

# Using LibInsight to Build an Application to Review and Grade Hein Greenslips

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SWALL CONFERENCE | NORMAN, OK | MARCH 2025

ROBERT LINZ | UNIVERSITY OF OKLAHOMA LAW LIBRARY



# Collection Development Resource

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## PROCESS

### Evaluate

Collection need according to policy

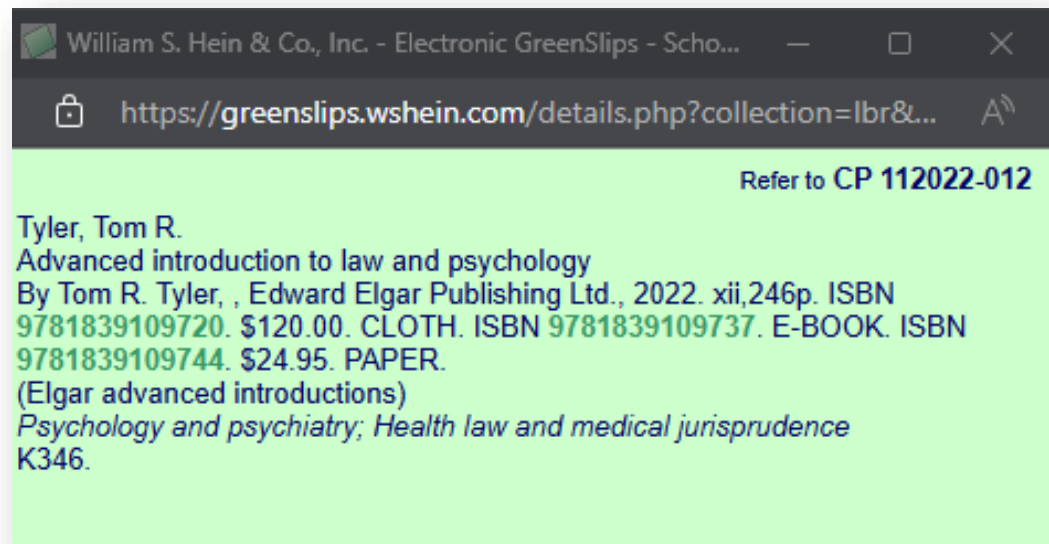
Price

Subject matter

Item Type

Share Recommendations

## A HEIN GREENSLIP



William S. Hein & Co., Inc. - Electronic GreenSlips - Scho... — □ ×

https://greenslips.wshein.com/details.php?collection=lbr&... A

Refer to CP 112022-012

Tyler, Tom R.  
Advanced introduction to law and psychology  
By Tom R. Tyler, , Edward Elgar Publishing Ltd., 2022. xii,246p. ISBN 9781839109720. \$120.00. CLOTH. ISBN 9781839109737. E-BOOK. ISBN 9781839109744. \$24.95. PAPER.  
(Elgar advanced introductions)  
*Psychology and psychiatry; Health law and medical jurisprudence*  
K346.

# Project Goals

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Main Goal - Enable librarians to review and grade Hein Greenslips electronically

Secondary Goals –

- Reporting
- Tracking

# Presentation Goals

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By the end of this presentation, you will be able to

- Understand how the process works
- Become familiar how to create it in your own libraries

# Tools You'll Need

## Hein Greenslips Subscription

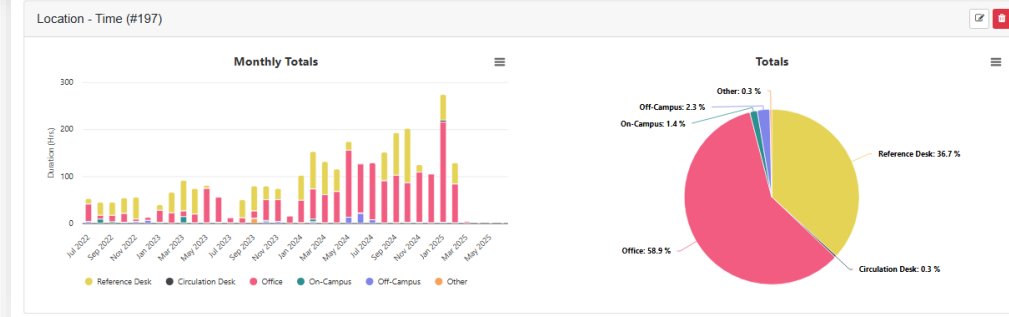
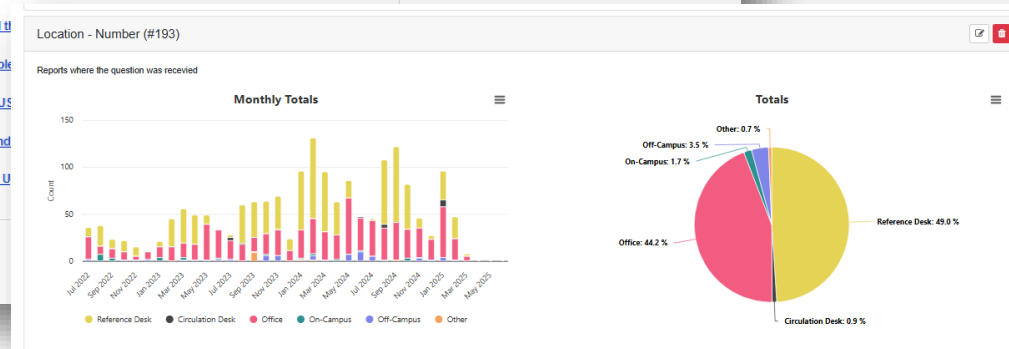
## LibInsight Subscription

- Part of LibGuides Family
- Spring Share Product
- Track and report on usage of library services (i.e., reference questions, circulation activity, ILL, doc del request, etc.)

## Microsoft Excel

The screenshot shows the LibInsight dashboard for user Robert. The top navigation bar includes Home, Datasets, Dashboards, Record Data, Analyze, Cross Dataset, Admin, and Help. The main content area is divided into several sections:

- Home:** Greeting "Hello, Robert!" and a welcome message: "Welcome to LibInsight. You are an Admin User in this system and have access to all the system operations."
- Announcements:** A banner for "LIBMAPS: Wayfinding, Not Wandering" with a compass icon and the text "More Webinars Added! March 13 & 26".
- Getting Started:** A section with instructions on how to get the system set up, including links for "Configure the system settings", "Create accounts", "Set up your SUSHI providers", and "Set up your account preferences". It also includes a "Dismiss" button and a "Dismiss Permanently" button.
- At-a-Glance:** A summary of system statistics: 54 of Unlimited Datasets, 138,561 Records (approx.), 32 Dashboards, 22 Widgets & APIs, 148 Accounts, 0 Shared Datasets, 0 SUSHI Providers, and 36 Friendly URLs. A "View All Datasets" link is provided.
- Shortcuts:** A section with various quick links: "All Datasets: View All or Create New or Update Existing Datasets", "Record Data to: Select Dataset", "Analyze Data in: Select Dataset", "Dashboards: Create shareable Public and Private Dashboards", "Cross-Dataset Analysis: Compare multiple Datasets with each other", "Shared Datasets: Admin -> See who shared it", "Widgets & APIs: Admin -> Create embeddable", "SUSHI Providers: Admin -> Manage your SUSHI Providers", "Friendly URLs: Admin -> View all your Friendly URLs", and "Manage Accounts: Admin -> Create New or Update Existing Accounts".
- Training Calendar:** A calendar view for March 2025 showing dates from 3 to 31. Below the calendar, there is a list of "Upcoming Events" including "LibGuides: Become a Power User" (1:00pm - 1:40pm, Tue Mar 11th 2025), "Best Practices for Chatbot" (9:00am - 9:40am, Wed Mar 12th 2025), "Build a Survey: Understanding Patron Preferences with LibWizard" (2:00pm - 2:40pm, Thu Mar 13th 2025), "LibGuides Basics: Building Your First LibGuide - Side Nav" (2:00pm - 3:00pm, Tue Mar 18th 2025), and "Creating Accessible Content in LibGuides".



