



# Placing Items on Reserve in Alma

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# Agenda

- Roles needed
- Creating terms and academic departments
- Creating courses
- Creating reading lists and adding citations
- Moving items to the temporary reserves location
- Completing reading lists

# Roles Need for Course Reserves

- Course Reserve Manager (to create courses)
- Course Reserve Operator (to add/edit reading lists)
- Fulfillment Operator (to manage move requests)
- Fulfillment Administrator (to create terms and departments)

# Creating Terms (Optional)

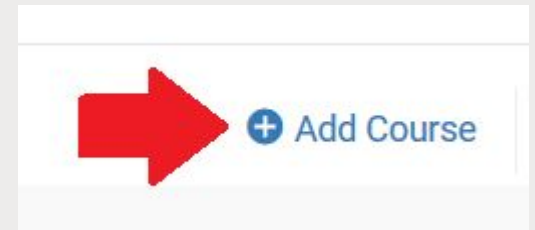
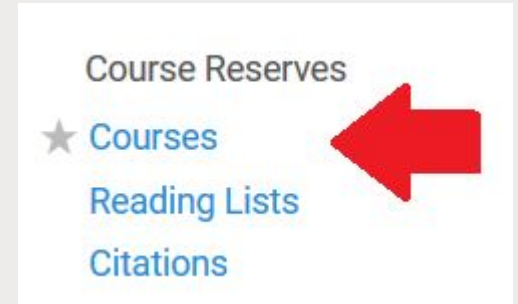
- Indicate the semester a course is being taught
- Do not impact course activation dates
- Can be used for display and reporting purposes
- Go to **Configuration | Fulfillment | Courses | Course Terms** to create terms

# Creating Academic Departments (Optional)

- Courses can be attached to specific academic departments
- Can be searched in Primo
- Can be used for display and reporting purposes
- Go to **Configuration | Fulfillment | Courses | Academic Departments** to create a department

# Step 1: Creating Courses

- Go to **Fulfillment | Course Reserves | Courses**
- Click the **Add Course** button
- Fill out Course Information tab
- Add Instructor(s)



# Step 1: Creating Courses

- Course Information Tab
  - Code: course code (ex. ENG 101)
  - Name: name of course
  - Section: can be used if you have multiple sections of a course with different reading lists
  - Term & Academic Department
  - Start/End Dates: Determine when the course is active and when reserve items will be removed from reserve
  - Processing Department: default is ok unless you've configured a specific department for course reserves processing
  - Year: the year the course is being taught
  - Searchable IDs: Primo search terms for the course (course nicknames, TAs, etc.)

# Step 1: Creating Courses

Course Information | Instructors | Notes | Campus

Code \*

Name \*

Processing Department \*  X ☰ 🕒

Status  Active  Inactive

Start date  X 📅

End date  X 📅

Number of participants:

