)
- You can also mark the citation as complete if the links are working correctly.
- Use Leganto when resource locate hasn’t worked in ALMA version e.g. if e and print version is on separate records or if ISBN for print version of not in stock item added with the cite it tool for Blackwells and Acquisitions ordered e-book.

![Figure 23: Complete and sent articles](image)

In the example above, the first article is complete and the link goes to the correct article so no action is required.

The second article has a status of ‘sent’ and the link goes to the correct article, so this can be marked as ‘complete’ by clicking on ‘Set complete’ using the button next to the citation (see screenshot below).

![Figure 24: Set complete in Leganto](image)

It is important that the quality check is done from the Leganto side as well as from the ALMA side of the system.

The priority should be ensuring that students can see and link through to the correct resource from their reading list.
4. Filtering Citation Tags

When working on citations in Alma, it is possible to specify which tag is attached. For example, when working on extra copies.

4.1. Checking ‘Extra Copies Required’ in Alma

(For PRL see separate instructions for Law and Walton).

There is currently no procedure in place for automatic ordering of additional copies. This checking is done separately in Alma following the instructions below.

How to filter Citations for checking/ordering titles tagged “Extra Copies Required”

1. Login to ALMA using shared HASS or SAgE Account
2. Select citations from menu at the top left (from ‘Fulfilment’ – ‘Course reserves’ in menu)

![Figure 25: Working on citations function from ALMA](image)

3. Using the ‘Facets’ filtering on the left hand side, under ‘Citation Tags’, select “Extra Copies Required” (you may need to select + more)

![Figure 26: Extra copies required tag in ALMA](image)
4. From the list of citations, check the course code of the first item e.g. The economics of contracts: a primer (sometimes there are several citations listed for the course).

Select “more information” if showing in the citation, this information identifies any other courses that the title appears on, remember to select active courses. You may of also noticed a sign showing demand. You can look at the modules showing in active courses and check category of reading, semester running and number of students in order to help with extra copy ordering.

Duplicate the browser tab (right click over the edit citations tab at the top) and in the browser you just opened in Alma, under ‘Fulfillment’ on the menu, select courses (or you may already have courses in your favourites).
You now have two tabs in your browser to work from.

5. Look up the course code for the citation listed e.g. NBS8559 in ALMA and select the reading list and click ‘View in Leganto’.

Figure 29: New browser

Figure 30: Linking to Leganto to work on additional copies ordering
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Figure 31: Working on citations in Leganto

Note: When you select the link you can see our holdings, however you will also need to check for any recent e-book orders in ALMA before sending to lib-buy@ncl.ac.uk

Figure 32: Checking holdings in Leganto

Tip: In ALMA you can select order lines and title to check for any recent orders sent.

Figure 33: Checking for orders in ALMA
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When placing orders use ordering criteria (number of copies guide) and mapping module code listing (fund and reporting code) as below.

G:\Resource Management\Acquisitions\Leganto Information - LIM - Liaison\Acquisitions - Leganto Ordering Criteria.docx

G:\Resource Management\Acquisitions\Leganto Information - LIM - Liaison\Acquisitions - Leganto Mapping Module Code Listing.xlsx

4.2. Checking ‘Refer to Notes’ tags in Alma

(For PRL only, please see separate instructions for Law and Walton)

When working on citations in Alma, it is possible to specify which tag is attached. In addition to “Extra Copies Required” (see separate instructions) or those “Requires a CLA scan” (scanning team look after these). You can also specify “Refer to Notes” and “Acquisition Query” tags which TS staff use for queries in their ordering procedure from the report generated from Leganto citations with no bib record attached.

How to filter Citations for checking/ordering titles tagged “Refer to Notes”

1. Login to ALMA using shared HASS or SAgE Account
2. Select citations from menu at the top left (from ‘Fulfilment’ – ‘Course reserves’ in menu)

![Figure 34: Working on citations function in ALMA](image)

Using the ‘Facets’ filtering on the left hand side, under ‘Citation Tags’, select “Refer to Notes”

![Figure 35: Refer to notes tag in ALMA](image)
You can check the reading list for notes and any comments added to the citation by selecting edit next to the citation.

Then select notes.

Any notes added will display.

