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Just Like Starting Over: Using Alma and Primo to Create a Successful Course Reserves Service

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Just Like Starting Over

Using Alma and Primo to Create a Successful
Course Reserve Service

Portland State University Snapshot

- ▶ Founded in 1946
- ▶ 27,000 students
 - ▶ 21,600 Undergrads
 - ▶ 5,500 Graduates
- ▶ Top Undergraduate Majors: Management, Psychology, Health Studies, Biology, and Accounting
- ▶ Top Graduate Majors: Social Work, Education, and Educational Leadership



Course Reserves

- ▶ Popular service with both students and faculty
 - ▶ 4,829 Checkouts Winter Term 2017
 - ▶ 6,814 Checkouts Fall Term 2016
- ▶ Purchase textbooks for high enrollment and faculty request
- ▶ Electronic reserves
 - ▶ Spring Term 2017: 76 reading folders; 671 files
 - ▶ Winter Term 2017: 51 reading folders; 684 files



Switching to ExLibris

- ▶ June 2014 – Moved to ExLibris
 - ▶ Part of a 39-member library consortia, The Orbis-Cascade Alliance
 - ▶ Moved to ExLibris in cohorts; PSU was in the third cohort
- ▶ Moved physical reserves first in June 2014
- ▶ Moved e-reserves to Alma in August



Docutek

Please use the provided search fields to locate your library materials.

Search for
course pages

course pages
by Department

course pages
by Instructor

Search for documents by
Title / Author

Find courses where:

Any Search Field ▼

contains ▼

Search

Clear

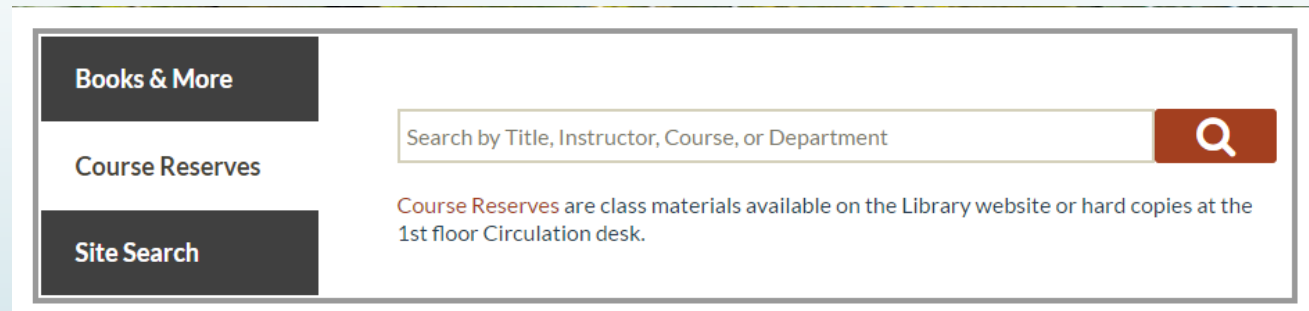
Questions? Comments? Please contact [the system managers](#).
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Course Reserves Before

- ▶ Cost; Alma no additional charge
- ▶ Did not work well in mobile browsers
- ▶ Difficult to identify and select specific course reserves in the catalog
- ▶ Multiple systems to handle course reserves
- ▶ Ran a list at the end of the term to pull materials.
- ▶ Cataloging librarian bulk update physical PSU-owned books to the stacks.
- ▶ Course passwords had to be changed each term.

