

Alma Essentials: Fulfillment

CREATING COURSE RESERVES

Hello, in this tutorial you will learn about the components and workflows of course reserves, as well as how to create course records and reading lists.

Please note that this session does not cover Ex Libris Leganto. If your institution uses Leganto to manage reading lists please watch the “Leganto for Library Staff” training sessions.

The structure of course reserves in Alma has four parts: Course Records, Reading Lists, Citations, and Resources.

Course records contain basic information about the course such as the name, course code, instructors, and start and end dates of the course. This is the highest level of the hierarchy and every course is associated with an academic department, as you’ll see shortly. Please note that you can update course records and reuse them from term to term.

Next, are the reading lists. A single course record can have one or more reading lists.

Third in the hierarchy are the bibliographic citations for the reading list items. They are only the citations for the article or book from the reading list including the title, author, publisher, and page numbers. These can be entered manually in Alma or loaded via APIs, as well as from Leganto if your institution has it.

Lastly, are the resources, which are the fulfilled citations. There are several ways that a citation can be fulfilled.

- The item can be digitized, in which it would follow the standard digitization workflow. The digitized file can then be uploaded to for discovery in Primo, or it can be emailed to the instructor to load into a course management system.
- Physical items may be moved to the Course Reserves location. This process can be handled by any staff member with the Requests Operator Role. Moved items will inherit the fulfillment policies assigned to that location.
- A temporary item record can be created, such as for a faculty copy or an online item outside the current catalog. A brief record can be created from within the Reading List.
- Or lastly, a link to the inventory for users to access. This will allow students to find the item when searching for their course in Primo, and will then see that the item is at the permanent shelving location, or available electronically. This option does not require any real ‘managing’ of the items because students will only be navigating to it from the reading list.

Once all items have been retrieved the library staff member can then pass the list back to the instructor to enter into a course management system. Additionally, at the start of the course, Alma will publish the reading list in Primo.

To create a Course Record you must have either the Fulfillment Services Manager or Operator role, or a Course Reserves Manager or Operator Role. You’ll go to Fulfillment > Courses. Here you can view and edit courses records that have already been created or make a new one.

To create a new course you’ll click “Add Course”. Now you’ll enter in the course code... Name... Processing Department, which assigns the department that will fulfill the reading list for this course... The Academic Department and Terms list are optional, and can be configured for your institution... Status is tied to the start and end dates, which determine when Alma will publish the reading list to Discovery... Searchable IDs provide additional search terms that can be used to

locate the course in Alma... and Instructors allows you to add the individuals that will be teaching the course and creating the reading lists.

You need to add a Reading List to a course so you'll open the row action tool for the course you need, and select "Reading List".

Now you can see existing Reading Lists for the course. To create a new list, click "Add Reading List". In the popup, you'll enter in the Reading List code, this can be the same as the course code, but please note that it cannot be changed later... Name is the full name of the course... Status is initially set to "Being Prepared" and can be updated later as it moves through the workflow... The Due Back Date is when the items will be due back to their permanent locations, the default is the end date of the course.

When you're done click "Add and Close" to create the new list and close the popup.

Please watch the next tutorial, "Populating Reading Lists" to learn how to complete the process of populating Reading Lists.