Course Reserves in Alma - Class Materials and Script

In this class, you will learn the workflows of processing course reserves, both print and electronic. Faculty will be submitting requests through Canvas using the new library reserves tool (Leganto). Note, Library Reserves in Alma and Leganto replaces Reserves List Tool (RLIST) and Aleph Course Reserves.

Suggested Class Sequence

- Intro to Alma
- Search & Sets
- Fulfillment 1
- Fulfillment 2

Links to any pre-reading and reference documents

- Library Reserves Quick Start Guide for Instructional Staff
- Fair Use Policy (coming soon)

Handouts

- Course Reserves Handout.docx
- Course Reserves practice exercises.docx
- ALMA_Reserves_Training_Instruction_Display.docx

Class title | Outline of topics | Links to related documentation

Class script

Word doc with prompts for presentation Reserves 1 script-6.docx

Script Table of Contents:

- Introduction
- Course Reserves
  - General Background
  - Processing a request for a set of Electronic and Print
  - Following up on unfulfilled requests
  - Additional topics
- Closing

Introduction

Welcome to the Course Reserves class. In this class, you will learn the workflows for processing course reserves, both print and electronic. Faculty will be submitting requests through Canvas using the new library reserves tool, Leganto. Note, Library Reserves in Alma and Leganto replaces Reserves List Tool (RLIST) and Aleph Course Reserves. This class will include time for hands-on practice.

- Prior to taking this class, we hope you were able to attend Intro to Alma, Search & Sets, Fulfillment 1, and Fulfillment 2.
- Let's start by introducing ourselves. (Go around the room and ask everyone to give their name, library/unit, and their primary roles there or how this class relates to their work)

A few notes:

- Alma went live on July 3rd and, as expected, we're learning new things about it as staff work with real data in the system. Everyone is continuing to learn Alma, and will have the support they need to do so.
- We are training on the tool of Alma, and while there is usually more than one way to do anything in Alma, we will show you one verified or
preferred way to do tasks. Once you've learned the best practice, we encourage staff to discuss local procedures and workflows in your units.

- We also encourage everyone to come together in Learning Circles - either cross-functional within units or on the same functions across units - to discuss how the implementation is going and how the new features and workflows in Alma might change work at Harvard.

- Please continue to use the LTS Alma Support form to ask questions and report issues with Alma data, workflows, or roles & permissions. Asking these questions, and working groups providing answers, is an important part of everyone learning more about Alma. You can find the link in the Notifications widget in Alma, along with the link to Alma documentation on the LTS wiki.

About today:

- You have a 1-page handout that contains a link to the Alma sandbox, the wiki page for this class, and a few other useful links. (If there are other handouts, describe them.) The script and all materials for this class are available to review on the wiki, and will continue to be updated with any changes in procedures.

- Some quick logistics information. The nearest bathrooms & water supply are:
  - Lamont rooms: Restrooms are gendered by floor. Lamont 310 is on a men's room floor, Lamont B-30 is on a women's room floor.
  - 90 Mt Auburn: Two restrooms are on the opposite side of the building on the basement level, water is in the kitchenette and in a fountain by the restrooms
  - 625 Mass Ave: Restrooms are at the opposite end of the building on the 3rd floor, by the water fountain

- The Alma Reserves Working Group has started a Slack channel for sharing information and asking and answering questions among library assistants involved in reserves at Harvard. The group also plans to host drop-in sessions when library assistants can ask for help with problems. You may also email me or Spruill with questions.

- Please ask questions when they come up; I will also pause between sections for questions and to make sure things are clear

- We have provided computers for the practice time we will take.
  - It is not necessary to follow along on your machine as I demonstrate, but you are welcome to if it helps you.
  - We will outline the basic steps. You will repeat what I'm showing you when practice time comes up.
  - Trainers and facilitators will circulate to assist and answer questions at this time.