Course Reserves After

- ▶ Went from multiple loan periods (one hour, four hour, three day) to just two: two hour and 24 hour.
- ▶ Mobile-friendly
- ▶ Single Sign On
- ▶ Easier to run circulation statistics





Course Reserves Processing in Alma

Creating a Course

The screenshot displays the Alma library system interface. At the top, the Alma logo is visible on the left, and navigation links for 'Tasks' and 'Analytics' are on the right. The current page is identified as 'Currently at PSU Library - Library Entra...'. Below the header, a search bar and a 'Go' button are present. The main content area is a navigation menu with four columns: 'ACQUISITIONS', 'RESOURCE MANAGEMENT', 'FULFILLMENT', and 'ADMINISTRATION'. The 'FULFILLMENT' column is expanded, showing a list of options including 'Course Reserves', 'Courses', 'Reading Lists', 'Resource Sharing', 'Advanced Tools', and 'Fulfillment Configuration'. The 'Courses' option is highlighted in yellow. The 'ACQUISITIONS' column includes 'Purchase Requests' and 'Create Purchase Request'. The 'RESOURCE MANAGEMENT' column includes 'Search', 'Create Inventory', and 'Manage Inventory'. The 'ADMINISTRATION' column includes 'User Management', 'User Management Configuration', 'General Configuration', 'Advanced Tools', 'Analytics', and 'Manage Jobs and Sets'. A copyright notice '© Ex Libris' is visible in the bottom left corner.

University Library
Alma

Tasks Analytics Currently at PSU Library - Library Entra...

Pat Back to Home Page

ACQUISITIONS
Purchase Requests
Create Purchase Request

RESOURCE MANAGEMENT
Search
Repository Search
Manage Exports
Create Inventory
Add Physical Item
Manage Inventory
Shelf Report

FULFILLMENT
Checkout/Checkin
Manage Patron Services
Return Items
Resource Requests
Scan In Items
Approve Digitization Requests
Monitor Requests & Item Processes
Course Reserves
Courses
Reading Lists
Resource Sharing
Lending Requests
Borrowing Requests
Receiving Items
Shipping Items
Rota Templates
Advanced Tools
Fulfillment Configuration Utility
Create Fulfillment Sets
Bulk Change Due Dates
View Restore Request Jobs
View Overdue and Lost Loan Jobs
Offline Circulation
Items Requiring Action
Transfer requests
Create Fines And Fees Report
Bulk Citation Inventory Enrichment
Resend Printouts/Emails
Fulfillment Configuration
Configuration Menu

ADMINISTRATION
User Management
Find and Manage Users
Purge User Records
Load Desk/Department Operators
Bulk Fine Waiving
User Identifier Types
User Management Configuration
Configuration Menu
General Configuration
Configuration Menu
Advanced Tools
HealthCheck Dashboard
Analytics
Design Analytics
Configuration Menu
Subscribe to Analytics
Manage Jobs and Sets
Run a Job
Monitor Jobs
Manage Sets

Go

© Ex Libris

Manage Course Information

Cancel

Course Information

Code: HST 442

Name: Ancient Rome - TEST TEST TEST

Academic Department: History

Terms list: Early Autumn, Fall, Spring, Summer

Status: Active Inactive

Start date: 04/03/2017

Number of participants: 0

Year:

Section: 001

Processing Department: Course Reserves

End date: 06/16/2017

Weekly hours: 0

Searchable IDs

Instructors

Quick Add

Instructor: Add instructor

Columns

Name	
1 Gunderson, Molly Mae - Faculty - 931039957	Remove
2 Nguyen, Linh Duy - Faculty - 955200751	Remove

Cancel



Courses

Processing Department All Status All Term All

Find : ancient rome in : Course Name

Add Course

1 - 1 of 1 Records Columns Tools

Code	Section	Name	Academic Department	Processing Department	Instructor	Status	Start Date	End Date	Term	Actions
1 HST 442	001	Ancient Rome - TEST TEST	History	Course Reserves	Multiple	Active	04/03/2017	06/16/2017	-	

- Edit
- Reading List
- Copy Reading List
- Duplicate
- Delete
- New hidden

Creating a Reading List

- ▶ Library-owned
 - ▶ Move from main location to temporary location
- ▶ Personal
 - ▶ In Alma: create record with call number, barcode,

Reading List

Course's Reading List Back

Course Code: HST 442 Section: 001 Course Name: Ancient Rome - TEST TEST TEST
Processing Department: Course Reserves Instructors: Gunderson, Molly Mae; Nguyen, Linh Duy; Number of participants: 0

Status: All Find: In: All Go

[Add Reading List](#)

No records were found.

