

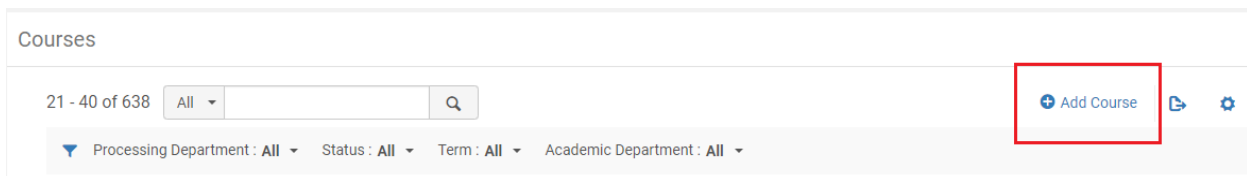
Alma Reserves Processing – Instructor Owned

Outline

1. Create the Course
 - a. Add an instructor
 - i. 1 course per instructor if the instructor uses unique materials
 - ii. All instructors added on the same course if all instructors share materials
2. Add a Reading List to the Course
3. Add Citations to the Reading List
 - a. Create a brief record for each Citation
4. Temporarily Move Citations to the appropriate Reserve Desk
5. Check your work in Primo

Add a Course

From the Alma homepage navigate to Fulfillment > Courses.



Once you are on the “Manage Course Information” page, begin filling out the required fields.

- **Code** – Follow the format “HIST101 – Reeves”.
- **Name** – The course name should match the course name in the catalog.
- **Processing Department** – Choose the appropriate department for your campus.
- **Start Date** – Should be today’s date.
- **End Date** – Choose an appropriately long end-date to the course. The end-date determines when the course is removed from Primo.

- **Searchable IDs** – Insert additional search parameters for the course. This should include variations of the Course ID.

Once you have filled out the “Course Information” tab, select the “Instructors” tab at the top of the page. On the “Instructors” tab select the “Add Instructor” button. In the field that appears, type the instructor’s last name, wait until a dropdown with user records is populated, then select the appropriate record. Once the record is entered, click “Add Instructor”.

When you are done adding an instructor, select “Save” at the top right of the screen.

Adding a Reading List to Your Course

Navigate to Fulfillment > Courses

In the “Courses” screen, type the course code for the course you just created (HIST) and hit enter. Navigate to the course that you created, and click the ellipses on the right side of the screen and select “Reading List”.

...	HIST101 - Reeves	-	World History Since 1500	-	Oceanside Course Reserves	Reeves, David	Active	08/28/...	08/28/...	-	...
...	HIST101-RESV-OCN	-	World History Since 1500	-	Oceanside Course Reserves	-	Active	-	08/15/...	-	...
...	HIST102-RESV-OCN	-	History of the Modern Middle East	-	Oceanside Course Reserves	-	Active	-	08/15/...	-	...
...	HIST103-	-	Origins of the	-	Oceanside	-	...	-	...	-	...

- Edit
- Reading List
- Copy Reading List
- Duplicate
- Delete
- View hidden

Once on the “Courses Reading List” page for the course you created, select “Add Reading List” on the right side of the window.

< Course's Reading List Back

World History Since 1500 v

Course Code: HIST101 - Reeves Processing Department: Oceanside Course Reserves Campus: -

Course Name: World History Since 15... Instructors: Reeves, David; Number of participants: 0

Section: -

All

Status: All v

+ Add Reading List

In the “Add Reading List” window that pops up, fill out all fields. Once all fields have been filled out, click “Add and Close”.

- **Code** – Follow the same format as the Course Code (HIST101 – Reeves).
- **Name** – Type in the name for the course.
- **Status** – Set to “Complete” so that citations are published to Primo as they are added
- **Due Back Date** – This is inherited from the Course end-date

Add Reading List

Code: * Status:

Name: *

Due Back Date:

Once you have added the reading list to the course it should appear in the window. Click on the Reading List’s Code to be brought to the configuration window for that reading list.

