

# Alma Course Reserves Guide



**University of Illinois at Urbana-Champaign**

**Central Access Services**

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This handy guide will help you to process Course Reserves in Alma Fulfillment. Units that offer Course Reserve can locate procedures and best practices here. **Click any entry in the Table of Contents below to navigate directly to that section of the guide.**

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## Roles Needed to Work in Alma Reserves

Before you work in the Alma Reserves module, your unit will need to request the following Roles in Alma:

- Course Reserves Viewer (scoped to your Library)
- Course Reserves Operator (scoped to your Library)
- Course Reserves Manager (scoped to your Library)

Roles can be requested using the [Alma Permissions Request Form](#)

## Checking Course Explorer

First, we need to verify that this course is being taught this semester by this specific instructor, and to determine if there are any cross-listings.

<https://courses.illinois.edu/schedule/DEFAULT/DEFAULT>

Make sure the appropriate semester is selected under **Term** on the right-hand side of the page and search for your course.

## Spring 2021

All Classes

Narrow by Subject Code:

**All** A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

190 entries

SUBJECT CODE	SUBJECT
AAS	Asian American Studies
ABE	Agricultural and Biological Engineering
ACCY	Accountancy
ACE	Agricultural and Consumer Economics
ACES	Agricultural, Consumer and Environmental Sciences
ADV	Advertising
AE	Aerospace Engineering
AFAS	Air Force Aerospace Studies

If the specific course number/instructor combination is not showing up on the list, contact either the department or the instructor to verify the details of the request.

Many courses are cross listed in multiple departments. In the timetable, cross-listed courses are indicated by **Same as** \_\_\_\_\_.

## AFRO 103

Spring 2021 **All Classes**

## Black Women in the Diaspora

[Course in Catalog](#)
[List of Terms offered](#)
[PDF](#)
[Register for Classes](#)
[Show Final Exam Schedule](#)
**Credit:** 3 hours.

Explores the historical, social, economic, cultural and political realities of black women in the African diaspora with an emphasis on the U.S., Canada, Britain, Africa and the English speaking Caribbean. How macro structures such as slavery, imperialism, colonialism, capitalism, and globalization shaped and continue to circumscribe the lives of black women across various geographic regions. Discussion of the multiple strategies/efforts that black women employ both in the past and present to ensure the survival of the self and the community.

Same as [AFST 103](#) and [GWS 103](#).**This course satisfies the General Education Criteria in Spring 2021 for:**

Cultural Studies - US Minority

[Status Icon Legend](#)
[My Favorites](#)
[My Schedule](#)
**Section Status updates every 10 minutes.**
[Show Section Details](#)
[Hide Section Details](#)
[AFRO - All Classes](#)

Search Table...

1 entries

Detail	Status	☆	CRN	Type	Section	Time	Day	Location	Instructor
	●	☆	44761	Online	A	09:00AM - 10:20AM	MW	n.a.	Flynn, K
Availability	CrossListOpen								
Degree Notes	Cultural Studies - US Minority course.								
Date Range	Meets 01/25/21-05/05/21								
Part of Term	1								

In this example: AFRO:103 is cross listed as AFST:103 and GWS:103.

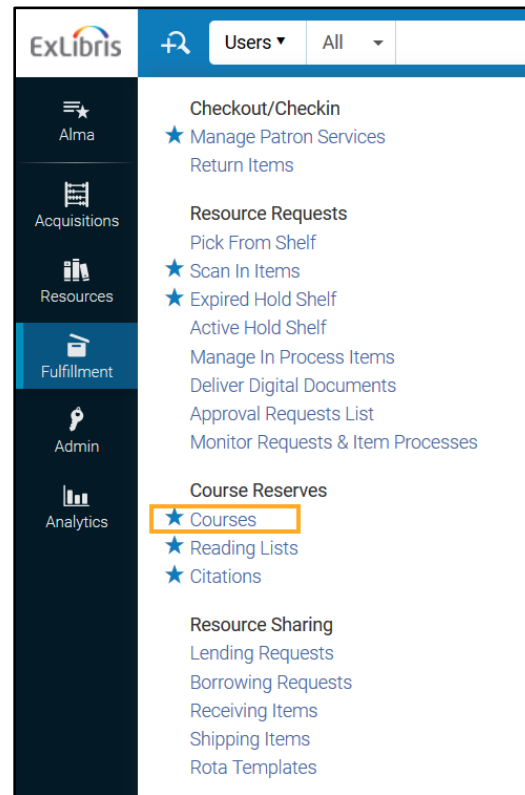
## Creating a New Course

After we've confirmed the details, the first step in Alma for processing a course reserves request is to create a Course. The Course contains important information about the class, including instructor and course code.

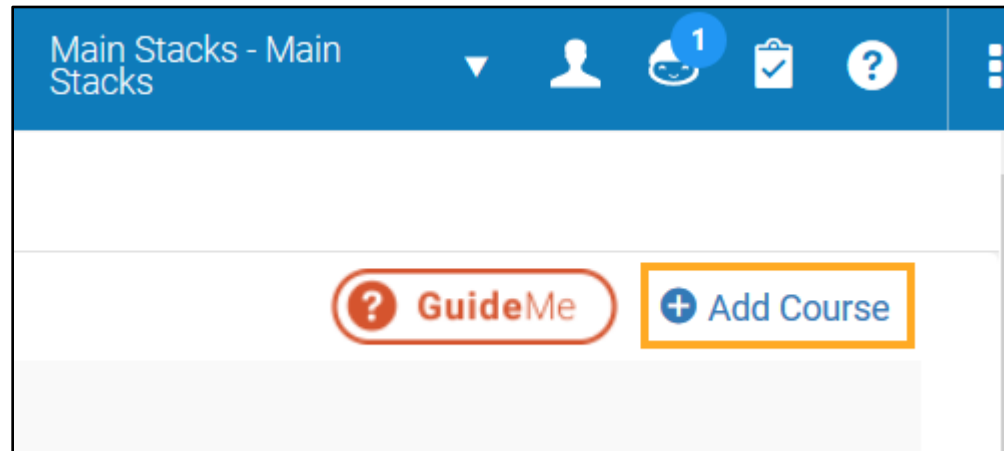
**Note:** If a course has cross-listed course codes (as in our example of AFRO:103/GWS:103), create a course for each cross-listed entry. In our example, this would mean that we'd follow the process below once for AFRO:103 and a second time for GWS:103 and connect them to the same Reading List. For more, please see [Associating a Reading List with Multiple Courses](#).

To navigate to **Courses**:

1. Select **Fulfillment** from the vertical navigation bar
2. Under **Course Reserves**, select **Courses**.



3. To add a new course, select **Add Course**:



Selecting **Add Course** will navigate you to the course creation wizard. Fill out the three available tabs as follows:

1. **Course Information** tab

1. **Code:** Enter the course code with department and course number separated by a colon. (In the example above, the course number is “AFRO:103”). This field is very important, as it informs how the course will appear to users in Primo VE. If the “Course” you’re adding is not a course, please see [Adding Reserves Lists for Non-Course Groups](#).
2. **Name:** Enter the name of the course as listed in Course Explorer (In the example above, the course name is “Black Women in the Diaspora”).
3. **Processing Department:** Select your department from the dropdown menu.
4. **Terms list:** Select the term for this list from the dropdown menu.
5. **Start date:** This should be at least seven days before the semester begins. See [Future Reserves Dates](#) for recommended reserves lists start dates for future years.

6. **End date:** This should be at least eight days after the semester ends for the list end date. See the [Future Reserves Dates](#) of this guide for recommended reserves lists end dates for future years. If this item is a permanent reserve, see [Items to be kept on Permanent Reserves](#).
7. **Year:** Fill in the year
8. Do not fill in the following fields:
  - a. Academic Department
  - b. Number of participants
  - c. Section
  - d. Weekly hours
9. **Searchable IDs:** You have the option to add searchable IDs. Enter terms here that you think will make the course more findable. Searchable IDs are viewable by patrons in Primo VE, so avoid entering jargon or internal notes in these fields.

