The University of Edinburgh

The Leganto-Rialto workflow: The key to streamlining the purchase of course materials

THE UNIVERSITY of EDINBURGH

With the Leganto and Rialto implementation, the University of Edinburgh library has increased its efficiency in managing resource lists and acquisitions and has strengthened interdepartmental collaboration.

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>
> Angela Laurins, Library Learning Services Manager

About University of Edinburgh

A member of the elite Russell Group of universities, the University of Edinburgh is a world-leading center of academic excellence. With a history dating back to 1583, it is one of the UK's oldest universities and Scotland's largest. Edinburgh's graduates have been awarded Nobel prizes, won Olympic medals, traveled into space, and written some of the world's most-read books. Among former students are naturalist Charles Darwin, philosopher David Hume, and Prime Minister Gordon Brown. Innovations linked to Edinburgh include the tuberculosis vaccine, and Dolly the Sheep, the world's first cloned mammal.

Edinburgh provides a high-quality learning and teaching environment for almost 27,000 undergraduates, more than 12,900 taught postgraduates, and 5,845 research postgraduates. The library's holdings consist of over 3.8 million books, e books, and e journals, with print resources housed in the purposebuilt eight-story Main Library building at George Square.

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The University of Edinburgh has been using the Ex Libris Leganto® course resource list solution since 2017. The workflow for processing course resource lists was set at that time and has worked well for the various teams using the solution: the Library Learning Services team, which reviews lists and flags citations for other teams to work on; the High Use Books team, which places books on short-term loan; the E-reserve team, which provides copyright-compliant scans; and the Acquisitions team, which manages book and e-book purchases and negotiations for key materials.

In 2019, the University of Edinburgh joined a global group of development partners to work with ProQuest on the Rialto™ academic marketplace, which offers libraries a range of acquisition models. Because course resource needs make up a great part of the acquisition requests, the team of development partners directed much of its attention to the integrated Leganto-Rialto workflow.

Communicating with Academics

The university library leverages the Leganto solution to determine what resources are required for courses and the extent to which the library collection supports the resource requirements. "As a one-stop shop with a single point of entry for library collection services, Leganto saves time," explains Library Learning Services Manager Angela Laurins at the University of Edinburgh library. "Academic staff members no longer have to send multiple emails and complete a variety of forms to request teaching materials." Although there is still no formal mandate requiring the use of Leganto, it is the Library's preferred route for making requests, and the teaching staff is strongly encouraged to take this route.

"As soon as we implemented Leganto," adds Laurins, "we began using it to manage informed purchases of materials for teaching, with our integrated, cross-team workflow seamlessly handling requests. To understand which resources the library needs to acquire for courses, the librarians can view the required materials alongside holdings information—a true time-saver!"

When learning moved online in 2020 because of the COVID-19 pandemic, the power of the Leganto solution as an acquisition tool became even more evident. Executing a strategy to make more e-resources available, the Library Learning Services team managed over 12,000 requests via Leganto during the 2020-2021 academic year.

The academic staff creates resource lists that include all types of materials, and the Leganto solution automatically checks resources in the library collection. The Library Learning Services team under Laurins has streamlined the workflow between the library and the academic staff by asking academics to tag resource list citations with the resource's priority (essential, recommended, or further reading and to highlight if a digitization or purchase is required (again using tags and adding notes via Leganto's Library discussion.. The librarians review the reading list in the Ex Libris Alma® interface (the Alma platform is the infrastructure on which the Leganto solution is built   and identifies candidates for digitization or purchase. Once the Library Learning Services team has reviewed the resource lists, relevant resources are pushed through to the Acquisitions team for purchasing or the E-reserve team for providing copyright-compliant scans. Although the library relies on the Copyright Licensing Agency's Digital Content Store (CLA DCS) to manage scans, digitization requests are first processed as acquisition requests to accommodate the library's policy of e-book first.

