Processing Course Reserves Requests

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Monitor Reading Lists

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

1. Go to the All tab
2. Filter for Status Ready for Processing, Publication Status Active, Processing Department = your department
3. Click Work On from the row action item list icon to choose a list to work on. Reminder: this will assign that list to you as soon as you click Save.
4. Click View to just view the reading list, without having it assigned to you

Once you have a reading list open, you can process the citations/requests (see following sections). A good practice is to click on the Expand option at the top of the citations list so you can see all format options available for that citation, whether physical or electronic.

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

To process a physical item of any media type:

1. For the citation you're processing, choose Manage Fulfillment Options from the row action item list icon (ellipsis)
2. Scroll down to the Physical Services section, the list of items available to fill the request
3. Request a specific copy by choosing Request from the row action item list for that item
4. Choose the Request Type: Move temporarily
5. After you choose the request type, the page will refresh and show two sections: Create Request and Additional Request Attributes. Choose options from drop-downs or enter the appropriate information for each field.
   1. Create Request section:
      - Note: only required if there is more than one volume, part, etc. (e.g, Louis Agassiz letters)
      - To: Select library location by scrolling through drop down menu or typing and selecting library name
   2. Additional Request Attributes section:
      1. Number of copies: Select number of copies
      2. Destination location: Reserve or Open Reserve
      3. Call Number Type and Call Number: not applicable
      4. Item policy: Select appropriate loan period for a reserve item at the temporary location
      5. Due back: best practice is to leave blank; due back dates default to the end of the semester
         - Note: The Due Back date will cause the item to have its Permanent Location automatically restored on that date, even if the item is still on the reserves shelf. 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. See the End of Semester page for more information.
6. Click Submit or hit Enter on your keyboard
7. Select Manage Resource Options in upper left to navigate back to list

Processing Requests for an Electronic Item (Library licensed resource)

To process an electronic item of any type:

1. For the citation you're processing, look for the word Other (#), with a number in the parenthesis
2. Click on Other to see the link for the eResource
3. Click on the pop-out icon to view the resource and confirm the link is working
4. If all is functioning properly, choose Select Complete
Processing a Request for a Set of Electronic and Print Items

It is possible to process multiple citations on a reading list at once, but instead of an item-level request, each citation will have a title-level request that might be filled by any item attached to that title/bibliographic record. If this is acceptable, continue with your bulk request.

Note: Title-level requests in Alma for Reserves have shown, so far, to not work as well as was expected or as well as they seemed to work in the Sandbox. As a result, library staff is advised to request specific items for Reserves, rather than place title-level requests and let Alma choose. This, in turn, makes bulk requests from a given Reading List problematic as well, but still possible if care is taken or if the situation is favorable for the process to succeed.

Before Placing Bulk Requests

When faced with a long list of books for one course, it may be preferable to attempt a bulk request, then check citations with multiple locations to make sure the proper item was requested. It is up to you to decide how long a list seems too long to request an item at a time, or what scenario lends itself best to making a multiple-citation request, but here is a suggestion as to how to choose:

1. At the top of the list of citations, choose Expand >> Expand All to see all print copies and their locations, as well as any links to electronic portfolios
2. If all or a good majority of the citations have copies available now in the general collection of the library in which they will be on reserve, or the only available copies are circulating copies in other locations, consider proceeding with a bulk request.
3. If a number of the citations fit the above criteria, but others do not, you can do a bulk request for some titles on the list and then request the others individually.

Note on requesting multiple copies of a single item: In cases where more than one copy needs to be on reserve for a given title, request that title separately from the rest, since the number of copies in a bulk request is a request for the same number of copies for every title in the bulk request. This is an advantage if you need 2 copies of every title on the list (for instance), but can also catch you unawares.

Placing Bulk Requests

Once you've decided which titles to include in your bulk request, you'll mostly follow the steps for an individual request above.

1. Select the citations to include in the bulk request:
   1. To request all citations on the list at once, click on the box next to Select All in the row above the citation list
   2. To request some citations:
      1. Click the box to the left of each citation you want to include OR
      2. For very long lists, click on Select All and then unclick/unchecked the box next to each citation you don't want to request in bulk. This will save time and clicking.
   3. Once all desired citations have been checked, click Place Request at the top of the list
   4. The same Create Request screens appear as for item-level requests
      • Reminder: 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. If this is what you want, a bulk request speeds up the process tremendously.
5. Click Submit
6. Alma will confirm the number of successful or unsuccessful requests and let you know know if some resources are already in the desired location (i.e., if they are already on reserve)

After Placing Bulk Requests

Review the list of citations for alerts - these alerts tell you what happened as a result of the bulk request.

1. Click Expand >> Expand All to view all information for each citation
2. If there are no alerts, the title-level request was successful
   1. If a citation displays items at multiple locations, you can check individual requests by clicking Manage Fulfillment Options and checking the request to make sure the location listed as Managed By Library is the expected one.
   2. If a request was made to an item from a location that is not the expected or preferred one, delete that request and make a separate request for the item from the preferred location.
3. If there are alerts, you'll need to handle the unsuccessful requests

Handling Unsuccessful Requests

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.

**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

**Pull List/Putting on Shelf**

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:

1. 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.
2. Switch location, go to PICK FROM SHELF, use facet for MOVE TEMPORARILY, select citation
3. The items are then pulled from the shelf, discharged and routed to the reserve shelf at your library.
4. Change location back to LAMONT, copy barcode for same item
5. 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.