< Manage Course Information
Cancel Save

Course Information

Instructors

Notes

Campus

Code \*

Name \*

Processing Department \*  ✕ ☰ ↻

Status  Active  Inactive

Start date  ✕ 📅

Number of participants:

Year

Searchable IDs

Section

Academic Department

Terms list  ✕

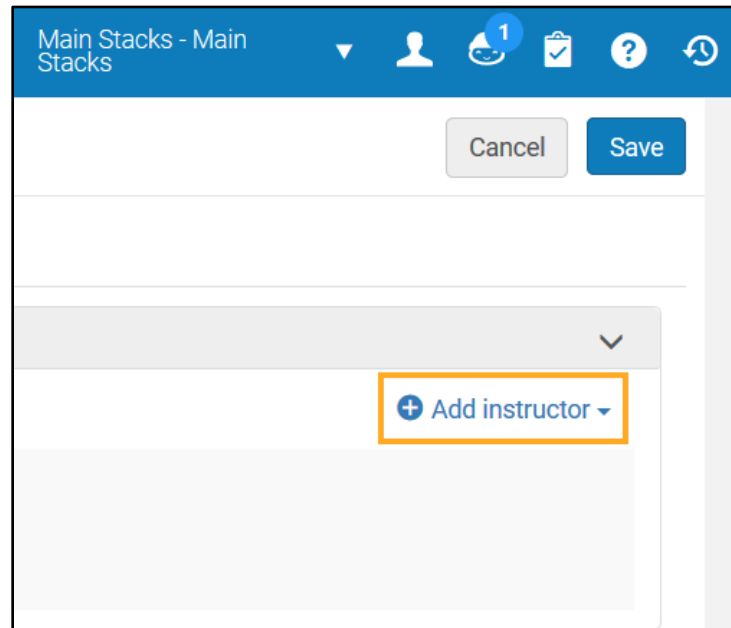
End date  ✕ 📅

Weekly hours

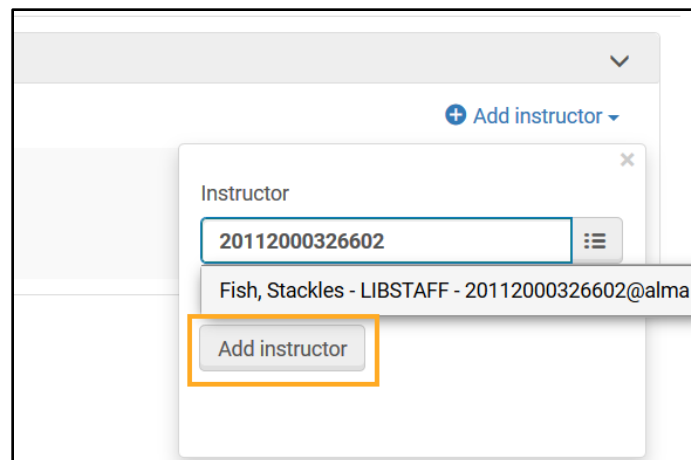
## 2. Instructors tab

Click **Add Instructor** to associate an instructor with this course.





1. Search for the instructor by barcode or NetID in the dropdown menu. You can also search by name but should use unique identifiers (like barcode and NetID) whenever possible for accuracy.
2. Click **Add Instructor**



### 3. **Notes** tab

Use as your unit sees fit. At this time this does not appear to display in Primo, but please keep in mind that if settings change it is possible that this note could become viewable for patrons.

### 4. **Campus** tab

Do not fill out any information on the Campus tab

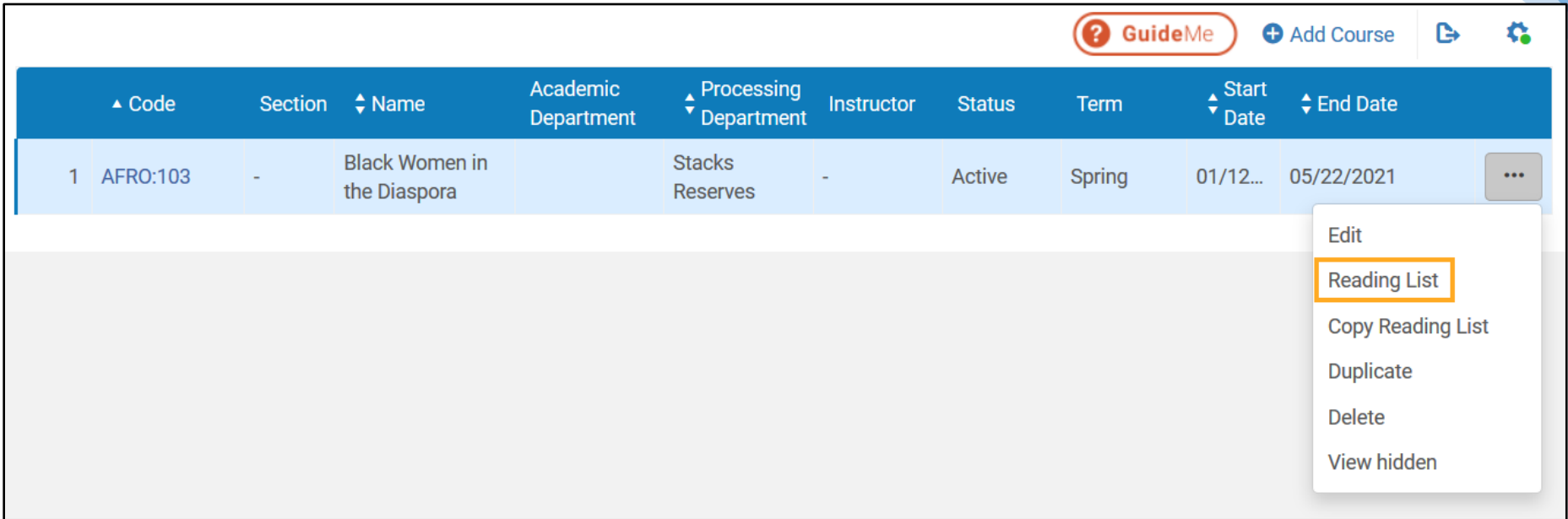
Once all tabs are completed, click **Save** to save this course.

## Creating a Reading List

Once you've created a Course, the next step is to add a Reading List. The Reading List is where you'll add the items (Citations) needed to complete a course reserves request.

After creating a Course (or identifying an existing Course to add a Reading List to), please follow the steps below.

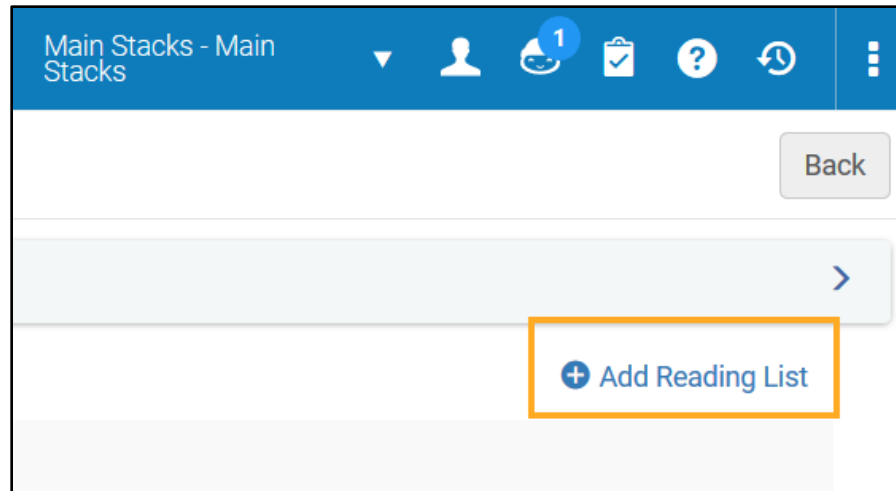
1. Start in the **Courses** screen (Fulfillment > Course Reserves > Courses).
2. Locate the Course for which you would like to set up a Reading List.
3. Select **Reading List** in the row action (...) menu for this course. The Course's Reading List page appears.



The screenshot shows a web application interface for managing course sections. At the top right, there is a "GuideMe" help icon, an "Add Course" button, and a settings gear icon. Below this is a table with the following columns: Code, Section, Name, Academic Department, Processing Department, Instructor, Status, Term, Start Date, and End Date. The first row of the table contains the following data: Code: AFRO:103, Section: -, Name: Black Women in the Diaspora, Academic Department: (empty), Processing Department: Stacks Reserves, Instructor: -, Status: Active, Term: Spring, Start Date: 01/12..., End Date: 05/22/2021. A context menu is open over the first row, listing the following options: Edit, Reading List (highlighted with an orange box), Copy Reading List, Duplicate, Delete, and View hidden.

Code	Section	Name	Academic Department	Processing Department	Instructor	Status	Term	Start Date	End Date
1 AFRO:103	-	Black Women in the Diaspora		Stacks Reserves	-	Active	Spring	01/12...	05/22/2021

4. Select Add Reading List. The Add Reading List dialog box appears.



The screenshot shows a mobile application interface for "Main Stacks - Main Stacks". The top navigation bar is blue and contains a dropdown arrow, a user profile icon, a notification bell with a "1" badge, a checklist icon, a question mark icon, a refresh icon, and a menu icon. Below the navigation bar is a "Back" button. A light blue bar with a right-pointing arrow is visible. At the bottom, a button with a plus sign and the text "Add Reading List" is highlighted with an orange box.