# Creating a LibInsight Dataset

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## HEIN'S GREENSLIPS FIELDS

TITLE	SUBJECT	PUBLISHER
AUTHOR	CALL NUMBER	PUBDATE
TYPE	JURISDICTION	
ISBN1	MEDIA1	PRICE1
ISBN2	MEDIA2	PRICE2
ISBN3	MEDIA3	PRICE3
ISBN4	MEDIA4	PRICE4

## LIBRARY'S DATA FIELDS

DATEIMPORT	LAWHOLD	UNIVHOLD
AMAZON	OCLC	UNIVCAT
IMPORTBATCH	CP	OTHERLAW
PRIOR EDS	PURCH_PRICE	STATUS
GRADE_LIB1	GRADE_LIB2	GRADE_LIB3
GRADE_LIB4	GRADE_LIB5	GRADE_LIB6
COPIESOWNED	NOTES	

\* indicates Required field

Left Column

Center Column

Right Column

PUBLISHER DATA (Text Block)  

Pubs (Divider Line)  

Timestamp (DateTime) (System Fields)  
DateImport (Start Date)

Import\_Batch (Single Select)  

CP (Text) \*  

AUTHOR (Text)  

TITLE (Text)  

PUBLISHER (Text)  

PUB DATE (Text)  

MEDIA (Text)  

PRICE (Monetary)  

ISBN (Text)  

MEDIA2 (Text)  

PRICE2 (Monetary)  

ISBN2 (Text)  



MEDIA3 (Text)  



PRICE3 (Monetary)  



ISBN3 (Text)  



Media4 (Text)  



Price4 (Monetary)  



LIBRARY DATA (Text Block)  



Library (Divider Line)  



TYPE (Text)  



SUBJECT (Multi Select)  



JURISDICTION (Text)  



CALL NUMBER (Text)  



Alma Holdings (Text)  



OCLC (Text)  



OU Law Hold (Single Select)  



Bizzell Hold (Single Select)  



Prior Eds (Text)  



Copies Owned (Text)  



Circs (Numeric)  



Other Law (Text)  



Amazon (Text)  



REVIEW DATA (Text Block)  



REVIEW (Divider Line)  



Purchase Price (Monetary)  



STATUS (Single Select)  



Notes (Text)  



Grade\_TS (Single Select)  



Grade\_Dir (Single Select)  

Grade\_AD (Single Select)  

Grade\_Lib1 (Single Select)  

Grade\_Lib2 (Single Select)  

Grade\_Lib3 (Single Select)  

Grade\_Lib4 (Single Select)  


Libinsight [Home](#) [Datasets](#) [Dashboards](#) [Record Data](#) [Analyze](#) [Cross Dataset](#) [Admin](#) [Help](#) robert.linz@ou.edu [Logout](#)

Home / Manage Datasets / Edit Dataset #33164 - Law - Hein Greenslips

### Edit Dataset #33164 - Law - Hein Greenslips


Edit your dataset in just a few clicks. To go back to previous screen(s), click on the arrow tabs below.

[1. Select Dataset Type](#)
[2. Describe Dataset](#)
[3. Define Permissions](#)
[4. Setup Fields](#)

Add New or Edit Existing Fields 

Create as many fields as needed and for each field, customize the field type and field properties. Field Type can only be changed if the dataset is empty.

All fields default to the Left Column position. You can arrange the fields in any of the 3 columns by dragging them to their desired column position or order. To use a one column layout, drag all fields in the left column, or for two column layout drag fields in left and center column. Make sure to click the **Save Changes** button after you are finished creating or updating the fields, or updating your Form Settings.

Edit Form Settings 

PUBLISHER DATA

Import\_Batch

CP \*

AUTHOR

TITLE

PUBLISHER

PUB DATE

MEDIA

PRICE

ISBN

MEDIA2

PRICE2

ISBN2

MEDIA3

PRICE3

ISBN3

Media4

Price4

LIBRARY DATA

TYPE

SUBJECT

JURISDICTION

CALL NUMBER

Alma Holdings

OCLC

OU Law Hold  Both  
 Electronic  
 None  
 Print

Bizzell Hold  Both  
 Electronic  
 None  
 Print

Prior Eds

Copies Owned

Circs

Other Law

REVIEW DATA

Purchase Price  [?](#)