  - I'd like to confirm - Can everyone see my screen?
  - Please log into your computer and navigate and login to Alma at this time.

Course Reserves

General Background

Let's begin our work by looking at Alma Reserves.

Since 2006, during the time that Aleph has been the ILS (Integrated Library System) at Harvard, we have had a homegrown system, the Reserves List Library Management Tool, or R-List, that was used to notify libraries of requests for reserve materials and to retain lists of citations for courses from previous semesters for possible reuse. This system worked well and was able to communicate with Canvas, but it could not share information directly with Aleph; that was up to library staff. A few libraries did use Aleph's Reserves module, but most did not.

Alma, however, is able to communicate with Canvas through Leganto, an LTI (Learning Tools Integration) system that will appear in Canvas as “Library Reserves.” Faculty, instructors, teaching assistants, and library staff, will be able to submit reading lists and citations in this system and publish them directly to Alma, where library staff can find requests for reserve materials and fulfill those requests. Reading lists and citations from the R-List will all be transferred into Alma for future reference and reuse as well.

Let's look at a Reading List in Alma. To get to an example, I'm going to use the Persistent Search Bar and search by Course Number.

**TRAINER: Navigate to a course by searching the course number. You will describe briefly what you see**

The top shows brief course information, followed by more detailed information, including semester and processing department assigned to this list. Of importance for reserves is the Start Date and End Date of the course. These dates govern whether or not a course is Active or Inactive. Courses that have recently been migrated from RLIST to Alma/Leganto do not have these dates, so they are currently treated as Active in Alma. We will talk about the end date a little further in our training today.

**Searching for and Navigating to a list**

If you haven't set your location to Lamont Circulation, please do so for this training session.

Click on the Fulfillment menu and select Reading Lists under Course Reserves. You'll notice that this page defaults to the 'Assigned to Me' tab
and to the Processing Department associated with your login; this will help lead you to Reading Lists that need your attention when preparing for a semester. Since there are no lists assigned to you yet and since everyone’s location for the purposes of this session is Lamont, please select the ‘All’ tab and ‘Lamont Course Reserves’ as the Processing Department.

It should be noted that LTS, with assistance from the Alma Reserves Working Group, has mapped courses offered by the various FAS departments to the appropriate library location for the processing of reserves, whether the reserves will actually be held at that library or not. Courses offered by the various schools are mapped to their respective libraries.

The tabs are there to separate out what is already assigned to you, either by virtue of you having worked on it previously or as designated by a supervisor or colleague. You may also need to find and work on lists that are not assigned to anyone or to work on one assigned to someone else; that’s the reason for the other two tabs. As with all tabs in Alma, the presence of a folded-down corner (a ‘dog-ear’) indicates that there are elements in the list.

Below the tabs, the row of filters allows for more ways to narrow down the set of lists to find what you need to be working on, starting with the Status filter. Here is a list of Statuses for Reading Lists:

- **Being Prepared** - The initial status when an instructor creates a list and is preparing it. The librarian will not process the list at this stage.
- **Ready for Processing** - The instructor sent the reading list, or any citation on the list, to the library for processing.
- **Being Processed** - A librarian began working on the citations in the reading list.
- **Complete** - The librarian finished preparing the reading list. Typically, you change this when all of the citations are also marked as complete.
- **Inactive** - The reading list is no longer relevant.
- **Declined** - The library was unable to fulfill the reading list.
- **New for August! Rolled Over** - A reading list rolled over by an instructor (if the instructor (or library) selects this as the initial status of these types of reading lists).

**Back to ALMA**

The Alerts filter concerns actions taken or needed involving citations within a list and those will be discussed in the second session. For working on the next or the current semester, the Publication Status should be left on its default setting, ‘Active’.

Below the set of filters, there is a search window for the Last Modification Date, which refers to the last time work was done on a given Reading List. Click on that, and you will see a set of date ranges, along with drop-down calendars for creating a custom range of dates. If you have to work on a large number of courses, this can help narrow the results based on how recently you or someone else had worked on them previously.