5. Enter the Reading List information.

The screenshot shows a mobile application interface for managing a course's reading list. At the top, there is a back arrow and the text 'Course's Reading List'. Below this is a search bar with a dropdown menu set to 'All' and a magnifying glass icon. To the right of the search bar is a '+ Add Reading List' button. Below the search bar is a status filter dropdown set to 'Status: All'. The main content area is a white modal box titled 'Add Reading List'. Inside this modal, there are four input fields: 'Code: \*' with the value 'AFRO:103/GWS:103 - Fish - Spring 21', 'Name: \*' with the value 'Black Women in the Diaspora', 'Status:' with a dropdown menu set to 'Being Prepared', and 'Due Back Date:' with the value '05/22/2021' and a calendar icon. At the bottom of the modal are three buttons: 'Add', 'Close', and 'Add and Close'.

- a. **Code:** For consistency and ease of searching, we suggest the following format for your Code:  
 Course code – Instructor last name – Term – Three letter library location code  
 Example: AFRO:103/GWS:103 – Fish – Spring 2020 – STX  
 This format allows for library staff to identify information about the list at a glance.
- b. **Name:** Enter the name of the course as listed in Course Explorer
- c. **Status:** In our Alma environment, statuses during this step are for your reference only. They can be used however best works for your unit. **Being Prepared** may be the status that you want to set a new list to.
- d. **Due back date:** This field should auto-populate from the date that you supplied as the end date for the course.

## 6. Click **Add and Close**

### Adding and Creating Citations

Now that you have your Reading List set up, you're ready to add items to your list.

1. Select **Work On** from the row action list for the course.

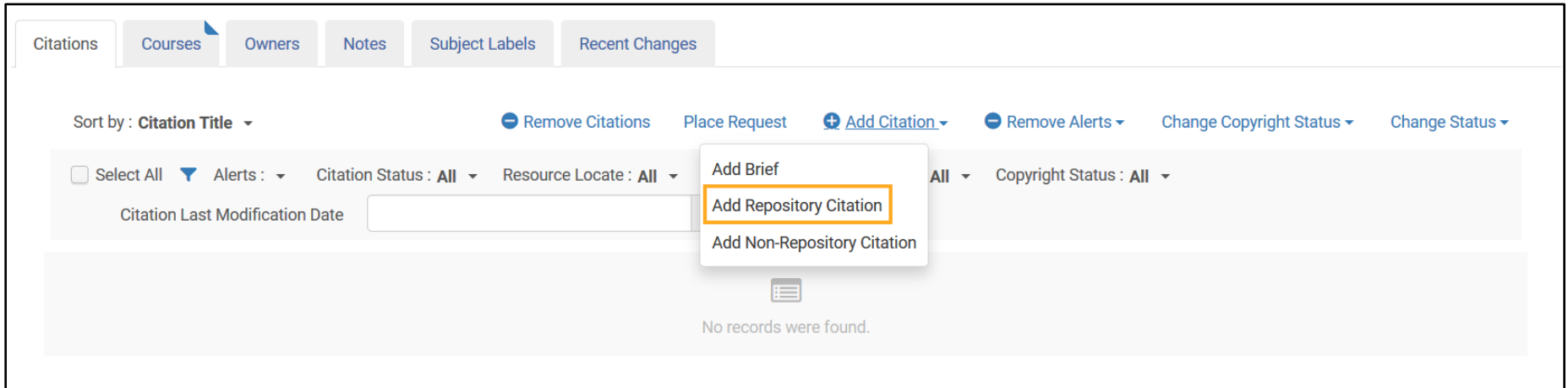
Code	Name	Status	Assignee	Owner/s	Due Back Date	
AFRO:103/GWS:103 - 1 Fish - Spring 2021 - STX	Black Women in the Diaspora	Being Prepared	-	-	05/22/2021	...

- View
- Work On
- Reassign
- Duplicate
- Associate this list with a course
- Remove associated course
- Delete
- Purge
- View hidden

2. You'll automatically be navigated to **Edit Reading List**.
3. At the bottom of the screen, select **Add Citation**.
4. You'll be given three options (**Add Brief**, **Add Repository Citation**, **Add Non-Repository Citation**). Do not use **Add Non-Repository Citation**.
  - a. If the library owns the item that you're adding to the list, select **Add Repository Citation**.
  - b. If the item is a personal copy submitted by an instructor, select **Add Brief**.

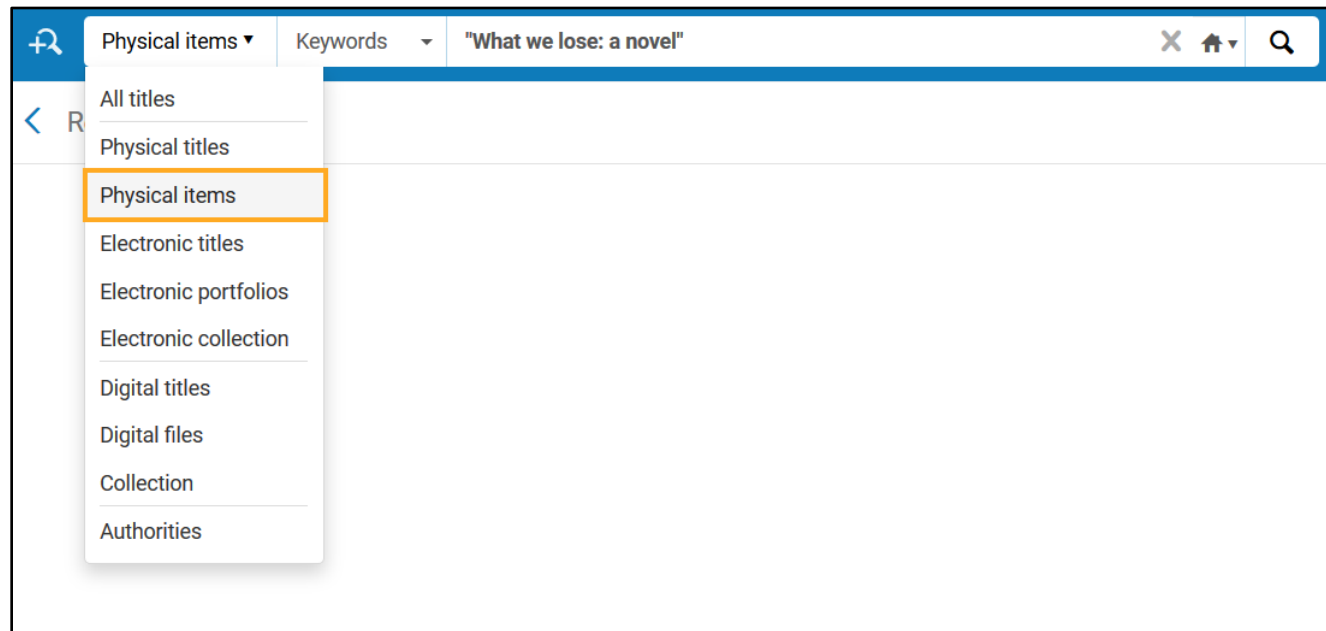
### Adding a Repository Citation

If the library owns the item that you're adding to the list, select **Add Repository Citation**.



The screenshot displays a web interface for managing citations. At the top, there are tabs for 'Citations', 'Courses', 'Owners', 'Notes', 'Subject Labels', and 'Recent Changes'. Below the tabs, the 'Citations' tab is active. The interface includes a 'Sort by' dropdown set to 'Citation Title'. A row of action buttons includes 'Remove Citations', 'Place Request', 'Add Citation', 'Remove Alerts', 'Change Copyright Status', and 'Change Status'. The 'Add Citation' button is expanded, showing a dropdown menu with three options: 'Add Brief', 'Add Repository Citation' (highlighted with an orange border), and 'Add Non-Repository Citation'. Below the menu, there are filters for 'Alerts', 'Citation Status', and 'Resource Locate', all set to 'All'. A search bar for 'Citation Last Modification Date' is visible. At the bottom, a message states 'No records were found.'

1. This will direct you to a Repository Search for the item in question.
2. Use the persistent search bar to search for the item.
  - a. **Before searching for an item, choose “Physical Items” as the search parameter.** This step is important, as a Physical Title search could lead to all items on a bib record being added to your Reading List.
  - b. Search for the item you would like to add to the Reading List.