STATUS

Notes

Grade\_TS

Notes

Grade\_Dir

Notes

Grade\_AD

Notes

Grade\_Lib1

Notes

Grade\_Lib2

Notes

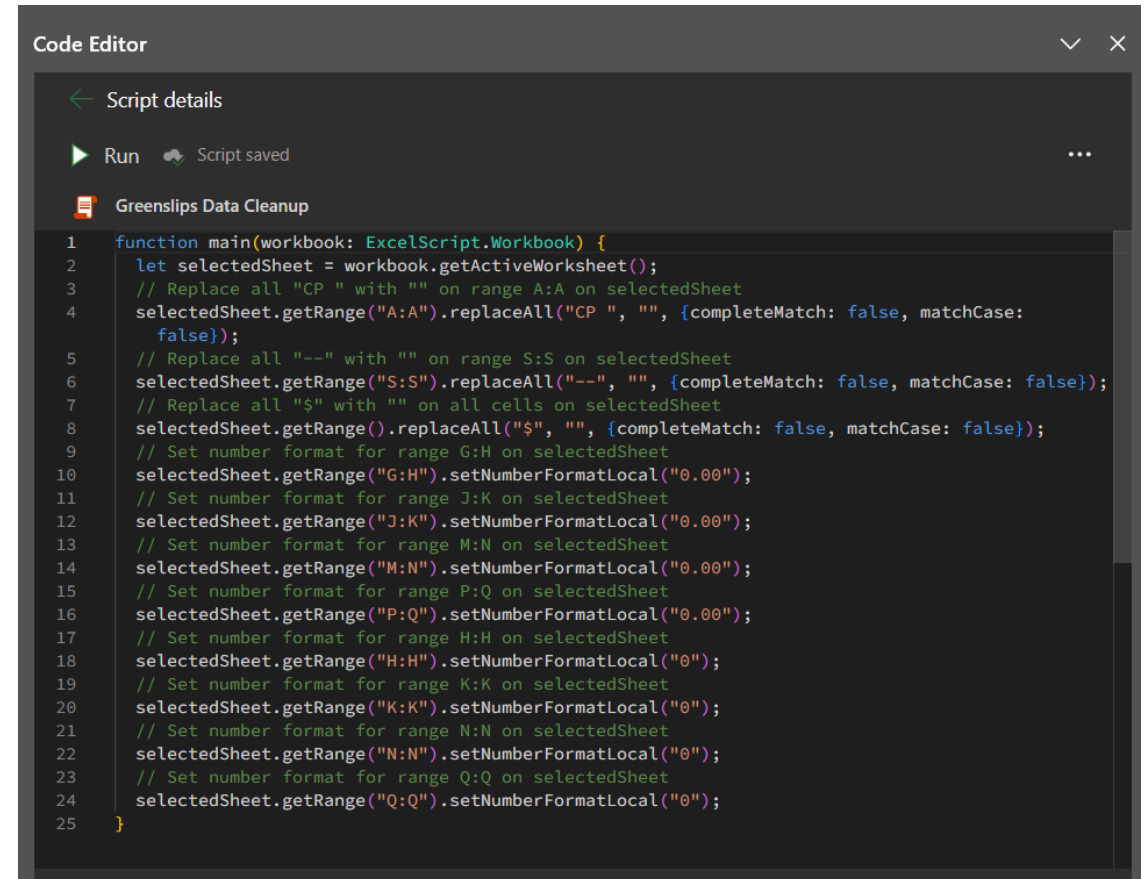
Grade\_Lib3

# Preparing Excel Data Files

## First File – Imports Hein Dataset and Preps It

### Creating a Script to Clean up the Hein Dataset

- What needs to be done
  - Converting text fields into number fields
  - Prepares it for use in LibInsight
- Easy to Create ...
  - Records your mouse and keystroke movements
  - Creates code
  - Save as an Automated script

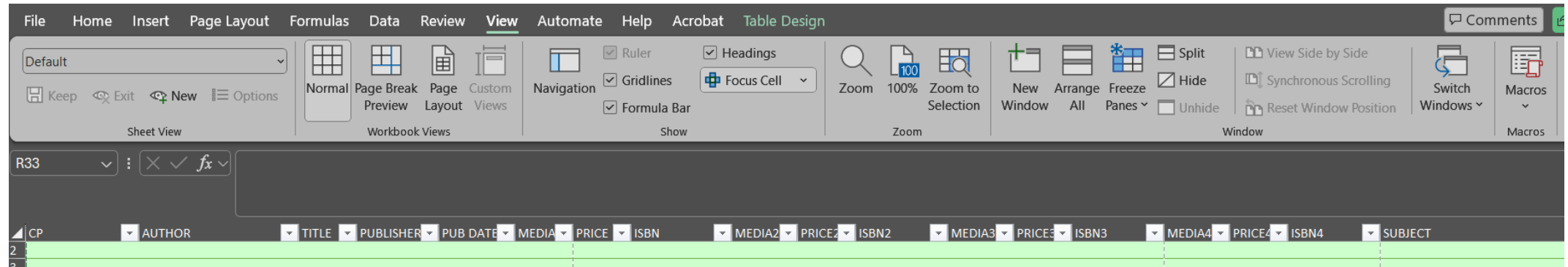


```
Code Editor
Script details
Run Script saved
Greenslips Data Cleanup
1 function main(workbook: ExcelScript.Workbook) {
2   let selectedSheet = workbook.getActiveWorksheet();
3   // Replace all "CP " with "" on range A:A on selectedSheet
4   selectedSheet.getRange("A:A").replaceAll("CP ", "", {completeMatch: false, matchCase:
5     false});
6   // Replace all "--" with "" on range S:S on selectedSheet
7   selectedSheet.getRange("S:S").replaceAll("--", "", {completeMatch: false, matchCase: false});
8   // Replace all "$" with "" on all cells on selectedSheet
9   selectedSheet.getRange().replaceAll("$", "", {completeMatch: false, matchCase: false});
10  // Set number format for range G:H on selectedSheet
11  selectedSheet.getRange("G:H").setNumberFormatLocal("0.00");
12  // Set number format for range J:K on selectedSheet
13  selectedSheet.getRange("J:K").setNumberFormatLocal("0.00");
14  // Set number format for range M:N on selectedSheet
15  selectedSheet.getRange("M:N").setNumberFormatLocal("0.00");
16  // Set number format for range P:Q on selectedSheet
17  selectedSheet.getRange("P:Q").setNumberFormatLocal("0.00");
18  // Set number format for range H:H on selectedSheet
19  selectedSheet.getRange("H:H").setNumberFormatLocal("0");
20  // Set number format for range K:K on selectedSheet
21  selectedSheet.getRange("K:K").setNumberFormatLocal("0");
22  // Set number format for range N:N on selectedSheet
23  selectedSheet.getRange("N:N").setNumberFormatLocal("0");
24  // Set number format for range Q:Q on selectedSheet
25  selectedSheet.getRange("Q:Q").setNumberFormatLocal("0");
}
```

# Preparing Excel Data Files

## Second File - Creating an Excel file with all data fields

- Add fields to spreadsheet and set data types
- After creating and testing the file, PROTECT THE WORKBOOK and set to READ ONLY so you don't overwrite the settings



S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG
JURISDICTION	TYPE	CALL NUMBER	NOTES	DateImport	OCLC	Amazon	Alma Holdings	Bizzell Hold	Circs	STATUS	Grade_AD	Grade_Dir	Grade_Lib1	Grade_Lib2
					NA	NA	NA			Imported				

AH	AI	AJ	AK	AL	AM	AN	AO	AP
Grade_Lib3	Grade_TS	Grade_Lib	Prior Eds	Copies Ov	OU Law Hold	Purchase Price	Import_Batch	Other L

# Preparing Excel Data Files

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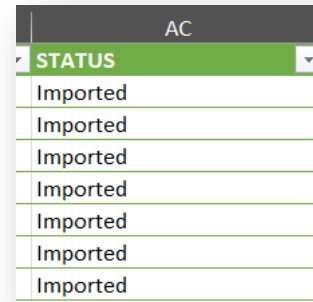
## Calculated Fields

- To create these, run the search in the system, copy the search string, and create variable for the OCLC number. You'll copy-n-paste that data from another field in your spreadsheet you downloaded from Hein.
- Creating an OCLC link based on the ISBN number of a title
  - `=IF(ISBLANK(H2),"NA", CONCAT("https://www.worldcat.org/search?q=bn%3A",H2))`
  - This formula adds the OCLC number provided in the Hein dataset to the end of URL string (i.e., found in field H2)
- Creating a search of our local law library catalog (Alma)
  - `=IF(ISBLANK(H2),"NA", CONCATENATE("https://ou-primo.hosted.exlibrisgroup.com/primo-explore/search?query=isbn,contains,",H2,",AND&tab=default_tab&search_scope=default_scope&vid=OUNEW&lang=en_US&mode=advanced&offset=0"))`
  - Again, creating a URL adding the ISBN number to a custom search in our catalog
- Creating an Amazon link
  - `=IF(ISBLANK(H5),"NA", CONCAT("https://www.amazon.com/s?i=stripbooks&rh=p_66%3A",H5))`

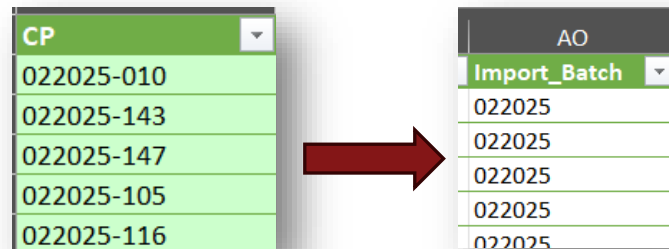
# Preparing Excel Data Files

## Calculated Fields

- Default value for the Status field to IMPORTED
  - Enter the text into that field
- Create the Import Batch data
  - This will simplify your finding (and deleting, if necessary) all of the data for a particular month.
  - Enter this formula into that field ... `=LEFT([@CP],6)`
    - This locates the CP field data (imported from Hein) and truncates to the first six characters in the text string
    - 022025-10 becomes 022025



A screenshot of an Excel table with a dropdown menu for the STATUS field. The table has a header row with the text 'AC'. The dropdown menu is open, showing the word 'STATUS' at the top, followed by a list of 'Imported' entries.



