

## ALMA Fulfillment Webinar – Course Reserves

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### On adding staff roles for managing Course Reserves:

The following are the bare basics needed to manage or make changes to course reserves.

- a. **Course Reserves Manager** - manages course reserve actions and reading lists
- b. **Fulfillment Services Manager/Operator** - manages the library's fulfillment services such as reading lists and move requests
- c. **Requests Operator** - manages fulfillment requests such as pick from hold shelf. Might be relevant.

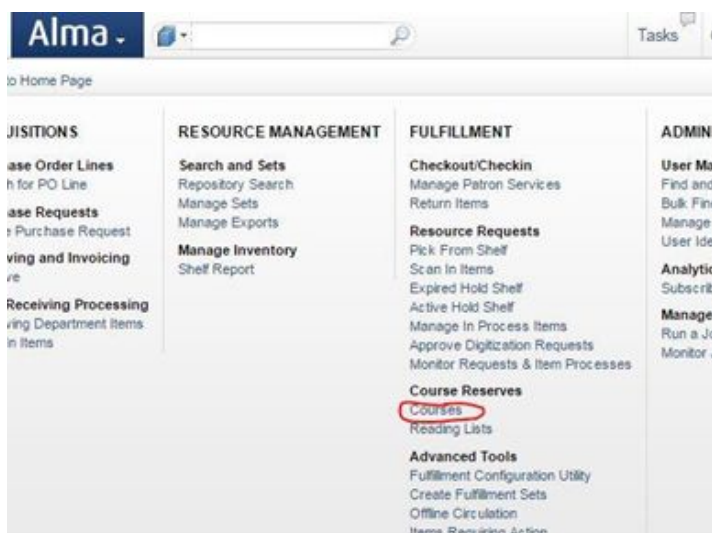
Optional but likely will be helpful:

- d. **Circulation Operator (limited) (optional)** - You do not necessarily need it but it might be useful for your staff to have at least a limited circulation role.
- e. Possibly an **Extended Cataloger** role for deleting holdings records. - This can also be accomplished through the work order process.

For more on Managing user roles:

[http://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_%28English%29/Administration/030User\\_Management/060Managing\\_User\\_Roles#addNewRoles](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_%28English%29/Administration/030User_Management/060Managing_User_Roles#addNewRoles)

### How to Add a Course



- a. You will want to add the Code, the name, and the section if applicable. The course code and name taken from Institution's course catalog
  - i. Note: the section # pertains to the courses in sequence in ALMA not in the institution's course catalog. One professor teaching multiple sections of the same course only needs one course reserve course set up in ALMA

- b. Next, Add the Processing Department.
  - i. If there are multiple departments processing course reserves, each department should be set up separately in ALMA. Here at SJSU, we only have one processing department for course reserves, so we only have one in the list.
- c. Sacramento has their Library Media Center check out its materials, and their User Services checks out everything else.
- d. Add Start Date
  - i. Using the previous day's date makes the course available in Primo sooner, within 4 hours). If you add the items early enough before the semester begins, it will show up the next day in Primo at the very most.
- e. Add End Date
  - i. This will vary by institution, Sacramento State uses the end of the academic year so in this case it would be 8/31/2017)
- f. There are two ways to add a professor's name.
  - i. You can either Search instructor's last name and click add instructor or you can use Searchable IDs
  - ii. Sac state adds the instructor's name here if they cannot locate it by searching the instructor box. This can happen with new part-time faculty who have not been added to the system via peoplesoft yet.
- g. Click Save, which will take you back to the listing of LIB 101 courses.
  - i. What it will look like when you're done:

The screenshot displays the ALMA course setup interface for course HS 165. At the top, it shows Course Code: HS 165, Section: 01, and Course Name: Health Sciences 165. Below this, the Processing Department is set to SJSU Course Reserves Department and the Instructors field contains MCCABE, JIM. The main form area is divided into several sections: Course Information (Code, Name, Processing Department), Status (Inactive/Active), Start date (09/24/2016), End date (09/17/2017), Number of participants (0), Year, Creator (FRANK, JEFFREY), Section (01), Academic Department, Terms list (Autumn, Early Autumn, Semester 1, Semester 2), Weekly hours (0), and Creation Date (10/26/2016). A Searchable IDs section lists McCabe, J., HS 165, and Health Sciences 165. At the bottom, there is an 'Instructors' section with a 'Quick Add' button and an 'Add instructor' button.

- h. If you found you made a mistake, you can always go back and edit the course. The only part you can't edit is the code.