Add Reading List

Code: * HST 442

Name: * Ancient Rome - TEST TEST TEST

Status: Complete

Due Back Date: 06/16/2017

Modified By: -

[Close](#) [Add](#) [Add and Close](#)

Back

Course Code: HST 442 Section: 001 Course Name: Ancient Rome - TEST TEST TEST
Processing Department: Course Reserves Instructors: Gunderson, Molly Mae; Nguyen, Linh Duy; Number of participants: 0

Status: All Find: in: All Go
[Add Reading List](#) 1 - 1 of 1 Records | Columns [Tools](#)

Code	Name	Status	Assignee	Owner/s	Due Back Date	Actions
1 HST 442	Ancient Rome - TEST TEST TEST	Being Prepared	-	-	06/16/2017	

- View
 - Work On
 - Reassign
 - Duplicate
 - Delete
 - Associate this list with a course
 - Remove associated course
 - View hidden
- [Back](#)

Course Code: HST 442 Section: 001 Course Name: Ancient Rome - TEST TEST TEST
Processing Department: Course Reserves Instructors: Gunderson, Molly Mae; Nguyen, Linh Duy; Number of participants: 0

Reading List Information

Code: * HST 442
Name: * Ancient Rome - TEST TEST TEST
Owners: -
Status: Being Prepared
Due Back Date: 06/16/2017
Modified By: Gunderson, Molly Mae (05/03/2017 08:49:16 PDT)

Citations **Owners** **Notes**

Alerts | All | Citation/Locate Status | All | Citation Type | All | Tags | Copyright Status | All

Add Repository Citation **Add Non-Repository Citation** **Add Brief**

No records were found.

Repository Search [Cancel](#) [Select](#)

Find where contains [Advanced search](#) [Saved queries](#)

0 rows selected


No search has been performed yet.

[Cancel](#) [Select](#)

Find where contains [Advanced search](#) [Saved queries](#)

Sort by Secondary Sort by

1 rows selected 1 - 2 of 2 Records

<input type="checkbox"/> Select All
1 <input checked="" type="checkbox"/>  In search of ancient Rome / Claude Moatti. Book (Book - Physical) text; unmediated; volume By Moatti, Claude. (New York : Abrams 1993.) ISBN: 0810928396 and others Series: Discoveries (New York, N.Y.) Subject: Rome (Italy)--Antiquities. Rome--In art. Italy--Rome, and others Language: English Record number: ocm27902808 Availability: Physical version at MILLAR PSU Library: PMAIN0 Shelves -- Basement; DG65 .M63 1993 (1 copy, 1 available)

Course Code: HST 442 Section: - Course Name: Ancient Rome - TEST TEST TEST
Processing Department: Course Reserves Instructors: Gunderson, Molly Mae Number of participants: 0

Reading List Information

Code: * HST 442
Name: * Ancient Rome - TEST TEST TEST
Owners: -
Status: Complete
Due Back Date: 06/16/2017
Modified By: Gunderson, Molly Mae (05/05/2017 11:48:07 PDT)

Citations Owners Notes

Alerts Citation/Locate Status Citation Type Tags Copyright Status

Select All

- 1 [In search of ancient Rome /](#)
Book By Moatti, Claude. (Abrams 1993.)
ISBN: 0810928396
Series: Discoveries (New York, N.Y.)
Subject: Rome (Italy)--Antiquities -- Rome--In art -- Italy--Rome, and others
Availability: Physical version at **MILLAR PSU Library: PMAINO Shelves -- Basement; DG65.M63 1993** (1 copy, 1 available)
Request Status: Being Prepared
Resource Locate Status: Resource Located
Copyright Status: Not Determined
[Edit](#) | [Set Complete](#) | [Manage Fulfillment Options](#) | [Items](#) | [Remove](#) | [Duplicate](#) | [Print Slip](#) | [Detach from Repository](#) | [Citation Details](#) | [More Info](#)

