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## Reading List Migration Tool (English)

Ex Libris can run an internal reading list migration tool to upload reading list data in bulk.

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### Note

If you are a customer migrating from Talis Aspire, please contact your project manager for more information about the Talis Aspire migration tool.

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The data to upload must be in an Excel file (.xls or .xlsx) with the following format. You can view a sample file [here](#).

- The excel file must contain a single sheet.
- Each citation must be on one row of the sheet.
- A header row is mandatory and skipped.
- **All citations within a section must be grouped together as consecutive lines in the sheet.** Similarly, all sections within a reading list must be grouped together, and all reading lists within a course must be grouped together.

As each line from the same reading list is read, it is stored in memory. When a new reading list is detected, the reading list is created and all lines in memory are added to the list.

- Fields (all fields are strings, unless noted; permitted values are case sensitive):

The fields **course\_code**, **section\_id**, **reading\_list\_code**, **reading\_list\_name**, **reading\_list\_description**, **reading\_list\_status**, and **owner\_user\_name** uniquely define a reading list. As lines are processed, if any of these are different from the previous line, a new reading list is assumed. If a line would create a new reading list that contains the same **reading\_list\_code** as an already existing reading list, the line is ignored.

For example, if you have two lines where the **reading\_list\_codes** are the same but the **reading\_list\_names** are different, the second line represents a new reading list, but it contains the same code as an existing reading list, so the line is skipped. If you have two lines where the **reading\_list\_codes** are different but the **reading\_list\_names** are the same, the second line represents a new reading list with a different code (both reading lists have the same name).

- **course\_code** – An existing course code within Alma. If not supplied or the code cannot be found, the reading list is not associated with a course. Courses cannot be created using this tool.
- **section\_id** – Section ID of the course. Relevant only for a course defined in Alma.
- **searchable\_id\_1** – Alternate ID that may be associated to a course.
- **searchable\_id\_2**
- **searchable\_id\_3**
- **reading\_list\_code** (mandatory) – The reading list code. Max 50 characters.
- **reading\_list\_name** (mandatory)
- **reading\_list\_description**
- **reading\_list\_subject** – Reading list subject codes, separated by commas. Invalid subject codes are ignored. Subjects are listed in Editing a Reading List in the Alma documentation. Subject codes are the subject names in capital letters, with spaces replace with underscores (for example, **ECONOMIC\_THEORY**).

- **reading\_list\_status** (mandatory) – The reading list status: **BeingPrepared, ReadyForProcessing, BeingProcessed, Complete, Inactive, or Declined**. A valid status is required. Note that custom statuses defined by the institution are supported for this field.
- **RLStatus** – The reading list publication status: **DRAFT** (default), **ARCHIVED, PUBLISHED**.
- **visibility** – The reading list's visibility status:
  - **DRAFT** – If **RLStatus** is **DRAFT**, set this to **DRAFT** as well.
  - **RESTRICTED** – Only course students can view the list and access the course materials.
  - **PUBLIC** – All authenticated Leganto users can view the list but only course students can access restricted course materials.
  - **REGISTERED** – All authenticated Leganto users can view the list and access any restricted course materials.
  - **OPEN\_TO\_WORLD** – Anyone, including guest users, can view the list, but only course students can access any restricted course materials.
  - **PARTIAL** – Anyone, including guest users, can view the list, but only authenticated Leganto users can access any restricted course materials.
  - **FULL** – Anyone, including guest users, can view the list and access all course materials.
- **reading\_list\_assigned\_to** – The user ID of the librarian to which the list is assigned.
- **reading\_list\_library\_note** – You can add one note of type **Library** for the reading list. You can not add multiple notes at this time.
- **reading\_list\_instructor\_note** – You can add one note of type **Instructor** for the reading list. You can not add multiple notes at this time.
- **owner\_user\_name** – The reading list owners, separated by commas; any valid Alma user identifiers defined for your institution are permitted. All IDs must exist in Alma; if they do not exist, they are ignored.
- **creative\_commons** – The creative commons code for the entire reading list, if any. See [Configuring the Default Creative Commons Value for a Reading List](#) for possible statuses.

The fields **section\_name**, **section\_description**, **section\_start\_date**, and **section\_end\_date** uniquely define a section. As lines are processed, if any of these are different from the previous line, a new section is assumed. There can be multiple sections with the same name.

- **section\_name** (mandatory)
- **section\_description**
- **section\_start\_date** (dd-mm-yyyy) – If the format is not correct, null is assumed.
- **section\_end\_date** (dd-mm-yyyy) – If the format is not correct, null is assumed.
- **section\_tags** – A comma-separated list of tags for the section. A tag that does not exist is ignored.

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#### Note

You must ensure that the end date is after the start date. The tool does not validate this. If the end date is before the start date, this may cause some display issues in Leganto.