For more on adding a course:

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_%28English%29/Fulfillment/060Courses\\_and\\_Reading\\_Lists/020Managing\\_Courses](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_%28English%29/Fulfillment/060Courses_and_Reading_Lists/020Managing_Courses)

### How to Create a Reading List

- a. Go to Actions > Click reading list > Click Add reading list
- b. The code and name should be identical.
  - i. This matters if you are adding a library copy and you have to search for the unique reading list for a specific course/instructor
  - ii. However, **this is not a requirement**. Many of the information we are discussing here will be up to the institution's discretion, these are just our suggestions for making the process easier for you.
- c. Sac state usually sets their status to complete immediately, but if you forget to change the status, don't worry about it. They found that not changing the status doesn't change whether or not the reading list is available.
- d. Sac state has also found that having a due back date is not necessary so they deleted theirs, but if you find it important for tracking purposes, you could add the date if you want to.
- e. Add and close

For more on managing reading lists:

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_%28English%29/Fulfillment/060Courses\\_and\\_Reading\\_Lists/030Managing\\_Reading\\_Lists](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_%28English%29/Fulfillment/060Courses_and_Reading_Lists/030Managing_Reading_Lists)

### A Note on Assigning Reading Lists:

If you have only have one person creating your course reserves, this will not apply to you. However, if you have multiple people creating reading lists you might want to consider using assignments to keep track of who has what. To do this:

- a. Go to "Reading lists". You click on 3 different tabs, "assigned to me," "unassigned", and "assigned to others."
- b. To assign yourself a reading list, go to unassigned, actions > reassign, and click from the list who you want to assign the item to.
- c. This list is made up of everyone who has the specific course reserve related roles such as course reserves manager or fulfillment operator/manager.
- d. If you want the person to be notified, you can click "send as email" and it will notify the person by email that they have been assigned a reading list to work on.
- e. Click "assign to" and it will show up in either the "assigned to me" tab (if you have assigned it to yourself) or "assigned to others" if it was assigned to someone else.

For more information on assigning reading lists:

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_%28English%29/Fulfillment/060Courses\\_and\\_Reading\\_Lists/030Managing\\_Reading\\_Lists#Releasing\\_and\\_Reassigning\\_a\\_Reading\\_List](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_%28English%29/Fulfillment/060Courses_and_Reading_Lists/030Managing_Reading_Lists#Releasing_and_Reassigning_a_Reading_List)

### 3. Next discussion: adding items to your reading list. There are 3ish ways to do this.

#### Add a Repository Citation (library copy)

The screenshot shows the 'Reading List Information' form in Alma. The form includes fields for Code (HS165), Name (Health Sciences 165), Owners (-), Status (Being Prepared), and Due Back Date (05/17/2017). Below the form are tabs for Citations, Owners, and Notes. A search bar is present with filters for Alerts, Citation/Locate Status, Citation Type, and Tags. Three buttons are visible: 'Add Repository Citation' (circled in red), 'Add Non-Repository Citation', and 'Add Brief'. Below the buttons is a 'Select All' checkbox and a list of items. The first item is 'Introduction to Leadership' by Northouse, P., with a checkbox next to it. The item details include Request Status (Being Prepared), Resource Locate Status (Resource Located), and Copyright Status (Not Determined). Action links for the item include Edit, Set Complete, Manage Fulfillment Options, Remove, Duplicate, Print Slip, and Detach from Repository. The footer of the page reads '© Ex Libris Ltd., 2016'.

- A. Add a repository citation > physical items > scan a barcode or search for an item > check box next to the item > Here you can set the item to complete. You can manually Set Complete or leave it alone. Sac State will usually use scan barcode because we do not add an item to a reading list until the processing department has the item in hand.
  - a. Adding an item with this method does not allow you to add a loan period. You would have to perform another step and edit the item record to add the loan period
    - i. To do this: go to Items (under the item information in your reading list) > Actions > Edit > Temporary item policy > edit all of the relevant fulfillment information such as changing the location, the library (if it's in another library), and the item policy.
    - ii. You don't necessarily have to have the item in hand at that point in time, but having the title or barcode will help. My best practice for this is to make sure you have the items in hand before you start changing their locations. Sac state does this. If the course only has one or two items, it's probably not as big of a deal. Another way to change the item information is do it via Change Item
- B. Information under the Scan In Items area. Click Scan In Items in the menu > Change Item Information > Change Type to Temporary > select the temporary location > select item policy

> search for reading list (search by format of the identical code/name from above, choose correct professor) > scan item barcode > Exit (note: utilize scan in items when processing several library copies for the same course making sure to pay attention to the different loan periods being requested by your professor).