If you are only looking for the Reading List for a specific course and you know the course code, a keyword from the course name, or the abbreviation and number for the course, you may search in the Persistent Search Bar at the top of the page, using Reading Lists as your Search Type, then choosing the proper Search Criteria and entering a value. Code refers to the 6-number code for a course, Name refers to the title of the course, like “Digging Up the Past,” and Course refers to the abbreviation for the department or program offering the course and the number that goes with it, such as “FRSEMR 30G.”

When a new semester approaches and it is time for you to see what reserves requests been submitted for your library:

- Go to All tab
- Filter for status Ready for Processing, Publication Status Active, Processing Department = your department.
- Choose a list to work on by clicking on the more options menu associated with the list and clicking on Work On.

It should also be pointed out that, if you choose Work On for a particular Reading List and, before leaving that list, you click on Save, that list is then assigned to you. So, if you only wish to know more about the list than you can see from the Reading List Task List, choose View.

**DISPLAY 2**

Now it is time for you to practice navigating to a Reading List. Make sure that you are located in "Lamont Library - LAM Circulation".

**Practice Time**

**Processing a Request for a Physical Item (Book, DVD, etc.)**

Now that you understand how to navigate to a list, let's look at how to process a citation for a physical item request. A good thing to remember, when looking at a list of citations, is the Expand option at the top of the list, which makes it possible to see all the possible options available for that citation, whether physical or electronic.

**Show single request then show title level request**

- Click on Ellipsis menu – Manage Fulfillment options
- Scroll down to Physical Services (list of items)
- Request specific copy by clicking on Ellipses right of item - Request
- Complete Create Request form using drop down menu:
  - Request Type: Move temporary
  - Description: (only required if there is more than one volume, part, etc.) *(Louis Agassiz letters)*
  - To: Select library location by scrolling through drop down menu or typing and selecting library name.
  - Number of copies: Select number of copies
  - Destination location: Reserve or Open Reserve
  - Item policy: Select appropriate loan period for a reserve item at the temporary location
• Due back: (leave blank)

The Due Back Date will cause the item to have its Permanent Location automatically restored on that date, even though the item is still on the reserves shelf, so make sure to set it at a date some time after the end of the semester. Since items will need to have their barcodes scanned as they are removed from the reserve shelf, it makes more sense to restore their Permanent Locations at that time. We will deal with this later in this session.

• Click Submit or hit Enter on your keyboard

Select Manage Resource Options in upper left to navigate back to list

DISPLAY 3

Now it is time for you to practice processing some physical reserve requests.

Practice Time

Processing Requests for an Electronic Item (Library licensed resource)

Back to ALMA

Follow instructions from How to find a Resource (aka Reserve or Reading) List, search for a reading list. For the purposes of this session, when it is time to practice, search in the Persistent Search Bar for the Search Type – Reading List, the Search Criteria – Courses, and the title of your EReserves example course.

Select reading list by clicking on ellipses at the end of the row display for that reading list and select Work On. In a list of citations, those available electronically will include a number in parentheses next to Other in the row of tabs underneath the citation information.

For an e-resource citation, click where it says Other, then click on e-resource or external link to confirm the link is working. If all functioning properly, select Set Complete.

DISPLAY 4

Practice Time

Pull List/Putting on Shelf

Back to ALMA

In the above process you requested that an item be transferred to your library for reserve. This is what happens at the owning library, or perhaps your own library, once they receive your request:

The owning library prints Pick Lists. They can print a list of all requested items or they can use the facet for Move Temporarily from the set of facets to the left of the Pick List to get and print only items that are requested for a temporary move.

Switch location, go to PICK FROM SHELF, use facet for MOVE TEMPORARILY, select citation

The items are then pulled from the shelf, discharged and routed to the reserve shelf at your library.