A diagram showing the transformation of CP field data into Import Batch data. On the left, a table with a header 'CP' shows five rows of data: '022025-010', '022025-143', '022025-147', '022025-105', and '022025-116'. A red arrow points to the right, where a table with a header 'AO' shows the same five rows of data, but the first six characters of each string have been truncated, resulting in '022025', '022025', '022025', '022025', and '022025'. The 'AO' table has a dropdown menu for the 'Import\_Batch' field.

# Processing Records

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# Step 1

## Downloading the Data

Login into your Hein Greenslips account and download the slips.

1. Logon

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# Step 1

## Downloading the Data

Login into your Hein Greenslips account and download the slips.

1. Logon
2. Select the data you want to download

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**Electronic GreenSlips**

HOME CONTACT US SOURCES HeinOnline

GREENSLIPS SEARCH ACCOUNT MANAGEMENT ABOUT LOGOUT

**SEARCH** [ Hide Search Table ]

ISBN:  Subjects: Accounting  
Administrative law  
Admiralty and maritime law  
Use Ctrl or drag with your mouse to select multiple.

Title:  Jurisdiction: [ All Jurisdictions ] (2005 Titles & Later Only)

Author:  Type: [ All Types ] (2005 Titles & Later Only)

Publisher:  Pub/Copy Date: - to -

Description:  Greenslips Date: February 2025 to February 2025

Sort By: Title Ascending  (NEW)

Search Argument Relation: AND

CLEAR SEARCH

SAVE SEARCH VIEW SELECTED SAVE SELECTED PRINT SELECTED EMAIL SELECTED DOWNLOAD

SELECT ALL SEARCH RESULTS (Showing: 1 - 150 of 150)

# Step 1

## Downloading the Data

Login into your Hein Greenslips account and download the slips.

1. Logon
2. Select the data you want to download
3. Review the results, select the records, and download the dataset

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**Electronic GreenSlips**

HOME CONTACT US SOURCES HeinOnline

GREENSLIPS SEARCH ACCOUNT MANAGEMENT ABOUT LOGOUT

**SEARCH** [ Hide Search Table ]

ISBN:  Subjects: Accounting  
Administrative law  
Admiralty and maritime law  
Use Ctrl or drag with your mouse to select multiple.

Title:  Jurisdiction: [ All Jurisdictions ] (2005 Titles & Later Only)

Author:  Type: [ All Types ] (2005 Titles & Later Only)

Publisher:  Pub/Copy Date: - to -

Description:  Greenslips Date: February 2025 to February 2025

Search Argument Relation: AND

Sort By: Title Ascending  NEW

CLEAR SEARCH

SAVE SEARCH VIEW SELECTED SAVE SELECTED PRINT SELECTED EMAIL SELECTED DOWNLOAD

**SELECT ALL** SEARCH RESULTS (Showing: 1 - 150 of 150)

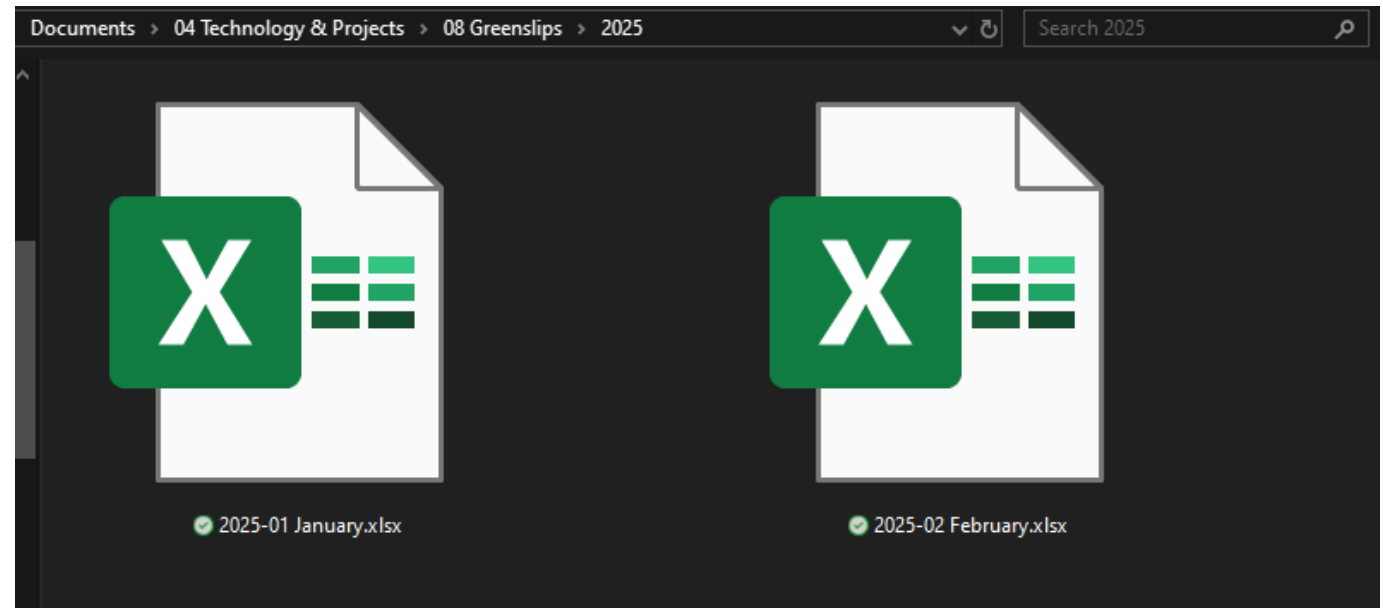
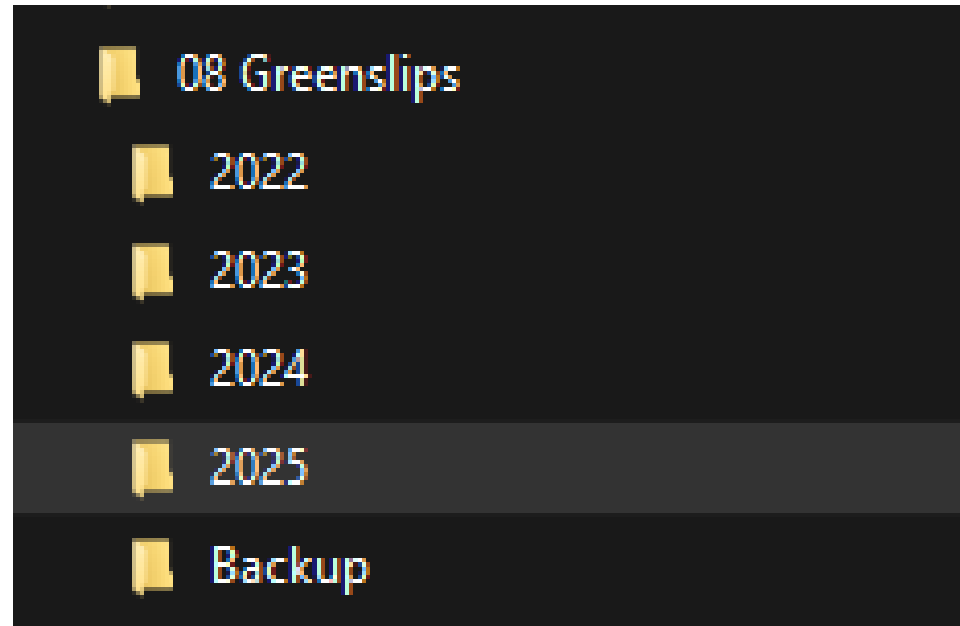
<input checked="" type="checkbox"/>	The 'Pillar Two' global minimum tax CP 022025-010 Author: Edited By Werner Haslehner Publisher: Cheltenham, Edward Elgar Publishing Ltd. ISBN: 9781035308736 Media: CLOTH Subjects: Business enterprises; Taxation; International law Pub. Date: 2024 Price: \$239.00
<input checked="" type="checkbox"/>	Advanced introduction to evidence CP 022025-143 Author: By Richard D. Friedman Publisher: Cheltenham, Edward Elgar Publishing Ltd. ISBN: 9781802201802 Media: CLOTH Subject: Evidence Jurisdiction: United States Pub. Date: 2024 Price: \$120.00
<input checked="" type="checkbox"/>	Animals as crime victims CP 022025-147 Author: Edited By Lacey Levitt et al. Publisher: Cheltenham, Edward Elgar Publishing Ltd. ISBN: 9781802209877 Media: CLOTH Subjects: Animal law; Criminal law and procedure Pub. Date: 2024 Price: \$165.00
<input checked="" type="checkbox"/>	Annual proceedings of the Fordham Competition Law Institute: international antitrust law and policy CP 022025-105