3. Once the search has run, check the check box for the item that you want to add on the left side of each entry.
4. Once you've checked the box for the copy of the item that you'd like to connect to the Reading List, click **Select**.

Physical Items | Contains Phrase "What we lose: a novel" Cancel Select

Select All 1 - 2 of 2 1 rows selected 1 rows selected

1 <input type="checkbox"/>	<p><b>What we lose : a novel / Zinzi Clemmons.</b>  <b>Book</b> By Clemmons, Zinzi, (New York, New York : Viking, [2017])  <b>Barcode:</b> 30112115047943  <b>Library:</b> Residence Hall Illinois Street Library  <b>Creation Date:</b> 09/10/2017 19:00:00 CDT  <b>Modification Date:</b> 11/12/2020 15:14:44 CST  <b>Expected Arrival Time:</b> -  <b>On Hold Expiration Date:</b> -  <b>Due Date:</b> -  <b>Needed By:</b> -  <b>Until:</b> -  <b>Permanent Location:</b> Stacks</p> <p><a href="#">Other details</a></p>	<p><b>Call Number:</b> CLEMMONS, ZINZI  <b>Call Number Type:</b> Dewey Decimal classification  <b>Status:</b> Item in place  <b>Due back:</b> -  <b>Item Policy:</b> BOOK2  <b>Material Type:</b> Book</p>	<p><b>Item ID:</b> 23889322840005899  <b>Holdings ID:</b> 22970811950005899  <b>MMS ID:</b> 99840720412205899</p>
2 <input checked="" type="checkbox"/>	<p><b>What we lose : a novel / Zinzi Clemmons.</b>  <b>Book</b> By Clemmons, Zinzi, (New York, New York : Viking, [2017])  <b>Barcode:</b> 30112123140896  <b>Library:</b> History, Philosophy and Newspaper Library  <b>Creation Date:</b> 02/21/2018 18:00:00 CST  <b>Modification Date:</b> 06/04/2020 15:09:58 CDT  <b>Expected Arrival Time:</b> -  <b>On Hold Expiration Date:</b> -</p>	<p><b>Call Number:</b> 813 C5919w  <b>Call Number Type:</b> Dewey Decimal classification  <b>Status:</b> Item in place  <b>Due back:</b> -  <b>Item Policy:</b> BOOK 16/4 WKS  <b>Material Type:</b> Book</p>	<p><b>Item ID:</b> 23889322820005899  <b>Holdings ID:</b> 22889322830005899  <b>MMS ID:</b> 99840720412205899</p>

5. After the item is added, Alma will navigate you automatically back to the Reading List you're currently working on. As you can see, this item has been successfully added to the AFRO:103 Reserve List.



Select All Alerts : ▾ Citation Status : All ▾ Resource Locate : All ▾ Material Type : All ▾ Tags : All ▾ Copyright Status : All ▾

Citation Last Modification Date



1  **What we lose : a novel**

Edit

Set Complete



**Book** By Clemmons, Zinzi, (Viking [2017])

**ISBN:** 9780735221710; 0735221715

**Subject:** African American women--Fiction. -- Mothers and daughters--Fiction. -- FICTION--Literary. and others

**Request Status:** Being Prepared

**Resource Locate Status:** Resource Located

**Copyright Status:** Not Determined

**Created By:** BLANKENSHIP, KRISTEN  
04/15/2021 12:17:01 CDT

**Modified By:** BLANKENSHIP, KRISTEN  
04/15/2021 12:17:02 CDT



● Physical (2)

**2 Holdings | 2 of 2 items are available**

Library	Location	Call Number	Accession Number	Item Availability	Related Record
HISTORY	<a href="#">hix</a>	813 C5919w	-	● 1 of 1 Available	-
RESHALLILL	<a href="#">rhlsrc</a>	CLEMMONS, ZINZI	-	● 1 of 1 Available	-

[Items of Related Records](#)

[Citation Details](#)



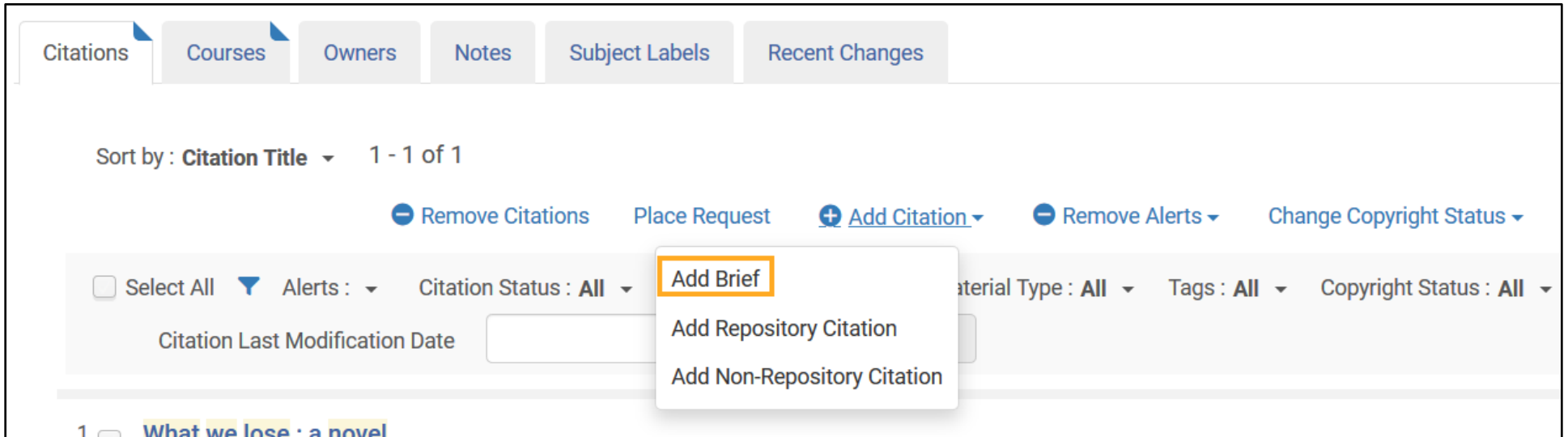
[More Info](#)



## Creating a Brief Record (Personal Copy)

If the item is a personal copy submitted by an instructor, follow this procedure to establish a citation for the item.

### 1. Select **Add Brief**.



The screenshot displays a library catalog interface. At the top, there are tabs for 'Citations', 'Courses', 'Owners', 'Notes', 'Subject Labels', and 'Recent Changes'. Below the tabs, the sorting is set to 'Citation Title' and shows '1 - 1 of 1' items. A row of action buttons includes 'Remove Citations', 'Place Request', 'Add Citation', 'Remove Alerts', and 'Change Copyright Status'. The 'Add Citation' button is active, and a dropdown menu is open, showing three options: 'Add Brief' (highlighted with an orange border), 'Add Repository Citation', and 'Add Non-Repository Citation'. Below the dropdown, there are filters for 'Alerts', 'Citation Status: All', 'Material Type: All', 'Tags: All', and 'Copyright Status: All'. A search bar for 'Citation Last Modification Date' is also visible. At the bottom, the first item in the list is '1 What we lose : a novel'.

### 2. This will create a pop-up message that will prompt you to choose the **Citation Type**. Choose **Physical Book**.



Citation Type  Physical Book  Physical Article

Electronic Book

Electronic Article

Cancel Choose

The screenshot shows a form with the title "Citation Type". There are four radio button options: "Physical Book" (selected), "Physical Article", "Electronic Book", and "Electronic Article". At the bottom right, there are two buttons: "Cancel" and "Choose". The "Choose" button is highlighted with an orange border.

- Alma will navigate you to a **Quick Cataloging** page to edit the brief record.
- Under **Placement of New Record**, choose **Institution**. This is an important step that ensures that I-Share users aren't able to find this item in Primo searches.



Quick Cataloging Cancel Save

Placement of new record

Placement of new record  Network  Institution

The screenshot shows the "Quick Cataloging" page. At the top left is a back arrow and the text "Quick Cataloging". At the top right are "Cancel" and "Save" buttons. Below this is a section titled "Placement of new record" with a dropdown arrow. Underneath, there are two radio button options: "Network" and "Institution". The "Institution" option is selected.