Change location back to LAMONT, copy barcode for same item

Since you already entered Items Process Status and Reserves as collection, the item will obtain this status when they are scanned/discharged at your library. Local physical processing workflow will be determined by each library.

Now it is time to practice discharging items received by the library for reserves and think about how you will incorporate physical processing.

DISPLAY 5

Practice Time

Marking a Citation as Complete

Back to ALMA

Once the requested reserve item has been received by the library and placed on the reserve shelf it is time to mark that request as Complete in Alma, which, in turn, changes its status in Leganto/Canvas Course Reserves to Available. There are three ways to find the citation you wish to change to Complete and the best one to use depends on the situation.

1. To set a single citation as Complete, use the Persistent Search box at the top of the Alma screen and choose Citations as the Search Type and Title as the Criteria, then type in the title and hit Return. If there is more than one result, make sure to select to citation that is the one you want to change. If you have the barcode for the item that was placed on reserve, use Barcode as the Criteria and enter the barcode. Then, either click on Set Complete from the Row Actions with the citation, or check the box for the citation and, from the set of actions above the filters, click Change Status and choose Complete from the menu, then click the Change Status button.
Now it is time to practice navigating to a single citation in a Reading List and marking it as complete.

2. If you want to set the citations for several items on reserve for the same course to Complete and you know the name, code, or other searchable element for the course, select Reading List as the Search Type in the Persistent Search box and the Search Criteria by which you may find the course. Alternately, go to Fulfillment--Course Reserves--Reading Lists and use filters to find the reading list. Once there, you may check the box(es) for all the citations you wish to set as Complete, then, from the set of actions above the filters, click Change Status and choose Complete from the menu, then click the Change Status button.

Now it is time to practice navigating to a several citations in a Reading List and marking it as complete.

3. If you want to set the citations for several items on reserve to Complete at once, perhaps just after processing a set of them, Go to Fulfillment--Course Reserves--Citations and set the filters as follows:
   - List Assigned to: Assigned to me
   - Citation Status: Ready for Processing
   - Alerts: Citation Move Request Completed
Then, click Select All or check the boxes for the citations you wish to set as Complete. From the set of actions above the filters, click Change Status and choose Complete from the menu, then click the Change Status button.

Now it is time to practice navigating to the list of Citations and marking one or more as complete.

Add a Citation Request in Alma

Sometimes, requests for course reserves are not made directly through Canvas, but via email or by delivering an item to the library to be placed on reserve; here is what to do in those situations.

Find a Reading List by following the instructions in the section Searching for and Navigating to a list. From the row of actions just above the list of citations, select Add Citation, then select Add Repository Citation if it an item from the library catalog or Add Non-repository citation if it is not.

For a Repository Citation, perform a search, then select which citation to add by checking the box next to it, then click the blue Select box in the upper right-hand corner of the screen. The citation will then appear in the Reading List.

For a Non-repository citation, select whether it is a book or an article in the window that appears after selecting Add Non-repository Citation. The Edit Reading List Citation screen will then open; fill as much information about the book or article as possible in the upper pane. If the citation is for a file, upload the file. Select the appropriate values for the Citation Parameters in the lower pane. Click the black box marked Save in the upper right-hand corner to add the citation, which will return you to the Reading List with the new citation added.

Viewing a Request in Leganto

After editing a Reading List, it is a good idea to see how the changes you have made will appear to the users of Library Reserves. To do so, find the View In Leganto link on the right side of the upper pane of the Edit Reading List page and click it. Check the display to make sure the information is clear and correct. If you added a file or link to electronic content, test it there to make sure it works.

End of Semester

At the end of the semester we will need to restore the item information before returning all the reserve items to their respective collections.

Use barcodes from sample course

Under Fulfillment – Resource Requests – Scan in Items

Change Item information
Processing a request for a set of Electronic and Print

TRAINER: Bulk processing will be used in this session. Need lots of time for reviewing and dealing with errors.