# Step 1

## Downloading the Data

Login into your Hein Greenslips account and download the slips.

1. Logon
2. Select the data you want to download
3. Review the results, select the records, and download the dataset
4. Transfer the file to a Greenslips folder and rename it, if necessary



# Step 2 Preparing the File

Using Excel, the file is cleaned and additional columns are added for OCLC and Library Catalog records, tracking the status of the slips and capturing review feedback.

1. Open the file you downloaded from Hein and use the Automate menu to run the cleanup script.

CP	AUTHOR	TITLE	PUBLISHER	PUB DATE	MEDIA	PRICE	ISBN	MEDIA	PRICE	ISBN	MEDIA	PRICE	ISBN	MEDIA	PRICE	ISBN	MEDIA	PRICE	ISBN	SUBJECT	JURISDICTION	TYPE	ALL NUMB	NOTES
CP 022025	Edited by The Pillar	Edward El	2024	CLOTH	\$239.00	9.78E+12	CLOTH	\$239.00	9.78E+12	CLOTH	\$239.00	9.78E+12								Business enterprise Monogra			K4550.	
CP 022025	By Richarc	Advanced Edward El	2024	CLOTH	\$120.00	9.78E+12	PAPER	\$24.95	9.78E+12	PAPER	\$24.95	9.78E+12								Evidence -- United Monogra			KF8935.	

CP	AUTHOR	TITLE	PUBLISHER	PUB DATE	MEDIA	PRICE	ISBN	MEDIA	PRICE	ISBN	MEDIA	PRICE	ISBN	MEDIA	PRICE	ISBN	MEDIA	PRICE	ISBN	SUBJECT	JURISDICTION	TYPE	ALL NUMB	NOTES
022025-01	Edited by The Pillar	Edward El	2024	CLOTH	239.00	9781035308736	CLOTH	239.00	9781035308736	CLOTH	239.00	9781035308736								Business enterpr				
022025-14	By Richarc	Advanced Edward El	2024	CLOTH	120.00	9781802201802	PAPER	24.95	9781802201826	PAPER	24.95	9781802201826								Evidence -- Unit				

# Step 2 Preparing the File

Using Excel, the file is cleaned and additional columns are added for OCLC and Library Catalog records, tracking the status of the slips and capturing review feedback.

1. Open the file you downloaded from Hein and use the Automate menu to run the cleanup script.
2. Now copy the data into the Excel spreadsheet containing the additional data columns.

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Electronic GreenSlips

CP	AUTHOR	TITLE	PUBLISHER	PUB DATE	MEDIA	PRICE	ISBN	MEDIA	PRICE
022025-01	Edited by The	'Pillar Edward El	2024	CLOTH	239.00	9781035308736	CLOTH	239.00	
022025-14	By Richarc	Advanced Edward El	2024	CLOTH	120.00	9781802201802	PAPER	24.95	
022025-14	Edited by Animals a	Edward El	2024	CLOTH	165.00	9781802209877	CLOTH	165.00	
022025-10	Edited by Annual pr	Juris Publi	2024	CLOTH	220.00	9781578235667	CLOTH	220.00	
022025-11	Edited by Arbitratio	Brill Nijho	2024	CLOTH	219.00	9789004694903	CLOTH	219.00	
022025-11	By Edwarc	Artificial i Wolters K	2024	CLOTH	125.00	9789403509877	CLOTH	125.00	
022025-02	By R.I.R.	A Aviation s Ethics Inte	2024	CLOTH	99.95	9781804416020	CLOTH	99.95	
022025-04	By Francin	Beyond cc University	2024	CLOTH	85.00	9780520394230	PAPER	29.95	978
022025-08	By Megan	Beyond th Carolina A	2024	PAPER	35.00	9781531027131	PAPER	35.00	
022025-12	Edited by Biodiversi	Springer N	2024	CLOTH	179.99	9783031562174	CLOTH	179.99	
022025-11	By Sonja v	Biolegalit Palgrave N	2024	CLOTH	119.99	9789819987481	CLOTH	119.99	
022025-06	Edited by Board-sha	Cambridg	2024	CLOTH	170.00	9781009360760	PAPER		
022025-02	Edited by Building b	Palgrave N	2024	CLOTH	59.99	9783031527906	CLOTH	59.99	
022025-05	By Rachel	Business c Global Lav	2024	PAPER	225.00	9781837230341	PAPER	225.00	
022025-04	By Julie D.	Business f Carolina A	2023	PAPER	40.00	9781531019969	PAPER	40.00	
022025-09	Edited by The Camb	Cambridg	2024	CLOTH	190.00	9781316517406	CLOTH	190.00	
022025-04	Edited by The Camb	Cambridg	2024	CLOTH	210.00	9781108843089	CLOTH	210.00	
022025-06	By Hendri A	century Oxford Ur	2024	CLOTH	145.00	9780192855503	CLOTH	145.00	
022025-01	By Jianyu	Chinese c Routledge	2024	CLOTH	180.00	9781032719788	PAPER		
022025-01	By Jianyu	Chinese c Routledge	2024	CLOTH	180.00	9781032719818	PAPER		
022025-01	By Jianyu	Chinese c Routledge	2024	CLOTH	180.00	9781032719849	PAPER		
022025-13	By Martin	Combatin Edward El	2024	CLOTH	155.00	9781032719832	CLOTH	155.00	
022025-08	By Katheri	The comm Edward El	2024	CLOTH	120.00	9781032719851	CLOTH	120.00	
022025-02	Edited by A compar	Springer S	2024	CLOTH	179.99	9781032719815	CLOTH	179.99	
022025-07	By Chae-h	The const Hart Publi	2024	CLOTH	115.00	9781032719885	PAPER	40.95	