- Under **Resource Information**, fill in the following fields:

Resource Information

Title *	Half of a Yellow Sun	Author initials	
Author	Chimamanda Ngozi Adichie	ISBN	
Edition		System Control Number	
LCCN		Barcode	
Other standard ID		Publisher	
Remote record ID		Place of publication	
Publication date	2007	Source	
Additional person name		Call number	AFRO:103 Fi100
Series title number		Volume	
Note		Chapter number	
Part		Start Page	
Pages		Chapter author	
End Page		Editor	
Chapter title			

Course Restricted  
 Suppress from Discovery

- a. **Title:** Supply the item's title
- b. **Author:** Supply the item's author
- c. **Call number:** To create a call number for a personal item, we suggest using the course code (in this example, AFRO:103). Then, create a cutter number to add to the end using the first two letters of the instructor's last name plus a three-digit number (e.g. Fi100). The three-digit number can be anything of your choosing but be careful not to re-use numbers from personal items that were previously on reserve. An example of a completed call number for this personal reserve copy would be "AFRO:103 Fi100". A second item could be "AFRO: 103 Fi101", and so on.
- d. **Publication date:** Supply the year that the item was published.
- e. **ISBN:** Supply the ISBN-13 if you would like for the item to be searchable by ISBN. This can be helpful in Alma.
- f. **Other fields:** Other fields are not required. Please supply any additional information as desired.
- g. **Course Restricted:** Check this box. This allows the item to be found through Course Reserves searches in Primo, but not through regular searches.
- h. **Suppress from Discovery:** Uncheck this box. If this box is checked, the item will not be discoverable in Primo.

6. Under **Citation Parameters**, you do not need to change anything.

7. Under **Item Location**

a. **Location:** Find your Library in the list. Under your Library, select **Reserves**.

Chapter title	Government Documents Stats Collection (docst-nc)	Editor	<input type="text"/>
Course Restricted	Mezzanine (stmezz)		
Suppress from Discovery	Microforms (stm)		
	Microforms Non-circulating (stm-nc)		
Citation Parameters	On Order (stonord-nc)		
Copyright Status	Periodicals Non-circulating (stper-nc)		
Material Type	Reference Non-circulating (stxref-nc)		
	<b>Reserves (stxresv)</b>		
Item Information	Serials Office (stserof-nc)		
Location	<input type="text" value="Look-up or select"/>	Barcode	<input type="text" value="3011200000001"/>
Material Type	<input type="text" value="Book"/>	Item policy	<input type="text"/>
Public note	<input type="text"/>		

b. **Material Type:** Choose the most appropriate type for the item that you are adding.

c. **Item policy:** If this item will circulate for two hours as most reserves do, you do not need to select an item policy. The Reserves location will inform how the item circulates. If you need help determining whether an item policy is needed, please [contact Central Access Services](#).

d. **Barcode:** After you've completed everything else in a record, attach a barcode to the item and enter it into this field. **Important note: Most barcode scanners will enter the barcode number and automatically do a carriage return after the barcode number (i.e., it will be as if someone typed "Enter" after adding the barcode). This could save your record before you're finished working on it. Add the barcode field last when you're working on a brief record.**

Item Information
▼

Location **Main Stacks: Reserves (stxresv)** ▼

Material Type **Book** ▼

Public note

Barcode **3011200000001**

Item policy  ▼

8. Return to the top of the screen and select **Save**.
9. Once the citation has saved, Alma will return you to the Reading List that you were working on. If you have the item in hand and are able to place the item directly onto the reserve shelf at this time, scroll down to the citation that you just created and click **Set Complete**.

1

**Half of a Yellow Sun**

[Edit](#)
[Set Complete](#)
⋮

**Book** By Chimamanda Ngozi Adichie (2007)

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

**Created By:** BLANKENSHIP, KRISTEN  
04/15/2021 12:45:45 CDT  
**Modified By:** BLANKENSHIP, KRISTEN  
04/15/2021 12:45:47 CDT

⤴

● Physical (1)

**1 Holdings | 1 of 1 items are available**

Library	Location	Call Number	Accession Number	Item Availability	Related Record
MAINSTACKS	stxresv	AFRO:103 Fi100	-	● 1 of 1 Available	-

[Items of Related Records](#)

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[Citation Details](#) >

---

[More Info](#) >

## Requesting or Recalling Items for Course Reserves

After you've added your Citation(s) to your Reading List, Alma makes it very simple to request or recall the items you need.

1. Check the box next to any citation in the list that you would like to request. You can also check **Select All** to request all items that you've added to this Reading List.
2. Click **Place Request**.

The screenshot displays the Alma interface for managing course reserves. At the top, there is a toolbar with buttons for 'Remove Citations', 'Place Request' (highlighted with an orange box), 'Add Citation', 'Remove Alerts', 'Change Copyright Status', 'Change Status', and 'Expand'. Below the toolbar is a filter bar with 'Select All' and various dropdown menus for 'Alerts', 'Citation Status', 'Resource Locate', 'Material Type', 'Tags', and 'Copyright Status'. A search field for 'Citation Last Modification Date' is also present.

The main content area shows a list of citations. The first citation is 'Recharting the Black Atlantic : modern cultures, local communities, global connections', which is selected (indicated by a checked checkbox and an orange box around the number '1'). The citation details are as follows:

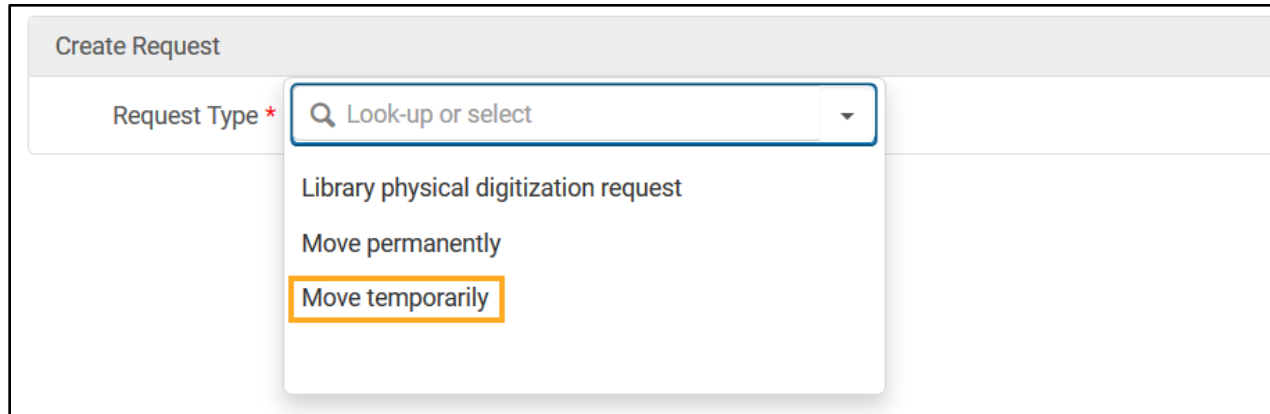
- Book** (Routledge 2008.)
- ISBN:** 9780203929582; 0203929586; 0415961114; 9780415961110
- Series:** Routledge research in Atlantic studies ; 1
- Subject:** African diaspora. – Africans–Migrations. – Blacks–Intellectual life. and others

Additional information for this citation includes:

- Request Status:** Being Prepared
- Resource Locate Status:** Resource Located
- Copyright Status:** Not Determined
- Created By:** BLANKENSHIP, KRISTEN  
04/15/2021 12:49:18 CDT
- Modified By:** BLANKENSHIP, KRISTEN  
04/15/2021 12:49:19 CDT

At the bottom of the citation entry, there are buttons for 'Edit', 'Set Complete', and a menu icon. Below the citation details, there are tabs for 'Physical (1)', 'Electronic', 'Digital', 'Other', 'Citation Details', 'Alerts', and 'More Info'. The 'Physical (1)' tab is currently selected.

- Alma will navigate you to a screen where you can choose the type of request. Choose **Move temporarily**. It is very important not to select Move permanently from this menu.



The screenshot shows a web form titled "Create Request". The form has a field labeled "Request Type \*" with a search icon and the text "Look-up or select". A dropdown menu is open, showing three options: "Library physical digitization request", "Move permanently", and "Move temporarily". The "Move temporarily" option is highlighted with an orange border.

- Alma should automatically update the screen to allow you to place a Move temporarily request.



