Alma Course Reserves Guide

University of Illinois at Urbana-Champaign

Central Access Services

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This handy guide will help you to process Course Reserves in Alma Fulfillment. Units that offer Course Reserve can locate procedures and best practices here. Click any entry in the Table of Contents below to navigate directly to that section of the guide.

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Checking Course Explorer

First, we need to verify that this course is being taught this semester by this specific instructor, and to determine if there are any cross-listings.

https://courses.illinois.edu/schedule/DEFAULT/DEFAULT

Make sure the appropriate semester is selected under Term on the right-hand side of the page and search for your course.

If the specific course number/instructor combination is not showing up on the list, contact either the department or the instructor to verify the details of the request.
Many courses are cross-listed in multiple departments. In the timetable, cross-listed courses are indicated by **Same as _____**.

In this example: AFRO:103 is cross-listed as AFST:103 and GWS:103.
Creating a New Course

After we’ve confirmed the details, the first step in Alma for processing a course reserves request is to create a Course. The Course contains important information about the class, including instructor and course code.

**Note:** If a course has cross-listed course codes (as in our example of AFRO:103/GWS:103), create a course for each cross-listed entry. In our example, this would mean that we’d follow the process below once for AFRO:103 and a second time for GWS:103 and connect them to the same Reading List. For more, please see [Associating a Reading List with Multiple Courses](#).

To navigate to **Courses**:

1. Select **Fulfillment** from the vertical navigation bar
2. Under **Course Reserves**, select **Courses**.

![Diagram showing navigation options](image-url)
3. To add a new course, select **Add Course**:

Selecting **Add Course** will navigate you to the course creation wizard. Fill out the three available tabs as follows:

1. **Course Information** tab

   1. **Code**: Enter the course code with department and course number separated by a colon. (In the example above, the course number is “AFRO:103”). This field is very important, as it informs how the course will appear to users in Primo VE. If the “Course” you’re adding is not a course, please see [Adding Reserves Lists for Non-Course Groups](#).
   2. **Name**: Enter the name of the course as listed in Course Explorer (In the example above, the course name is “Black Women in the Diaspora”).
   3. **Processing Department**: Select your department from the dropdown menu.
   4. **Terms list**: Select the term for this list from the dropdown menu.
   5. **Start date**: This should be seven days before the semester begins. See [Future Reserves Dates](#) for reserves lists start dates for future years.
6. **End date**: This should be eight days after the semester ends for the list end date. See the [Future Reserves Dates](#) of this guide for reserves lists end dates for future years. If this item is a permanent reserve, see [Items to be kept on Permanent Reserves](#).

7. **Year**: Fill in the year

8. Do not fill in the following fields:
   a. Academic Department
   b. Number of participants
   c. Section
   d. Weekly hours

9. **Searchable IDs**: You have the option to add searchable IDs. Enter terms here that you think will make the course more findable. Searchable IDs are viewable by patrons in Primo VE, so avoid entering jargon or internal notes in these fields.

![Manage Course Information](image)

2. **Instructors** tab

   Click **Add Instructor** to associate an instructor with this course.
1. Search for the instructor by barcode or NetID in the dropdown menu. You can also search by name but should use unique identifiers (like barcode and NetID) whenever possible for accuracy.
2. Click **Add Instructor**
3. **Notes** tab

Use as your unit sees fit. At this time this does not appear to display in Primo, but please keep in mind that if settings change it is possible that this note could become viewable for patrons.

4. **Campus** tab

Do not fill out any information on the Campus tab

Once all tabs are completed, click **Save** to save this course.

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**Creating a Reading List**

Once you’ve created a Course, the next step is to add a Reading List. The Reading List is where you’ll add the items (Citations) needed to complete a course reserves request.

After creating a Course (or identifying an existing Course to add a Reading List to), please follow the steps below.

1. Start in the Courses screen (Fulfillment > Course Reserves > Courses).
2. Locate the Course for which you would like to set up a Reading List.
3. Select **Reading List** in the row action (...) menu for this course. The Course’s Reading List page appears.
4. Select Add Reading List. The Add Reading List dialog box appears.
5. Enter the Reading List information.

