

Alma Essentials: Fulfillment

POPULATING READING LISTS

Hello, in the previous session you learned how to create a course reserve record and an associated reading list. In this tutorial you will learn how to add citations to reading lists from a repository search, scanning in items, and from Leganto.

An instructor has asked you to add several citations to a reading list for them. There are several ways to manually add item citations.

First, you'll open the reading list by going to Fulfillment > Reading Lists and then open the row action tool and select "Work On". When you click "Add Citation, there are three options: Add Brief, Add Repository Citation, and Add Non-Repository Citation.

"Add Repository Citation" – will allow you to conduct a repository search... and select an item from the library's inventory.

If the item needs to be moved to the Course Reserves location or digitized, open the row action tool and select "Manage Fulfillment Options" link to create a request and trigger the appropriate workflow.

"Add Brief" – will let you create and add a brief record for an item, such as for an instructor's personal copy.

You'll be prompted to select the type of citation record you want to create. Note that citation types can be used for different formats. For example, "Physical Book" could be used for a sound recording. Please note that this is a basic template. Additional edits to the bibliographic record can be made in the Metadata Editor after the record is created. When you're done click "Choose".

In the form enter the information you have in order to create the brief record. Check the "Course Restricted" box if you want the item to be searchable in Discovery only with a courses search scope, and check "Suppress from Discovery", if you do not want the record to appear in Discovery at all. You will need to enter the library and location as well as provide a barcode if necessary. Click Save when you're done and the item will now appear on the reading list.

"Add Non-Repository Citation" – is a placeholder for an item if you are unsure if the title is available at your institution and may need to be ordered or borrowed via Resource Sharing. Please note that "Non-Repository Citations" are automatically created if instructors enter citations through a webform and Alma's APIs.

The form for a "Non-Repository Citation" is very similar to the Brief record form. Enter the citation details... and click "Save" when you're done. To see if the item exists in the Repository, open the row action tool, and select "Resource Locate". This will search the library's repository for the item based on the information that was entered for the citation.

Another way to add a citation to a reading list is from the list of results of a search. You'll execute an all titles, title search... and here's the record. Click on the row action tool and select "Add to Reading list", then select the correct list when prompted.

You will only see reading lists that have been assigned to you.

Once the item is linked to the reading list the item's location will be displayed in Discovery, as you'll see shortly. If it's an electronic resource, as you just did, it will display a link.

In this workflow you have items in hand that need to be added to a reading list. To do this, you'll go to Fulfillment > Scan in Items.

When the page loads click on the “Change Item information” tab. This will be a temporary move... change the location to “Course Reserves”, set the due back date, in this case you’ll set it for the end of the semester. Depending on how your fulfillment units are configured, an item policy may need to be assigned to items while they’re on reserve. Then select the correct “Reading List.”

Once this information is set, you can scan in barcodes of the items that will be associated with this particular reading list.

This workflow accomplishes two tasks at once; citations are added to a reading list and the item record’s Temporary Location Information has been updated so the inventory has been moved to “Course Reserves.”

Items can also be added to reading lists by loading in citations via webform and Alma APIs. With this option, once the citation is added, library staff can decide how to fulfill it.

Please note that this workflow will show you how to add citations to reading lists, but some items may require another step that moves them to their temporary course reserves location.

For example let's locate an item that has been moved to its temporary location in Course Reserves. When you open the information section both the temporary and permanent locations will be displayed, but only the temporary one will be shown in Discovery.

If your institution uses Leganto there are several additional ways to add citations. For more information please visit the Leganto for Instructors training sessions in the Knowledge Center.