Create Request

Request Type \* **Move temporarily**

Note **Needed for course reserves, AFRO:103 Spring 2021. -kb/cas**

To \* **Main Stacks**

Additional Request Attributes

Destination Locations

Call Number Type

Call Number

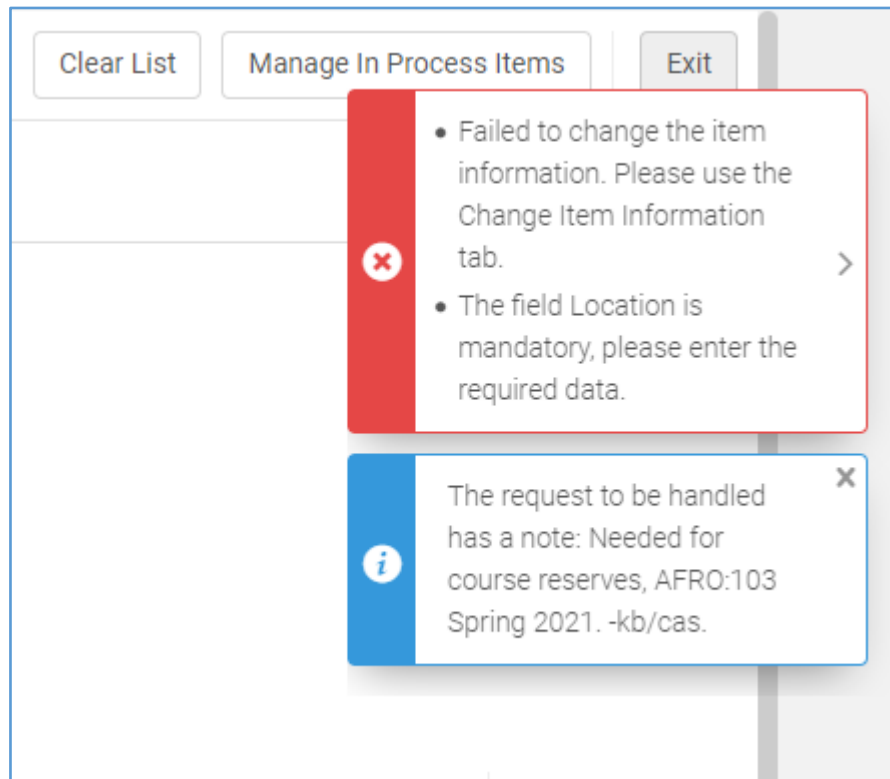
Item Policy

Due Back

5. Fill in the following fields:

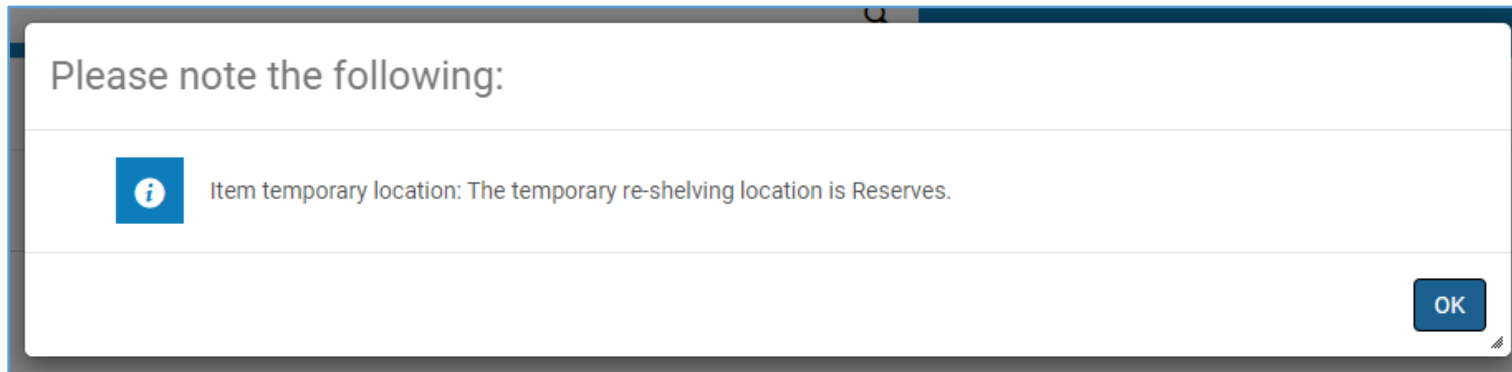
- a. **Note:** We recommend noting that the item is being requested for course reserves.
- b. **To:** Your location
- c. **Destination Locations:** Your unit has a two options for this field. **We recommend not providing a destination location and leaving this field blank.**

If you don't provide a location, Alma will give an error when you scan the item in:



Any note you made for the request will also popup here. These popups can alert the operator that is scanning in items that they should be given to someone who processes reserves for your unit. Then, you can follow the directions in the [Processing Items for Reserves](#) section of this guide to update the item's Temporary Location when it's fully processed and ready to circulate from your Reserves location.

If you do provide a Destination Location, when the item is scanned in at your circulation desk, Alma will **automatically update the temporary location to Reserves and will not alert the operator that the location has changed**. Alma will not generate a routing slip. The only indication of the change will be a pop-up to reshelv in reserves:



The item will also show up in Primo as available for check out through Reserves shortly after it's scanned in, which may not be ideal if you have further steps to take before it will be ready to circulate.

- d. **Due Back:** Due Back Date is something that you set for the Course and Reading List for Reserves, so this shouldn't impact your request. We recommend leaving this field blank. Please note that this does not change the due date for an item being recalled.

Please leave other fields blank.

- 6. Click **Submit**. This will place a request for available items, as well as recall any items that are currently checked out. The due date for a recalled item will not change automatically. Please see [Adjusting the due date for a recalled item](#) for more about updating due dates for recalled items.

#### [Adjusting the due date for a recalled item](#)

1. When an item is recalled, the patron will first receive a notice that the item's status has changed to **Recalled**.
2. Alma will not change the current due date. If we need this item sooner, navigate to the patron's Loans via **Manage Patron Services**.
3. Locate the recalled item(s). Click the row action (...) button and choose **Change Due Date** to select a date at least two weeks from today's date for the recall to be due.

The screenshot shows a 'Select Due Date' modal window. The 'New Due Date \*' field contains '04/30/2021' and the 'At(HH:MM)' field contains '17:00'. The background shows a table with columns: Due Date, Title, Barcode, Loan Status, Loan Date, Item Policy, Library, and Loan Notes. The selected item is:

Due Date	Title	Barcode	Loan Status	Loan Date	Item Policy	Library
05/13/2021 22:00:00 CDT	Recharting the Black Atlantic : modern cultures, local communities, global connections / edited by Annalisa Oboe and Anna Scacchi.	30112086935670	Recalled	04/15/2021	BOOK 16/4 WKS	Main Stacks

4. Choose the **New Due Date**. If desired, fill in your library's closing time for **At(HH:MM)** in military time (e.g., 17:00 = 5pm); this is not required.
5. Click **Change Due Date**.
  - a. When the new due date is entered, the patron will receive a second notice to let them know that the due date has changed.
  - b. **When you're done in Manage Patron Services and want to leave this screen, we recommend not clicking Done in the top right corner.** Clicking **Done** here will generate a third notice to the patron that summarizes the transaction again and may be confusing. We recommend navigating away from this screen through your Alma menu to avoid sending this third notice.

## Processing Items for Reserves

Once you have a physical item in hand, follow these directions to add it to your Reading List.

1. Select the **Fulfillment** menu, then navigate to **Scan in Items** under **Resource Requests**.

2. Select the **Change Item Information** tab

The screenshot shows a web interface titled "Scan In Items". At the top, there are two tabs: "Scan in Items" and "Change Item Information". The "Change Item Information" tab is highlighted with an orange border. Below the tabs, there are several form fields and controls:

- "Automatically print slip" with radio buttons for "Yes" (selected) and "No".
- "Register in-house use" with an unchecked checkbox.
- "Work Order Type" with a dropdown menu.
- "Scan item barcode \*" with a search input field containing "Look-up or select", a magnifying glass icon, and an "OK" button.
- "Scan request ID" with an input field and an "OK" button.
- A "Create Item" button is located on the right side of the form.

3. Fill out the following fields on the **Change Item Information** tab:

- Change Type:** This should automatically populate with **Temporary**. If it doesn't, please select **Temporary** from the dropdown menu. **It is very important not to choose Permanent from this menu.**
- Location:** Choose the appropriate location from the dropdown menu. This will typically be **Reserves**.
- Item policy:** If this item will circulate for two hours as most reserves do, you do not need to select an item policy. The Reserves location will inform how the item circulates. If you need help determining whether an item policy is needed, please [contact Central Access Services](#).
- Reading List:** You can select the Reading List that you're adding this item to by searching for the Reading List using the course code. This might be helpful if you're scanning in a stack of items for a specific course that you already have in hand. Adding the Reading List here automatically marks the Citation Complete in the Reading List.