- **Code:** For consistency and ease of searching, we suggest the following format for your Code:
  
  Course code – Instructor last name – Term – Three letter library location code
  
  
  This format allows for library staff to identify information about the list at a glance.

- **Name:** Enter the name of the course as listed in Course Explorer

- **Status:** In our Alma environment, statuses during this step are for your reference only. They can be used however best works for your unit. **Being Prepared** may be the status that you want to set a new list to.
d. **Due back date:** This field should auto-populate from the date that you supplied as the end date for the course.

6. Click **Add and Close**

**Adding and Creating Citations**

Now that you have your Reading List set up, you’re ready to add items to your list.

1. Select **Work On** from the row action list for the course.

![Image of a table with columns for Code, Name, Status, Assignee, Owner/s, and Due Back Date, with a row for AFRO:103/GWS:103 - Fish - Spring 2021 - STX, Black Women in the Diaspora, Being Prepared, -, -, and 05/22/2021. A dropdown menu is visible with options such as View, Work On, Reassign, Duplicate, Associate this list with a course, Remove associated course, Delete, Purge, and View hidden.]

2. You’ll automatically be navigated to **Edit Reading List**.
3. At the bottom of the screen, select **Add Citation**.
4. You’ll be given three options (Add Brief, Add Repository Citation, Add Non-Repository Citation). Do not use **Add Non-Repository Citation**.
   a. If the library owns the item that you’re adding to the list, select **Add Repository Citation**.
   b. If the item is a personal copy submitted by an instructor, select **Add Brief**.
Adding a Repository Citation

If the library owns the item that you’re adding to the list, select **Add Repository Citation**.

1. This will direct you to a Repository Search for the item in question.
2. Use the persistent search bar to search for the item.
   
   a. **Before searching for an item, choose “Physical Items” as the search parameter.** This step is important, as a Physical Title search could lead to all items on a bib record being added to your Reading List.
   b. Search for the item you would like to add to the Reading List.
3. Once the search has run, check the check box for the item that you want to add on the left side of each entry.
4. Once you’ve checked the box for the copy of the item that you’d like to connect to the Reading List, click **Select**.
5. After the item is added, Alma will navigate you automatically back to the Reading List you’re currently working on. As you can see, this item has been successfully added to the AFRO:103 Reserve List.
Creating a Brief Record (Personal Copy)

If the item is a personal copy submitted by an instructor, follow this procedure to establish a citation for the item.

1. Select Add Brief.

2. This will create a pop-up message that will prompt you to choose the **Citation Type**. Choose **Physical Book**.
3. Alma will navigate you to a Quick Cataloging page to edit the brief record.

4. Under Placement of New Record, choose Institution. This is an important step that ensures that I-Share users aren’t able to find this item in Primo searches.

5. Under Resource Information, fill in the following fields:
a. **Title**: Supply the item’s title

b. **Author**: Supply the item’s author

c. **Call number**: To create a call number for a personal item, we suggest using the course code (in this example, AFRO:103). Then, create a cutter number to add to the end using the first two letters of the instructor’s last name plus a three-digit number (e.g., Fi100). The three-digit number can be anything of your choosing but be careful not to re-use numbers. An example of a completed call number for this personal reserve copy would be “AFRO:103 Fi100”. A second item could be “AFRO:103 Fi101”, and so on.

d. **Publication date**: Supply the year that the item was published.

e. **Other fields**: Other fields are not required. Please supply any additional information as desired.

f. **Course Restricted**: Check this box. This allows the item to be found through Course Reserves searches in Primo, but not through regular searches.

g. **Suppress from Discovery**: Uncheck this box. If this box is checked, the item will not be discoverable in Primo.
6. Under **Citation Parameters**, you do not need to change anything.

7. Under **Item Location**
   a. **Location**: Find your Library in the list. Under your Library, select **Reserves**.
   
   ![Image of a screenshot showing the form for adding an item to reserves with fields for Location, Material Type, Barcode, and Item policy highlighted.]

   b. **Material Type**: Choose the most appropriate type for the item that you are adding.
   c. **Barcode**: Attach a barcode to the item and enter it into this field.
   d. **Item policy**: If this item will circulate for two hours as most reserves do, you do not need to select an item policy. The Reserves location will inform how the item circulates. If you need help determining whether an item policy is needed, please [contact Central Access Services](#).
8. Return to the top of the screen and select **Save**.
9. Once the citation has saved, Alma will return you to the Reading List that you were working on. Assuming that you’re able to place the item on the reserve shelf at this time, scroll down to the citation that you just created and click **Set Complete**.
Requesting or Recalling Items for Course Reserves

After you’ve added your Citation(s) to your Reading List, Alma makes it very simple to request or recall the items you need.