Earlier you learned how to process an individual citation by requesting a specific book for processing for reserve. It is possible to process multiple citations on a reading list at once by placing a title-level request.

Once you have navigated to your reading list, click on the Select All box and then select Place Request. This prompts you to create title-level requests for all titles on the list. The next steps are the same when processing an individual citation.

Placing the Requests

Use the drop-down box to select Request Type: Move temporarily. You will then be presented with a page containing two main areas: Create Request and the other Additional Attributes.

Create Request has three fields:
- Request Type: Move temporarily
- Notes: optional field for further information
- To: select library location

Additional Request Attributes has six fields:
- Number of copies: select number of copies needed—options will range from 1 to how many copies there are in the Harvard Library. If you select multiple copies when placing a bulk move request, all titles on the list will be requested for the same number of copies.
- Destination location: Reserves
- Call number type: not applicable
- Call number: not applicable
- Item policy: select the appropriate policy for the destination location
- Due back date: you may leave this section blank because due back dates default to the end of the semester when the course ends. Otherwise enter a date when the item should be taken off reserves.

When fields are completed, select Submit button in upper right.
This will return you to the reading list.

After placing the bulk move requests, Alma will confirm the number of successful or unsuccessful requests and let you know if some resources are already in the desired location (i.e., if they are already on reserve). You will see individual alerts on each citation in the Reading List when the move request is successful; click Expand and choose All to view the Alerts and Physical holdings information for each. You will not see any alerts if the request was unsuccessful for any reason. You now need to scan the list for the unsuccessful requests and determine how to process them next.

Find a citation without an alert. If it is an example that has print and electronic holdings, Alma will not place a move request because it isn’t sure which format you’d like. Follow local best practices in determining whether to fulfill request with print and/or electronic item.

Examples of reasons for failure: E-book, missing, non-circulating library, materials Harvard does not own, only Harvard copy or copies already on reserve at the requested location.

Follow local practice for if you purchase or not. If book is Missing, Non-Circulation or not owned by Harvard.

Now it is time for you to bulk process a reading list and troubleshoot the requests that failed.
Practice Time

Purchasing Request

Note: this will be different based on your library’s practices. Please confirm with your selector how this will be done. You may need to talk to everyone involved in your reserve and purchasing process to determine this.

If it done via ALMA/GOBI follow these steps: (This is based on how Lamont buys reserves)

  If you use GOBI then do so as normal, placing desired item in shopping basket
  In ALMA
  … button

Purchase Request

The form auto-populates but you can add additional information

Click save

The request is sent to your selector and they will take it from here

Practice Time

Following up on unfulfilled requests

From the persistent menu bar at the top of the page, choose Fulfillment, then Citations, if you do not wish to check up on citations from a particular Reading List, or choose a particular Reading List. Use these filters:

List Assigned to: Assigned to me
Publication Status: Active
Citation Status: Not Complete
Alerts: Citation Move Request In Progress

A gray dot next to the tab for Physical items along the bottom of each citation indicates there are no items currently available on the shelf; a green dot indicates there is at least one available. To find out details about the status of all the items of a citation, click the Ellipsis menu and choose Items. From there, determine if any action is needed to get the item. If a copy has been recalled, go to the Reading List in Leganto, find the citation, click Add tags to item, and select Waiting for recalled copy. As a result, the citation will now show in a list under Fulfillment--Citations with the filter Citation Tags: Waiting for recalled copy.

To see if all available items have been designated as missing, change the Alerts filter to Citation Move Request Cancelled.

Additional topics

Some other topics that are important with regard to Course Reserves are:

Closing

In the next day or two, you’ll receive an email that includes an evaluation for this class. Please take a few moments to fill it out - your feedback will help us improve this class and will help me improve my training skills.

If you have any questions, use the LTS Alma Support form in the Notifications wiki to submit them.

Is everyone signed up for the next class in their sequence, or would you like more information about that class?