Year

Searchable IDs

Section

Academic Department  ▼

Terms list  X ▼

Weekly hours

Course Information | Instructors | Campus

Instructors ▼

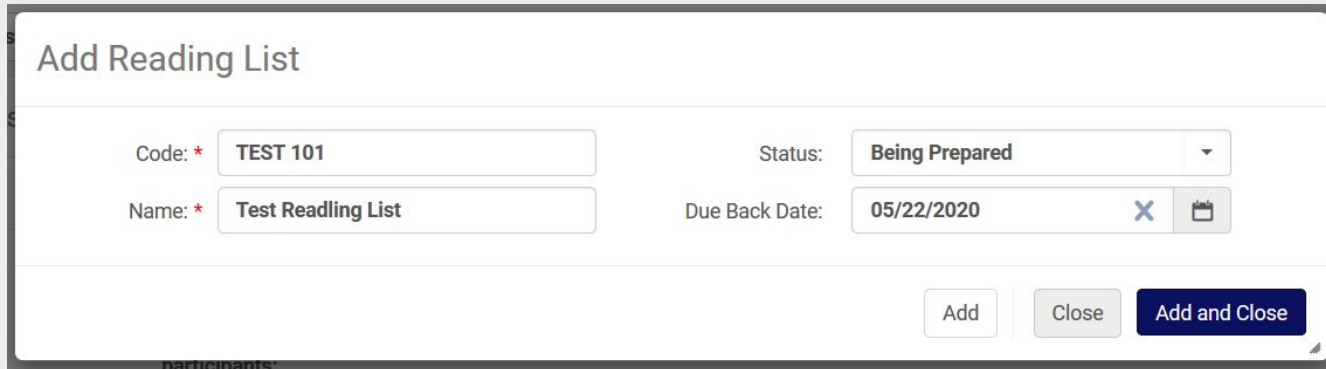
+ Add instructor 📄 ⚙️

Name	
1	SUNY, SLC <span>👤</span> <span>⋮</span>



# Creating Reading Lists

- Go to the course you wish to create a reading list for, in your Courses list, click the ellipsis next to that course, and then click the **Reading List** link
- Click **Add Reading List**
- Fill out Code and Name fields and click **Add and Close**
- You can select a different Due Back Date if needed



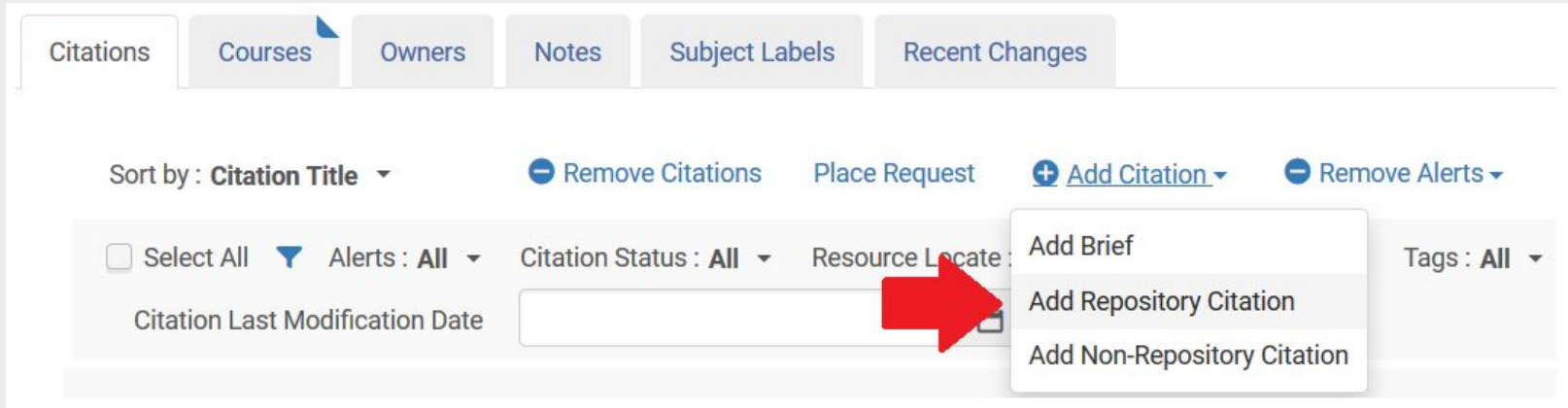
The screenshot shows a form titled "Add Reading List" with the following fields and controls:

- Code:** \* TEST 101
- Name:** \* Test Reading List
- Status:** Being Prepared (dropdown menu)
- Due Back Date:** 05/22/2020 (calendar icon and close icon)

At the bottom right, there are three buttons: "Add", "Close", and "Add and Close".

# Adding Citations to a Reading List

- Go to the reading list you want to add citation to, click the ellipsis next to that list, and then click **Work On**
- To add an item from your collection, click **Add Citation** and then click **Add Repository Citation**



The screenshot displays a user interface for managing a reading list. At the top, there are tabs for 'Citations', 'Courses', 'Owners', 'Notes', 'Subject Labels', and 'Recent Changes'. Below the tabs, the 'Courses' tab is active. The interface includes a 'Sort by' dropdown set to 'Citation Title', and several action buttons: 'Remove Citations', 'Place Request', 'Add Citation', and 'Remove Alerts'. A 'Select All' checkbox is present, along with filters for 'Alerts: All', 'Citation Status: All', and 'Tags: All'. A search field for 'Citation Last Modification Date' is also visible. A red arrow points to the 'Add Citation' button, which has a dropdown menu open. The dropdown menu contains three options: 'Add Brief', 'Add Repository Citation', and 'Add Non-Repository Citation'.

