

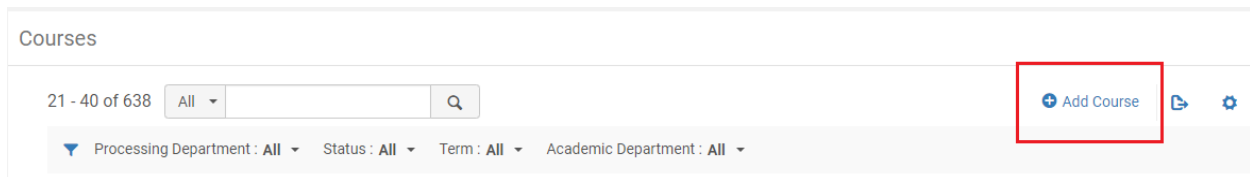
## Alma Reserves Processing – Library Owned

### 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
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.

Manage Course Information

Course Information | Instructors | Campus

Code \* HIST101 - Reeves

Name \* World History Since 1500

Academic Department

Terms list

Status  Active  Inactive

Start date 08/28/2019

End date 08/28/2020

Number of participants: 0

Year

Processing Department \* Oceanside Course Reserves

Weekly hours 0

Searchable IDs

- HIST 101
- HIS
- World History
- HIST-101

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”.

Manage Course Information

Course Information | Instructors | Campus

Instructors

No records were found.

Add instructor

Instructor

Reeves, David - Faculty -

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

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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

All

Status: All ▼

[+ 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

<b>Course Code:</b> HIST101 - Reeves	<b>Processing Department:</b> Oceanside Course Reserves	<b>Campus:</b> -
<b>Course Name:</b> World History Since 15...	<b>Instructors:</b> Reeves, David;	
<b>Section:</b> -	<b>Number of participants:</b> 0	

1 - 1 of 1 All

+ Add Reading List

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 Repository Citation"

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 Remove Citations Place Request Add Citation Remove Alerts Change Copyright Status Change Status

Select All Alerts: All Citation Status: All Resource Location Tags: All Copyright Status: All

Citation Last Modification Date

Add Brief  
Add Repository Citation  
Add Non-Repository Citation

You will be brought to a search window. Change the "All Titles" filter to "Physical Titles", then change the secondary filter to "Barcode", enter the barcode for the item and hit enter. Once the record appears on the screen, check the box on the left side of the record and then choose "Select" on the upper-right side of the screen.

Physical titles Barcode 1000220458    Advanced

Physical Titles 1000220458

Select All 1 - 1 of 1 1 rows selected Expand

1   Things fall apart / Chinua Achebe.

**Book** By Achebe, Chinua, (New York : Anchor Books, 1994.)  
**Subject:** Bosch, Ida Nigeria--Fiction. British. and others  
**Edition:** 1st Anchor books edition

**Language:** English  
**ISBN:** 0385474547 and others  
**Record number:** (CwaIC)30111784-01cacc\_l\_antonio  
**Update Date:** -

Physical (2) Other details

Once the citation has been added to the Reading List select “Save” at the top-right of the screen.

## Change the Item’s Temporary Location

The last step is to change the library-owned item’s temporary location.

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

The screenshot shows the 'Scan In Items' interface. At the top, there are two tabs: 'Scan in Items' and 'Change Item Information'. A red arrow points to the 'Change Item Information' tab. Below the tabs, there are several form fields and buttons:

- 'Automatically print slip' with radio buttons for 'Yes' and 'No' (selected).
- 'Register in-house use' with a checked checkbox.
- 'Scan item barcode \*' with a search input field containing 'Look-up or select', a dropdown menu icon, and an 'OK' button.
- 'Scan request ID' with an empty input field and an 'OK' button.
- A 'Create Item' button on the right side.
- A message at the bottom: 'No records were found.' with a list icon.

Once you are on the “Change Item Information” tab, fill out the following fields:

- **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.

Scan In Items Exit

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Scan in Items | Change Item Information

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→ Change Type: 
→ Location: 
→ Due Back:

→ Call Number Type: 
→ Item Policy: 
→ Call Number:

→ Reading List:

→ New Barcode:

→ Scan item barcode:

Check Requests

## 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, and not the default Library of Congress call number.
- 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.