"The option to filter the citations by reading-list tags is incredibly useful when you are working through lists that are sometimes hundreds of items long," says Laurins. "You can really focus on those citations that you need to take action on. In addition, all the metadata has been pulled through automatically by Leganto, so we don't have to edit anything there."
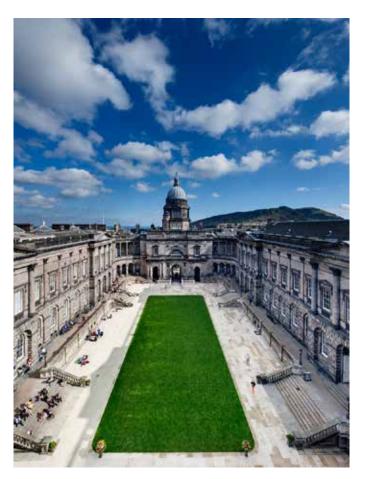
Innovating with Rialto

University of Edinburgh Content Acquisition & Access Manager Elize Rowan led the team that collaborated with ProQuest and Ex Libris developers as part of the Rialto development partnership. "It made sense for us to be a development partner, given that ProQuest is our main supplier of both print materials and e-books," comments Rowan. "We knew that our acquisition workflow had a number of pain points, and anything that was going to deliver some relief from the inefficiencies was worth our time."

Once the university went live with the Rialto solution, in early 2020, the library worked to refine the flow of information between the Leganto and Rialto services. The outcome was a significant decrease in costs related to staff hours in the acquisition workflow and time to acquisition.

Today the entire acquisition workflow takes place on the Ex Libris higher-ed platform. When the Acquisitions

team receives an order, the library staff sees both the Rialto marketplace and the library's own holdings, with background information from the purchase request (including information from the reading list) available in a pop-out panel. After the purchase is executed through the Rialto service, the faculty member who made the request is automatically updated.

The Ex Libris Leganto course resource list solution affords libraries a greater role in teaching and learning and streamlines the workflows between the academic staff and librarians.

The innovative ProQuest Rialto academic marketplace provides a single, integrated experience enabling libraries to make evidence-based, data-driven selection and acquisition decisions.

The Power of a Unified System

In the past, the Library Learning Services team occasionally struggled to discover the status of an order, but now Rialto notifies the team when an order is confirmed. An alert tab on the reading list screen shows when the purchase request was submitted. "And even more useful," Laurins says, "I can see whether the request was rejected or approved. As someone who doesn't have access to the acquisition end of things, I find it incredibly helpful to be able to view the outcome of my requests. Of course, once the purchase request is complete, the e-book is automatically activated and becomes available to students in the Leganto interface."

Elize Rowan notes that the new workflow has cut the time that it takes to place an order in half—from 11 minutes to about five or six minutes. "Using Rialto as part of our purchase request fulfillment has delivered multiple efficiencies," she explains. "The single intuitive interface enables us to search the marketplace, see what is already

in our holdings, and follow through to place an order, all on one screen. Rialto has been a great time saver by automating many of these processes and minimizing the number of keystrokes they require."

Since the pandemic-mandated shift to online teaching and learning, the University of Edinburgh, like most academic institutions, has focused on providing as much online content as possible. "We committed to checking e-book availability for all resources that the staff marked as essential or recommended," says Rowan. "We also—for the first time—proactively identified essential-tagged book chapters for digitization and checked for e-book availability before providing a scan." Clearly, cutting the processing time in half has had a significant impact on the handling of the 12,000 requests submitted via the Leganto solution, each of which is individually processed by the Acquisitions team.

About Rialto

Rialto serves as a comprehensive selection and acquisition tool, helping over 500 libraries manage their collections more efficiently. When it comes to purchasing ebooks, we know choice is essential. With Rialto, your library can search, select, and order from more than 20 leading publisher and aggregator platforms within a single, easy-to-use marketplace. Rialto eliminates the need to purchase separately from individual platforms to simplify invoicing and

other workflows.
Rialto is expanding to support informed fulfillment powered by analytics and AI, with a holistic approach that incorporates resource sharing networks and open access. It is also evolving to include collection analysis workflows that help libraries better understand and develop their collections. For mor information, visit our Rialto webpage.