Scan in Items
Change Item Information

Change Type Temporary ▼

Location \*  ▼

Call Number Type  ▼

Reading List  ☰ ↻

New Barcode

Scan item barcode \*  ☰ OK

Check Requests

Due Back  📅

Item Policy  ▼

Call Number

4. Do not fill in the following fields:

- a. Call Number Type
- b. New Barcode
- c. Due Back
- d. Call Number

5. In the **Scan item barcode:** field, scan the barcode for the item.

6. Alma will return a line for each item updated to let you know that this process has been performed successfully.

1 - 1 of 1 🔍 ⚙️

Change Type	Title	Destination	Barcode	Location	Call Number Type	Call Number	Due Back	Item Policy	
1 Temporary	Recharting the Black Atlantic : modern cultures, local communities, global connections / edited by Annalisa Oboe and Anna Scacchi.	Reshelve	30112086935670	Reserves	-	909.0496 R243	05/22/20...	-	⋮

7. In the Reading List, mark this Citation **Complete**. If you added the item to the Reading List using Scan In Items in step 3d, you can skip this step.

The screenshot shows the Alma Reading List interface. At the top, there are navigation options: 'Sort by: Last modified', '1 - 3 of 3', and a toolbar with buttons for 'Remove Citations', 'Place Request', 'Add Citation', 'Remove Alerts', 'Change Copyright Status', 'Change Status', and 'Expand'. Below the toolbar, there are filters for 'Select All', 'Alerts', 'Citation Status: All', 'Resource Locate: All', 'Material Type: All', 'Tags: All', and 'Copyright Status: All'. A search box for 'Citation Last Modification Date' is also present. The main content area displays a single citation: 'Recharting the Black Atlantic : modern cultures, local communities, global connections'. The citation details include: 'Book (Routledge 2008.)', 'ISBN: 9780203929582; 0203929586; 0415961114; 9780415961110', 'Series: Routledge research in Atlantic studies ; 1', and 'Subject: African diaspora. -- Africans--Migrations. -- Blacks--Intellectual life. and others'. The citation status is 'Request Status: Being Prepared', 'Resource Locate Status: Resource Located', and 'Copyright Status: Not Determined'. The citation was created by 'BLANKENSHIP, KRISTEN' on '04/15/2021 12:49:18 CDT' and modified by 'BLANKENSHIP, KRISTEN' on '04/15/2021 13:32:30 CDT'. At the bottom of the citation card, there are tabs for 'Physical (1)', 'Electronic', 'Digital', 'Other', 'Citation Details', 'Alerts(2)', and 'More Info'. The 'Set Complete' button is highlighted with a yellow box.

## Completing a Reading List

When you have added all course materials to a reading list, you can now set the Reading List status to complete.

1. Locate the completed Reading List that you would like to mark Complete.
2. Using the drop-down menu, set "Status" to "Complete."
3. **Important note:** There is often a lag between course reserves information being entered into Alma and the information being available in Primo. This lag seems to be variable but seems to be a maximum of a 4-6 hours. If reserves information that you've entered doesn't appear in Primo by the following day, please contact [Central Access Services](#).

Black Women in the Diaspora

Reading List Information

Code: \* AFRO:103/GWS:103 - Fish - Spring 2021 - STX

Name: \* Black Women in the Diaspora

Creative Commons License

Owners: -

Status:

Due Back Date:

- Being Prepared
- Being Processed
- Complete**
- Declined
- Inactive
- Ready For Processing
- Rolled Over

Citations Courses Owners Notes Subject Labels Recent Changes

Sort by: Last modified 1 - 3 of 3

## Associating a Reading List with Multiple Courses

If a course is cross listed, follow these directions to link the Reading List to each course.

1. Create any needed Courses using the directions under [Creating a New Course](#).
2. Once this is completed, navigate to the Reading List that you want to link to multiple Courses
3. In the row action (...) menu, select **Associate this list with a course**.



Alerts : All ▾

Code	Name	Status	Assignee	Owner/s	Due Back Date	Alerts
1 AFRO:103/GWS:103 - Fish - Spring 2021 - STX	Black Women in the Diaspora	Being Prepared	-	-	05/22/2021	✓

- View
- Work On
- Reassign
- Duplicate
- Associate this list with a course**
- Remove associated course
- All Reading Lists for this Course
- Delete
- Purge
- View hidden

4. Alma will navigate you to a new screen where the first Course that you created should be listed. Click **Associate Course**.

Citations Courses Owners Notes Subject Labels Recent Changes

Associate Course ▾

Creation Date	Code	Section	Name	Start Date	End Date	Number
1 04/15/2021	AFRO:103	-	Black Women in the Diaspora	01/12/2021	05/22/2021	0







Select Course \*

Q GWS

GWS:103 - Black Women in the Diaspora

Ex Libris © Ex Libris, a ProQuest Company, 2021

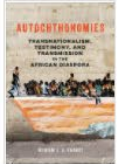
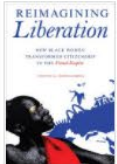
5. Use the search bar that opens to search for the other Course(s) you'd like to associate with this Reading List and click the **Associate Course** button.
6. Both Courses should now be listed under the **Courses** tab for this list.

Citations													
Courses													
Owners													
Notes													
Subject Labels													
Recent Changes													
Associate Course ▾  													
↕	Creation Date	▲	Code	Section	↕	Name	↕	Start Date	↕	End Date	Number Of Participants	Instructor	
1	04/15/2021		AFRO:103	-		Black Women in the Diaspora		01/12/2021		05/22/2021	0	- 	
2	04/15/2021		GWS:103	-		Black Women in the Diaspora		01/12/2021		05/22/2021	0	Fish, Stackles 	

## Taking Physical Items Off of Reserves

### “Restore Item” Requests in Alma

In Alma, a job runs nightly to generate requests for items that are shelved in temporary locations and are scheduled to be returned to their permanent location. For course reserves, this will happen once the **Due Back Date** that you set for your Reading Lists has passed. The request type is **Restore item**. These requests will appear in your unit’s Pick From Shelf list as individual requests, and you can limit the list to show just these Restore item requests using facets.

8		<b>Autochthonomies : transnationalism, testimony, and transmission in the African Diaspora / Myriam J. A. Chancy.</b>	<a href="#">Cancel Request</a> <a href="#">Mark as Missing</a> <a href="#">...</a>
		<b>Author:</b> Chancy, Myriam J. A., 1970- author. <b>ISBN:</b> 0252084918 <b>Imprint:</b> Urbana : University of Illinois Press, [2020]	<b>Location:</b> Reserves <b>Call Number:</b> DT16.5 .C47 2020 <b>Requests:</b> 1
9		<b>Reimagining liberation : how Black women transformed citizenship in the French empire / Annette K. Joseph-Gabriel.</b>	<a href="#">Cancel Request</a> <a href="#">Mark as Missing</a> <a href="#">...</a>
		<b>Author:</b> Joseph-Gabriel, Annette K., author. <b>ISBN:</b> 0252084756 <b>Imprint:</b> Urbana : University of Illinois Press, [2020]	<b>Location:</b> Reserves <b>Call Number:</b> HQ1163 .J67 2020 <b>Requests:</b> 1

**Request Date** ▾

- Today (8)
- Yesterday (2)
- Up to a Week Ago (2)

**Request/Process Type**

- Patron physical ... (10) ▾
- Restore item (2)

**Location** ▾

- Reserves (2)
- Stacks (10)

If you are sending it back to its permanent location, you can use Scan in Items to simply scan the item in as if it were a return. This will route it for reshelving to its permanent location. If you find that you need to keep the item on reserves for longer, you can also cancel this request and update the Due Back Date in your Course and Reading List.

## Processing Items Off of Reserves

A week after the end of the semester, it's time to remove physical items that are on reserves and route them back to their permanent locations. This is the recommended time to take them off of reserves, but this can be any date that you've indicated as the Due Back Date in your Course and Reading List.

1. Select the **Fulfillment** menu, then navigate to **Scan in Items** under **Resource Requests**.
2. Select the **Change Item Information** tab.
3. In the **Change Type** field dropdown menu, choose **Restore**.

The screenshot shows the 'Change Item Information' tab in the 'Scan in Items' section. The 'Change Type' dropdown menu is open, displaying three options: 'Permanent', 'Temporary', and 'Restore'. The 'Restore' option is highlighted with an orange border. Below the dropdown, there are several input fields: 'Location \*' (set to 'Permanent'), 'Call Number Type' (set to 'Temporary'), 'Reading List', 'New Barcode', 'Scan item barcode \*' (with a search icon and 'OK' button), and 'Check Requests' (checked).

4. Once you choose Restore, your screen will update to a simplified version of the Change Item Information Tab.
5. In the **Scan Item Barcode** field, scan the item barcode.

