Alma Course Reserves Guide

University of Illinois at Urbana-Champaign

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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

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 _____." The primary course is indicated by "See _____".

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

The first step in processing a course reserves request is to create a Course. The Course contains important information about the class, including instructor and course code.

To navigate to Courses:

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

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 the **Future Reserves Dates** section of this guide 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 current 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 will be viewable by patrons in Primo VE, so avoid entering complicated jargon or internal notes in these fields.
2. **Instructors** tab

   Click **Add Instructor** to associate an instructor with this course.

   1. Search for the instructor by barcode in the dropdown menu. You can also search by name, but should use barcode when possible for accuracy.
   2. Click **Add Instructor**
3. **Campus** tab
   - Do not fill out any information on the Campus tab

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

**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 physical and electronic 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 **Course** (Fulfillment > Course Reserves > Courses) screen.
2. Locate the Course for which you’d like to set up a Reading List.
3. Select **Reading List** in the row actions list for the course to which you want to add a reading list. 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.
a. **Code:** For consistency and ease of searching, please format the Code for your Reading List as follows:

   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.

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

c. **Status:** Statuses are for your reference only, so they can be used however best works for your unit. **Processing** 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.

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 (Physical and Electronic)

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.
   b. You can search by barcode or call number when available, or title if necessary.
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 to make sure that I-Share users aren’t able to find this item in Primo.

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, first take the course code (in this example, AFRO:103). 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. Altogether, an example of
a completed call number for this personal reserves 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. Check the **Suppress from Discovery** box.

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**.

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**: Select the appropriate item policy for this citation. Typically, this will be **RESERVE 2 HOURS**.
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 Items for Course Reserves

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

1. Check the box next to any citation in the list that you would like to request.
2. Click **Place Request**
Recalling Items for Reserves

As we know, items requested for reserves are often high-circulation titles that may already be checked out. Follow the directions in this section to recall items for use in Course Reserves.

Creating a Set

1. Identify which item(s) that need to go on reserves are currently checked out.
2. Navigate to Admin> Manage Sets> Add Set to create a Set (a list of item records in Alma) to recall.
3. To create a Set, select **Create a Set** and choose **Itemized**.
4. You’ll add some information to the Set here.
   a. Name the Set something helpful that will indicate what it’s being used for. For example, this list is named “STX AFRO:103 Summer 2020 Reserves Recalls” to give some information about its use.
   b. The Description and Note fields are optional. Determine how to best use these in your unit.
   c. IMPORTANT: For the Set content type, choose Physical items. Choosing another option can lead to unintended consequences (e.g., bib-level recalls).
   d. The radio buttons at the bottom of the screen should populate currently and require no changes.
   e. Finally, to add items to this Set, click Add Members to Set
5. This will navigate you to a repository search to add your items to the **Set**.
   a. **IMPORTANT:** Make sure your search is a “Physical Items” search if searching for barcodes to add to the set.
   b. Search for the item using the item barcode for accuracy.
   c. Once you’ve located the correct item, check the box to the left of the item record and click **Add Selected**.
   d. Repeat these steps for all items you would like to add to this set to recall.
Running a Job on Your Set

Once the Set is ready, you’ll run a Job to recall the items in your Set.

1. Navigate to Admin > Manage Jobs and Sets > Run a job
2. Select **Create physical item move requests** from the list of available jobs. While the jobs are numbered, this number will not be the same for everyone so its position on the list will depend on your roles in Alma.

3. Click **Next**.
4. This will navigate you to a page where you’ll choose the Set that you want to run this Job on. Choose the Set that you created to recall reserves using the radio button next to the name of the Set.
5. Click **Next**.
6. On the Run a Job- Enter Task Parameters window:
   a. **New library**: Pick the library where the reserves location is.
   b. **New location**: Pick the Reserves location within that library.
c. **IMPORTANT: Change Type:** Temporary. This field defaults to permanent, so we want to be extra sure that we choose temporary.

d. **Sent from library:** Select the item’s permanent library. In testing, we’ve found that we can add items from different libraries to the same set and successfully recall them. So, if not all items in this set are from the same library, you should be able to just choose one of the libraries and proceed.

e. **Print Transit Letter:** Choose **No**.

f. Click **Next**. You’ll be able to review your job before submitting it.

7. Click **Submit**
8. Alma will let you know how many items your Job will affect, as well as ask to confirm that you’d like to run the job.

Confirmation Message

You are about to run a job which will affect 2 members of the set. This cannot be reversed. Do you want to continue?

Cancel  Confirm

9. You’ll receive an email letting you know when the Job has completed. You can also check Admin > Manage Jobs and Sets > Monitor Jobs to check for progress.
10. Once your job has completed, you can check the patron’s account to see if the item has been successfully recalled.

11. We can see here that the item is now recalled, but the due date hasn’t changed.
   a. If this is a reserve request for a future semester, or if the item is due soon enough that this due date is fine, we don’t need to do anything else for this recall. The patron will not be able to renew it and the item will route to your location when returned.
   b. If we need this item sooner, use the row action button and the **Change Due Date** option to select a date at least two weeks from today’s date for the recall to be due.
12. Choose the **New Due Date**. Fill in your library’s closing time for **At(HH:MM)** in military time (e.g., 17:00 = 5pm).

13. Click **Change Due Date**.
Processing Items for Reserves (physical and electronic)

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

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.
   b. **Location**: Choose the appropriate location from the dropdown menu. This will typically be **Reserves**.
   c. **Item Policy**: Choose the appropriate policy for the item. Most reserve items will be **RESERVE TWO HOUR**.
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.

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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 location.

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.
### Scan In Items

**Scan in Items**

**Place directly on hold shelf**
- [ ] Yes
- [ ] No

**Change Type**
- [ ] Restore

**Check Requests**
- [ ]

---

<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>Item Policy</th>
<th>Due Back</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restore</td>
<td>What we lose: a novel</td>
<td>History, Philosophy and Newspaper Library</td>
<td>30112123140896</td>
<td>Stacks</td>
<td>Dewey Decimal classification</td>
<td>813 05919w</td>
<td>BOOK 16/4 WKS</td>
<td>-</td>
</tr>
</tbody>
</table>
Deletion 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.
<table>
<thead>
<tr>
<th>Semester</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 2020</td>
<td>5/11/20</td>
<td>8/16/20</td>
</tr>
<tr>
<td>Fall 2020</td>
<td>8/17/20</td>
<td>12/26/20</td>
</tr>
<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>
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<tr>
<td>Spring 2022</td>
<td>1/11/2022</td>
<td>5/22/2022</td>
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<tr>
<td>Summer 2022</td>
<td>5/9/2022</td>
<td>8/16/2022</td>
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<td>Fall 2022</td>
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<td>12/24/2022</td>
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<td>5/21/2023</td>
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<td>Spring 2024</td>
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<tr>
<td>Summer 2024</td>
<td>5/6/2024</td>
<td>8/11/2024</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 in the Ex Libris Alma Knowledge Base:

https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Fulfillment/Course_Reserves

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