World History Since 1500

Course Code: HIST101 - Reeves Processing Department: Oceanside Course Reserves Campus: -

Course Name: World History Since 15... Instructors: Reeves, David;

Section: - Number of participants: 0

1 - 1 of 1 All [Search] + Add Reading List [Share] [Settings]

Status: All

Code	Name	Status	Assignee	Owner/s	Due Back Date
1 HIST101 - Reeves	World History Since 1500	Complete	-	-	08/28/2020

Adding Citations to Your Reading List

Once you are on the “Edit Reading List” screen you can begin to add citations to the list.

Begin by selecting “Add Citation”, then choose “Add Brief”

Reading List Information

Code: * HIST101 - Reeves Status: Complete

Name: * World History Since 1500

Due Back Date: 08/28/2020 Creative Commons License

Owners: -

Citations Courses Owners Notes Subject Labels Recent Changes

Sort by: Citation Title 1 - 1 of 1

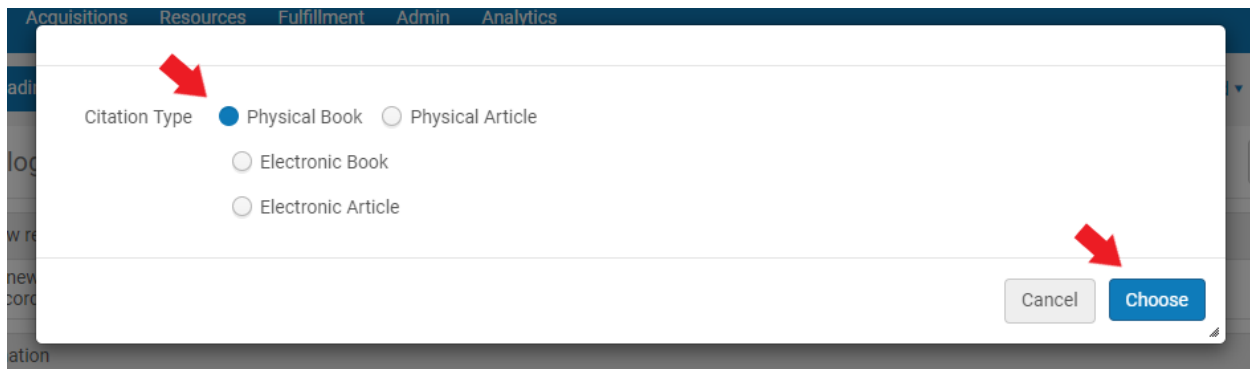
Remove Citations Place Request Add Citation Remove Alerts Change Copyright Status Change Status Expand [Share] [Settings]

Select All Alerts: All Citation Status: All Material Type: All Tags: All Copyright Status: All

Citation Last Modification Date

- Add Brief
- Add Repository Citation
- Add Non-Repository Citation

At the pop-up screen, select “Physical Book” and click “Choose”



You will be brought to the “Quick Cataloging” screen. Choose “Institution” as the placement of the new record, then begin to fill out the necessary fields for a brief record. Refer to the Bibliographic Formatting for Brief Title Creation for Reserves document on the shared drive.

Quick Cataloging Cancel Save

Placement of new record
Placement of new record Network Institution

Resource Information

Title *	Crucible of struggle : a history of Mexican Americans from colonial times to the present era		
Author	Vargas, Zaragosa	Author initials	
Edition		ISBN	
LCCN		System Control Number	
Other standard ID		Barcode	
Remote record ID		Publisher	
Publication date		Place of publication	
Additional person name		Source	
Series title number		Call number	
Note		Volume	
Part		Chapter number	
Pages		Start Page	
End Page		Chapter author	
Chapter title		Editor	

Course Restricted
Suppress from Discovery

Citation Parameters

Copyright Status

Material Type

Item Information

Location *

Barcode


Material Type

Item policy

Public note

After you have entered all field, click “Save” at the top-right of the screen. Once you return to the “Edit Reading List” page, your citation should be added to the reading list. Select “Save” again at the top-right of the screen.