Citations Courses Owners Notes Subject Labels Recent Changes

Sort by: Citation Title Remove Citations Place Request Add Citation Remove Alerts

Select All Alerts: All Citation Status: All Resource Locate: Tags: All

Citation Last Modification Date

Add Brief  
Add Repository Citation  
Add Non-Repository Citation


# Adding Citations to a Reading List

- A repository search will open
- Search for the item you wish to add to the citations list, check the box next to the item(s), and click **Select**

All titles ▾ Keywords ▾ beatles 🔍 Advanced ▾

All Titles | beatles Cancel Select

Select All 1 - 50 of 91 1 rows selected Expand ▾ ⚙️



1 <input checked="" type="checkbox"/> 	<b>The Beatles</b> / by Hunter Davies. <b>Book {Book - Physical} text; unmediated; volume</b> By Davies, Hunter, (New York : McGraw-Hill ©1978.) <b>Subject:</b> Rock musicians--England--Biography. Rock musicians. England. and others <b>Creation Date:</b> 06/23/2019 10:19:28 EDT <b>Modification Date:</b> 12/17/2019 13:16:44 EST <b>Edition:</b> Rev. ed.	<b>Language:</b> English <b>ISBN:</b> 0070154635 and others <b>Record number:</b> ocm03481781-01suny_network ▾	<b>MMS ID:</b> 990000737660204836
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● Physical (1) Electronic Digital Other details


# Adding Citations to a Reading List

- Once you have finished adding citations to the reading list, select the items that need to be placed on reserve and then click the **Place Request** button

Sort by: Citation Title ▾ 1 - 1 of 1

[Remove Citations](#) [Place Request](#) [Add Citation](#) [Remove Alerts](#) [Change Copyright Status](#) [Change Status](#) [Expand](#)  

Select All [Alerts: All](#) [Status: All](#) [Resource Locate: All](#) [Material Type: All](#) [Tags: All](#) [Copyright Status: All](#)

Citation Last Modification Date  

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1  **The Beatles** [Edit](#) [Set Complete](#) [...](#)

**Book** By Davies, Hunter, (McGraw-Hill ©1978.)  
**ISBN:** 9780070154636; 0070154635  
**Subject:** Rock musicians--England--Biography. -- Rock musicians. -- England. and others

**Request Status:** Being Prepared  
**Resource Locate Status:** Resource Located  
**Copyright Status:** Not Determined

**Created By:** SUNY, SLC 01/13/2020 15:34:55 EST  
**Modified By:** SUNY, SLC 01/13/2020 15:34:57 EST

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

# Adding Citations to a Reading List

- A Create Request window will open
- Select Move temporarily from the **Request Type**
- Select your reserves location from the **Destination Location** dropdown
- Select the desired loan period from the **Item Policy** dropdown
- Click **Submit**