Alma will add a row to your change history to indicate that the item has been successfully restored to its permanent location. A printing dialog box will automatically pop up to print a transit slip if needed.

Scan in Items
Change Item Information

Change Type Restore

Check Requests

Scan item barcode \*  OK

1 - 2 of 2 🔗 ⚙️

Change Type	Title	Destination	Barcode	Location	Call Number Type	Call Number	Due Back	Item Policy	
1 Restore	Recharting the Black Atlantic : modern cultures, local communities, global connections / edited by Annalisa Oboe and Anna Scacchi.	Reshelve	30112086935670	Stacks	Dewey Decimal classification	909.0496 R243	-	BOOK 16/4 WKS	⋮

## Deleting or Archiving Courses and Reading Lists

At the end of a semester, it is best practice to delete or Archive any Courses and Reading Lists that will not remain in use for the following semester.

### Deleting Courses and Reading Lists

If you no longer need the Course or Reading List in question, you can delete it. The process for deleting Courses and Reading Lists is the same.

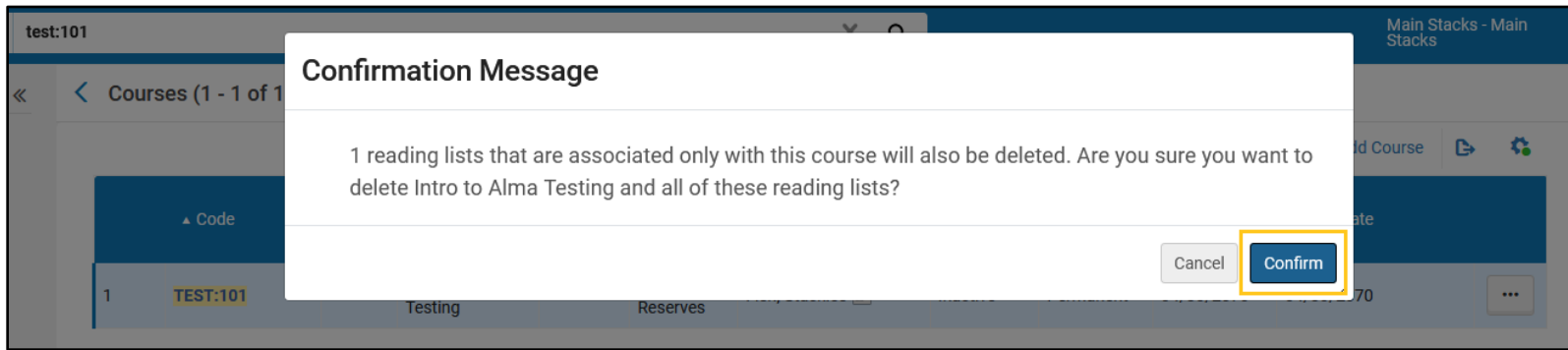
**Note: Deleting a Course or Reading List is permanent and removes analytic data for the Course or Reading List in Alma.**

1. Search for the Course or Reading List that you're going to delete.
2. In the row actions for the list, select **Delete**.

The screenshot shows a web interface for 'Reading Lists Task List (1 - 1 of 1)'. It features a filter bar with 'All', 'Assigned to Me', 'Unassigned', and 'Assigned to Others'. Below this is a 'Processing Department : Stacks Reserves' filter. The main content is a table with columns: Code, Name, Status, Assignee, Owner/s, Due Back Date, and Alerts. A single row is visible with the following data: Code 'AFRO:103/GWS:103 - Fish - Spring 2021 - STX', Name 'Black Women in the Diaspora', Status 'Being Prepared', Assignee '-', Owner/s '-', Due Back Date '05/22/2021', and Alerts '✓'. A context menu is open over the row, listing actions: View, Work On, Reassign, Duplicate, Associate this list with a course, Remove associated course, All Reading Lists for this Course, Delete (highlighted with an orange box), Purge, and View hidden.

	Code	Name	Status	Assignee	Owner/s	Due Back Date	Alerts
1	AFRO:103/GWS:103 - Fish - Spring 2021 - STX	Black Women in the Diaspora	Being Prepared	-	-	05/22/2021	✓

3. You'll receive a pop-up letting you know what will be deleted. Select **Confirm**.



## Archiving Courses and Reading Lists

If you would like to retain the Course or Reading List in question, you can archive it. The process for archiving Courses and Reading Lists is the same.

**Note: Archiving a Course or Reading List is not permanent and does not remove analytic data for the Course or Reading List in Alma.**

1. Search for the Course or Reading List that you're going to archive.
2. In the row actions for the list, select **Archive**.

Courses (1 - 1 of 1) | TEST:101

+ Add Course

Code	Section	Name	Academic Department	Process Department	Instructor	Status	Term	Start Date	End Date	More actions
1	TEST:101	-	Intro to Alma Testing	Stacks Reser...	Fish, Stackles	Inactive	Perma...	04/30/...	04/30/2070	<ul style="list-style-type: none"><li>Edit</li><li>Reading List</li><li>Copy Reading List</li><li>Duplicate</li><li>Delete</li><li>Archive</li><li>View hidden</li></ul>

3. You'll receive a pop-up letting you know what will be archived. Select **Confirm**.

EST:101 Main Stacks - Main

### Confirmation Message

1 reading lists that are associated with this course will also be archived. Are you sure you want to archive Intro to Alma Testing and all its reading lists?

Cancel **Confirm**



## Unarchiving Courses and Reading Lists

If you find that you need to use a Course or Reading List that is Archived, you can easily Unarchive it. The process for archiving Courses and Reading Lists is the same.

1. Search for the Course or Reading List that you're going to Unarchive.
2. In the row actions for the list, select **Unarchive**.

The screenshot shows a web interface for managing courses. At the top, it says 'Courses (1 - 1 of 1)' and 'test:101'. There are buttons for '+ Add Course', a share icon, and a settings icon. Below is a table with columns: Code, Section, Name, Academic Department, Processing Department, Instructor, Status, Term, Start Date, and End Date. The table contains one row for 'TEST:101' with status 'Inactive'. A dropdown menu is open for this row, listing actions: Edit, Reading List, Copy Reading List, Duplicate, Delete, Unarchive (highlighted with a yellow box), and View hidden.

Code	Section	Name	Academic Department	Processing Department	Instructor	Status	Term	Start Date	End Date
1	-	Intro to Alma Testing		Stacks Reserves	Fish, Stackles	Inactive	Permanent	04/30/2070	04/30/2070

3. Your Course or Reading List is now Unarchived. **Note: Courses and Reading Lists must be Unarchived separately. Once you have Unarchived a Course or Reading List, make sure to Unarchive the corresponding Course or Reading List as needed.**

## Other Course Reserves scenarios

### Adding Reserves Lists for Non-Course Groups

Occasionally, certain campus reading or colloquium groups will request that readings be placed on reserve. These groups will not be listed in the timetable, but they are still valid “courses”. Replace the course code in a non-course reserves list with a label that corresponds to the requesting group. Examples of codes for these might include “IPRH” or “UNIT”.

### Items to be kept on Permanent Reserves

If an item will stay on Course Reserves permanently, update the **End Date:** to 12/31/2050 or a similar date in the future.

## Future Reserves Dates

<b>Semester</b>	<b>Start Date</b>	<b>End Date</b>
Fall 2024	8/18/2024	12/27/2024
Spring 2025	1/12/2025	5/22/2025
Summer 2025	5/11/2025	8/16/2025
Fall 2025	8/17/2025	12/26/2025
Spring 2026	1/11/2026	5/21/2026
Summer 2026	5/12/2026	8/16/2026
Fall 2026	8/16/2026	12/25/2026
Spring 2027	1/10/2027	5/20/2027
Summer 2027	5/13/2027	8/17/2027
Fall 2027	8/15/2027	12/24/2027
Spring 2028	1/9/2028	5/19/2028

Find official campus dates here: [https://senate.illinois.edu/a\\_calendar.asp](https://senate.illinois.edu/a_calendar.asp)

## More Alma Course Reserves Resources

Find more in-depth documentation about Course Reserves at the following links:

CARLI How to: Course Reserves in Alma

[https://www.carli.illinois.edu/products-services/i-share/alma-fulfillment/how-to\\_reserves](https://www.carli.illinois.edu/products-services/i-share/alma-fulfillment/how-to_reserves)

Ex Libris Alma Knowledge Base

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Materials/050Alma\\_FAQs/Fulfillment/Course\\_Reserves](https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Fulfillment/Course_Reserves)

Questions? Troubles? Feedback for this guide? Contact [Central Access Services!](#)

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