1. Check the box next to any citation in the list that you would like to request. You can also check Select All to request all items that you’ve added to this Reading List.
2. Click Place Request.
3. Alma will navigate you to a screen where you can choose the type of request. Choose **Move temporarily. It is very important not to select Move permanently from this menu.**

4. Alma should automatically update the screen to allow you to place a Move temporarily request.
5. Fill in the following fields:
   a. **Note**: Optional. Use as needed.
   b. **To**: Your location
   c. **Destination Locations**: Reserves
   d. **Due Back**: This does not appear to impact the request. Any date can be supplied here. Please note that this does not change the due date for an item being recalled.

Please leave other fields blank.
6. Click **Submit**. This will place a request for available items, as well as recall any items that are currently checked out. The due date for a recalled item will not change automatically. Please see [Adjusting the due date for a recalled item](#) for more about updating due dates for recalled items.

Adjusting the due date for a recalled item

1. Items recalled through a Reading List will be due four weeks from the date they’re recalled. If we need this item sooner, navigate to the patron’s Loans via **Manage Patron Services**.
2. Locate the recalled item(s). Click the row action (…) button and choose **Change Due Date** to select a date at least two weeks from today’s date for the recall to be due.
3. Choose the **New Due Date**. If desired, fill in your library’s closing time for **At(HH:MM)** in military time (e.g., 17:00 = 5pm); this is not required.
4. Click **Change Due Date**.

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### Processing Items for Reserves

Once you have a physical item in hand, follow these directions to add it to your Reading List.

1. Select the **Fulfillment** menu, then navigate to **Scan in Items** under **Resource Requests**.
2. Select the **Change Item Information** tab

![Scan In Items](image)

3. Fill out the following fields on the **Change Item Information** tab:
a. **Change Type**: This should automatically populate with **Temporary**. If it doesn’t, please select **Temporary** from the dropdown menu. **It is very important not to choose Permanent from this menu.**

b. **Location**: Choose the appropriate location from the dropdown menu. This will typically be **Reserves**.

c. **Item policy**: If this item will circulate for two hours as most reserves do, you do not need to select an item policy. The Reserves location will inform how the item circulates. If you need help determining whether an item policy is needed, please [contact Central Access Services](#).

d. **Reading List**: Select the Reading List that you’re adding this item to. You can search for the Reading List using the course code or title of the course.

4. **Do not fill in the following fields:**
   a. **Call Number Type**
   b. **New Barcode**
   c. **Due Back**
   d. **Call Number**

5. In the **Scan item barcode**: field, scan the barcode for the item.

6. Alma will return a line for each item updated to let you know that this process has been performed successfully.

7. In the Reading List, mark this Citation **Complete**.
Completing a Reading List

When you have added all course materials to a reading list, you can set the status to complete.

1. Locate the completed Reading List that you would like to mark Complete.
2. Using the drop down menu, set "Status" to "Complete."
Associating a Reading List with Multiple Courses

If a course is cross-listed, follow these directions to link the Reading List to each course.

1. Create any needed Courses using the directions under Creating a New Course.
2. Once this is completed, navigate to the Reading List that you want to link to multiple Courses
3. In the row action (...) menu, select Associate this list with a course.
4. Alma will navigate you to a new screen where the first Course that you created should be listed. Click **Associate Course**.
5. Use the search bar that opens to search for the other Course(s) you’d like to associate with this Reading List and click the **Associate Course** button.
6. Both Courses should now be listed under the **Courses** tab for this list.

![Courses tab screenshot]

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**Taking Physical Items Off of Reserves**

A week after the end of the semester, it’s time to remove physical items that are on reserves and route them back to their permanent locations.