< Edit Reading List Print Slip Print Slip Report Back **Save**

Code: Status: 

Name:

Due Back Date: Creative Commons License:

Owners: -

Citations Courses Owners Notes Subject Labels Recent Changes

Sort by: Citation Title 1 - 2 of 2 Remove Citations Place Request Add Citation Remove Alerts Change Copyright Status Change Status Expand

Select All Alerts: All Citation Status: All Resource Locate: All Material Type: All Tags: All Copyright Status: All

Citation Last Modification Date:

1 **Crucible of struggle : a history of Mexican Americans from colonial times to the present era** Edit Set Complete

Book By Vargas, Zaragosa **Request Status:** Being Prepared **Created By:** Hartzell, Jay 08/29/2019 13:03:27 PDT
Resource Locate Status: Resource Located **Modified By:** Hartzell, Jay 08/29/2019 13:03:27 PDT
Copyright Status: Not Determined

Physical (1) Electronic Digital Other Citation Details Alerts More Info

2 **Things fall apart /** Edit Set Complete

Book By Achebe, Chinua, (Anchor Books, 1994.) **Request Status:** Being Prepared **Created By:** Hartzell, Jay 08/28/2019 12:40:39 PDT
ISBN: 0385474547 **Resource Locate Status:** Resource Located **Modified By:** Hartzell, Jay 08/28/2019 12:40:39 PDT
Subject: Bosch, Ida -- Nigeria--Fiction. -- British. and others


Physical (2) Electronic Digital Other Citation Details Alerts More Info

Change the Item's Temporary Location

The last step is to change the instructor-owned item's temporary location. This step isn't used to change the *location* of the item, but rather to add a temporary call number to the record. This temporary call number then displays in Primo.

Begin by navigating to Fulfillment > Scan in Items. On the "Scan in Items" page, choose the second tab titled "Change Item Information"

Scan In Items


Scan in Items **Change Item Information** 

Automatically print slip Yes No

Register in-house use

Scan item barcode * **Create Item**

Scan request ID


No records were found.

- **Change Type** – Remains “Temporary”
- **Location** – Choose Open or Closed for your location
- **Reading List** – Choose “Select from a list” on the right side of the field, then search for the list you just created (HIST101 – Reeves). Once selected it should populate that field with the reading list name.
- **Call Number** – Type in the same information as the reading list / course code (HIST101 – Reeves)
- **Item Policy** – Choose the appropriate item policy (3-day, 7-day etc) if your item is not for 2-hour in-library use. If your item is for in-library use only, choosing the appropriate location (OCN Closed_Res) will default to a 2-hour circulation period and no item policy needs to be selected. Since a location must be chosen anyways, any exceptions to this policy such as a 3 or 7 day checkout must utilize a selection in the Item Policy dropdown.
- **Scan item barcode** – Enter the item’s barcode and hit enter. Do this step last.

The screenshot shows the 'Scan In Items' form with the following fields and values:

- Change Type:** Temporary
- Location:** OCN Resv-Ocn
- Call Number Type:** (empty)
- Reading List:** World History Since 1500
- New Barcode:** (empty)
- Scan item barcode:** 1000478560
- Check Requests:**
- Due Back:** (calendar icon)
- Item Policy:** (dropdown menu)
- Call Number:** HIST101 - Reeves

Red arrows point to the Change Type, Location, Reading List, Scan item barcode, and Call Number fields.

Checking Primo

Once you have finished changing the item’s location, it is now on reserve.

- **It will take between 10 – 30 minutes before the reserve information is published to Primo.**

Wait roughly 30 minutes, then check Primo. We check Primo to confirm that the item has been correctly placed on reserve and that the information was entered accurately. Here are a few things to look for when searching for your reserve in Primo:

- Confirm that the citations are listed under the correct course, campus, and reserve desk.
- Confirm that the information you put in the temporary call number field (HIST101 – Reeves) is displaying from the main search results page. You shouldn’t have to click through to an item record to see this information.
- Try searching using the different Searchable ID’s that you entered to confirm that these are working properly.
- Try a search for the instructor’s last name in the “Everything” search. Your reserve items should be at the top of the list.
- Try using both the “Everything” and “Course Reserves” search scope to confirm that you can find your reserves under either.