IT	FULFILLMENT	ADMINIS
	<b>Checkout/Checkin</b> Manage Patron Services Return Items <b>Resource Requests</b> Pick From Shelf <b>Scan In Items</b> Expired Hold Shelf Active Hold Shelf Manage In Process Items Approve Digitization Requests Monitor Requests & Item Processes <b>Course Reserves</b> Courses Reading Lists	<b>User Mar</b> Find and Purge Us Load Des Bulk Fine Manage S User Ider <b>User Mar</b> Configura <b>General</b> Configura <b>Advance</b> HealthCh Application

4. Add a Brief Record (personal copy)

**Important Note: Make sure the placement of your record is set to Institution rather than Network. This is important because when you go to delete this item later, you will want access to it. If you put it in the network zone, it will have to be deleted by the network's manager.**

**Placement of new record**

Placement of new record  Network  Institution

**Resource Information**

Title \*

Author

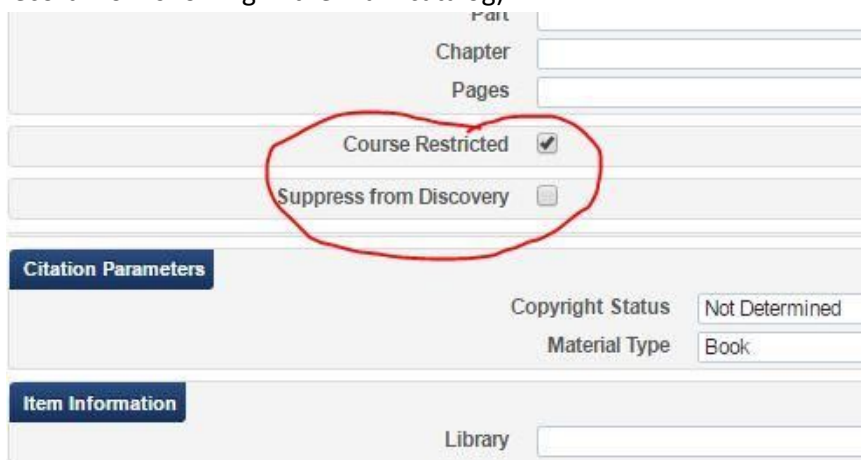
a. Add brief > choose citation type > enter cataloging fields

i. Sac State uses: Title, Author, Edition, Barcode, Pub. Date, Call Number (from copyright page or OCLC Connexion), Volume

ii. SJSU uses: Title, Author, Edition-if greater than 1st ed, Barcode, Source= enter instructor's name who owns the book, Call number= should be added so it can populate holdings,

b. Make sure to suppress from Discovery. The box should be unchecked.

c. Course Restricted check box (this is done only for personal copies. It prevents the bib and item record from showing in the main catalog)



Part \_\_\_\_\_  
Chapter \_\_\_\_\_  
Pages \_\_\_\_\_  
Course Restricted   
Suppress from Discovery   
**Citation Parameters**  
Copyright Status Not Determined  
Material Type Book  
**Item Information**  
Library \_\_\_\_\_

d. Item Information: choose your library > location > Material Type > Item Policy > Scan Barcode

e. Scanning the barcode last automatically takes you back to Reading list.

## 5. Add an item to an existing brief record

a. From reading list select items > Go to Actions > Click Duplicate > Material Type > Copy ID > Location > Scan new barcode > Save takes you back to the reading list.

## 6. Add a Non-Repository Citation

While we don't have to go over this in detail because it is unnecessary for most instances, it's worth briefly mentioning. It's only relevant if you have professors order items for their reading lists via an API, which is beyond the scope of this discussion.

## 7. Removal (library owned)

a. Check to see if the book is on the reading list for any other courses > more info > courses (if so, you will remove from the specified reading list and reshelve the book at course reserves for continued use by other professors)

b. Go to item on reading list > select Remove from the bottom menu

If the book is not on for other professors/courses:

c. Scan in items > Change item info > Change type to restore > scan barcode > item is ready to reshelve to main collection

- d. If no materials remain on the reading list delete reading list > Actions > Delete > Confirm
- e. If no reading lists remain for the course, delete the course > Actions > Remove > Confirm

### **8. Removal (personal copy)**

- a. Check to see if the book is on the reading list for any other courses > more info > courses (if so, you will remove the book from all other courses because the book will be returned to the owner).
- b. Go to item on reading list > select Remove from the bottom menu
- c. If no materials remain on the reading list, delete reading list > Actions > Delete > Confirm
- d. If no reading lists remain for the course, delete the course > Actions > Remove > Confirm

### **9. Delete the item and holding records for Personal Copy if the book is being removed completely.**

**Note: deletions should be performed by someone with extended cataloging privileges. You can either do this yourself or send a work order to your tech services department to withdraw the item.**

**Note: Do not delete if the book will remain on any additional reading lists.**

- a. In ALMA search box scan item barcode > select items > select the correct barcode > Actions > Withdraw > Confirm
- b. If all items in the holding record have been deleted a pop up will appear “Last item of this holding deleted” Select Delete the holdings record > Go
- c. Delete the Bib record if applicable (if you have removed all items in the holding record, the system should default to this screen) > click on the title > select edit > select file > select delete record > on pop up select Yes > click the blue ALMA do not click back, do not click the exit door, do not click exit from the drop down menu.