1. Select the **Fulfillment** menu, then navigate to **Scan in Items** under **Resource Requests**.
2. Select the **Change Item Information** tab.
3. In the **Change Type** field dropdown menu, choose **Restore**.
4. Once you choose Restore, your screen will update to a simplified version of the Change Item Information Tab.
5. In the **Scan Item Barcode** field, scan the item barcode.

Alma will add a row to your change history to indicate that the item has been successfully restored to its permanent location. A printing dialog box will automatically pop up to print a transit slip.
<table>
<thead>
<tr>
<th>Change Type</th>
<th>Title</th>
<th>Destination</th>
<th>Barcode</th>
<th>Location</th>
<th>Call Number Type</th>
<th>Call Number</th>
<th>Due Back</th>
<th>Item Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restore</td>
<td>Recharting the Black Atlantic : modern cultures, local communities, global connections / edited by Annalisa Oboe and Anna Scacchi</td>
<td>Reshelve</td>
<td>30112086935670</td>
<td>Stacks</td>
<td>Dewey Decimal classification</td>
<td>909.0496 R243</td>
<td>-</td>
<td>BOOK 16/4 WKS</td>
</tr>
</tbody>
</table>
Deleting Courses and Reading Lists

At the end of a semester, best practice is to delete any Courses and Reading Lists that will not remain in use for the following semester. The process for deleting Courses and Reading Lists is the same.

1. Search for the Course or Reading List that you’re going to delete.
2. In the row actions for the list, select **Delete**.
Other Course Reserves scenarios

Adding Reserves Lists for Non-Course Groups

Occasionally, certain campus reading groups or colloquium groups will request that readings be placed on reserve. These groups will not be listed in the timetable, but they are still valid “courses”. Replace the course code in a non-course reserves list with a label that corresponds to the requesting group. Examples of codes for these include “IPRH” or “UNIT”.

Items from Residence Hall Libraries

Items from Residence Hall Libraries may not be placed on Course Reserves. If you need an item for Reserves and the only copy on campus is at RHL, purchase a copy for Reserves.

Items to be kept on Permanent Reserves

If an item will stay on Course Reserves permanently, update the End Date: to 12/31/2050 or a similar date in the future.
## Future Reserves Dates

<table>
<thead>
<tr>
<th>Semester</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring 2021</td>
<td>1/12/2021</td>
<td>5/22/2021</td>
</tr>
<tr>
<td>Summer 2021</td>
<td>5/10/2021</td>
<td>8/15/2021</td>
</tr>
<tr>
<td>Fall 2021</td>
<td>8/17/2021</td>
<td>12/25/2021</td>
</tr>
<tr>
<td>Spring 2022</td>
<td>1/11/2022</td>
<td>5/22/2022</td>
</tr>
<tr>
<td>Summer 2022</td>
<td>5/9/2022</td>
<td>8/16/2022</td>
</tr>
<tr>
<td>Fall 2022</td>
<td>8/15/2022</td>
<td>12/24/2022</td>
</tr>
<tr>
<td>Spring 2023</td>
<td>1/10/2023</td>
<td>5/21/2023</td>
</tr>
<tr>
<td>Summer 2023</td>
<td>5/8/2023</td>
<td>8/13/2023</td>
</tr>
<tr>
<td>Fall 2023</td>
<td>8/21/2023</td>
<td>12/30/2023</td>
</tr>
<tr>
<td>Spring 2024</td>
<td>1/9/2024</td>
<td>5/18/2024</td>
</tr>
<tr>
<td>Summer 2024</td>
<td>5/6/2024</td>
<td>8/11/2024</td>
</tr>
<tr>
<td>Fall 2025</td>
<td>8/18/2025</td>
<td>12/27/2025</td>
</tr>
<tr>
<td>Spring 2026</td>
<td>1/13/2026</td>
<td>5/23/2026</td>
</tr>
</tbody>
</table>

Find official campus dates here: [https://senate.illinois.edu/a_calendar.asp](https://senate.illinois.edu/a_calendar.asp)
More Alma Course Reserves Resources

Find more in-depth documentation about Course Reserves at the following links:

CARLI How to: Course Reserves in Alma
https://www.carli.illinois.edu/products-services/i-share/alma-fulfillment/how-to_reserves

Ex Libris Alma Knowledge Base
https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Fulfillment/Course_Reserves

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