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- **citation\_secondary\_type** (mandatory) – The citation's material type. One of:
  - ABSTRACT
  - ANTHOLOGY
  - AR – audio recording

- ARCHIVE
- AW – artwork
- BK – book. BK is the default, and is used for an empty or invalid value.
- BK\_C – book chapter
- BL – blog
- CASE
- CASE\_STUDY
- CD
- CONFERENCE – conference series, proceedings, or paper
- CP – computer program
- CR – journal or article
- DATABASE
- DISSERTATION
- DO – document
- DVD
- E\_BK – e-book
- E\_CR – e-article
- EOFFPRINT
- GOVERNMENT\_DOCUMENT
- GRANT
- IM – image
- INTERVIEW
- JR – journal
- LEGAL\_DOCUMENT
- LEGISLATION
- LETTER
- LIB\_GUIDES
- MANUSCRIPTS
- MP – map
- MU – music
- NEWSPAPER\_ARTICLE
- NOTE – Citations of this type are added by instructors in Leganto. They are used to provide information to the students who are viewing the reading list, and do not need to be fulfilled by the library staff.
- NP – newspaper
- OTHER
- PAMPHLET
- PATENT
- POEM

- PRESENTATION
  - REFERENCE\_ENTRY
  - RESEARCH\_DATASET
  - REVIEW
  - SCORE
  - SERIES
  - STANDARDS
  - STATISTICAL\_DATA\_SET
  - TEC\_REP – technical report
  - TEXT\_RESOURCE
  - TH – thesis
  - TR – transcript
  - VD – video
  - WORK\_PAPER – working paper
  - WS – website
- **citation\_status** (mandatory) – The citation status: **BeingPrepared, ReadyForProcessing, BeingProcessed, Complete, Inactive, or Declined**. A valid status is required. Note that custom statuses defined by the institution are supported for this field.
  - **citation\_tags** – A comma-separated list of Citation Tag(s) code(s) (public or fulfillment) as defined in the configuration area. Invalid tags are ignored. The citation tag's code is required.
  - **citation\_mms\_id** – The MMS ID.
  - **citation\_originating\_system\_id** – Used for tracking and to enable resource locate matching with the relevant bibliographic record's originating system id.
  - **citation\_title** (mandatory) – There can be multiple citations with the same name. For an article, use this for the article name and **citation\_journal\_title** for the journal name. For a journal, use this for the journal name and leave **citation\_journal\_title** empty. For a book chapter, use this for the book name and **citation\_chapter\_title** for the book chapter name.
  - **citation\_journal\_title** – The journal name for an article citation.
  - **citation\_author** – Citation author. The field is read as a single string, including any commas (multiple authors are not parsed).
  - **citation\_publication\_date**
  - **citation\_edition**
  - **citation\_isbn** – If an ISBN/ISSN is not provided, a thumbnail does not appear in Leganto.
  - **citation\_issn** – For a journal. If an ISBN/ISSN is not provided, a thumbnail does not appear in Leganto.
  - **citation\_place\_of\_publication**
  - **citation\_publisher**
  - **citation\_volume**
  - **citation\_issue** – The citation issue number or code.
  - **citation\_pages** – The page range of the citation.
  - **citation\_start\_page**

- **citation\_end\_page**
- **citation\_doi** – The citation digital object identifier: just the ID and not the URL.
- **citation\_oclc** – The citation OCLC number (or any system control number).
- **citation\_lccn** – The citation LCCN number.
- **citation\_chapter** – The citation chapter number. Relevant for book chapters.
- **citation\_chapter\_title** – The citation chapter title. Relevant for book chapters.
- **citation\_chapter\_author** – The citation chapter author. Relevant for book chapters.
- **citation\_editor**
- **citation\_source** – The citation data source: MARC21 field 786 or 590, or any URL link to the source or full text of the citation.
- **citation\_source1** – Any additional source.
- **citation\_source2**
- **citation\_source3**
- **citation\_source4**
- **citation\_source5**
- **citation\_source6**
- **citation\_source7**
- **citation\_source8**
- **citation\_source9**
- **citation\_source10**
- **citation\_note** – A note about the citation. This note appears to the instructor in Leganto and to the student on the citation page.
- **additional\_person\_name** – Additional authors and/or contributors.
- **file\_name** – Optionally upload a file for the citation. Files to upload must reside in a folder called **files** placed in the same directory as this file. If there is a problem reading/uploading the file, the process will continue and only this citation will fail.

Name	Ext	Size	Changed	Rights	Owner
files			02-Jul-20 17:50:09	rw-rw-rw-	urm
rl_loader_uu_v2July2020	.xlsx	404 KiB	02-Jul-20 21:44:06	rw-r--r--	urm

- **citation\_public\_note** – A note displayed to students in Leganto on the reading list page.
- **license\_type** – A license type for the citation, if any: **SELFDECLARED** for a self-declared copyright, or a creative commons code if any. See [Configuring the Default Creative Commons Value for a Reading List](#) for possible statuses.
- **citation\_instructor\_note** – You can add one note of type **Instructor** for citation. You can not add multiple notes at this time.
- **citation\_library\_note** – You can add one note of type **Library** for the citation. You can not add multiple notes at this time.
- **external\_system\_id** – Optionally used for transferring a CCC license. Value must be `CCC_<license number>_<funded|nonfunded>`, where `<license number>` is the CCC license key. Example: `CCC_70193668_funded`. If the rest of the citation metadata is present (including start and end page), Alma maps

a valid CCC license to the citation. The copyright license status is **Requires Renewal**. Renew the license manually in the UI or by running the license renewal job.

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**Note**

Add a blank space to this field, rather than leaving it empty, to ensure that you do not get an invalid line size for the row.

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