U	V	W	X	Y	Z	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO		
CALL NUMBER	NOTES	DateImprt	OCLC	Amazon	Alma Holdings	Bizzell	Circs	STATU	Grade_AD	Grade_Dir	Grade_Lib1	Grade_Lib2	Grade_Lib3	Grade_TS	Grade_Lib	Prior Eds	Copies Ov	OU Law Hold	Purchase Price	Import_Batch	
Business enterprises, Tax Monographs			K4550.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported													022025	
Evidence -- United Monographs			KF8935.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Animal law; Criminal law Monographs			K3620.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Trade regulation; Internal Proceedings of			K3859.A6.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Conflict of laws; Internati Monographs			K2400.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Science and technology Monographs			K564.C6.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Air and space law Monographs			K4100.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Criminal law ani -- United Monographs			KF9479.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Legal research a -- United Study Aids			K94.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Comparative anc -- Europe Monographs			K3488.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Jurisprudence Monographs			K328.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Business enterprises, Pra Monographs			K1328.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Environmental law; Nativi Monographs			K3585.5.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Legal profession; Women Monographs			K118.W6.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Business enterprises Textbook			KF1355.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
International la -- China Monographs			K24376.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Comparative and foreign l Monographs			K559.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Legal history; Internation Monographs			K26385.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Comparative anc -- China Monographs			KNQ1710.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Comparative anc -- China Monographs			KNQ1710.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025
Comparative anc -- China Monographs			KNQ1710.	https://www.amaz	https://ou-primo.hosted.exlibrisgrou	ore/search?query=isb	Imported														022025

AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO
Bizzell Hold	Circs	STATU	Grade_AD	Grade_Dir	Grade_Lib1	Grade_Lib2	Grade_Lib3	Grade_TS	Grade_Lib	Prior Eds	Copies Ov	OU Law Hold	Purchase Price	Import_Batch
xlbrsgru.com/primo-explore/search?query=isb	Imported													022025
xlbrsgru.com/primo-explore/search?query=isb	Imported													022025
xlbrsgru.com/primo-explore/search?query=isb	Imported													022025
xlbrsgru.com/primo-explore/search?query=isb	Imported													022025

# Step 2

## Preparing the File

Using Excel, the file is cleaned and additional columns are added for OCLC and Library Catalog records, tracking the status of the slips and capturing review feedback.

1. Open the file you downloaded from Hein and use the Automate menu to run the cleanup script.
2. Now copy the data into the Excel spreadsheet containing the additional data columns.
3. Save the file in the CSV file format.

**Save As**

Recent

- OneDrive - University of...  
robert.linz@ou.edu
- OneDrive - Personal  
robert.linz@live.com

Quick access

- OU Law Library
- Circulation Staff  
Site Assets
- OL OU Law Library - Displays
- UL UL Locations & Spaces
- Show more...

Share options

- Share
- Copy Link
- This PC
- Add a Place

OneDrive - University of Oklahoma > Documents > 04 Technology & Projects > 08...

Greenslips Conversion CSV

CSV UTF-8 (Comma delimited) (\*.csv)

Unsupported

Save

Sensitivity labels are not supported for the current file type.  
[Learn More](#)

[More options...](#)

New Folder

Name ↑	Date modified
2022	3/14/2024 3:09 PM
2023	3/14/2024 3:09 PM
2024	1/2/2025 9:13 AM
2025	3/6/2025 4:21 PM
Backup	3/14/2024 3:09 PM
<b>Greenslips Conversion CSV.csv</b>	<b>2/4/2025 8:59 AM</b>

# Step 3 Using LibInsight

Import the data file into LibInsight

1. Log into LibInsight

The screenshot shows the LibInsight dashboard for user Robert Linz. The top navigation bar includes links for Home, Datasets, Dashboards, Record Data, Analyze, Cross Dataset, Admin, and Help. The user is logged in as 'robert.linz@ou.edu'. The main content area is titled 'Home' and greets the user with 'Hello, Robert!'. A welcome message states: 'Welcome to LibInsight. You are an Admin User in this system and have access to all the system operations.' The dashboard is divided into several sections:

- Announcements:** Features a 'LIBMAPS: Wayfinding, Not Wandering' announcement with a compass icon and a note that more webinars were added on March 13 & 26.
- Getting Started:** Provides a checklist of tasks for new users, including 'Configure the system settings', 'Create accounts', 'Set up your SUSHI providers', and 'Set up your account preferences'. It also offers links to a 'Help Guide' and 'LibInsight training'.
- At-a-Glance:** A summary panel showing system statistics: 52 of Unlimited Datasets, approximately 138,546 Records, 32 Dashboards, 22 Widgets & APIs, 149 Accounts, 0 Shared Datasets, 0 SUSHI Providers, and 36 Friendly URLs. A 'View All Datasets' link is provided at the bottom.
- Training Calendar:** A calendar view for March 2025, showing dates from 3 to 14.
- Shortcuts:** A section for quick actions, currently displaying 'All Datasets: View All or Create New or Update Existing Datasets'.

# Step 3

## Using LibInsight

Import the data file into LibInsight

1. Log into LibInsight
2. Open to the Greenslips dataset and choose the “Record Data” menu option.

The screenshot displays the LibInsight web application interface. At the top, a navigation bar includes the LibInsight logo and menu items: Home, Datasets, Dashboards, Record Data (highlighted in green), Analyze, Cross Dataset, Admin, and Help. Below the navigation bar, the breadcrumb trail reads: Home / All Datasets / Law - Hein Greenslips Analysis. The main heading is 'Law - Hein Greenslips Analysis'. To the right, there is a 'Go To:' field containing 'Law - Hein Greenslips (#33164)'. Below this, a descriptive text states: 'Enables evaluation of Hein's Greenslips for collection development.' Further down, a summary line indicates: 'There are 3,542 records in total for this dataset. The earliest record in this dataset is from May 25 2023.' The 'Report Filters' section contains several controls: 'Date Range' set to 'Custom Date Range', 'From' set to 'Jul 01 2024', 'To' set to 'Jun 30 2025', 'Limit to' set to 'All Days', 'between' set to '00 hr', and 'and' set to '24 hrs'. Below these, 'Entered by' is set to 'Everybody' and 'Order by' is set to 'Date desc'. There is also an 'Add Additional Report Filter' section with a dropdown menu labeled 'Select a Field to Filter'. At the bottom of the filter section, there are three buttons: 'Generate Report', 'Save Report Filter', and 'Clear All Filters'.