Title: In search of ancient Rome /	Author: Moatti, Claude.	ISBN: 9780810928398
Place Of Publication: New York ::Abrams	Chapter: -	Pages: -
Additional Person Name: -	Year: 1993.	Edition: -
Call Number: DG65		
Note: Translated from the French by Anthony Zielonka.		
Alerts: -		

Course Details

Course Code: HST 442	Section: -	Course Name: Ancient Rome - TEST TEST TEST
Number of participants 0	Reading List name Ancient Rome - TEST TEST TEST	
Demanded for 1 courses with overall 0 participants.		

Electronic Services

No records were found.

Digital Services

No records were found.

Physical Services

Library	Location	Call Number	No. of Items	Available	Actions
1 PSU Library	Shelves -- Basement	DG65 .M63 1993	1	1	View Items Request Update Move Expiry

This Record In Other Lists



Alma

Tasks Analytics Currently at: PSU Library - Circulation D...

Help Gunderson, Molly...

List of Items

Back

Resource description [In search of ancient Rome / Moatti, Claude. Abrams New York : 1993. \[9780810928398\]](#)

Location [PSU Library: Shelves -- Basement: DG65 .M63 1993](#)

[View all holdings](#)

Sort routine Temporary location

Status All

Find: in: Call number

1 - 1 of 1 Records Columns Tools

[Add Item](#) [Bind Items](#) [Change Holdings](#) [Open Predicted Items](#) [Relink to another Bib](#)

	Barcode	Library	Location	Call Number	Description	Temporary Location	Status	Process type	Access Number	Receiving date	Actions
1	50110012328932	PSU Library	Shelves -- Basement	DG65 .M63 1993	-	No	Item in place	-	-	05/05/2002	<ul style="list-style-type: none"> View Edit Duplicate Change Location Toggle Missing Status Work Order View hidden

Physical Locations List
 Location Type All Attached Fulfillment Unit All Find: In: Code Go 1 2 3 1 - 20 of 74 Records Columns

	Code	Name	Location Type	Fulfillment Unit
1	PME4	4th floor cabinets	Open	Regular
2	PCLAWD	Child Lit Award	Open	Regular
3	PCIRDK	Circulation Desk	Open	Short-Term Loans
4	PCIRACD	Circulation Desk, CDs	Open	Short-Term Loans
5	PCIRDKEQ	Circulation Desk, Equipment	Open	Equipment
6	PCIRDKME	Circulation Desk, Media	Open	Short-Term Loans
7	PCIRRES	Circulation Desk, Permanent Reserves	Unavailable	Reserves
8	PCIRREST	Circulation Desk, Temporary Reserves	Unavailable	Reserves
9	PDH	Dark Horse	Open	Regular
10	PDH3	Dark Horse -- 3rd floor	Open	Regular
11	PDH4	Dark Horse -- 4th floor	Open	Regular
12	PDH5	Dark Horse -- 5th floor	Open	Regular
13	PGDFNC	Gov Docs, Core Collection (Non-circulating)	Open	Non-Circ
14	PGDFNCX	Gov Docs, Core Collection (Non-circulating) -- Offsite	Closed	Non-Circ
15	PGDF	Gov Docs, Federal	Open	Regular
16	PGDMAP	Gov Docs, Maps	Open	Short-Term Loans
17	PGDMICME	Gov Docs, Microforms -- 4th floor	Open	Short-Term Loans
18	PGDMIC0	Gov Docs, Microforms -- Basement	Open	Short-Term Loans
19	PGDMICANX	Gov Docs, Microforms -- Offsite	Open	Regular
20	PGDFANX	Gov Docs -- Offsite	Open	Regular