Or
From the list of citations, check the course code covered by PRL stock i.e. not Walton or Law module codes at present, sometimes there are several citations listed for the course.

You are looking for created by and modified by this will identify the person/team who created the citation and the member of staff in TS who has added the tag.

**Figure 39: Checking for refer to notes tag in ALMA**

You can check the notes field in the Course Code ALMA for any comments, though usually you can get more information by making a note of who created note and modified by dates and go to: `G:\Resource Management\Acquisitions\Leganto Daily Order Listing` and either go to current file or the archive depending on the date. You may need to look at a few archived files in order to find the correct reference and note.

**Figure 40: Accessing the refer to notes spreadsheets in T drive**

When you have located the citation on the acquisitions report the note (Acquisitions Action) will inform you for example if a duplicate order (DUP) or if found in stock e.g. IS, P & E.
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Figure 41: Refer to notes spreadsheet

In ALMA look up course code and work on in ALMA. Look up citation and then use resource locate this will then find the record if match found and the citation will show as complete.

Figure 42: Resource Locate in ALMA
However, if a match not found it could be because a print ISBN was used in the “cite it tool” when creating citation and the e-book has just been ordered or both print and e-book have been ordered and resource locate doesn’t know which to use as on separate records. In this case you will need to locate citation in Leganto and add record (sometimes easier to delete original record with refer to notes on as there is a better record now available e.g. e and p on same record). Add the correct record to Leganto ensure tag for e.g. Recommended is added and make complete then delete original record with refer to notes on. If for some reason the link to holdings as instructions above for refer to notes is available when you first look at the citation and everything is ok then just remove the “refer to notes” tag.
4.3. Checking ‘Acquisitions Query’ tags in Alma
(For PRL only, please see separate instructions for Law and Walton)

Check the notes field in the Course Code ALMA for any comments and follow the same instructions as in ‘Refer to notes’ (section 4.2. but use the Facet filter to click on ‘Acquisitions Query’.

For “Acquisition Query” tag this time when you locate in the daily order listing it is likely that the delay in ordering is due to query being raised due to price of print/ e-book over limit of £150 and total order of £750 which required follow up with Liaison staff.

Sometimes you might see that the citation links to holdings and just needs tag removing if all ok. If the citation is incomplete still, then try “resource locate” or if not found or unable to locate e.g. citation has been brought over from Blackwell’s with “cite it tool” for example ISBN is print though e-book ordered. Follow instructions “Refer to Notes” as above for looking up citation again in Leganto to add as e-book record. Remember to add category, make citation complete and remove print incomplete citation and “Acquisitions Query” tag if all now resolved.

If order has not yet been placed then check with relevant Liaison Librarian/ Liaison Assistant to find out what is happening.

Please do not remove any notes in the ALMA record that TS staff have added.
4.4. Other tags to be aware of

These are being reviewed as part of the reading list project in 2019/20.

- Unable to obtain tags - not currently being utilised but may be picked up at a later date by Technical Services
- Not Yet Published tag – currently the Liaison team are picking up items with this tag.
- Transfer to STC tag – Margaret Roxborough and some of CS staff look after and organise retrieving material and transferring.

For a full list of tags (Alma), ordering criteria and notes that are dealt with by Technical Services please see the following folder on T:

T:\Resource Management\Acquisitions\Leganto Information - LIM - Liaison
5. Other checks carried out in the Task List

5.1. No Resources Located

Adding items to Leganto allows staff to search for resources using the ‘Cite it!’ button. Although this is an efficient way to upload bibliographical information, there may be instances where the information is incomplete. In some cases, the citation in Alma will show as ‘No Resources Located’. Often there will be a record including a URL link to the journal or webpage.

You can filter the reading list in Alma to show only citations with the ‘Resource Locate Status’ as ‘No Resources Located’. This is done by changing the status on the ‘Resource Locate’ button. See screenshot below.

![Figure 45: No Resources Located](image1)

Within these citations you can then use the ‘More Actions’ button on the right hand side to try and locate the correct resource.