# Adding Citations to a Reading List

[← Create Request](#) Cancel Submit

The Beatles / by Hunter Davies. ▼

**Institution** SUNY Polytechnic Institute

Create Request ▼

Request Type \* **Move temporarily** ▼

Note **For TEST 101 reading list**

To \* **Peter J. Cayan Library, SUNY Polytechnic Institute** ▼

Additional Request Attributes ▼

Number of Copies

Destination Locations **RESERVES-RES** ▼

Call Number Type

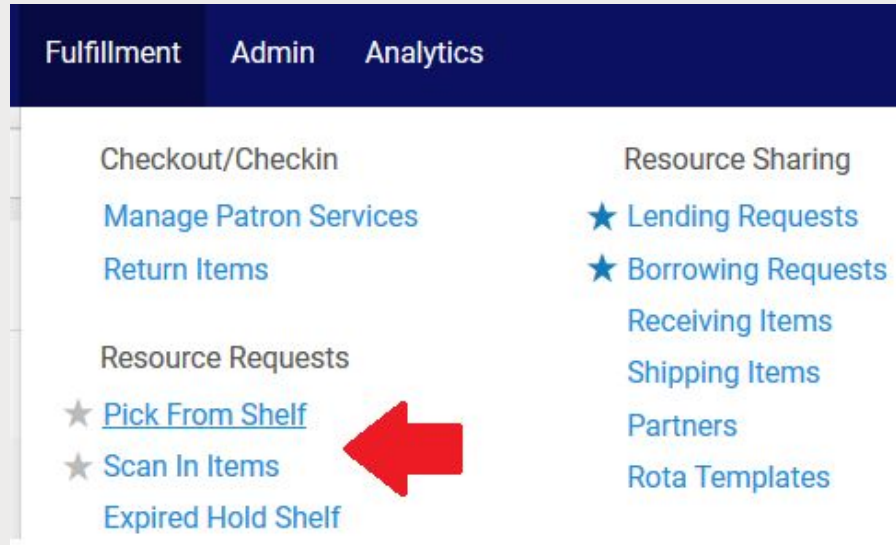
Call Number

Item Policy **2 HOUR RESERVE** ▼

Due Back **05/22/2020** ✕ 📅

# Adding Citations to a Reading List

- Items will appear on Pick From Shelf list
- Scan In items
- Items will be temporarily moved to reserves



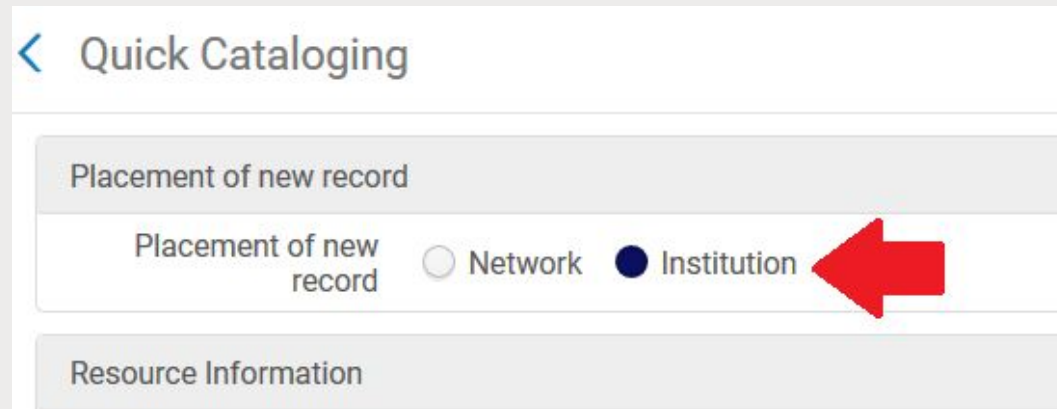
# Adding Citations to a Reading List

- To add a personal copy to a reading list, click **Add Citation** and then click **Add Brief**
- Click the **Physical Book** radio button then click **Choose**
- In the Placement of New Record section, click the **Institution** radio button
- Fill in Resource Information section
- In the Item Information section, select your reserves location and desired item policy
- Click **Save**



# Adding Citations to a Reading List

- It is very important that you select **Institution** in the Placement of New Record Section, otherwise the record is added to the Network Zone
- If you accidentally add a record to the Network Zone:  
<https://slcny.libanswers.com/faq/267356>



< Quick Cataloging

Placement of new record

Placement of new record  Network  Institution

Resource Information

# Completing Citations and Reading Lists

- As you're completing reading lists, you should set item request statuses to Complete


1  **Test 101 Personal Copy** Edit Set Complete ...

**Book** **Request Status:** Being Prepared **Created By:** SUNY, SLC 01/13/2020 16:09:32 EST

**Resource Locate Status:** Resource Located **Modified By:** SUNY, SLC 01/13/2020 16:09:32 EST

**Copyright Status:** Not Determined


Physical (1)  Digital  Other [Citation Details](#) [More Info](#)



# Completing Citations and Reading Lists

- Once an entire reading list has been completed, you should change the reading list status to Complete

Status:	<input type="text" value="Look-up or select"/>
Due Back Date:	Being Prepared
	Being Processed
	Complete
	Declined



# Removing Items From Reserves

- Individual Items can be removed from reserves using the Restore option of the Change Item Information tab of the Scan In function
- Items will automatically be removed from reserves once the Due Back Date is reached

# FAQ

- <https://slcny.libanswers.com/faq/277478>