# Step 3 Using LibInsight

Import the data file into LibInsight

1. Log into LibInsight
2. Open to the Greenslips dataset and choose the “Record Data” menu option.
3. Choose to Upload the CSV file you just saved.

Home / All Datasets / Record Data to Law - Hein Greenslips

## Record Data to Law - Hein Greenslips

Go To:

Enables evaluation of Hein's Greenslips for collection development.

Don't want to record data manually? You can also upload data in bulk! [Upload File](#) Or you can also [Manage your Records](#)

Pre-Defined Entries [?](#)

[Manage Pre-Defined Entries](#)

Entered By

NOTES

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PUBLISHER DATA	LIBRARY DATA	REVIEW DATA
Import_Batch <input type="text" value="Select a value"/>	TYPE <input type="text" value=""/>	Purchase Price <a href="#">?</a> <input type="text" value="\$"/>
CP <input type="text" value=""/>	SUBJECT <input type="text" value=""/>	

# Step 3 Using LibInsight

Import the data file into LibInsight

1. Log into LibInsight
2. Open to the Greenslips dataset and choose the “Record Data” menu option.
3. Choose to Upload the CSV file you just saved.
4. Set the options and upload the file.

## Custom: Record Data to Law - Hein Greenslips (File Upload)

Go To: Law - Hein Greenslips (#33164)

Enables evaluation of Hein's Greenslips for collection development.

File Upload

Uploads List

Instructions

Fields List and CSV Template

File Upload

Choose Date Format ⓘ

MM/DD/YYYY (06/01/2019) ▼

Choose the date format that applies to your data.

Choose a CSV file \*

Choose File Greenslips Conversion CSV.csv

Upload limit is 18 MB

Required Fields

Required fields may be empty ⓘ

Required fields must contain data ⓘ

Allow Adding Options ⓘ

No - Do not add to existing single/multi-select options ⓘ

Yes - Add to existing single/multi-select options ⓘ

**Important:** If you are uploading columns with multi-select options, make sure that the options are separated by semi-colon (;). Options are case-sensitive. Make sure that the options' letter casing matches what's defined in this dataset's select fields.

Upload data

# Step 3 Using LibInsight

Import the data file into LibInsight

1. Log into LibInsight
2. Open to the Greenslips dataset and choose the “Record Data” menu option.
3. Choose to Upload the CSV file you just saved.
4. Set the options and upload the file.
5. Wait a few minutes for the system to process your data. Enjoy some coffee.

We have received your data file. Due to its complex processing, CSV files will be processed in our server instead. We will notify you by email once your data is ready. If you would like to know the status of your data, please use **Upload #17267ca2414af969-03-2025** as your reference. ✕

Add **do-not-reply@libinsight.com** to your contacts list so the email does not get flagged as spam. Make sure to check your Spam or Trash folder too, if you think you are not receiving email alerts.

## Custom: Record Data to Law - Hein Greenslips (File Upload)


Go To:

*Enables evaluation of Hein's Greenslips for collection development.*

[Analyze these records](#) or [Add more data to this dataset](#)



[LibInsight] Your File Upload #174 on Dataset Law - Hein Greenslips (#33164) was processed successfully

 Springshare <do-not-reply@libinsight.com>  
To: Linz, Robert M.

--# Do not reply to this message, as replies are routed to an unmonitored mailbox. For technical assistance, please contact the LibInsight support team.

File upload request has been processed for:

Reference: 17467cb1c3d9cfc0-03-2025  
File Name: Greenslips Conversion CSV.csv  
Requested by: [robert.linz@ou.edu](mailto:robert.linz@ou.edu)  
Status: success

Message: Successfully processed 150 rows

Go to [Upload List](#)

# Step 4 Use Data in LibInsight

The data is now imported into LibInsight where additional filtering can be done and made ready for use.

1. Open the dataset, choose “Analyze” and filter to review the latest import.

Home / All Datasets / Law - Hein Greenslips Analysis

LibInsight Home Datasets Dashboards Record Data Analyze Cross Dataset Admin Help robert.linz@ou.edu Logout

Go To: Law - Hein Greenslips (#33164)

Enables evaluation of Hein's Greenslips for collection development.

There are 3,692 records in total for this dataset. The earliest record in this dataset is from May 25 2023.

Report Filters

Date Range Custom Date Range

From Jul 01 2024 To Jun 30 2025 Limit to All Days

Entered by Everybody Order by Date desc

Add Additional Report Filter Import\_Batch is

Add this filter

Generate Report Save Report Filter Clear All Filters

012023  
012024  
012025  
022023  
022024  
022025

Home / All Datasets

## All Datasets

Below is the list of all the Datasets you have access to. Go to Admin → [Manage Datasets](#) to create new or update

Search By: ID / Name / Description law Dataset Types All Types Owner All Users

ID	Dataset Name	Dataset Type	# of Recs	Last Update
40681	<a href="#">Law - Gate Count</a>	Gate Count	0	2025-03-07 09:30 am
40187	<a href="#">Law - Circulation - Newspapers Log</a>	Custom	60	2025-03-07 09:04 am
40222	<a href="#">Law - Gate Count</a>	Custom	4	2025-03-07 07:16 am
33164	<a href="#">Law - Hein Greenslips</a>	Custom	3,542	2025-03-06 05:02 pm

# Step 4

## Use Data in LibInsight

The data is now imported into LibInsight where additional filtering can be done and made ready for use.

1. Open the dataset, choose “Analyze” and filter to review the latest import.
2. Review the data.
3. Use additional filters to tailor dataset results.

The screenshot displays the LibInsight web application interface. A dropdown menu titled "Select a Field to Filter" is open, listing various text fields: Internal Notes, CP, AUTHOR, TITLE, PUBLISHER, PUB DATE, MEDIA, ISBN, MEDIA2, ISBN2, MEDIA3, ISBN3, JURISDICTION, TYPE, CALL NUMBER, Prior Eds, Copies Owned, and Notes. The "PUBLISHER" field is currently selected. Below the dropdown, the "Add Additional Report Filter" section shows a filter applied: "Import\_Batch" is one of "022025". The filter is highlighted with a yellow box. The interface also shows a "Date Range" filter set to "Custom Date Range" from "Jul 01 2024" to "Today", and an "Entered by" filter set to "Everybody". The "Generate Report" button is visible. The main content area shows a "Go To:" field with the value "Law - Hein Greenslips (#33164)" and a message stating "Found 150 records, out of total 3,692 in this dataset (or 4.06%)".

# Step 4

## Use Data in LibInsight

The data is now imported into LibInsight where additional filtering can be done and made ready for use.

1. Open the dataset, choose “Analyze” and filter to review the latest import.
2. Review the data.
3. Use additional filters to tailor dataset results.
4. Edit and grade slips.