Course Code: HST 442	Section: -	Course Name: Ancient Rome - TEST TEST TEST
Processing Department: Course Reserves	Instructors: Gunderson, Molly Mae	Number of participants 0

Reading List Information

Code: HST 442
Name: Ancient Rome - TEST TEST TEST
Owners: -
Status: Complete
Due Back Date: 06/16/2017
Modified By: -

[Citations](#) [Owners](#) [Notes](#)

Alerts [All](#) [Citation/Locate Status](#) [All](#) [Citation Type](#) [All](#) [Tags](#) [Copyright Status](#) [All](#)

[Tools](#)

1 **In search of ancient Rome /**
Book By Moatti, Claude. (Abrams 1993.)
ISBN: 0910928306
Series: Discoveries (New York, N.Y.)
Subject: Rome (Italy)--Antiquities. -- Rome--In art. -- Italy--Rome, and others
Availability: Physical version temporarily at MILLAR PSU Library; PCIRREST Circulation Desk, Temporary Reserves; DG65 .M63 1993 (1 copy, 1 available)
Physical version at MILLAR PSU Library; PMAIN0 Shelves -- Basement; DG65 .M63 1993
Request Status: Being Prepared
Resource Locate Status: Resource Located
Copyright Status: Not Determined
[Citation Details](#) | [More Info](#)

Resource description [In search of ancient Rome / Moatti, Claude. Abrams, New York : 1993. \[9780810928398\]](#)

Holding [PSU Library, Shelves -- Basement, DG65, M63,1993](#)

Barcode 50110012328932

Process type -

Holdings ID 22206273310001853

Item ID 23206273280001853

Status Item in place

[View all holdings](#)

[View all items](#)

[Browse shelf listing](#)

General Information

ENUM/CHRON Information

Notes

History

Barcode

Material type

Provenance

PO Line

Receiving date

Enumeration A

Chronology I

Description

Pages

Replacement cost

Process type

Generate

Copy ID

Item policy

Is magnetic

Issue date

Expected receiving date

Enumeration B

Chronology J

Pieces

Receiving operator

Inventory Number Information

Inventory number

Inventory price

Inventory date

Clear Inventory Information

Location Information

Permanent library *

Alternative call number type

Storage location ID

Permanent location *

Alternative call number

Temporary Location Information

Item is in temporary location No Yes

Temporary library

Temporary call number type

Temporary item policy

Temporary location

Temporary call number

Due back date

Reading List - Personal Copy

Edit Reading List [Back](#) [Print Slip](#) Being Prepared [Change Status](#) [Print Slip Report](#) [Place Request](#) [Remove Alerts](#) [Remove Citations](#) [Change Copyright Status](#) [Save](#)

Course Code: HST 442 Section: 001 Course Name: Ancient Rome - TEST TEST TEST
Processing Department: Course Reserves Instructors: Gunderson, Molly Mae; Nguyen, Linh Duy; Number of participants: 0

Reading List Information

Code: * HST 442
Name: * Ancient Rome - TEST TEST TEST
Owners: -
Status: Being Prepared
Due Back Date: 06/16/2017
Modified By: Gunderson, Molly Mae (05/03/2017 08:49:16 PDT)

[Citations](#) [Owners](#) [Notes](#)

Alerts | All | Citation/Locate Status | All | Citation Type | All | Tags | Copyright Status | All

[Add Repository Citation](#) [Add Non-Repository Citation](#) [Add Brief](#) [Tools](#)

Select All

1 **Ancient Rome : from Romulus to Justinian /**
Book By Martin, Thomas R., (Yale University Press 2012.)
ISBN: 9780300160048
Subject: Rome--History. -- Rome--Civilization. -- Rome (Empire) and others
Availability: Physical version at MILLAR PSU Library: PMAIN0 Shelves -- Basement; DG209.M38 2012 (1 copy, 1 available)
Request Status: Being Prepared
Resource Locate Status: Resource Located
Copyright Status: Not Determined
[Edit](#) | [Set Complete](#) | [Manage Fulfillment Options](#) | [Items](#) | [Remove](#) | [Duplicate](#) | [Print Slip](#) | [Detach from Repository](#) | [Citation Details](#) | [More Info](#)

