5-12-2017

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

Molly Gunderson
Portland State University, mgun2@pdx.edu

Let us know how access to this document benefits you.

Follow this and additional works at: https://pdxscholar.library.pdx.edu/ulib_fac

Part of the Collection Development and Management Commons

Citation Details


This Presentation is brought to you for free and open access. It has been accepted for inclusion in Library Faculty Publications and Presentations by an authorized administrator of PDXScholar. For more information, please contact pdxscholar@pdx.edu.
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
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
<table>
<thead>
<tr>
<th>Code</th>
<th>Section</th>
<th>Name</th>
<th>Academic Department</th>
<th>Processing Department</th>
<th>Instructor</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>HST 442</td>
<td>001</td>
<td>Ancient Rome - TEST TEST TEST</td>
<td>History</td>
<td>Course Reserves</td>
<td>Multiple</td>
<td>Active</td>
<td>04/03/2017</td>
<td>06/16/2017</td>
<td>-</td>
</tr>
</tbody>
</table>
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

- **Code**: HST 442
- **Course Name**: Ancient Rome - TEST TEST TEST
- **Section**: 001
- **Instructor**: Gunderson, Molly Mae, Nguyen, Linh Duy
- **Number of participants**: 0

<table>
<thead>
<tr>
<th>No.</th>
<th>Code</th>
<th>Name</th>
<th>Status</th>
<th>Assignee</th>
<th>Owner(s)</th>
<th>Due Back Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>HST 442</td>
<td>Ancient Rome - TEST TEST TEST</td>
<td>Being Prepared</td>
<td>-</td>
<td>-</td>
<td>06/16/2017</td>
</tr>
</tbody>
</table>

**Tools**
- View
- Mark as completed
- Reassign
- Duplicate
- Delete
- Associate this list with a course
- Remove associated course
- View hidden
1 rows selected

1. In search of ancient Rome / Claude Moatti.
   Book (Book - Physical text; unmediated); volume
   Moatti, Claude. (New York, : Abrams, 1995.)
   Series: Discoveries (New York, N.Y.)
   Alt Name: Antiquities, Rome, in art, Italy, Rome, and others.
   Language: English.
   Record number: aca27982008.
   Availability: Physical item at MILLAR PCB Library; PMA100; Shelves - Basement; D105.103 1995 (1 copy, 1 available.)
<table>
<thead>
<tr>
<th>Course Code</th>
<th>HST 442</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section</td>
<td></td>
</tr>
<tr>
<td>Instructions</td>
<td>Gunderson, Molly Mae</td>
</tr>
<tr>
<td>Course Name</td>
<td>Ancient Rome - TEST TEST TEST</td>
</tr>
<tr>
<td>Number of participants</td>
<td>0</td>
</tr>
</tbody>
</table>

**Reading List Information**

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

**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
- Edit
- Save
- Remove
- Duplicate
- Find Slip
- Detach from Repository
- Citation Details
- More Info
<table>
<thead>
<tr>
<th>Library</th>
<th>Location</th>
<th>Call Number</th>
<th>No. of Items</th>
<th>Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSU Library</td>
<td>Shelves - Basement</td>
<td>DG65 M83 1953</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td># Code</td>
<td>Name</td>
<td>Location Type</td>
<td>Fulfillment Unit</td>
<td></td>
</tr>
<tr>
<td>-------</td>
<td>------------------------------------</td>
<td>---------------</td>
<td>-----------------</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>PAGE1 4th floor cabinets</td>
<td>Open</td>
<td>Regular</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>PCLAWD Child Lit Award</td>
<td>Open</td>
<td>Regular</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>PCORDK Circulation Desk</td>
<td>Open</td>
<td>Short-Term Loans</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>PCORCD Circulation Desk CDs</td>
<td>Open</td>
<td>Short-Term Loans</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>PCORKEQ Circulation Desk Equipment</td>
<td>Open</td>
<td>Equipment</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>PCORDKME Circulation Desk Media</td>
<td>Open</td>
<td>Short-Term Loans</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>PCORRES Circulation Desk Permanent Reserves</td>
<td>Unavailable</td>
<td>Reserves</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>PCORRES Circulation Desk Temp Reserves</td>
<td>Unavailable</td>
<td>Reserves</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>PDM Dark Horse</td>
<td>Open</td>
<td>Regular</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>PDH1 Dark Horse 3rd floor</td>
<td>Open</td>
<td>Regular</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>PDH4 Dark Horse 4th floor</td>
<td>Open</td>
<td>Regular</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>PDMH Dark Horse 8th floor</td>
<td>Open</td>
<td>Regular</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>PGDFNC Gov Docs Core Collection</td>
<td>Open</td>
<td>Non-Circ</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>PGDFNCX Gov Docs Core Collection</td>
<td>Open</td>
<td>Non-Circ</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>PGDF Gov Docs Federal</td>
<td>Open</td>
<td>Regular</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>PGDFMAP Gov Docs Maps</td>
<td>Open</td>
<td>Short-Term Loans</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>PGDMICME Gov Docs Microforms 4th floor</td>
<td>Open</td>
<td>Short-Term Loans</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>PGDMIC20 Gov Docs Microforms Basement</td>
<td>Open</td>
<td>Short-Term Loans</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>PGDMICANX Gov Docs Microforms Offsite</td>
<td>Open</td>
<td>Regular</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>PGDFANX Gov Docs Offsite</td>
<td>Open</td>
<td>Regular</td>
<td></td>
</tr>
<tr>
<td>Reading List Information</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Code:  HST 442</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name:  Ancient Rome - TEST TEST TEST</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Owner:  -</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status:  Complete</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Due Back Date:  06/10/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Modified By:  -</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Book</th>
</tr>
</thead>
<tbody>
<tr>
<td>In search of ancient Rome /</td>
</tr>
<tr>
<td>By M. I. E. Col. (A.D. 1991)</td>
</tr>
<tr>
<td>ISBN:  0-520-20539-6</td>
</tr>
<tr>
<td>Publisher:  New York, N.Y.</td>
</tr>
<tr>
<td>Process Location:  Circulation Desk, Temporary Reserve; DG45 JN3 1993</td>
</tr>
<tr>
<td>Request Status:  Not Available</td>
</tr>
<tr>
<td>Request Details:  None</td>
</tr>
<tr>
<td>Copyright Status:  Not Determined</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Alerts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citation/State:  All</td>
</tr>
<tr>
<td>Citation Type:  All</td>
</tr>
<tr>
<td>Copyright Status:  All</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citation Details:  More Info</td>
</tr>
</tbody>
</table>
Reading List - Personal Copy
Results List in Primo

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
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?

Molly Gunderson
Access Services Manager
Portland State University Library
mgun2@pdx.edu