Home / All Datasets / Law - Hein Greenslips / Edit Record 6122

### Law - Hein Greenslips - Edit Record 6122

Entered By: Linz, Robert

NOTES

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PUBLISHER DATA	LIBRARY DATA	REVIEW DATA
<b>DateImport</b> <input type="text" value="Mar 07 2025 10:18 am"/>	<b>TYPE</b> <input type="text" value="Monographs"/>	<b>Purchase Price</b> <input type="text" value="\$"/>
<b>Import_Batch</b> <input type="text" value="022025"/>	<b>SUBJECT</b> <input type="text" value="*Criminal law and procedure"/> <input type="text" value="*International law"/> <input type="text" value="*Sexuality and the law"/> <input type="text" value="*Women"/>	<b>STATUS</b> <input type="text" value="Select a value"/>
<b>CP</b> <input type="text" value="022025-028"/>	<b>JURISDICTION</b> <input type="text"/>	<b>Notes</b> <input type="text"/>
<b>AUTHOR</b> <input type="text" value="By Sheri Labenski,"/>	<b>CALL NUMBER</b> <input type="text" value="K644."/>	<b>Grade_TS</b> <input type="text" value="Select a value"/>
<b>TITLE</b> <input type="text" value="Women defendants and international law: feminist dialogues"/>	<b>Alma Holdings</b> <input type="text" value="https://ou-primo.hosted.exlibrisgroup.com/primo-explore/search?"/>	<b>Notes</b> <input type="text"/>
<b>PUBLISHER</b> <input type="text" value="Routledge"/>	<b>OCLC</b> <input type="text" value="https://www.worldcat.org/search?q=bn%3A9780367245238"/>	<b>Grade_Dir</b> <input type="text" value="Select a value"/>
<b>PUB DATE</b> <input type="text" value="2025"/>	<b>OU Law Hold</b> <input type="radio" value="Both"/> <input type="radio" value="Electronic"/> <input type="radio" value="None"/> <input type="radio" value="Print"/>	<b>Notes</b> <input type="text"/>
<b>MEDIA</b> <input type="text" value="CLOTH"/>	<b>Bizzell Hold</b> <input type="radio" value="Both"/> <input type="radio" value="Electronic"/> <input type="radio" value="None"/> <input type="radio" value="Print"/>	<b>Grade_AD</b> <input type="text" value="Select a value"/>
<b>PRICE</b> <input type="text" value="\$ 180.00"/>	<b>Prior Eds</b> <input type="text"/>	<b>Grade_Lib1</b> <input type="text" value="Purchase"/> <input type="text" value="Do Not Purchase"/> <input type="text" value="Wishlist"/> <input type="text" value="Defer"/>
<b>ISBN</b> <input type="text" value="9780367245238"/>	<b>Copies Owned</b> <input type="text"/>	<b>Grade_Lib2</b> <input type="text" value="Select a value"/>
<b>MEDIA2</b> <input type="text" value="PAPER"/>	<b>Circs</b> <input type="text"/>	<b>Notes</b> <input type="text"/>
<b>PRICE2</b> <input type="text" value="\$"/>	<b>Other Law</b> <input type="text"/>	<b>Grade_Lib3</b> <input type="text" value="Select a value"/>
<b>ISBN2</b> <input type="text" value="9781032796758"/>	<b>Amazon</b> <input type="text" value="https://www.amazon.com/s?i=stripbooks&amp;rh=p_86%3A9780367245238"/>	<b>Notes</b> <input type="text"/>
<b>MEDIA3</b> <input type="text" value="PAPER"/>		<b>Grade_Lib4</b> <input type="text" value="Select a value"/>
<b>PRICE3</b> <input type="text" value="\$"/>		<b>Notes</b> <input type="text"/>
<b>ISBN3</b> <input type="text" value="9781032796758"/>		
<b>Media4</b> <input type="text" value="PAPER"/>		
<b>Price4</b> <input type="text" value="\$"/>		
<b>ISBN4</b> <input type="text" value="9781032796758"/>		

# Reports

## Dashboards

LibInsight | Home | Datasets | Dashboards | Record Data | Analyze | Cross Dataset | Admin | Help

Home / Dashboard Manager

### Dashboard Manager

Create shareable custom dashboards providing a broad overview of the library's metrics. Dashboards can be used internally of their library's services.

Click on a dashboard's name or select "Update Dashboard" from the Actions column to create or edit that dashboard's charts.

My Dashboards | Other Dashboards

Search By: ID / Title / Description / Friendly URL | Status: All Status | Type

+ Add New Dashboard

ID	Title	Description	Friendly URL
41	Law - Circulation Services		lawcirc_fy24
23	Law - Faculty Support - FY23	July 1, 2022 to June 30, 2023	lawfac_fy23
25	Law - Faculty Support - FY24	July 1, 2023 to June 30, 2024	lawfac_fy24
33	Law - Faculty Support - FY25	July 1, 2024 to June 30, 2025	lawfac_fy25
20	Law - Hein Greenslips		lawgreen

LibInsight | Home | Datasets | Dashboards | Record Data | Analyze | Cross Dataset | Admin | Help

Home / Dashboards / Law - Hein Greenslips

Law - Hein Greenslips

Select row type | Add New Row | Preview | Edit Dashboard Settings | Back to Dashboards List

### Status (#108)

3,692 TOTAL

### Monthly Load (#109)

3,692 COUNT

### Purchases (#187)

Projected v Actual Cost by Subject

POWERED BY Springshare

# Reports

## Use Analyze to Report on ...

- Grades by any particular librarian
- Status of records in a batch by ..
  - Imported
  - Ordered
  - Prepared
  - Purchase
  - Wishlist
- Number of titles by a particular publisher
  - Ordered, Reviewed, etc.
- Number of titles in a particular subject area
  - Ordered, Reviewed, etc.

### Report Filters

**Date Range** Custom Date Range ▾

**From** Jul 01 2024 **To** Jun 30 2025 **Limit to** All Days ▾ **between** 00 hr ▾ **and** 24 hrs ▾

**Entered by** Everybody ▾ **Order by** Date desc ▾

**Add Additional Report Filter** SUBJECT ▾ is ▾ \* Domestic relations Add this f

- Import\_Batch is one of 022025; ✕
- SUBJECT is one of Domestic relations; ✕

Generate Report
Save Report Filter
Clear All Filters

---

[Data Grid](#)
[Fields Analysis](#)
[Time-Based Analysis](#)
[Duration](#)
[Distributions](#)
[Cross Tab Report](#)
[Trends](#)

Found 1 record, out of total 3,692 in this dataset (or 0.03%)

	ID	Info	DateImport
<input type="checkbox"/>	6051	<b>Import_Batch:</b> 022025 <b>CP:</b> 022025-056 <b>AUTHOR:</b> By Bethany Wilkinson, Susan Goodwin, <b>TITLE:</b> Intimate partner femicide: contesting the legal story <b>PUBLISHER:</b> Routledge <b>PUB DATE:</b> 2025 <b>MEDIA:</b> CLOTH <b>PRICE:</b> \$ 66.99 <b>ISBN:</b> 9781032473857 <b>MEDIA2:</b> CLOTH <b>PRICE2:</b> \$ 66.99	Mar 07 2025 10:18 AM

# In Review

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## ADVANTAGES

- Relatively easy solution for a group of librarians to review and grade Hein Greenslips
- No cost if you have LibInsight
- Reporting
- Integrates with LibInsight ecosystem to add value to a Faculty dashboard

## DISADVANTAGES

- Somewhat of inefficient interface to review, grade, and move to the next record
- Additional work for Acquisitions to add final purchase data to each record
- Users can overwrite other user's grades

# Questions

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## CONTACT

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