[Back](#) [Print Slip](#) Being Prepared [Change Status](#) [Print Slip Report](#) [Place Request](#) [Remove Alerts](#) [Remove Citations](#) [Change Copyright Status](#) [Save](#)

Placement of new record Network Institution

Suppress from Discovery

Save

Choose Holding Type

Choose Holding Type * Existing
 New

Citation Type

[Cancel](#)

Placement of new record

Placement of new record Network Institution

Resource Information

Title	<input type="text"/>
Author	<input type="text"/>
Author Initials	<input type="text"/>
Edition	<input type="text"/>
ISBN	<input type="text"/>
LCCN	<input type="text"/>
OCLC Number	<input type="text"/>
Other Standard ID	<input type="text"/>
Barcode	<input type="text"/>
Remote Record ID	<input type="text"/>
Publisher	<input type="text"/>
Publication Date	<input type="text"/>
Place of Publication	<input type="text"/>
Additional Person Name	<input type="text"/>
Source	<input type="text"/>
Series Title Number	<input type="text"/>
Call Number	<input type="text"/>
Note	<input type="text"/>
Volume	<input type="text"/>
Part	<input type="text"/>
Chapter	<input type="text"/>
Pages	<input type="text"/>

Suppress from Discovery

Item Information

Library *

Cancel Save

Item Information

Library * PSU Library

Barcode

Item policy

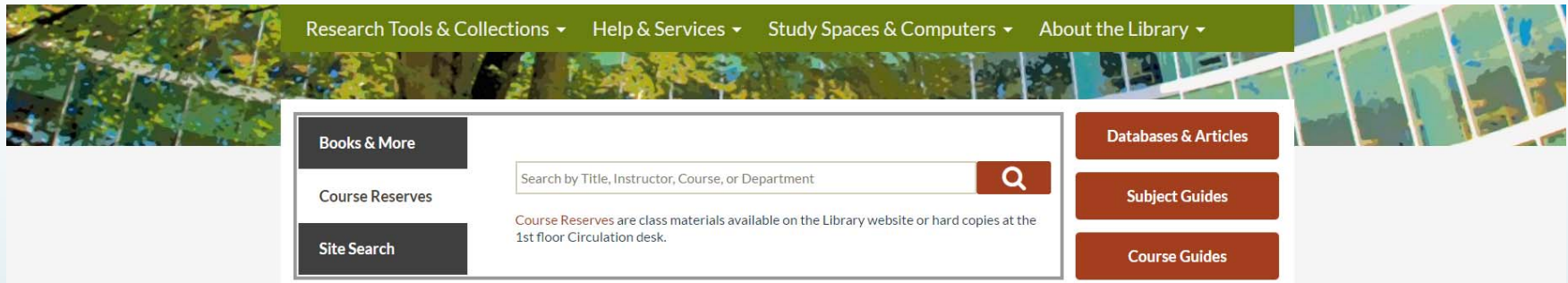
Location * Circulation Desk Reserves

Material Type

Public note

Save

Results List in Primo



The screenshot shows a library website interface. At the top, a green navigation bar contains the following menu items: "Research Tools & Collections", "Help & Services", "Study Spaces & Computers", and "About the Library". Below this is a search area with a central input field labeled "Search by Title, Instructor, Course, or Department" and a magnifying glass icon. To the left of the search field are three dark grey buttons: "Books & More", "Course Reserves", and "Site Search". To the right are three brown buttons: "Databases & Articles", "Subject Guides", and "Course Guides". Below the search input field, there is a note: "Course Reserves are class materials available on the Library website or hard copies at the 1st floor Circulation desk."

[History 442](#)

Primo Can Be Tricky...