![Figure 46: Using the 'Resource Locate' function](image2)

If located correctly, you will see a message advising you that the resource has been located and the status will change to ‘Resource Located’.
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5.2. Locating Resources in Leganto

Click on ‘Check availability’

Check that the link works and directs you to the correct resource

Click on ‘Set Complete’

The status should update as shown below
5.3. Blackwell’s URL added in error in Leganto (The screen shot is from ALMA and working in Leganto? – to show both sides?)

When adding items to Leganto using the ‘Cite it!’ button, the system will find the bibliographic record of a book. In some instances, it pulls in the URL from Blackwell’s or Amazon website in error. These items will show up in the task list with a ‘No Resources Located’ status. To deal with these, click on the ‘Edit’ button next to the citation. Scroll down and remove the URL. Then click on the blue ‘Save’ button at the top of the page.

Figure 50: Removing the publisher’s URL

5.4. List created by Academic uploading a single attachment
(This function has been disabled so will no longer apply for 2019/20):

Leganto allows academic staff to upload and edit their own reading lists for checking by the library. In some cases, rather than add items to Leganto directly, they may upload a document to Leganto. This may result in an error in the module number shown in the ‘Code’ column. See below.

Figure 51: Reading lists with attachments

It is important that these be processed correctly via Library Help. To do this:

- Under ‘Citations’, click on ‘Other’ where you should be able to locate the file.
**Figure 52: Downloading an attachment**

- Download the file, delete it from the list and complete the form ([https://libhelp.ncl.ac.uk/friendly.php?slug=readinglists](https://libhelp.ncl.ac.uk/friendly.php?slug=readinglists)) and upload the file on behalf of the academic.

The Reading list will now be processed via the normal Library Help Queue.

- Mark the reading list in Alma as ‘Completed’ and save it to remove it from the task list.

Remember after working on any citations in the task list, to follow steps 7 & 8 on page 9/10 above in order to complete the list.
6. TASK LIST: Scenarios/workflow

Scenario 1:

- Start with first code
- Select code – check if these match (if system no., add the course code)
- Check who has created/modified citations
- View in Leganto
- How many items in process? If there are items in process, you can’t filter from the Leganto side, go back to list in ALMA & filter using citation status (ready for processing)
- Using the title go back to Leganto and search for it (e.g. Scan digitisation approved, mark citation as complete)
- Citations tagged
- Citations complete
- Go to Edit and make list complete
- Refresh screen – all items should now show as complete and the list is finished with.
- It will now not show on the task list as needing attention.

Scenario 2:

- List produced and sent by academic
- Tip: In ALMA the contributor’s name will appear in the list of citations under ‘Created by’
- Check for sufficient copies
- Check for illegal uploading of scans
7. Technical Support

If you identify any issues or problems with Leganto, please alert your supervisor by phone/email.

They can then report any technical issues or problems with Leganto or ALMA to the Digital Library Services team by submitting a library staff support ticket via the desktop icon. Alternatively, you can email the DLS team at lib-web@ncl.ac.uk

When you receive confirmation of your ticket submission, please share this with colleagues on the reading list team so they are aware that the issue has been reported.

Email: lib-readinglists@newcastle.ac.uk
Appendix 1: Flow chart 1 – Triaging the Library Help queue

Reading Lists Queue
in LibAnswers

Hyperlink

For ‘New’ tickets
Perform quick quality check

Passed?

YES

NO

Prepare ticket for processing by
Customer Services staff

Reply to the academic with your
query

Record time in Ref
Analytics

RL Queue: https://libhelp.ncl.ac.uk/admin/home?m=queue&quid[]=2187&lasource=0&status=-1&claimed[]=1&qname=&qemail=
Appendix 2: Flow chart 3 – Receiving lists from academics via the Task List in Alma

1. Academic adds citations to new/existing list in Leganto
2. Publish
3. SEND LIST
4. Academic

- Click on the ‘All’ tab
- Open a Reading List from the task list
- Citation Status filter: “Ready for Processing”

- Outstanding Reading List tasks “Ready for Processing”
- Login to Alma using shared dedicated account

- Citation: do “stuff” eg. checking/ordering
- Was the list created by academic uploading a single attachment?

- Set Complete (citation)
- Change Reading List status to “Complete”

- Download the file, delete it from the list and complete the form on behalf of the academic.
- End of process. Will be processed via normal Library Help queue.

- Record time in Ref Analytics

Rota’d Liaison Librarian