- ▶ 24 hour delay before item processed in Alma shows up in Primo
- ▶ Facets may be confusing (Social Work example)
- ▶ Facets only show 40 characters
- ▶ Permissions are tricky (Academic Department Code Example)
- ▶ Adding a course or a reading list – cannot have the same name or section number – tricky when the same class is being taught year-to-year
 - ▶ Don't want to delete because course may be re-activated and e-reserves are inactive

Widget

Course Home | Course Content | Activities ▾ | People ▾ | Grades ▾ | Help ▾ | Course Settings

News | ▾

Week of May 8 ▾ ×

Posted May 8, 2017 8:38 AM

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vide, quantum, inquam, fallare, Torquate. Egone non intellego, quid sit don Graece, Latine voluptas? Quid, si non sensus modo ei sit datus, verum etiam animus hominis? Prioris generis est docilitas, memoria; Quid, quod res alia tota est? Certe, nisi voluptatem tanti aestimaretis. Mihi vero, inquit, placet agi subtilius et, ut ipse dixisti, pressius. Duo Reges: constructio interrete.

Nihil minus, contraque illa hereditate dives ob eamque rem laetus. Sin aliud quid voles, postea. Positum est a nostris in iis esse rebus, quae secundum naturam essent, non dolere; Quid de Platone aut de Democrito loquar? Istic sum, inquit. Primum cur ista res digna odio est, nisi quod est turpis?

Egone quaeris, inquit, quid sentiam? Estne, quaeso, inquam, sitienti in bibendo voluptas? Si stante, hoc natura videlicet vult, salvam esse se, quod concedimus; Quod autem ratione actum est, id officium appellamus. At, si voluptas esset bonum, desideraret. Quo modo? Esse enim, nisi eris, non potes. At, si voluptas esset bonum, desideraret.

Primum in nostrane potestate est, quid meminerimus? Huius, Lyco, oratione locuples, rebus ipsis ielunior. Hanc quoque iucunditatem, si vis, transfer in animum; Hoc sic expositum dissimile est superiori. Quasi vero, inquit, perpetua oratio rhetorum solum, non etiam philosophorum sit. Ita graviter et severe voluptatem secrevit a bono.

[Show All News Items](#)

Activities and Content | ▾

[Bookmarks](#) [Recently Visited](#)

There is no content to display.
[Create some content.](#)

Calendar | ▾

Monday, May 8, 2017 ▸

Upcoming events ▾

There are no events to display.
[Create an event.](#)

Library Resources

[Research Guides & Tutorials](#) ▸

[GO](#)

[Ask a Librarian](#) ▸

[Visit the PSU Library Website](#) ▸

Widget - Course Reserves

Link to course reserves folder and to the books on reserve from D2L using a [widget](#).





E-Reserves

Current E-Reserves Processing

- Download PSU-owned articles to our server, OCR, tag headings, and place in folder.
- Scan book chapters, OCR, tag, and place in folder.
- Create a record in Alma for the folder; students can view folder and get the readings using the course reserves module in [Primo](#).
- Pursue copyright on behalf of instructors for non-PSU articles and multiple book chapters (one or two requests from librarians per term).
- All of these items have to be removed manually at the end of each term.

Next Steps for E-reserves

- ▶ Using links instead of downloading PDFs?
- ▶ Getting out of the e-reserves business altogether?
- ▶ Helping instructors add their e-reserves in our learning management system?
- ▶ Exploring Leganto!

Removing course reserves

- ▶ End Date
 - ▶ Library items – due back June 16 (easier in beginning, more work at the end)
 - ▶ Print paging slips
 - ▶ Pull from shelves
 - ▶ Return by checking everything in

- ▶ Personal Items do not have to be checked in
 - Bulk delete based on the note and temporary location

Lessons Learned

- Anticipation is worse than reality!
- Important to evaluate current policies and procedures
 - Document new workflows
- Share expertise and documentation
 - Staff intranet
 - Connect with other libraries in consortium



Questions?

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